

# SharePoint Workshop Notes

## Sharepoint and OneDrive Definitions

The terminology around Onedrive and Sharepoint is very confusing! This is because both Sharepoint and Onedrive refer to specific locations in the cloud, but also to a collection of functionality that goes beyond a place to store documents.

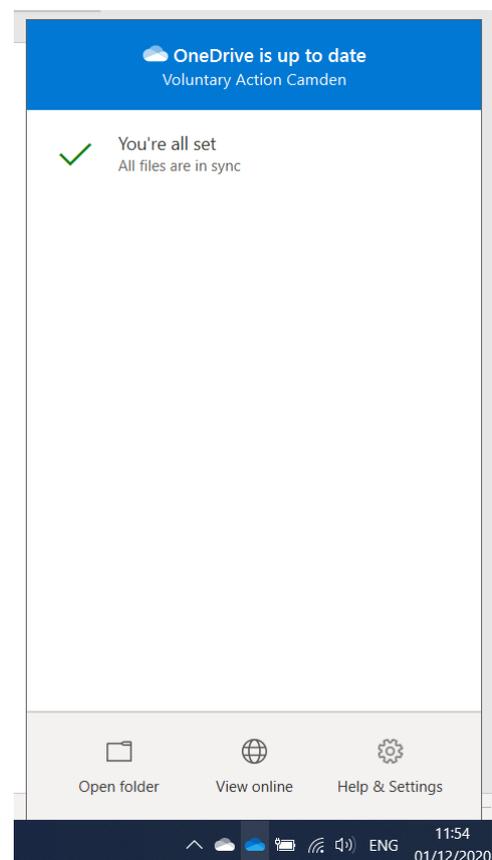
**Sharepoint:** can typically be thought of as the place where your company documents can be saved and accessed in the cloud. It is usually referred to as a **site** or a collection of **sites and sub-sites**.

Documents in sharepoint can be accessed using Sites, and Document Libraries. If you have a Teams's Group, you may also have Team Documents saved within the Sharepoint space. You access these documents through the Teams interface but it is still utilising the Sharepoint platform.

**OneDrive:** can typically be thought of the place where your private or personal documents can be saved and accessed in the cloud. You may then move these over into the relevant company folders on sharepoint, and once complete and ready for company-wide viewing.

Where it gets confusing is that OneDrive is also the name of the tool which you use to 'sync' files between your computer and the onedrive or sharepoint libraries in the cloud.

If you are using OneDrive sync tool for syncing, you will see a little blue cloud in the system tray in your PC. When you click on this it will tell you the status of all the files being synced between your PC and your cloud storage space in onedrive or sharepoint online.

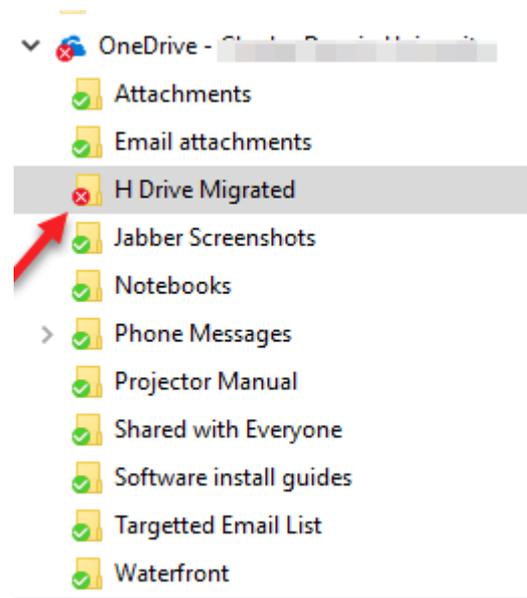


## Syncing

Syncing is a way of accessing files that live in the cloud via your PC so you have a local copy on your PC, as well as the online copy in the cloud. It means you can locate files in the Windows Explorer view which we are most familiar with when using a PC. In most cases, the local and online file are in fact the same thing – so changes you make on the PC copy will upload to the online version (sometimes called server copy), and vice versa. Occasionally you may run into sync errors whereby changes you made on a local copy have not uploaded to the cloud copy. If this happens, you will usually see a **red cross** on the onedrive sync tool, or on the library on your PC where you are syncing file.

A **green tick** means the files are both on your PC and the cloud.

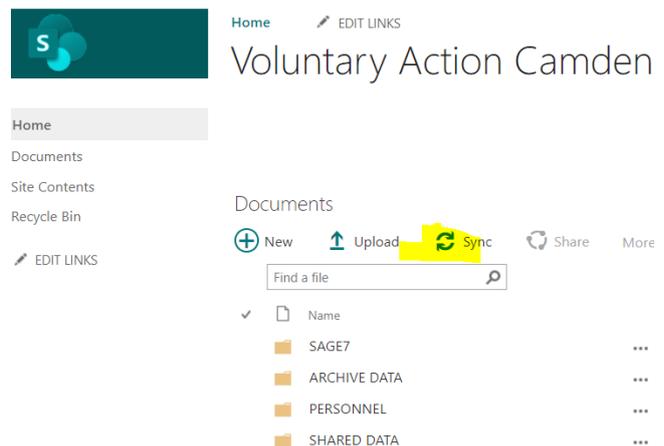
A **blue cloud** means the files are only in the cloud and not on your PC.



