



University Information  
Technology Services

# Presidential Transition Taskforce

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Office 365

OneDrive for Business

Sharepoint Online

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

## **Introduction**

This guide has been created to assist the Presidential Transition Taskforce with the following online Microsoft tools: Office 365, OneDrive for Business, and Sharepoint Online. The accompanying guides will provide a basic introduction and cover some key features of the tools.



University Information  
Technology Services

# Office 365

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## Getting Started

University Information Technology Services

Learning Technologies, Training, & Audio Visual Outreach

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# University Information Technology Services

## Office 365 Getting Started

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## Introduction

*Office 365* is a collection of applications and services that you can use to be productive across a variety of devices from just about anywhere. The KSU *Office 365* subscription plan includes access to Office applications and other productivity services available through your favorite browser on your PC or Mac.

## Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Access your Office 365 account
- Understand and navigate the Office 365 interface
- Open documents within Office 365 online
- Open documents stored online with the desktop version of Office 2016
- Save your document
- Sign out of Office 365

## Logging in to Office 365

You will be able to access Office 365 both on-campus and off-campus. When logging into Office 365 while on-campus, your access is controlled by your log-in to the local machine. Once you sign into a desktop computer on-campus, Office 365 will recognize your credentials and log you in.

**Note:** Logging-in to Office 365 while off-campus follows the same steps as listed below.

To log into Office 365 while on-campus:

1. In your web browser of choice, navigate to [portal.office.com](http://portal.office.com).
2. The *Office 365* log-in screen will appear. In the *user name* field, type in your full **KSU email** and press **Enter**.



Figure 1 - On-Campus: Office 365 sign-in

3. *Office 365* will redirect you to the KSU sign-in page.



Figure 2 - Click Sign In

4. You will be redirected to the Office 365 home page.

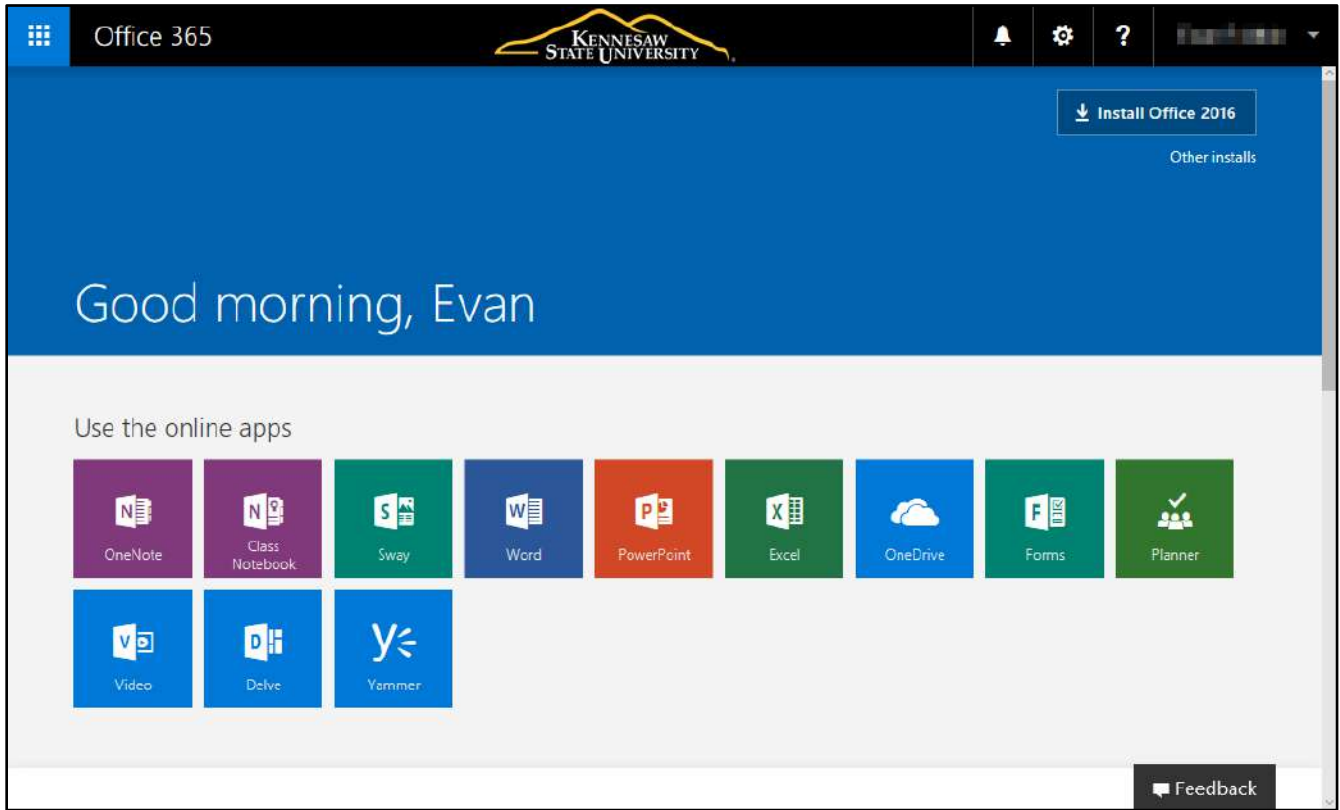


Figure 3 - Office 365 Home Page

**Note:** While on-campus, access is controlled by the log-in credentials used to log-in to the local machine. If you wish to use your account in Office 365 while someone else is logged into the computer, you will need to use the browser's private/incognito browsing mode to access your Office 365 account while the other user is logged into the machine.



# Office 365 Overview

From the Office 365 home page, you can access the following:

- a. **App Launcher:** Access the Office web based applications from here at any time while on *Office 365* (see Figure 4).
- b. **Notifications/Settings/Help:** Access notifications, Office 365 settings, and additional Office 365 help (see Figure 4).
- c. **Account Information:** Access your account information and sign out of Office 365 (see Figure 4).
- d. **Install Office:** Download desktop versions of the current Office suite of programs (see Figure 4).
- e. **Online Apps:** Access web-based versions of Microsoft Office programs and edit documents from your browser (see Figure 4).
- f. **OneDrive:** Access your KSU OneDrive for Business online storage account (see Figure 4).
- g. **Recent Documents/Folders:** Access recently accessed documents and folders directly from your *Office 365* home page (see Figure 4).

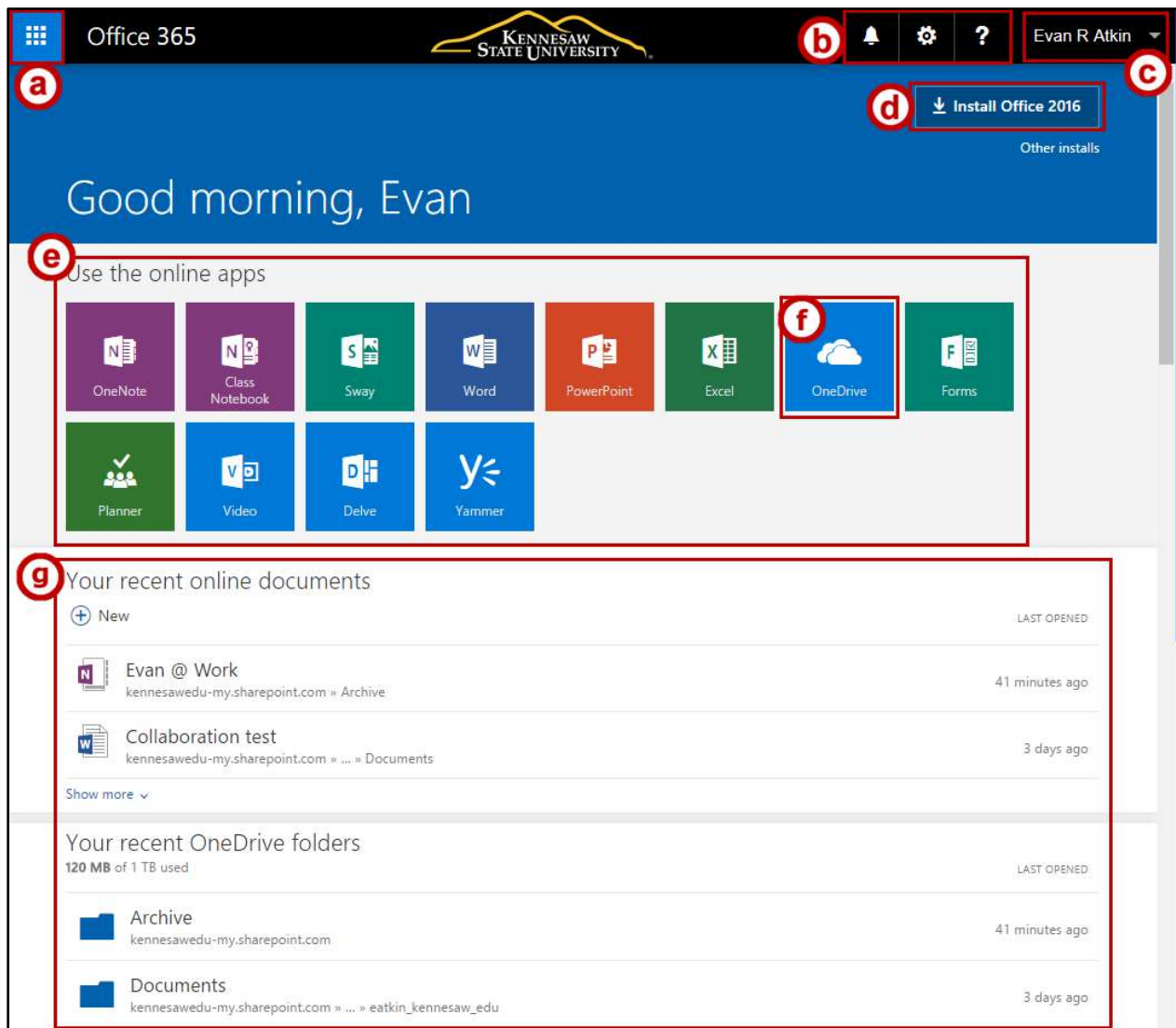


Figure 4 - Office 365 Overview

## Using Web Versions of Microsoft Office

New with *Office 365* is the inclusion of Office Online, which allows access to Microsoft Office products such as Word, Excel, PowerPoint, and OneNote through your web browser. Although these web applications do not include the full functionality of their locally installed counterparts, you can use them on any computer connected to the internet, make edits to your work from within your web browser, and save your work to your OneDrive account.

