TUHSD Tech Quick Guide for SharePoint & OneDrive

An Overview

SharePoint: Microsoft portal for organizations to share documents through team sites and shared spaces – part of Office 365

OneDrive Pro: Microsoft online storage, with sharing capabilities, for organization members – part of Office 365

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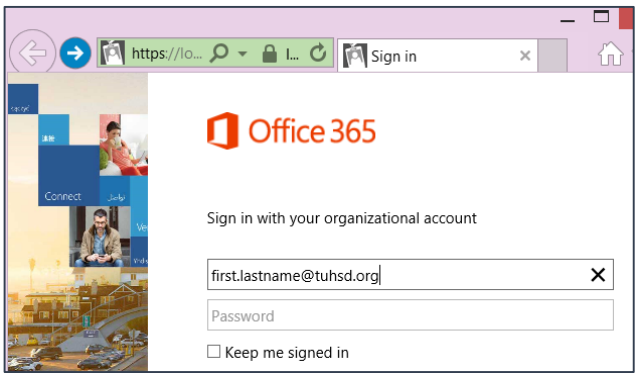
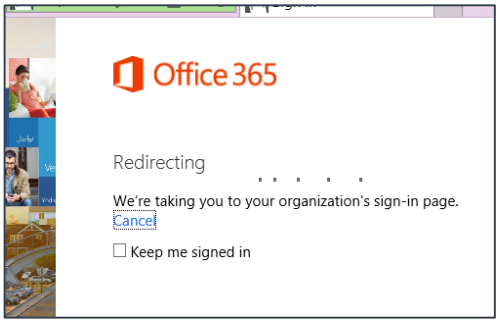
Accessing OneDrive in Office 365 Web Portal

1. Log onto Office 365.

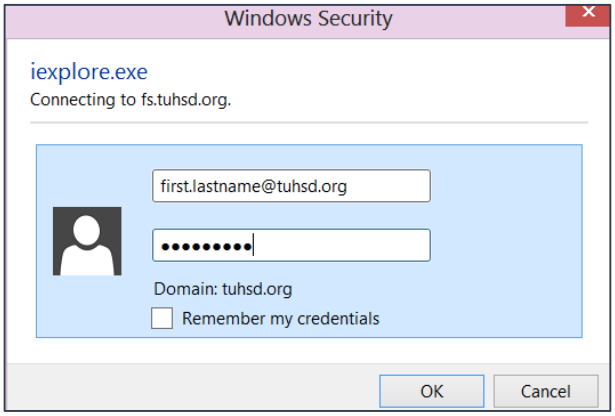
2. Type your full email address. Click on the **Tab** or **Enter** key.



3. Wait a moment for the login prompt.



4. Type your username (or email address) and password. Click **OK**.



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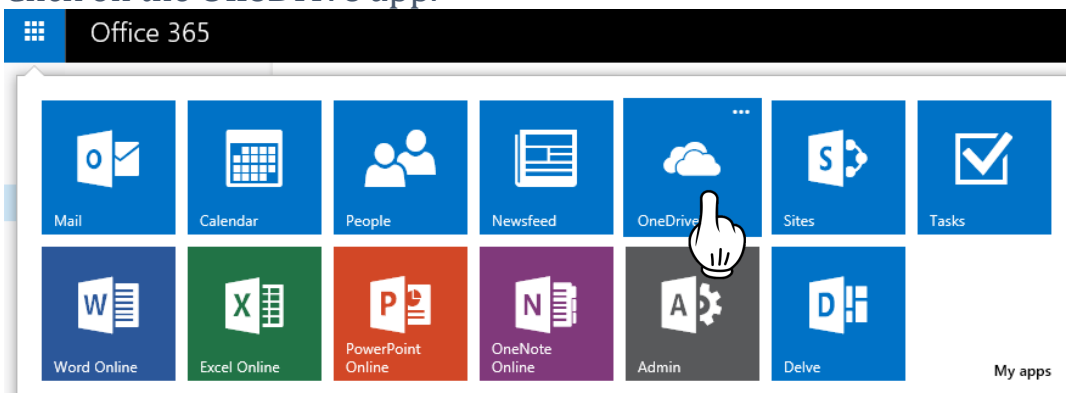
Working Directly in OneDrive of Office 365 Web Portal

1. Click on the web apps icon to the top-left corner of the page.

2. Click on the **OneDrive** app.



3. Notice the **Shared with Everyone** folder. This is a public folder each user owns in which he/she may add documents which may be viewed by others within the district. (Documents saved outside of this public folder are private unless intentionally shared with others.)

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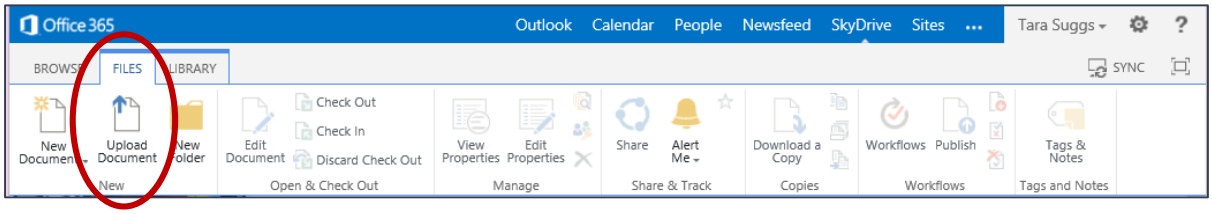
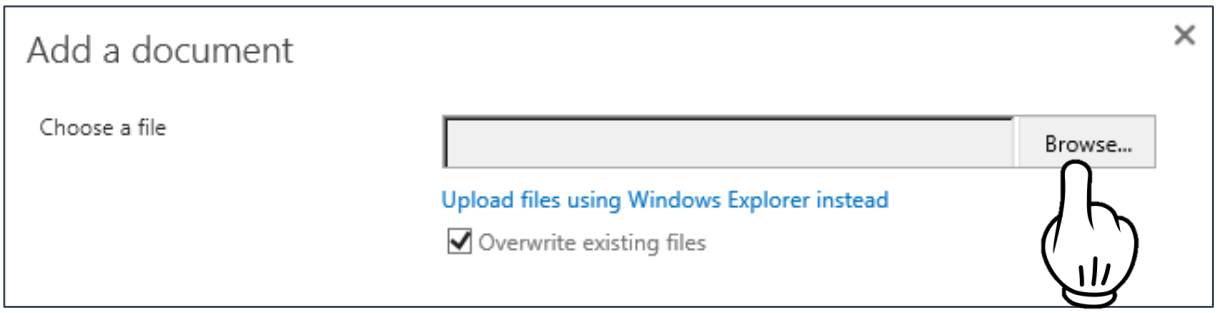
Uploading Documents in Office 365 Web Portal