**A word of caution: if files are synced between your PC and online and you delete files on your PC, you will also delete this from the cloud!! People have accidentally deleted entire folders from sharepoint from their PC when syncing. You can restore files from the Recycle Bin in sharepoint but the length of time the files are retained changes depending on your license.**

## How to sync a document library or site

1. Navigate to the relevant folder, library or site on onedrive or sharepoint.
2. Click on the **sync** button
3. This will open up or install the **onedrive sync tool** – a tool that connects files on your pc with the online version of that file.
4. Depending on your permissions, you can choose to sync an entire company site, a specific folder within that site, or just your onedrive folders.



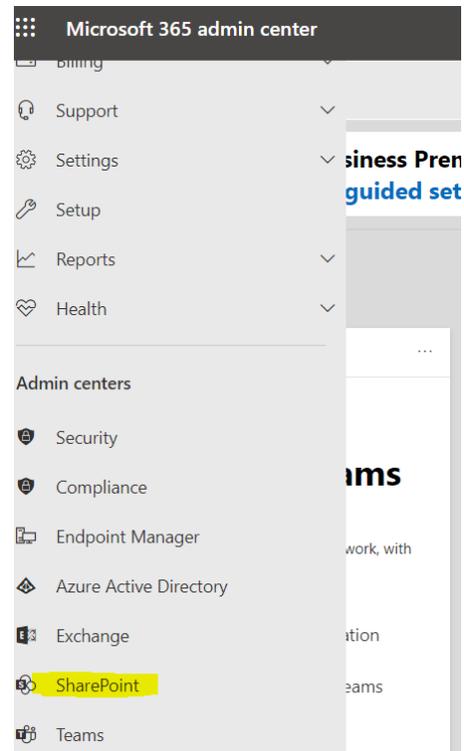
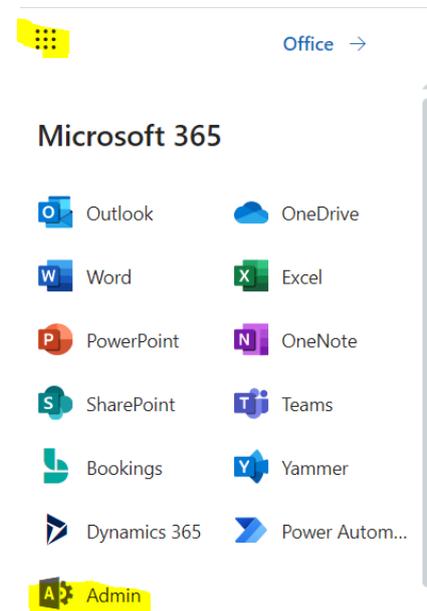
## SharePoint Admin – Setting Up a New Site

### Accessing the Admin Portal

- Log into the office portal – [www.office.com](http://www.office.com) which will take you to the Microsoft 365 dashboard.
- On the left-hand side, there is a waffle button. If you click on this and click on Admin it will take you to the Admin portal.
- Scroll down to the Admin Centrs until you get to Sharepoint.

### Setting up / Accessing the Site

- Two places you be interested in is Active sites and policies/ sharing.
- Active sites are where you create your site – you can have as many sites as you want.
- There will be one site created from the organisation already (default site)
- The other ones will get set up by you or a member of your group.
- You can see the leading site's information which tells you
  - The name
  - Storage limits
  - Domain/URL – Takes you to the specific site on SharePoint
  - The activity in the site
  - Who has permissions to view/add to the site
- When creating a site, make sure you think who can access it.
- **There are two types of sites:** team sites and communication sites.
  - A team site is the most common– it is a collaboration site within SharePoint with a group of people in your organisation. Internal facing site
  - A communication site is visually aesthetic used of intranets or websites—customer-facing site.
- **How to create a site:**
  - Click on create
  - Chose team or communication site
  - Enter your name, group owner name or email address and click next and follow the instructions after.
- **Sharing policies** – this is where you set who can see and share files within your organisation and people outside of your company.
  - Sharing for external use – make sure to select which one applies to you and your organisation.
    - Anyone



- New and existing guests
- Existing guests only
- Only people in your organisation



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- SharePoint – it is a collaboration tool for sharing data and workflows. Can use to fill in forms and automate specific processes.
- Access SharePoint through [www.office.com](http://www.office.com) – click the green SharePoint app, and it will take you to which sites you visit frequently and following.
- Another way to access your site is via the URL you created, e.g., [http://\[your domain name\].sharepoint.com](http://[your domain name].sharepoint.com)
- Remember every site will end with .sharepoint.com – if the end of the URL doesn't show .sharepoint.com, then it is not a SharePoint site.
- Use Teams, can access some elements of teams on SharePoint.
  - You can see and upload files to a specific place in SharePoint.
  - Files uploaded can be accessed on both teams and SharePoint.

## OneDrive

- Can access your files from windows explorer where the folder will be a blue SharePoint icon.
- To sync files in one drive, go to SharePoint and click the sync button and it will automatically sync to your OneDrive/ Windows explorer
- When you see a file with a cloud icon next to it – means the file is on SharePoint. – This is not on the computer only in the cloud
- When you add a file to a folder via windows explorer, it will have two arrows forming circle which mean its uploading to your site. When done, it will have a tick next to it.
- To make sure files are both on SharePoint and your device, make sure you tick always keep on this device. So when offline, you can access the files.
- You can drag and drop your documents onto the folder, and it will automatically sync to OneDrive/SharePoint.