
Guide to SharePoint

What is SharePoint?

- SharePoint is a central web-based portal containing all company data.
- SharePoint provides a platform for everyone in the organisation to share and work together whilst maintaining central security control of the data.
- Version Control

What is OneDrive?

- OneDrive is a storage service for files in the cloud for your own data although can be individually shared.
- OneDrive offers a simple way to store, sync and share files.
- You can access the files stored in your OneDrive directly from a web browser, Straight from Windows or Mac Device, including all mobile devices.
- Limitations – full functionality would require all the latest updates on the devices.
- Version Control

Ways of connecting to SharePoint

Windows

- **Mapped Drive (shows in file explorer)**
 - You can connect to your SharePoint data via a mapped drive in your file explorer, you will be able to access all company data in one location without having to use any space on your PC.
- **Online through a browser**
 - You can connect to SharePoint online through any browser by signing into your work Microsoft 365 account and selecting SharePoint. You can choose to edit office files online in browser or open in a local desktop application.
- **Offline sync using OneDrive Application**
 - You can sync SharePoint data to your computer through the OneDrive application for offline use.
 - Sync Everything locally to your machine or Sync on demand, only select the files you would like to sync and choose to move them back online after a certain number of days to manage disk space.
 - Work offline will automatically sync to your OneDrive or SharePoint when you reconnect to the internet
- **Microsoft Applications**
 - Through Microsoft applications on your desktop you can open and save directly to SharePoint or OneDrive.

Mac OS

- **Online through a browser**
 - You can connect to SharePoint online through any browser by signing into your work Microsoft 365 account and selecting SharePoint. You can choose to edit office files online in browser or open in a local office application.
- **OneDrive Sync (MAC OS 10.14.2 or later)**
 - Sync everything locally on your machine or Sync on demand, only select the files you would like to sync and choose to move them back online after a certain number of days to manage disk space
- **Work Offline**
 - Work offline then sync when reconnected to the internet

Files and Folder status

- **White cloud with blue borders icon**
 - This indicates that the file is only available when you are connected to the internet, and it is not using local storage
- **Solid green with white tick mark icon**
 - You will see this icon when using the 'always keep on this device option'
- **White icon with green borders and a green tick mark icon**
 - This indicates that the file is available for offline use, you can open them without the internet but will be taking up local stage space.
- **2 arrows forming a circle**
 - This indicates that the file is currently syncing
- **Solid red with white X icon**
 - This is to alert you that there is a problem trying to sync a folder or file.
- **White Cloud with blue border and person to the right**
 - The file or folder has been shared with other people

OneDrive icons explained

- **Solid blue cloud icon**
 - OneDrive is up to date and syncing with no issues
- **Solid grey cloud icon**
 - OneDrive is running but the account needs to be signed in
- **2 arrows forming a circle**
 - OneDrive is actively downloading or uploading files or folders to the cloud
- **Solid red icon with a white X icon**
 - OneDrive is running but there are sync problems.

Limitations

- Folder name and file name combinations can have up to 250 characters.
- You cannot sync a file or folder with these characters in the name:
~ # % & * { } \ : < > ? / + | “
- The file name cannot exceed 240 characters.
- You cannot have spaces at the start or end of the file/folder name.
- “forms” is not supported when the folder is at the root level for library.
- These names are not allowed for files or folders: **.lock, CON, PRN, AUX, NUL, COM0 - COM9, LPT0 - LPT9, _vti_, desktop.ini,**
- You cannot create any filename starting with ~\$.
- any folder name that begins with a tilde (~).

Sharing folders and files in SharePoint

To Share folders and files from SharePoint you will need to sign into your Microsoft account online, select the share button next to the file or folder

- **Anyone:** this will give access to the item to anyone who has the link, including people outside your organization. People using an *Anyone* link do not have to authenticate, and their access cannot be audited.
- **People in your organization:** work for only people inside your Microsoft 365 organization. (They do not work for guests in the directory, only members).
- **Specific people:** only work for the people that users specify when they share the item.

Sharing in OneDrive

You can use OneDrive to share photos, Microsoft Office documents, other files, and entire folders with people. Right click the file in your OneDrive within File Explorer for windows or Finder for Mac

- **Anyone with the link**
 - gives access to anyone who receives this link, whether they receive it directly from you or forwarded from someone else. This may include people outside of your organization.
 - **People in your organisation**
 - gives anyone in your organization who has the link access to the file, whether they receive it directly from you or forwarded from someone else.
 - **People with existing access**
 - can be used by people who already have access to the document or folder, but the expiration date has been reached. This does not change the permissions on the item.
 - **Specific people**
 - This will give access only to the people you specify, if people forward the sharing invitation, only people who already have access to the item will be able to use the link. You can also specify allow editing, setting and expiration date, setting a password for the file or folder and if you would like the user to be able to download the file or folder
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- **Allow editing** - When you share items with this type of link, people can edit files, and can add or delete files in a shared folder. Recipients can forward the link, change the list of people sharing the files or folder, and change permissions for recipients. If you are sharing a folder, people with edit permissions can copy, move, edit, rename, share, and delete anything in the folder.
 - **Set expiration date** - The link will only work until the date you set. After that, the link will be invalid, and you will need to create a new link for users requiring access to your file or folder.
 - **Set password** - When a user clicks the link, they will be prompted to enter a password before they can access the file. You will need to provide this password separately to users.
 - **Block Download** – you can choose if the end user can download the file or online edit online.