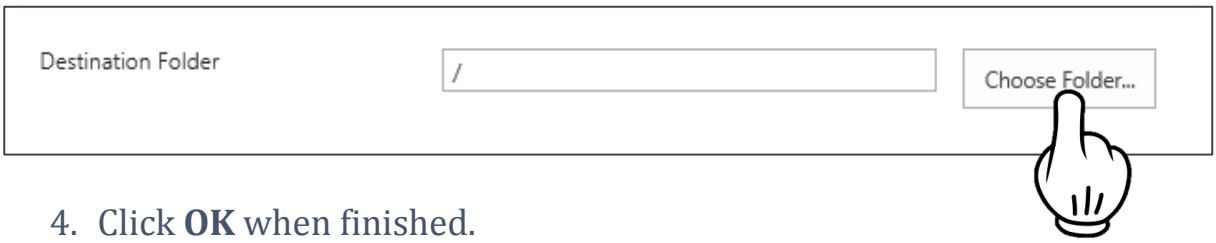
1. On the OneDrive page, click on **Files** then on **Upload Document**.



2. Click **Browse** to select documents to upload from the computer or desired network drive.



3. Select the destination folder by clicking on **Choose Folder**.



4. Click **OK** when finished.

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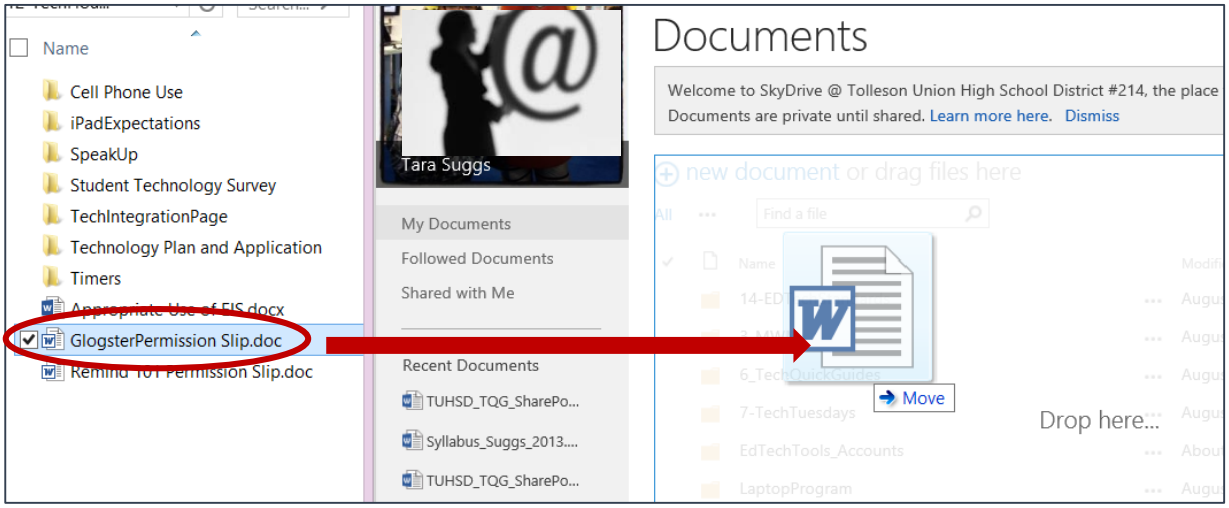
Adding Documents using Drag and Drop

1. On the OneDrive page, locate the + new document of drag files here link.

2. Open **File Explorer** and locate the file(s) you wish to add to OneDrive.

3. Select the file by clicking on it and dragging it over to the **+ new document or drag files** here prompt. *This works best when the File Explorer window is placed* beside *the OneDrive web page.*



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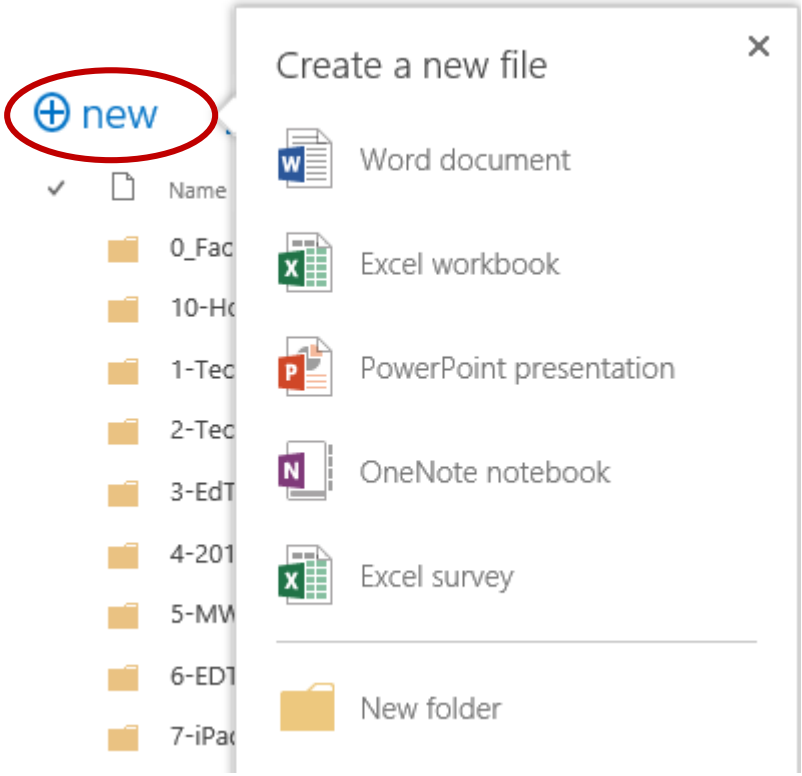
Using Web Apps on Office 365 Web Portal

OneDrive users have the ability to create new documents within the web page. These small web programs are called Web Apps. Users may create and edit **Word**, **Excel**, **PowerPoint**, **OneNote**, and **Excel survey** documents. Click on **+ new** to view these options.