**Note:** Although the following provides information on using the browser version of *Word*, many of the features or ways to access features are similar when using other browser versions of *Office 365*.

For example, to access the *Office 365* version of Microsoft Word:

1. Using your browser of choice, log in to *Office 365* (see *Logging in to Office 365*).
2. From the *Office 365 Home Page*, click **Word**.

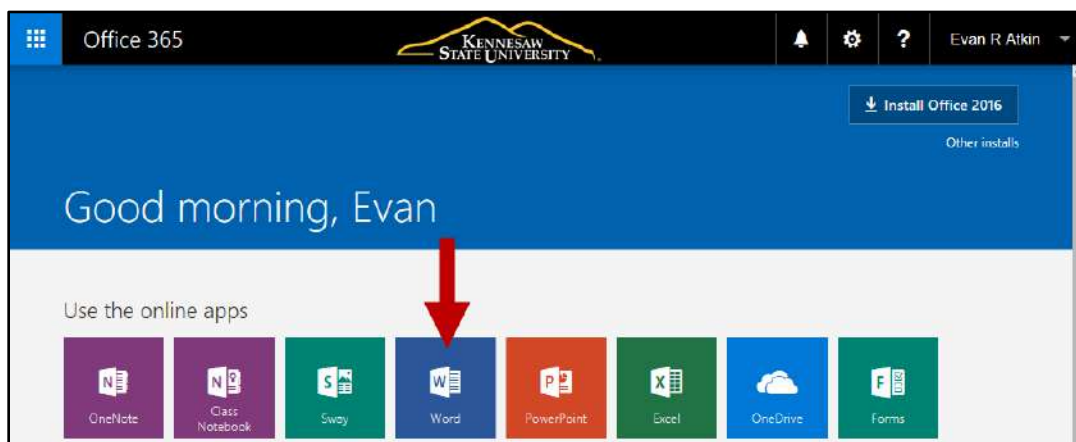


Figure 5 - Word Online

3. The *Word Online* will open in a new browser tab and display the *backstage view*.

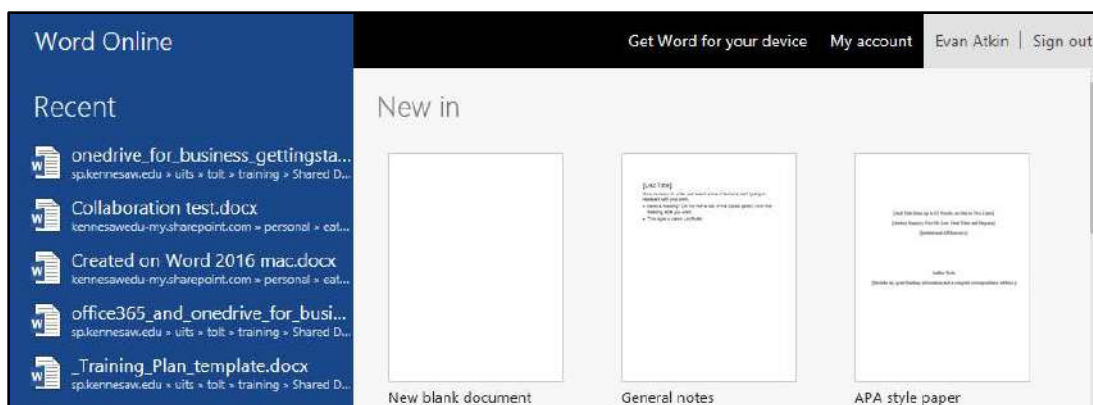


Figure 6 – Word Online Backstage View

**Note:** Although versatile, the *Office 365 Online Applications* only provide the basic tools for editing your work. For example, the online version of Word provides the basic tools in the ribbon to edit your work.

## Opening your Word Online document in Word

The following explains how to open your *Word Online* document in your desktop version of Microsoft Word:

1. Click on **Edit in Word** to open the document on your computer in the current version of Microsoft Word.

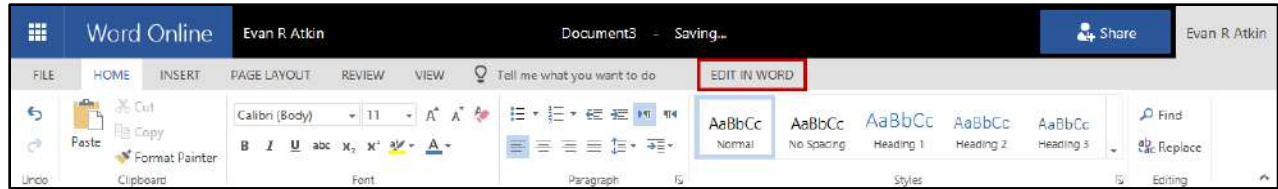


Figure 7 - Open in Word

**Note:** The *Edit in* feature is available in all of the online versions of Microsoft Office with an accompanying desktop version.

2. A window will appear confirming if you wish to open this file in Microsoft Word. Click **Yes** to continue.

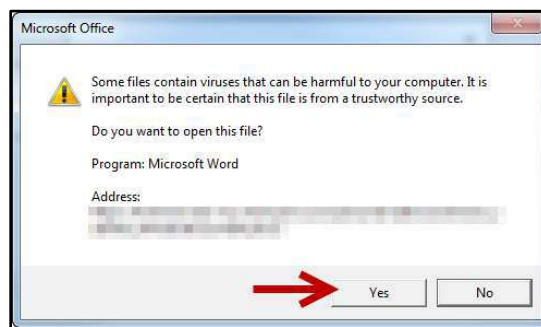


Figure 8 - Do You Want To Open This File?

3. The document will open in Microsoft Word and you can continue editing your work.

For more information on utilizing the desktop version of the *Microsoft Office* programs, visit the UITS Document Center at [uits.kennesaw.edu/cdoc](http://uits.kennesaw.edu/cdoc) and search for your preferred *Microsoft Office 2016* application (e.g. Word, Excel, PowerPoint, or OneNote).

## Saving your Document

There is no save document button in the online versions of *Microsoft Office*. *Word Online* (as well as the other online versions of Microsoft Office) automatically saves the changes to your document as you go along to your *OneDrive for Business* account. If you wish to save multiple versions of your document, you can change the title of your document.

## Sign out of Office 365

The following explains how to sign out of *Office 365*:

1. In the *upper-right* corner of your screen, click on your **name**.



Figure 9 - Click on your Name

2. A dropdown menu will appear. Click on **Sign out**.



Figure 10 - Sign Out

3. You will be signed out of *Office 365*.

## Additional Help

For additional support, please contact the KSU Service Desk:

### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: [service@kennesaw.edu](mailto:service@kennesaw.edu)
- Website: <http://uits.kennesaw.edu>



University Information  
Technology Services

# KSU OneDrive for Business

Getting Started

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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# University Information Technology Services

## KSU OneDrive for Business

### Getting Started

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## Introduction

*OneDrive for Business* is Microsoft's version of cloud storage where you can store, edit, sync, and share your files with others. *OneDrive for Business* is integrated with Office 365, enabling you to update and share your files from anywhere and work on Office documents with others at the same time.

KSU's agreement with Microsoft currently allows 1 TB of space with a 4 GB upload size while on-campus.

For more information on Office 365, please refer to the *Office 365: Getting Started* section of your booklet.

## Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Access your Kennesaw State University (KSU) OneDrive for Business account
- Manage your files in your OneDrive for Business account
- Upload files and folders to your OneDrive for Business account
- Share and manage files with other members within your organization



## Access your OneDrive for Business Account through Office 365

1. In your web browser of choice, navigate to [portal.office.com](https://portal.office.com).
2. The *Office 365* log-in screen will appear. In the *user name* field, type in your full **KSU email** and press **Enter**.



Figure 1 - On-Campus: Office 365 sign-in

3. *Office 365* will redirect you to the KSU sign-in page.



Figure 2 - Click Sign In

4. If this is your first time signing-in on the computer or browser, then you will be prompted to enter your *username* and *password*. Enter your **log-in** credentials and click **OK**. Otherwise, skip to step 5.

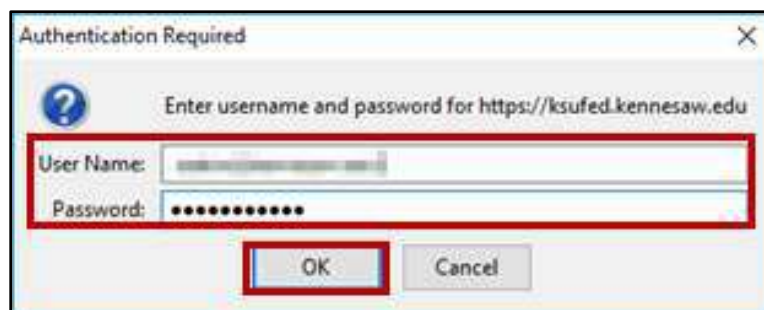


Figure 3 - Authentication Required

5. The *Office 365* home page will open. Click **OneDrive**.

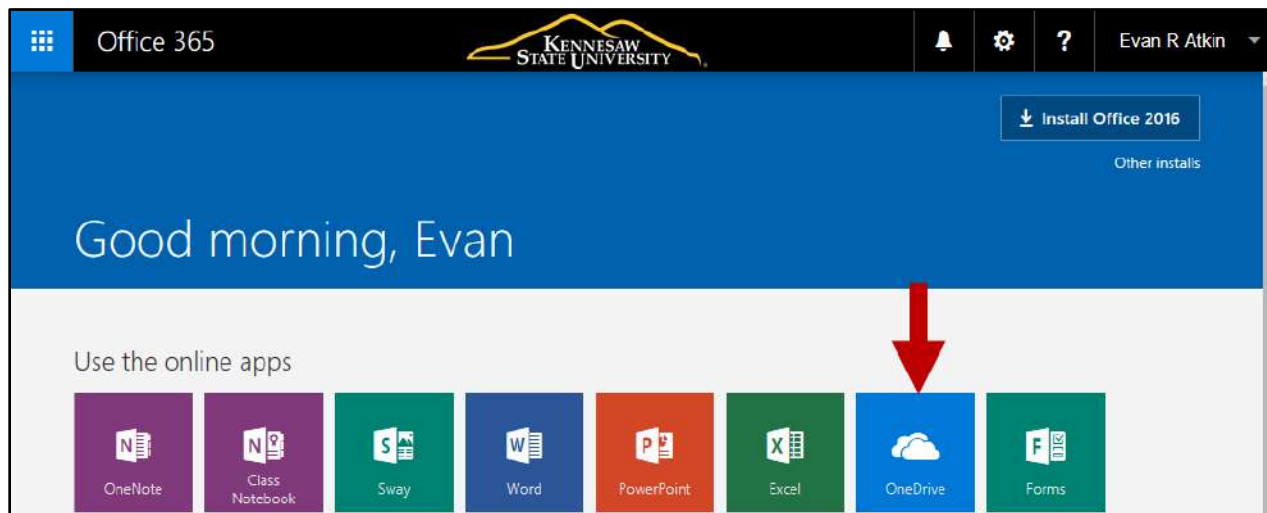


Figure 4 - OneDrive Icon

6. *OneDrive for Business* will open and display your documents.

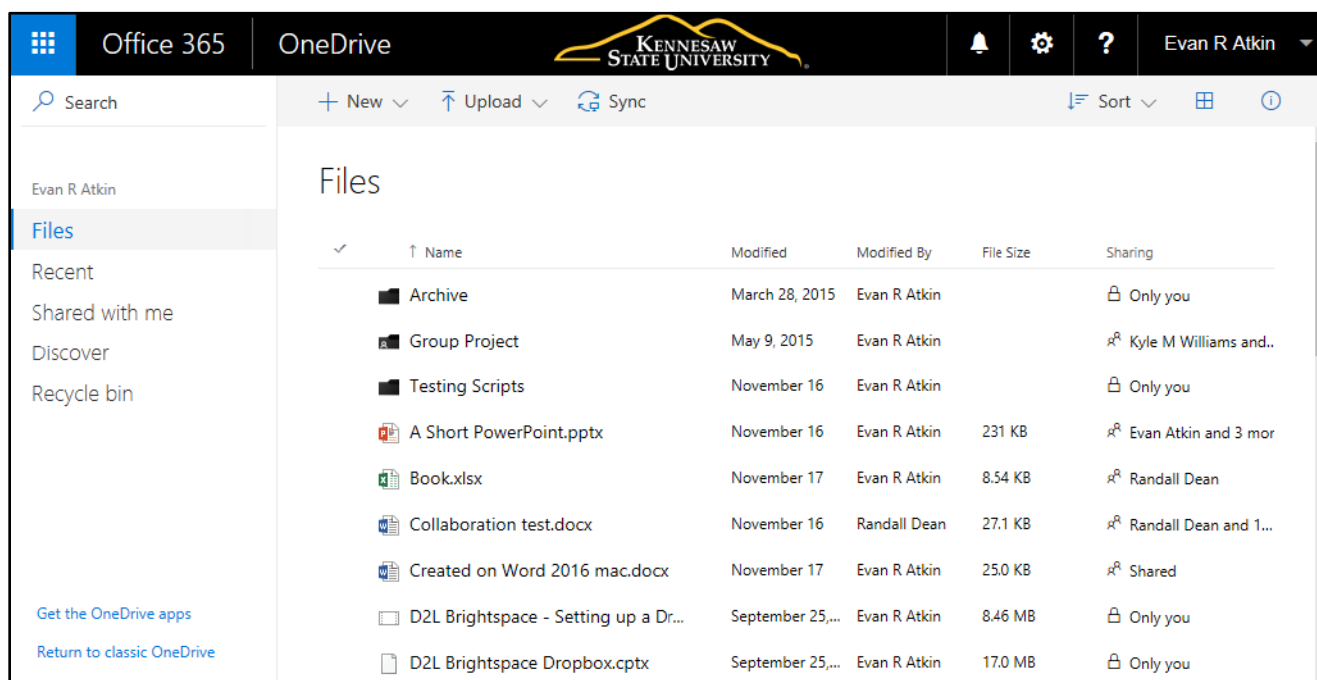


Figure 5 - Documents in OneDrive

**Note:** While on-campus, access is controlled by the log-in credentials used to log-in to the local machine. If you wish to use your account in Office 365 while someone else is logged into the computer, you will need to use the browser's private/incognito browsing mode to access your Office 365 account while the other user is logged into the machine.

## Managing your Files in OneDrive for Business

You can use your *OneDrive for Business* account to upload, store, manage, and access your files. You can also share files with other users and see what documents have been shared by your colleagues.

### Upload Files to OneDrive

You can upload files, or an entire folder containing all of your files, to your OneDrive for Business account. The easiest way to upload a file is to simply drag the file into your file list on OneDrive for Business. The will automatically be uploaded to your account.

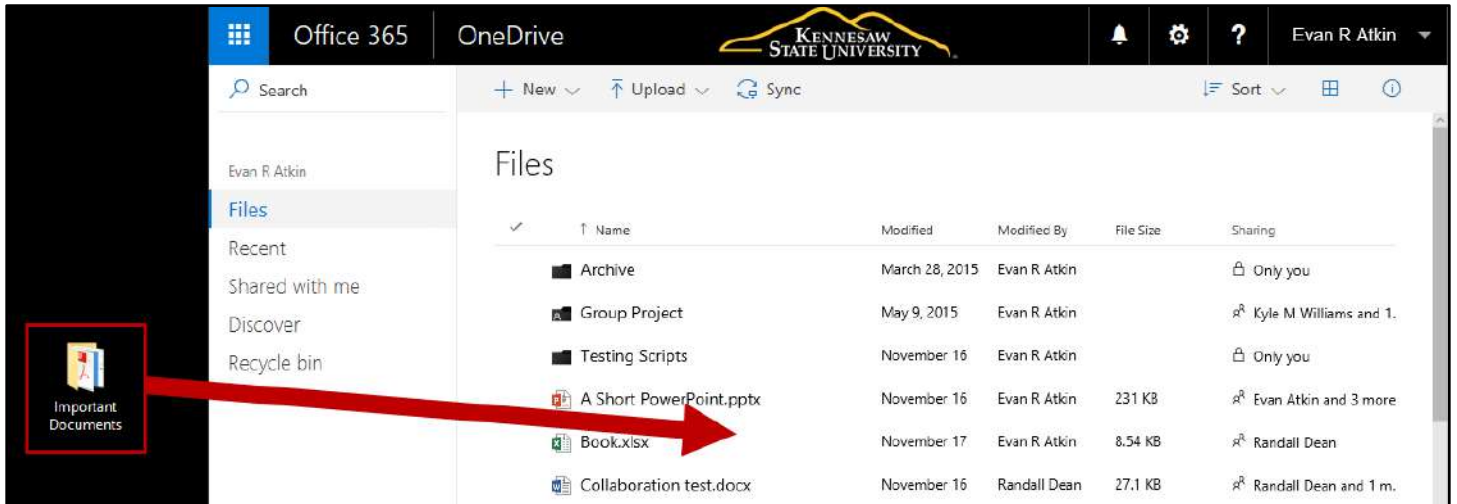


Figure 6 – Dragging a Folder from the Desktop into OneDrive for Business

To upload an entire folder to your OneDrive for Business account:

1. Click **Upload** (see Figure 7).
2. From the drop-down, select **Folder** (to upload a single folder with multiple files inside) (see Figure 7).