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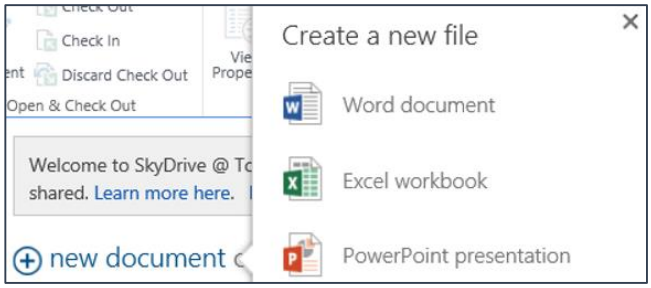
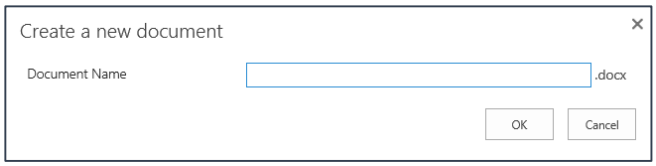
Working with Word in Office 365 Web Portal and Opening in Word 2013

(*Applicable to Excel, PowerPoint, and OneNote*)

1. Click on **+ new document** and select the file type you wish to create. (Word is used to illustrate this process.)

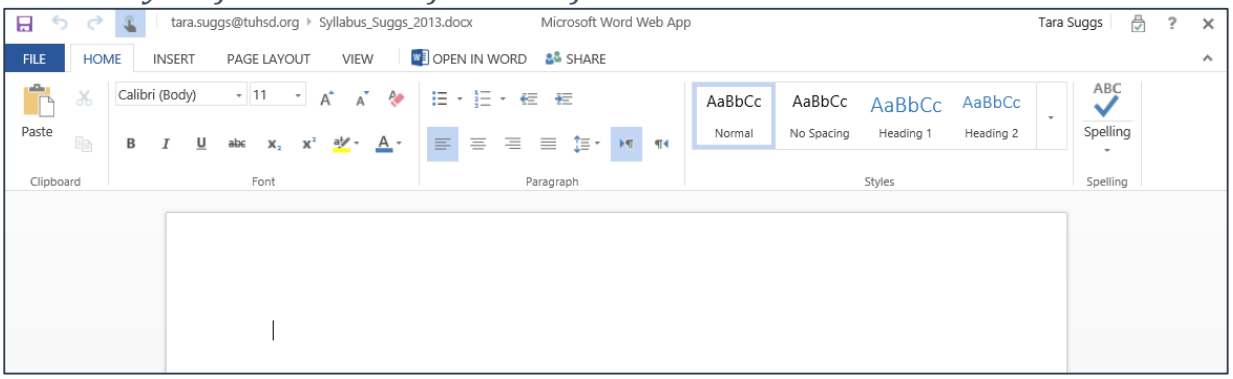


2. Type the name of the document. Click **OK**.

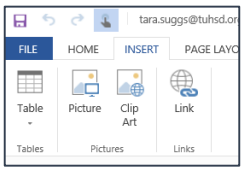


3. **Word Web App** will open.

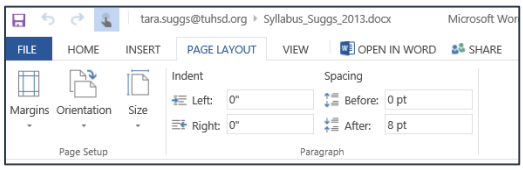
4. Begin working on the document. ***Note**: Web Apps provide enough options to work on a simple document. Advanced features are available only on full versions of Microsoft Word.*



INSERT Tab



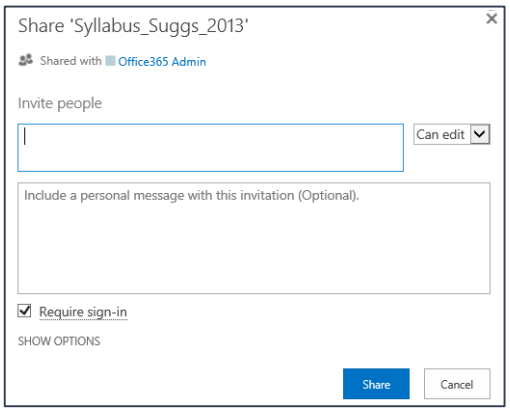
PAGE LAYOUT Tab



VIEW Tab

One may share the document by clicking on the **SHARE** tab.

a. Type the name(s) of the people.
b. Give specific permissions to view only or edit.
c. Add a personal message if.
d. Select desired document security (require sign-in is more secure).
e. Click **Share**.



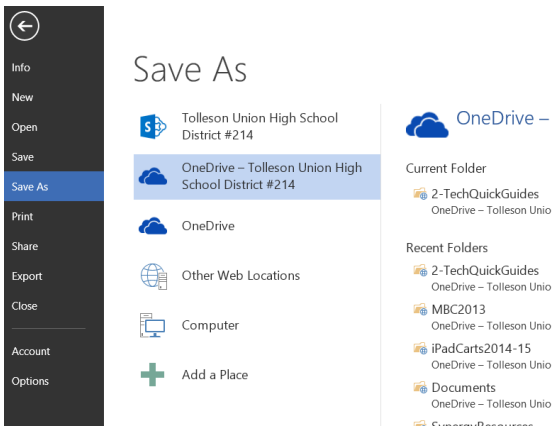
Open in Word

Click on the **OPEN IN WORD** tab to open the document in Word 2013. This will allow for more advanced formatting.

Edit the document as desired.

Save the document by click on the save icon or click on **File** > **Save As** for more options.

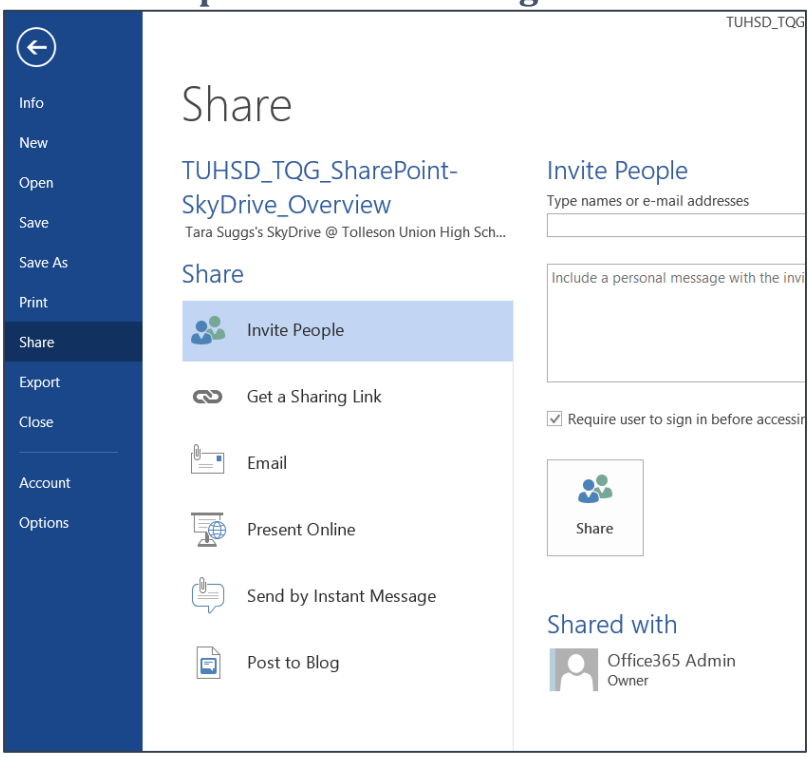
a. When creating a document directly in Word 2013, one may save it directly to his/her OneDrive/SharePoint files. Click on **File** > **Save As**.
b. Select **OneDrive-Tolleson Union High School District #214**.
c. Click **Browse**. Click **your email address** (this is your OneDrive folder)
d. Type the file name.
e. Click **Save**.



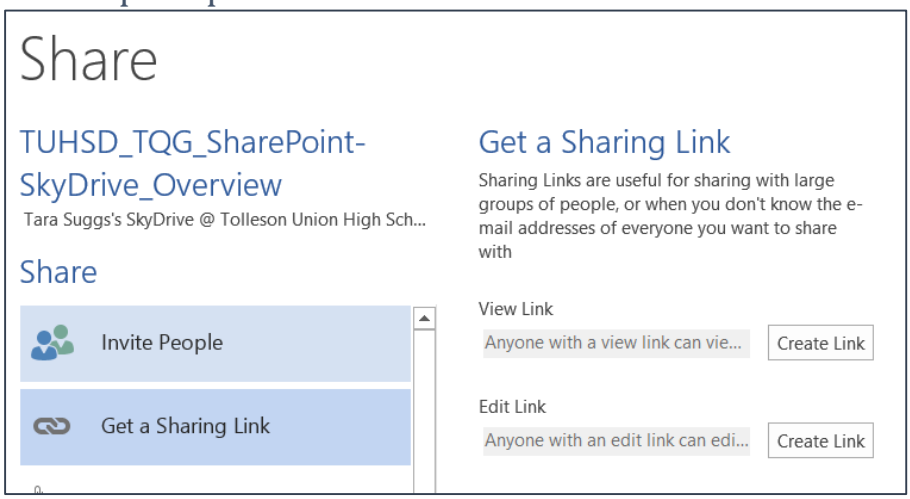
Once a document is saved onto OneDrive, one may share documents with others through Word 2013.

a. To do this, go to **File** > **Share**.

b. Click on **Invite People** or **Get a Sharing Link**.



c. Follow the prompts to share the document.



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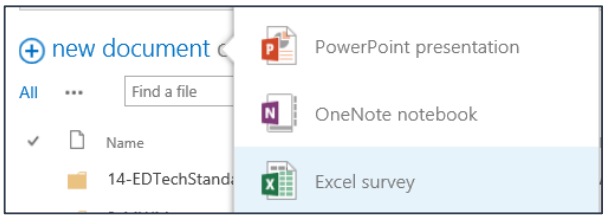
Excel Survey

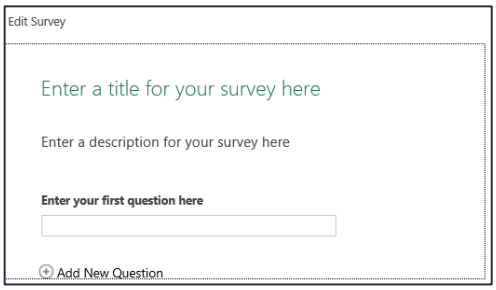
Users may create a simple survey directly in Office 365 web portal. Responses will be placed in an Excel workbook.

1. To begin, click on **+ new document** and click on **Excel survey**.

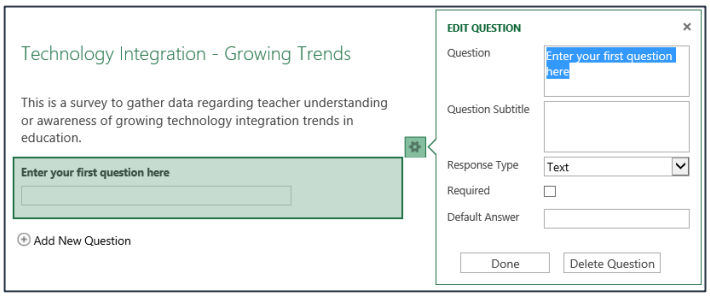


2. Type the name of the document. Then click **OK**.

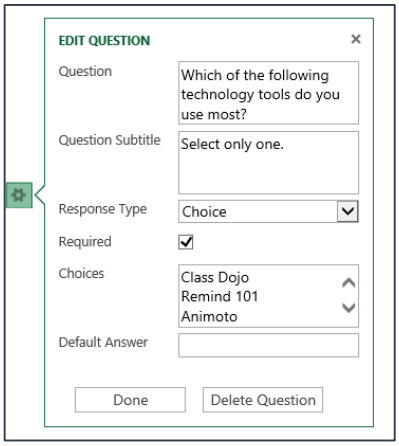
3. Complete the form by adding the survey title and description