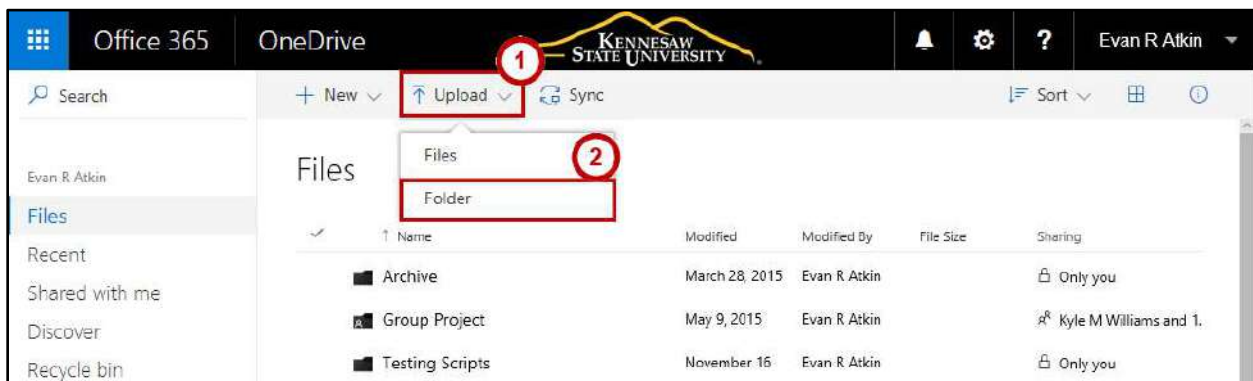


Figure 7 - Upload to OneDrive

3. The *File Explorer* will appear. Select the **folder** from your computer to upload, and click **Select Folder**.

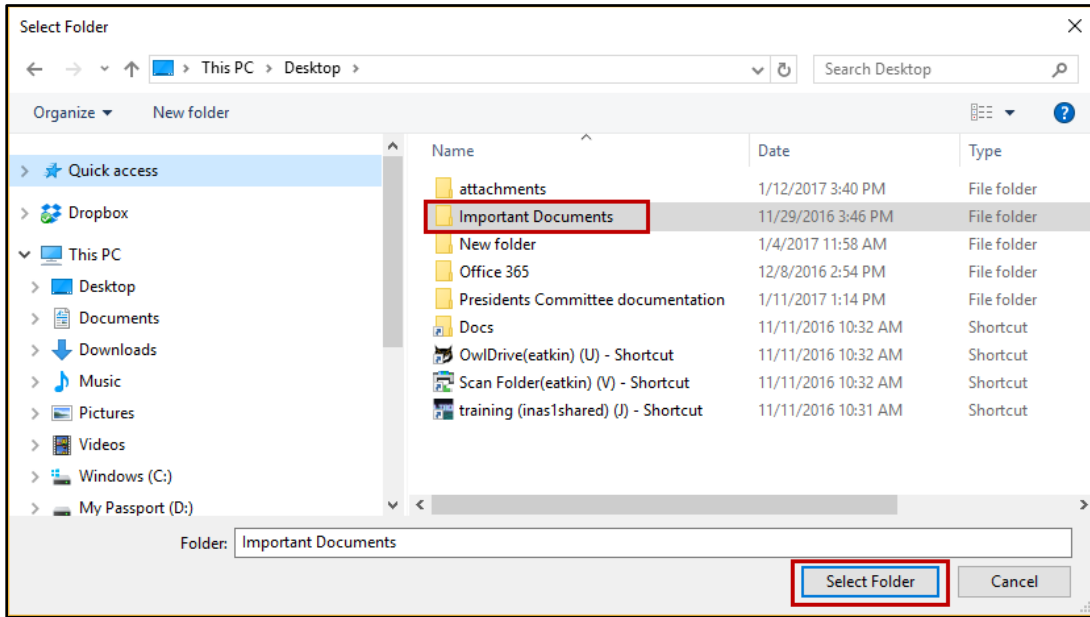


Figure 8 - File Upload

4. The folder, along with all files/folders contained inside it will be uploaded to your *OneDrive for Business* account.

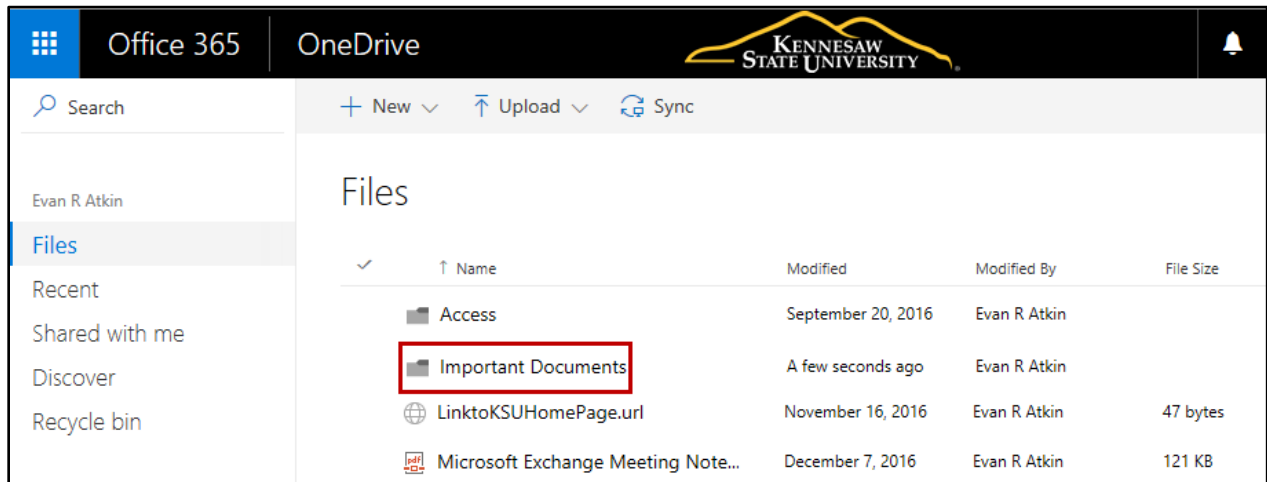


Figure 9 – Folder Uploaded Successfully

## Opening Documents from OneDrive for Business

OneDrive for Business allows you to access your Microsoft Office files and edit them online with the *Microsoft Office Online* set of tools, or open the file in the desktop version of Microsoft Office.

The following example will demonstrate how to open a Word document stored in OneDrive with Word Online, then continue editing the document in the desktop version of Word:

1. Click the **document** you wish to open.

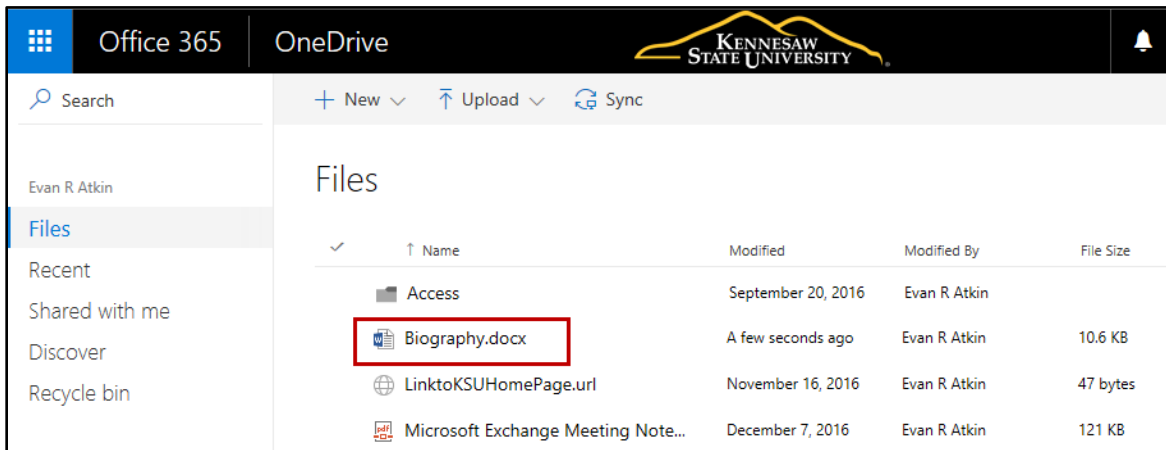


Figure 10 - Select a Document to Open

2. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online*, etc). You can preview the document, or choose to edit the document within your browser. Click **Edit Document** (see Figure 11).