4. Enter questions and select desired options.

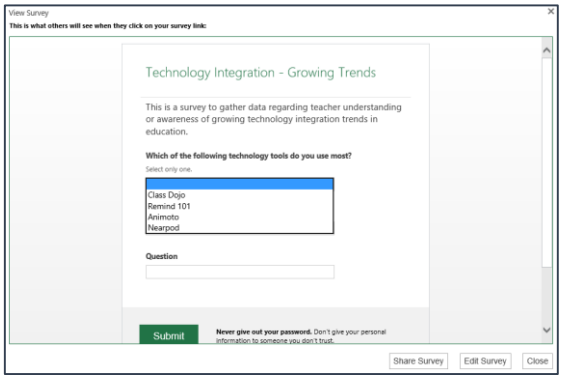


5. Click on the settings icon to edit questions.

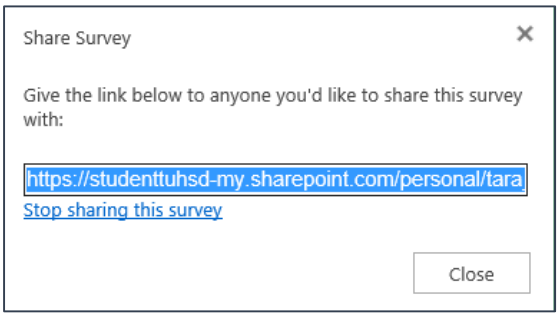


6. To preview the survey click on **Save and View**. To share with others, click on **Share Survey**.

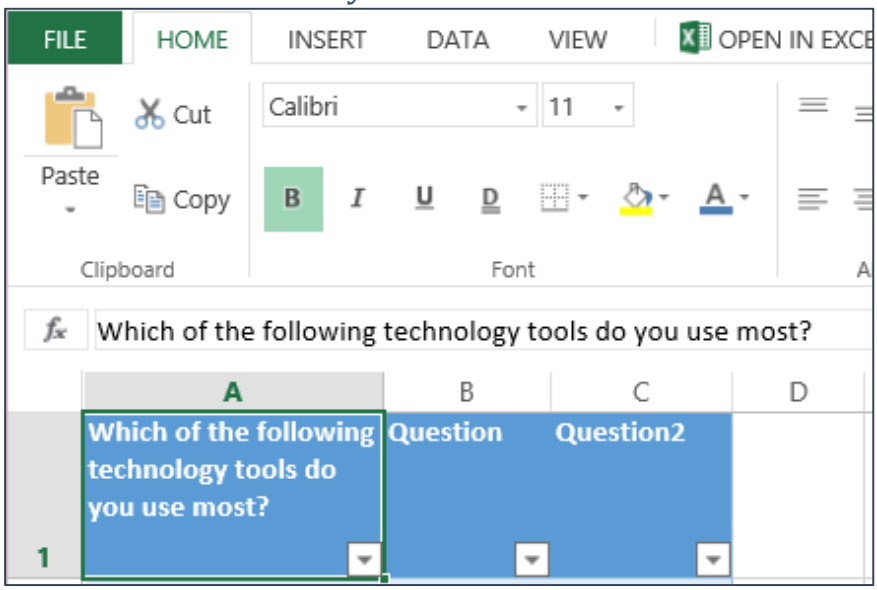
Save and View Mode



Share Survey



View survey results on Office 365.



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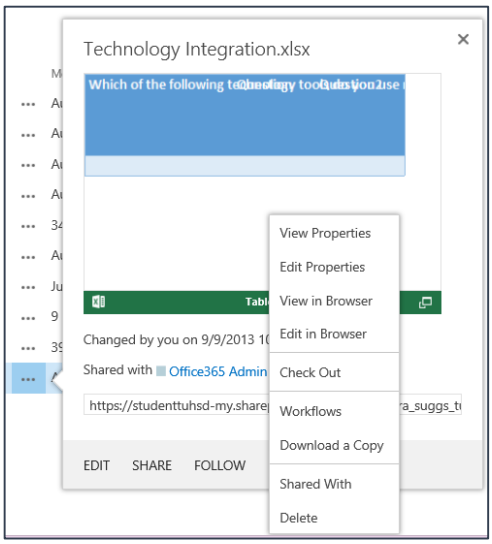
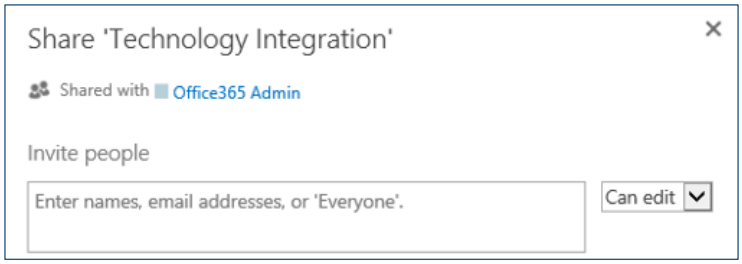
Other Document Features in OneDrive on the Office 365 Web Portal

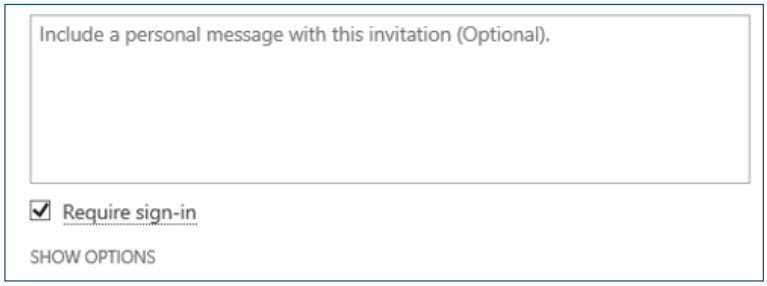
1. On OneDrive, click on the ellipses (…) to view more features and options.



2. When sharing a document or folder, click on **Share** and complete the form by adding names, email addresses, or "Everyone" if sending to all district users.



3. You may add a personal message, and you may designate additional security for the document by checking **Require Sign-in**.



4. Click on **Share** when finished.

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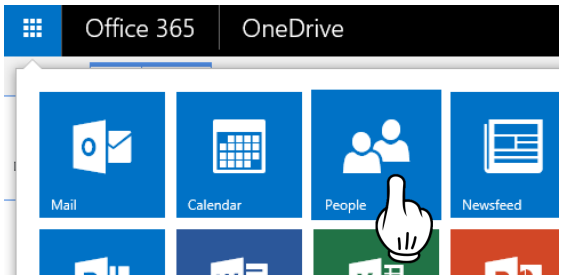
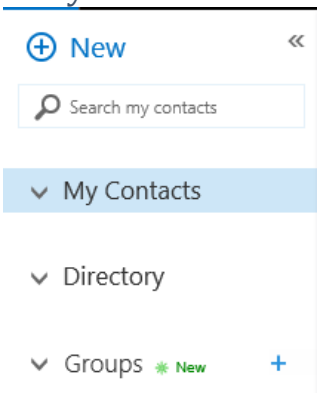
Finding other SharePoint Contacts

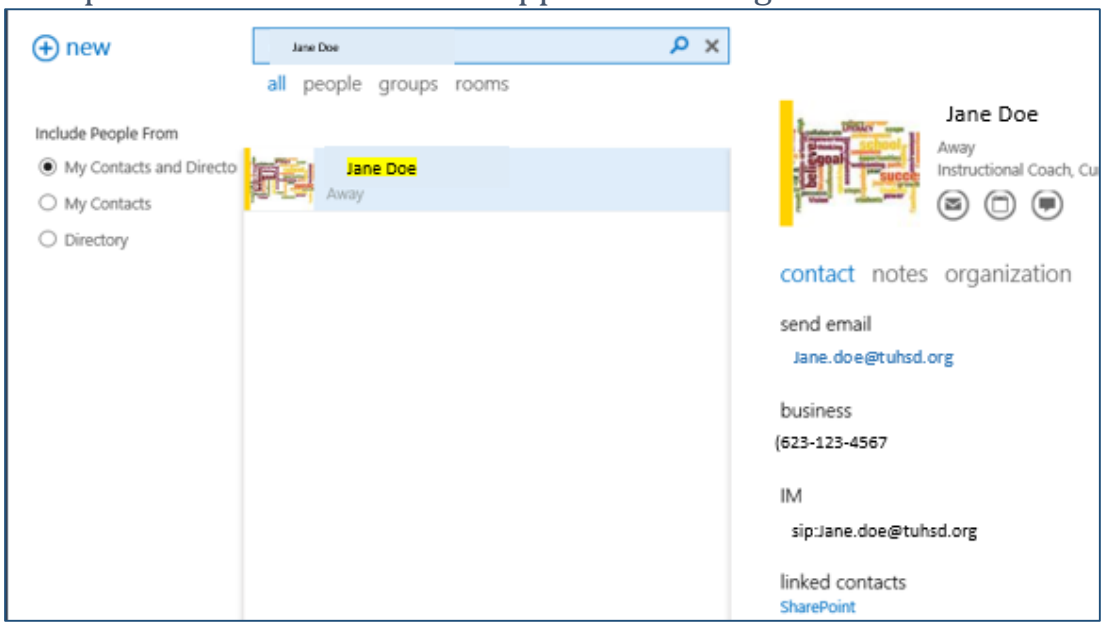
1. In Office 365, click on the People link from the web apps menu.



2. Type the name of the contact you wish to view.



3. The person's contact card will appear on the right side of the screen.



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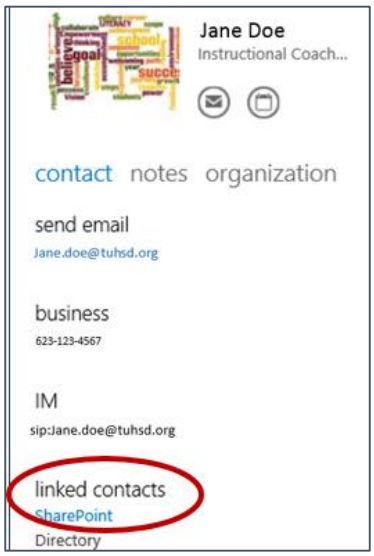
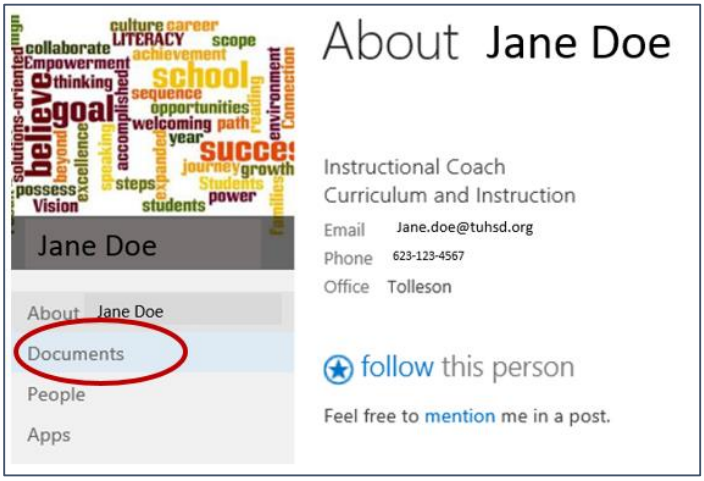
View Shared Folders