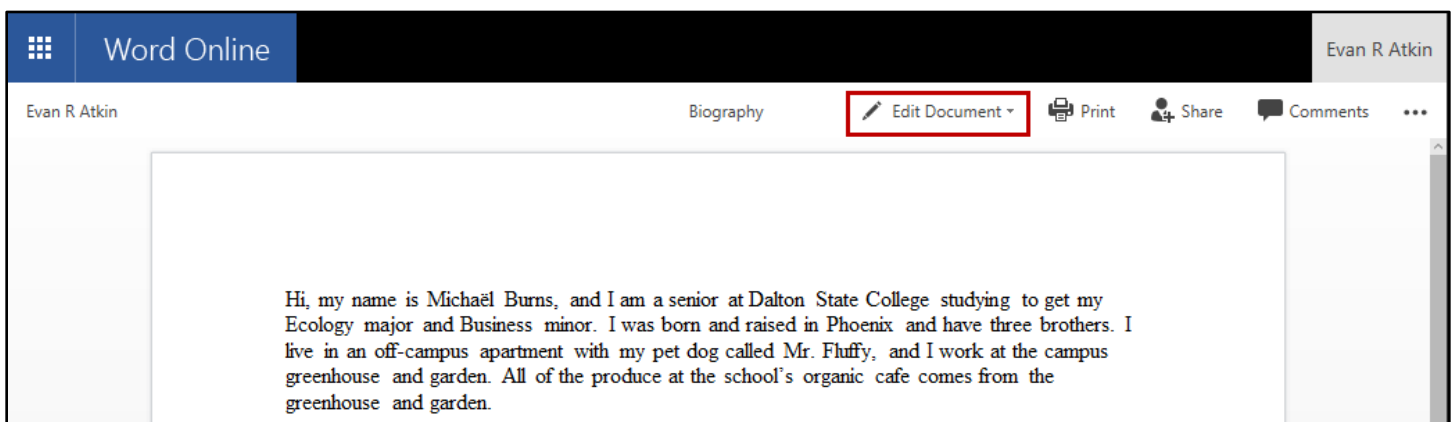


Figure 11 - Edit Document

3. A drop down menu will appear with the following options:
  - a. **Edit in Word:** If you have Microsoft Office installed on your computer, then the file will open with the corresponding Office program (see Figure 12).
  - b. **Edit in Browser:** You can select to edit the document in *Word Online*, or open the document in your desktop version of *Microsoft Word* (see Figure 12).

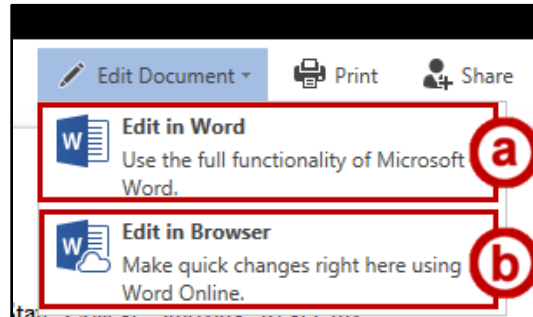


Figure 12 - Edit Online or Offline

4. Click your **name** to return to your *OneDrive* account (see Figure 13).



Figure 13 - Click Name to Return to OwlDrive

5. You will be returned to your *OneDrive* account. You can also open a document from within OneDrive for Business by:
  - a. Clicking the space to the **left** of the document to select it (see Figure 14).
  - b. Clicking **Open** to reveal a dropdown with more options (see Figure 14).

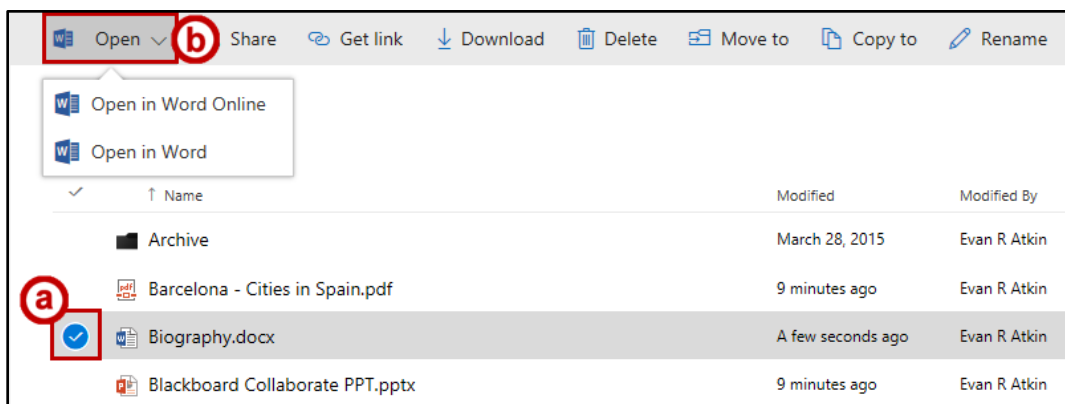


Figure 14 – Opening Within OneDrive for Business

6. A window will appear asking if you want to open the file. Click **Yes**.

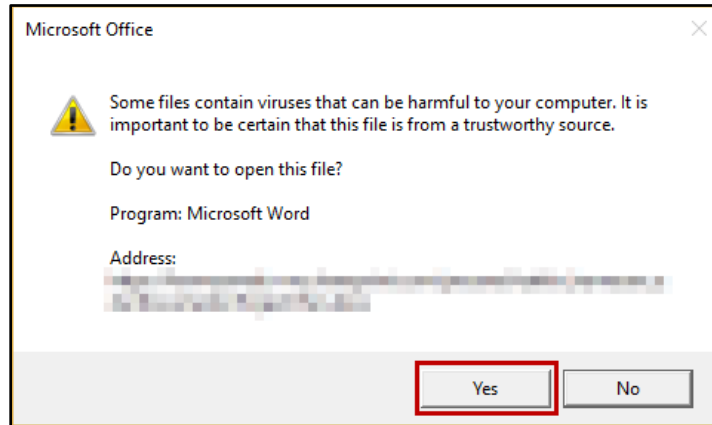


Figure 15 - Open File

7. The document will open in your desktop version of *Microsoft Office*.

### Creating a New File within OneDrive for Business

In addition to creating a file outside of *OneDrive for Business*, you can also create a new file from within the *OneDrive for Business* account. For example, you could choose to create a new document from within *OneDrive for Business*:

1. In the *Menu Bar* at the top of the page, click **New**.

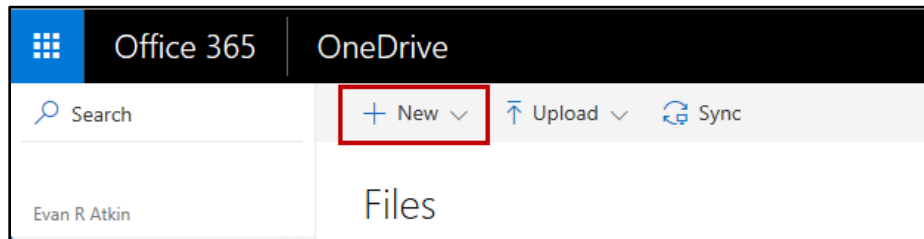


Figure 16 - New

2. A list will appear displaying options to create a new folder, web link, or various types of Office documents. For example, click **Word document**.

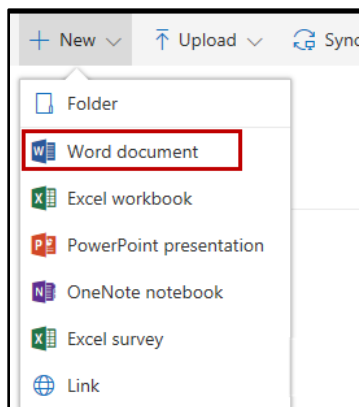


Figure 17 - Create a New Word Document



3. Word Online will open with a blank document ready for you to edit.

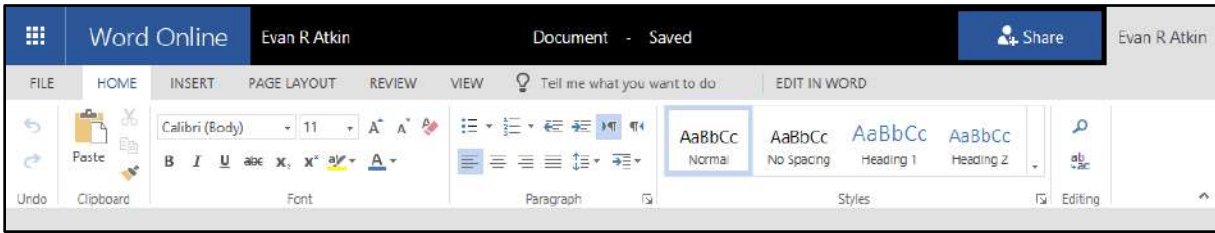


Figure 18 - New Document Created in Word Online

4. To return to your OneDrive account, click **your name** next to *Word Online*.

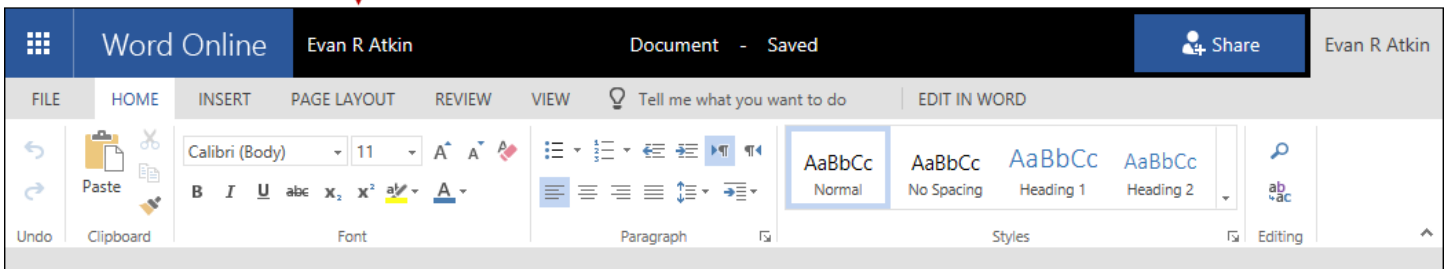


Figure 19 - Return to your OneDrive Account

## Creating a New Folder within OneDrive for Business

The following explains how to create a new folder within OneDrive for Business:

1. In the *Menu Bar* at the top of the page, click **New**.

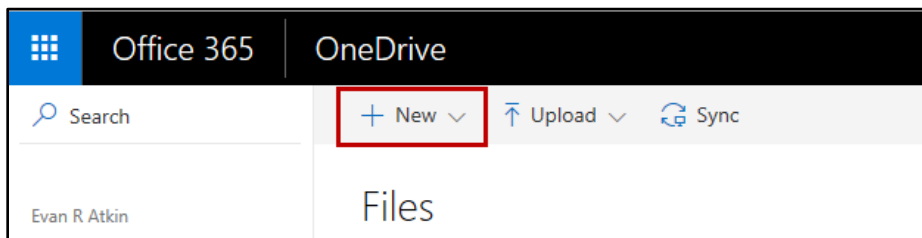


Figure 20 – New



2. From the drop-down list, click **Folder**.

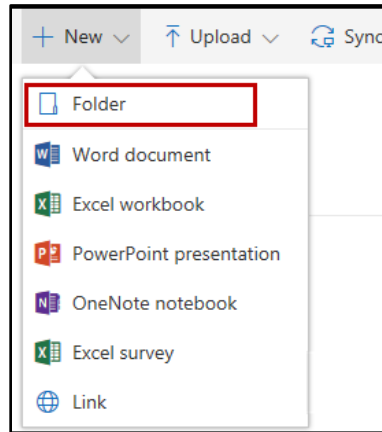


Figure 21 - Create a New Word Document

2. The *Folder* window will appear. In the *Name* field, type the **name** for your folder (see Figure 22).
3. Click **Create** (see Figure 22).

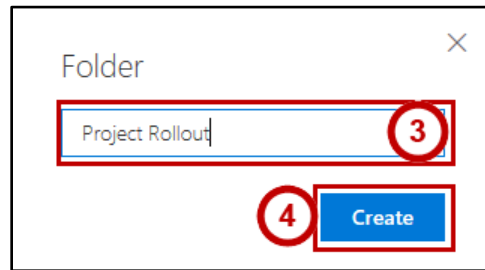


Figure 22 – Creating a New Folder

4. The folder will be created.

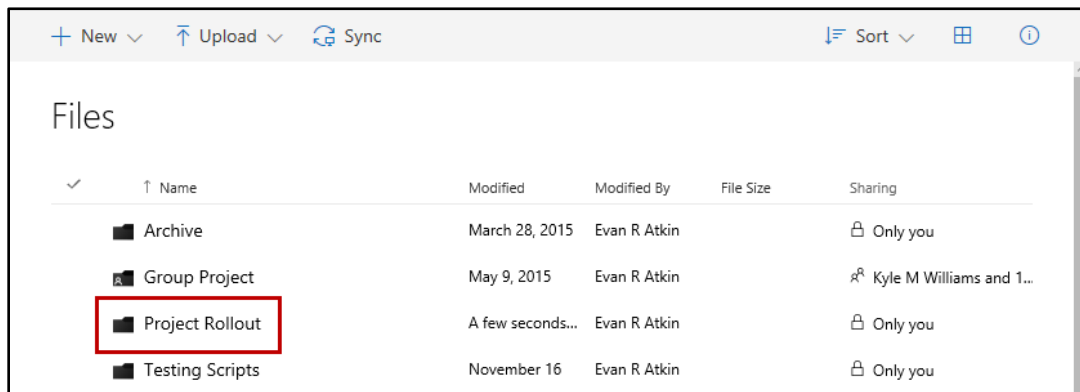


Figure 23 - Invite People

## Deleting Files and Folders

You can delete files and folders no longer needed from your *OneDrive for Business* account. These file will then be moved to the recycling bin of your *OneDrive for Business* account (see Restoring Deleted Files and Folders). The following will explain how to delete files and folders:

1. Click the **space** next to the file(s) to select (see Figure 24).
2. Click **Delete** (see Figure 24).

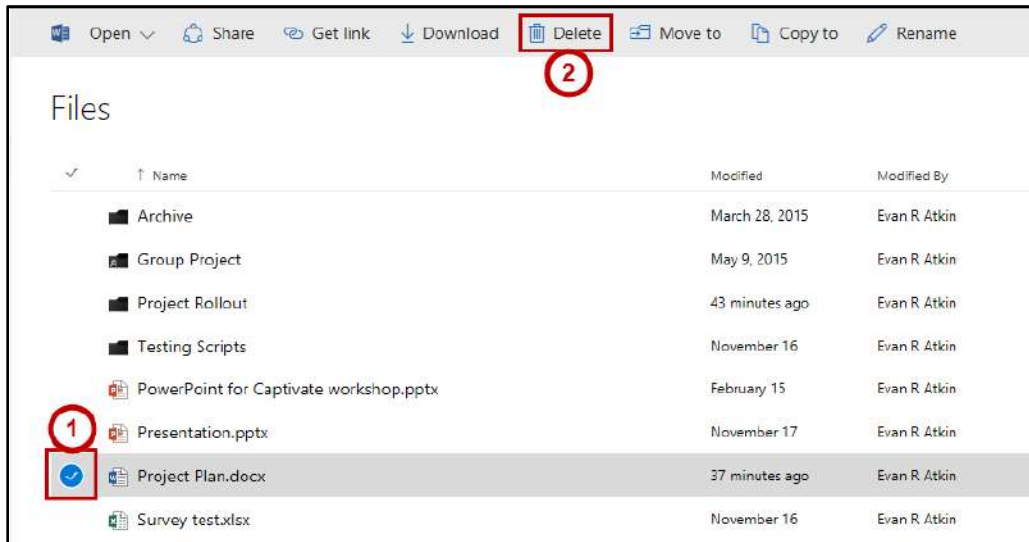


Figure 24 - Select File for Deletion

3. The file(s) will be deleted and moved to the *Recycling bin* of your *OneDrive for Business* account.

## Restoring Deleted Files and Folders

Files and folders that have been deleted will be moved into the *recycling bin* in your *OneDrive for Business* account. From here, you can restore files/folders, permanently delete them, or empty your recycling bin all at once (permanently deleting all files). The following example will show how to restore a deleted file:

1. Click the **Recycle bin** link.

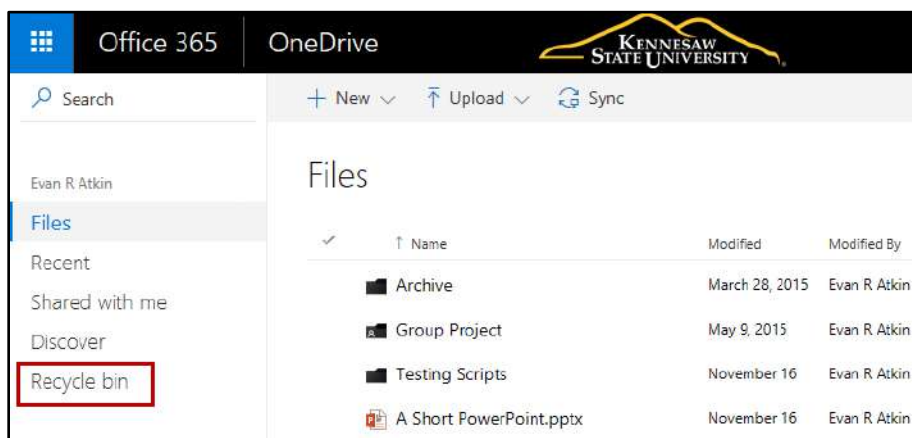


Figure 25 - Click Recycling Bin

- The *Recycling Bin* will open and display all files currently in the recycling bin, where the file came from, who deleted the file and when, and who the original author was (see Figure 26).
- Click the **checkbox(s)** next to the file(s) you wish to restore (see Figure 26).
- Click **Restore** (see Figure 26).