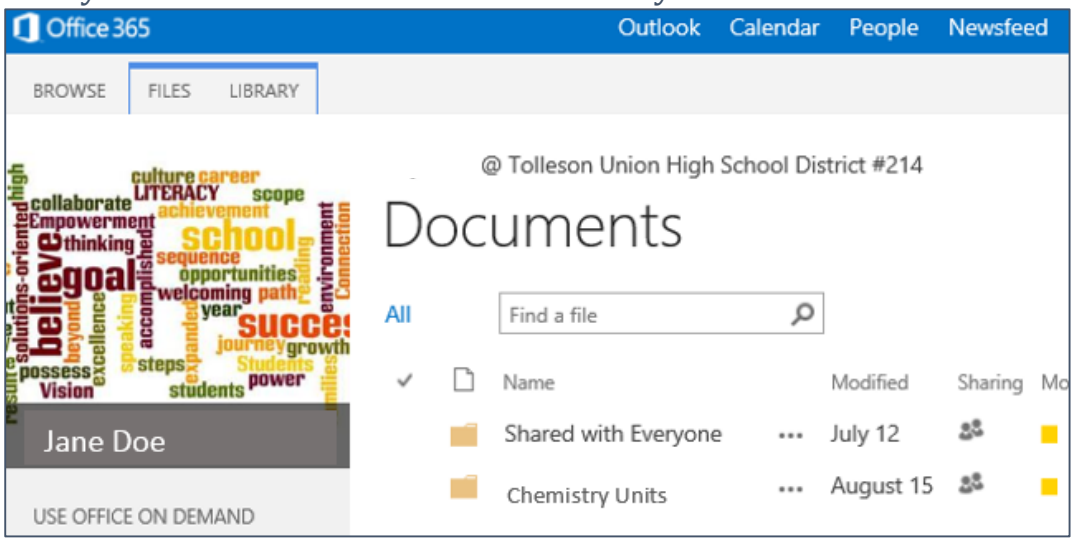
1. Click on **SharePoint** beneath linked contacts to access a person's activity page.



2. Click on **Documents** beneath the person's name.



3. Only documents or folders shared with you will be visible.



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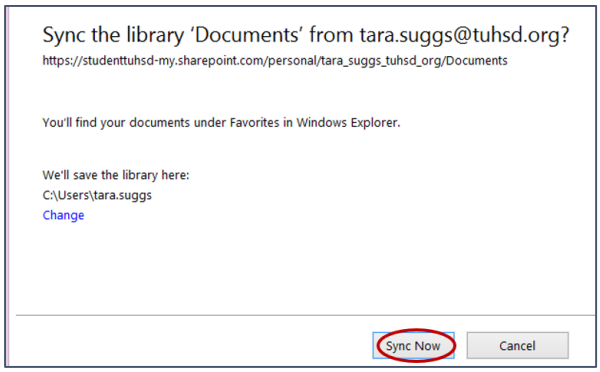
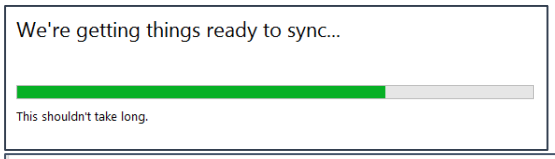
Synchronizing OneDrive folder from Office 365 Web Portal to Computer Desktop

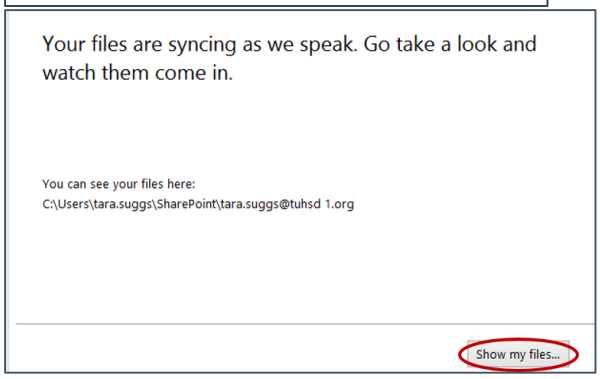
1. Click on the **Sync** link on the top-right corner of the OneDrive page.

2. A folder will be created on your desktop computer to sync the OneDrive documents with your computer. When this prompt appears, click on Sync Now.

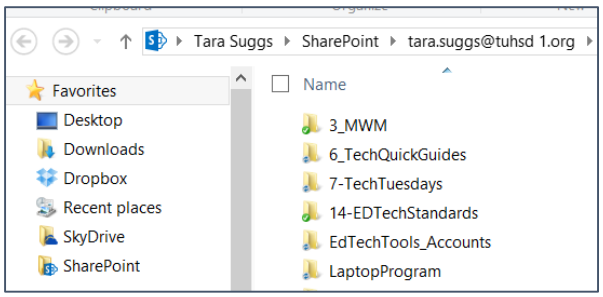


3. The computer will begin to sync with your OneDrive folder. Click on **Show my files…** to view the folder.





5. The SharePoint (or OneDrive @ SharePoint) folder will be displayed. This may be found under Favorites in File Explorer.



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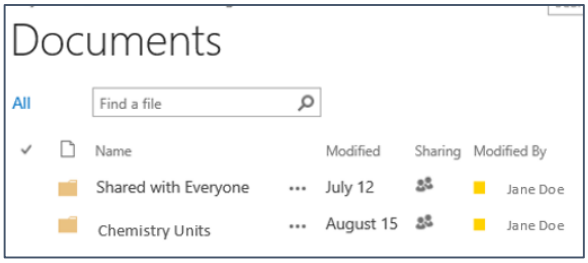
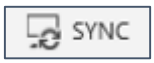
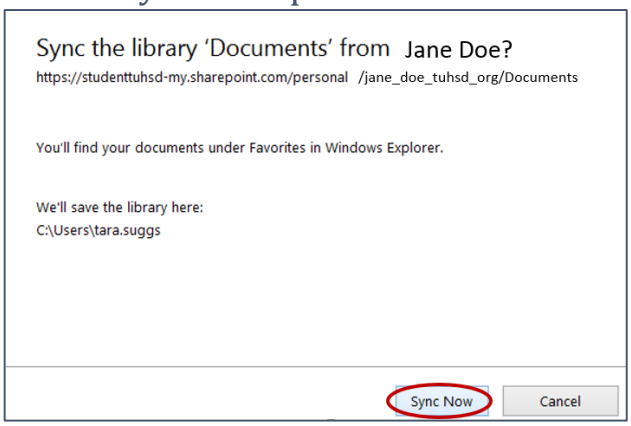
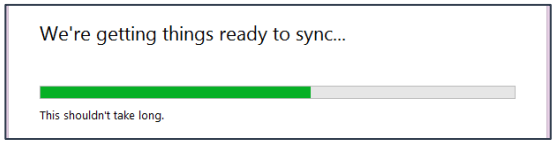
Synchronizing Shared Folders from SharePoint Contacts on Office 365

1. Access a contact's SharePoint folder by searching for the contact (See View Shared Folder in this document) or click on the invitation link he or she may have sent you via email.