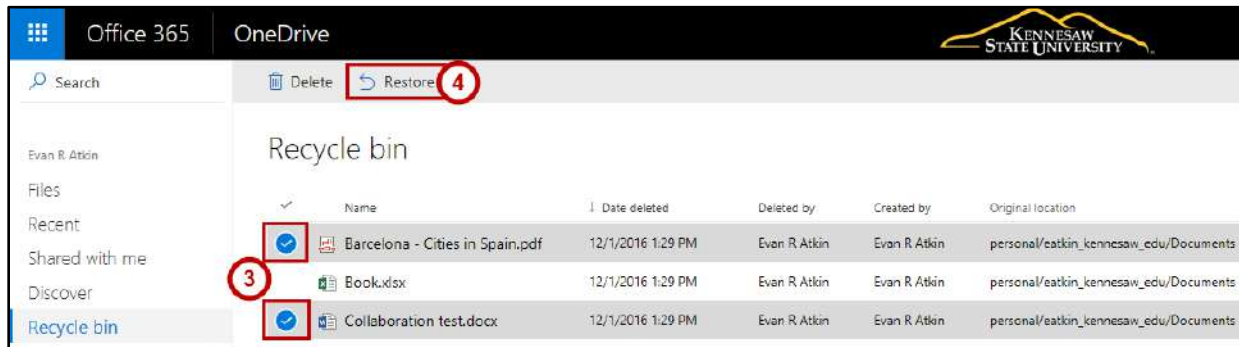


Figure 26 - Select Files for Restoration

- The file will be restored and returned to the folder it was last deleted from.

## Sharing Files and Folders with Others

You can share files and folders within your *OneDrive for Business* account with others to easily collaborate on projects; regardless of if they are members of your organization. *OneDrive for Business* provides the option for emailing access links or generating a link for you to use, all while allowing you to choose if others will have editing or viewing access. The following shows how to invite people to edit a file:

**Note:** When sharing a folder, you can choose to have all files available, even items with unique permissions.

- Click to the **left** of the document(s) you want to share (see Figure 27).
- Click **Share** (see Figure 27).

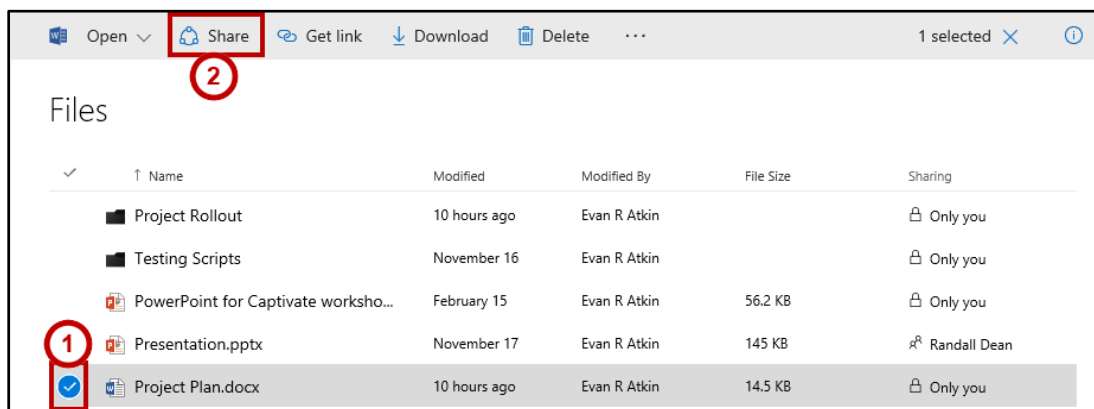
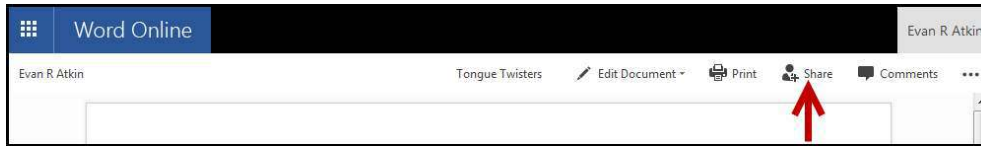


Figure 27 – Sharing Documents

**Note:** You can also access this screen by clicking the **Share** button while viewing or editing a document



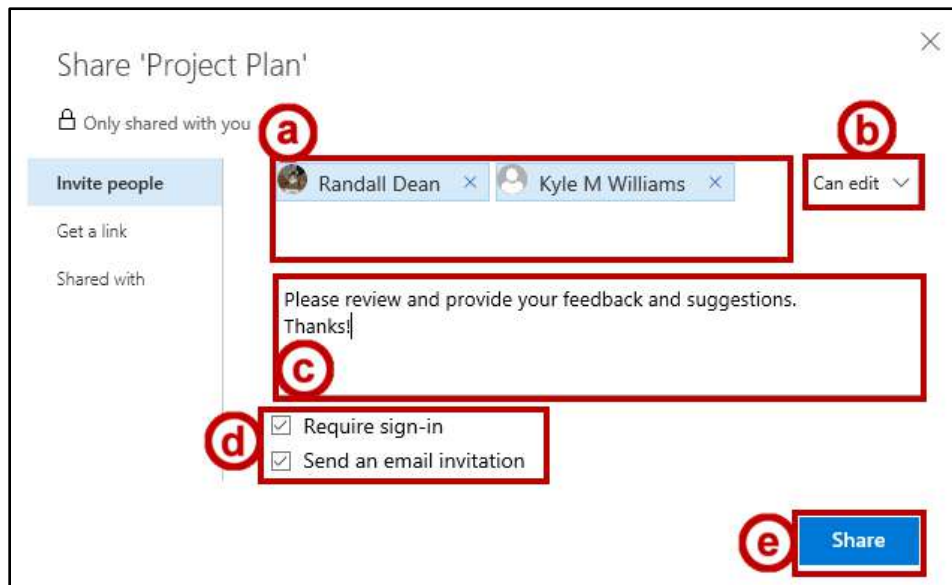
**Share button while viewing a document**



**Share button while editing a document in Word Online**

**Figure 28 - Accessing Share Button**

3. The *Share* window will open and will display the *Invite People* tab with the following:
  - a. Enter the **email addresses** of the individuals you wish to share with (see Figure 29).
  - b. From the drop-down, select the **permissions** to grant (edit or view) (see Figure 29).
  - c. Type a **message** to be sent to the recipients of the share (optional) (see Figure 29).
  - d. Set if users will need to sign-in to Office 365, and if you wish to send them an email notification about the share (see Figure 29).
  - e. Click **Share** to share the document(s) (see Figure 29).



**Figure 29 – Inviting People to a Share**

- An email notifying recipients about the file share will be sent out. The email will contain a link that recipients can click in order to access the share file.

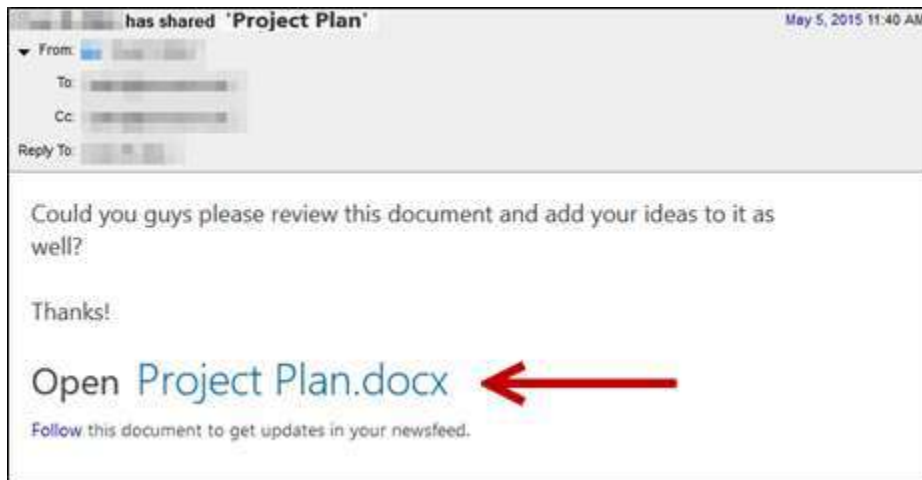


Figure 30 – Example of Share Notification Email

- Clicking on the link will redirect you to *OneDrive for Business*. After signing in to their account, recipients will be able to view and/or edit the shared document (based on the access granted when the share was initially created).
- Files and folders that have been shared with other users will show how many people have been granted from *OneDrive for Business*.