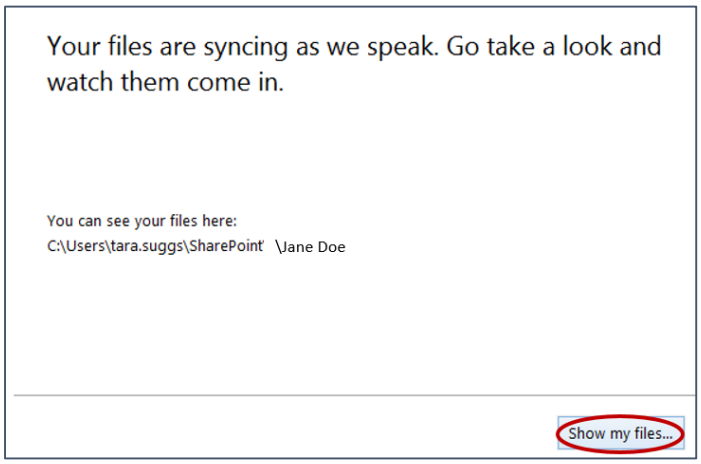


2. Click on the **Sync**  link on the top corner of the page.
3. Click **Sync Now** to create a folder on your OneDrive/SharePoint folder on your computer.

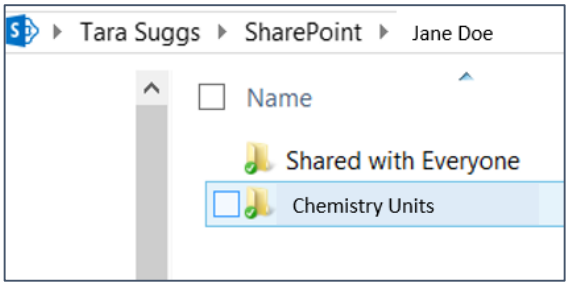




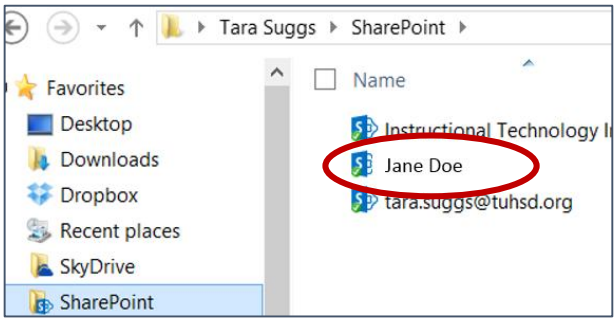
4. Once the folder is created, click on **Show my files…**



The SharePoint folder will display all Office 365 folders you have synchronizing on your computer.



5. Double-click on the folder with the person's name. You will be able to view only folders shared with you or shared publicly.



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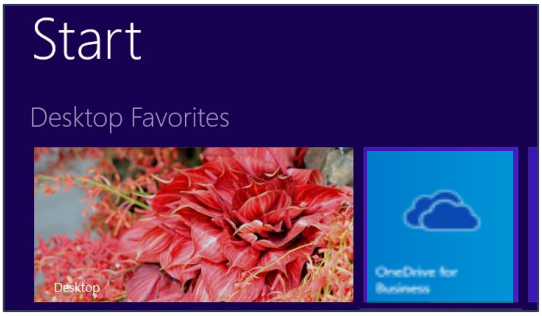
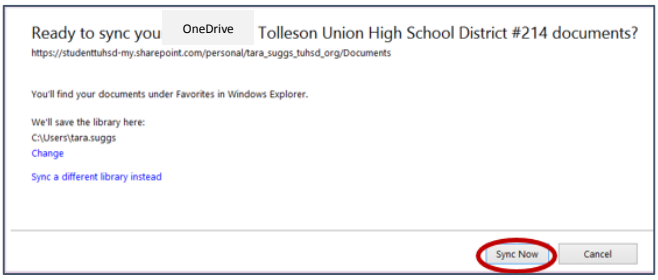
Accessing OneDrive Pro Folder

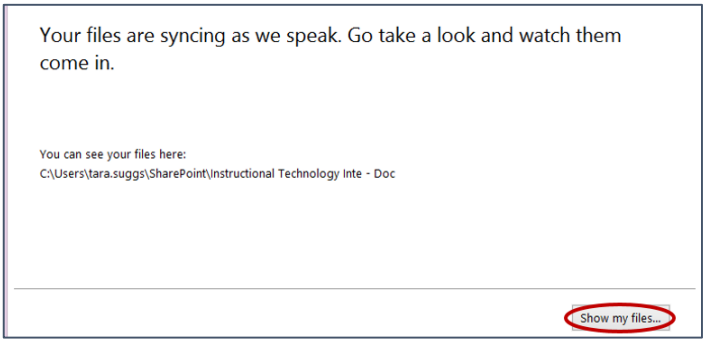
1. To view or synchronize your Office 365 documents onto your computer, click/tap on the OneDrive for Business tile on the Windows 8 Start Screen.



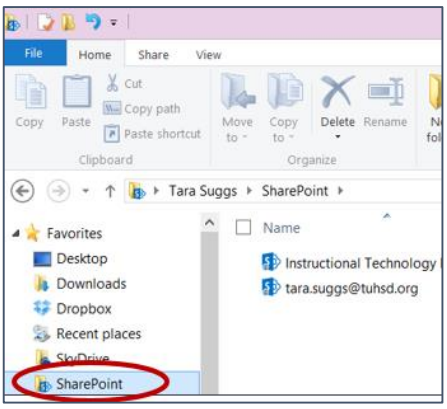
2. A folder will be created on your desktop computer to sync the OneDrive documents with your computer. When this prompt appears, click on **Sync Now**.



3. Click on **Show my files…** to open the OneDrive folder.



4. The folder will be located under Favorites in File Explorer. It may be labeled SharePoint or OneDrive@…



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