✓	↑ Name	Modified	Modified By	File Size	Sharing
	Group Project	May 9, 2015	Evan R Atkin		👤 Kyle M Williams and 1...
	Project Rollout	11 hours ago	Evan R Atkin		🔒 Only you
	Evan @ OneDrive - Kennesaw Stat...	September 22	Evan R Atkin		👤 Randall Dean and 2 m...
	LinktoKSUHomePage.url	November 16	Evan R Atkin	47 bytes	🔒 Only you
	Office 365 Word Test.docx	November 15	Evan R Atkin	10.7 KB	👤 Evan Atkin and 1 more
	Presentation.pptx	November 17	Evan R Atkin	145 KB	👤 Randall Dean
	Project Plan.docx	11 hours ago	Evan R Atkin	14.5 KB	👤 Kyle M Williams and 3...
	Tongue Twisters.docx	November 21	Evan R Atkin	10.7 KB	🔒 Only you

Figure 31 - Share Status of Files and Folders

## Viewing Files that have been Shared with you

Once files have been shared with you from other individuals, you can access these files from within your *OneDrive for Business* account. To view what files have been shared with you:

1. Click **Shared with me** from the menu to the left.

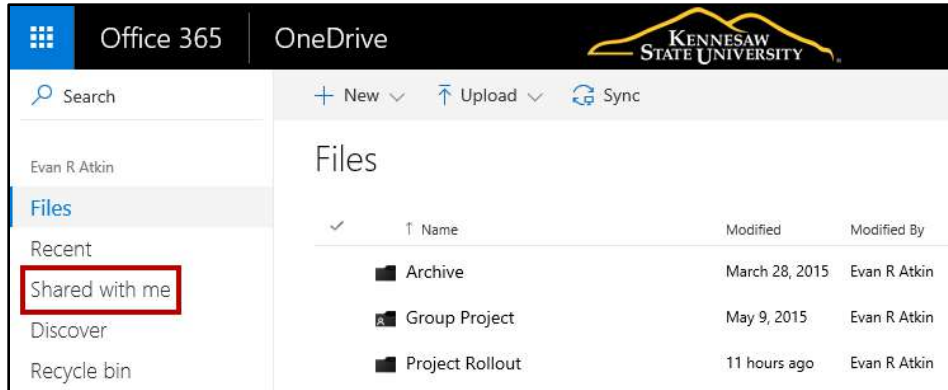


Figure 32 - Access Files Shared with you

2. A list of all the shares from other individuals will be displayed.

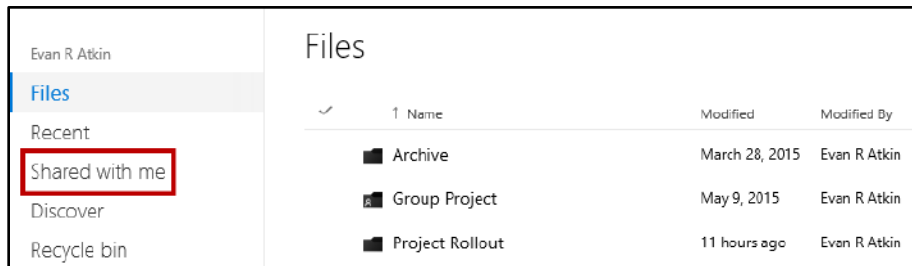


Figure 33 - Shared with Me

## Sharing a File via a Link

You can create an anonymous guest link that can be sent in an email, posted online, or shared through social media. Users can use this link to either view or edit the file/document depending on the link generated. For example, to create a guest link with view only access:

1. Click to the **left** of the document(s) you want to generate a guest link for (see Figure 34).
2. Click **Get Link** (see Figure 34).

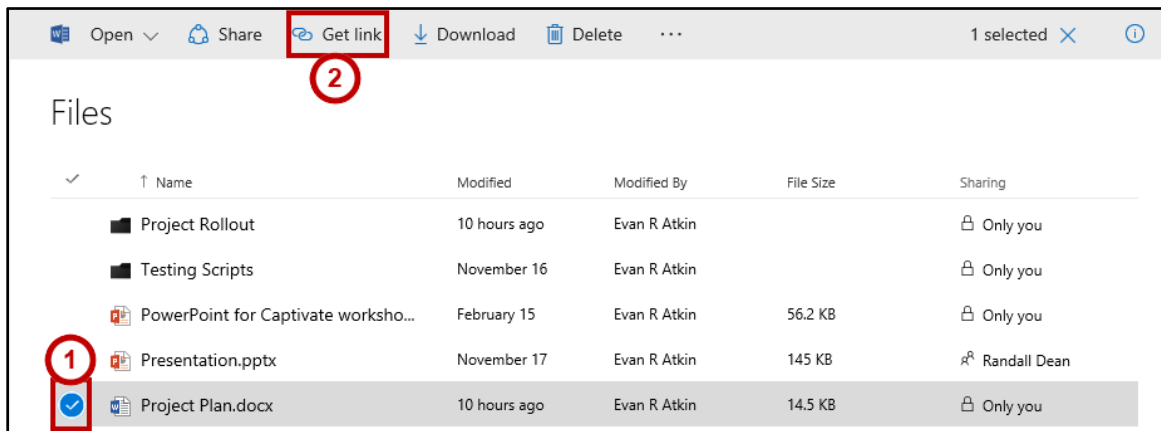


Figure 34 – Generate a Guest Link

3. The *Get a Link* tab will open. Select **View Link** from the options. Additional options include: (see Figure 35).
  - a. **Restricted Link** – Only specific people will be able to open this link (see Figure 35).
  - b. **View Link KSU** – Only people with a KSU netid and password will be able to view (see Figure 35).
  - c. **Edit Link KSU** – Only people with a KSU NetID and password will be able to edit (see Figure 35).
  - d. **View Link** – Anyone with the link will be able to view. (see Figure 35).
  - e. **Edit Link** – Anyone with the link will be able to edit (see Figure 35).
4. Click **Create** to generate the link (see Figure 35).

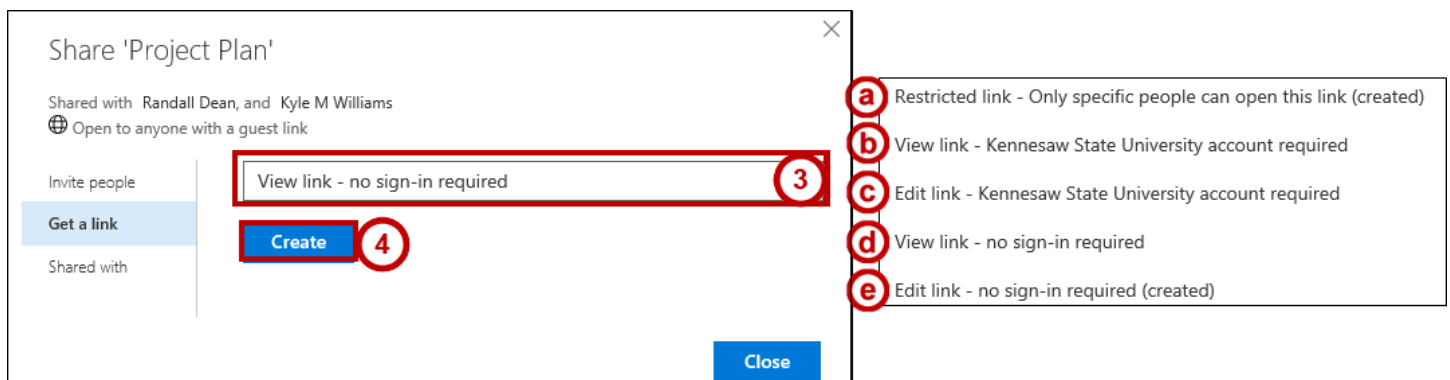


Figure 35 - Guest Link Options

- The guest link will be created and displayed. You can copy and paste this link into an email. If you need the link again, it will remain in the *Get a Link* tab for this file (see Figure 36).
- If you wish to deactivate the link, click **Remove** (see Figure 36).
- You can set the link to expire after a set amount of days by clicking **Set Expiration** (see Figure 36).
- Once finished, click **Close** (see Figure 36).

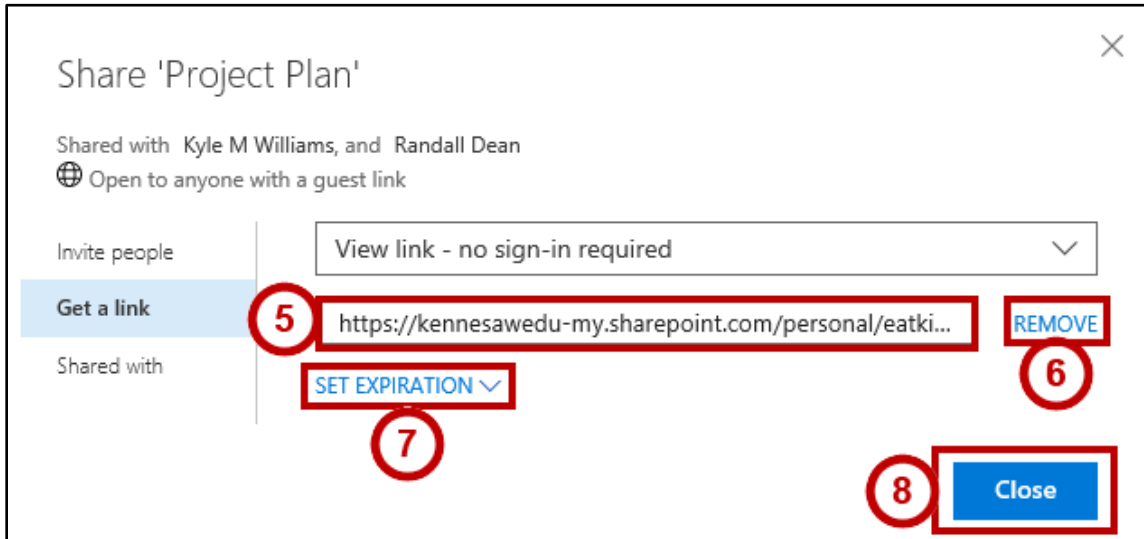


Figure 36 - Guest Link Generated

## Editing an Existing Share

Once you have created a share with another user, you can alter the permissions they have to the file/folder, remove individuals from a share, or remove everyone at once from the share.

- Click to the **left** of the document(s) you want to alter the permissions on (see Figure 37).
- Click **Get Link** (see Figure 37).

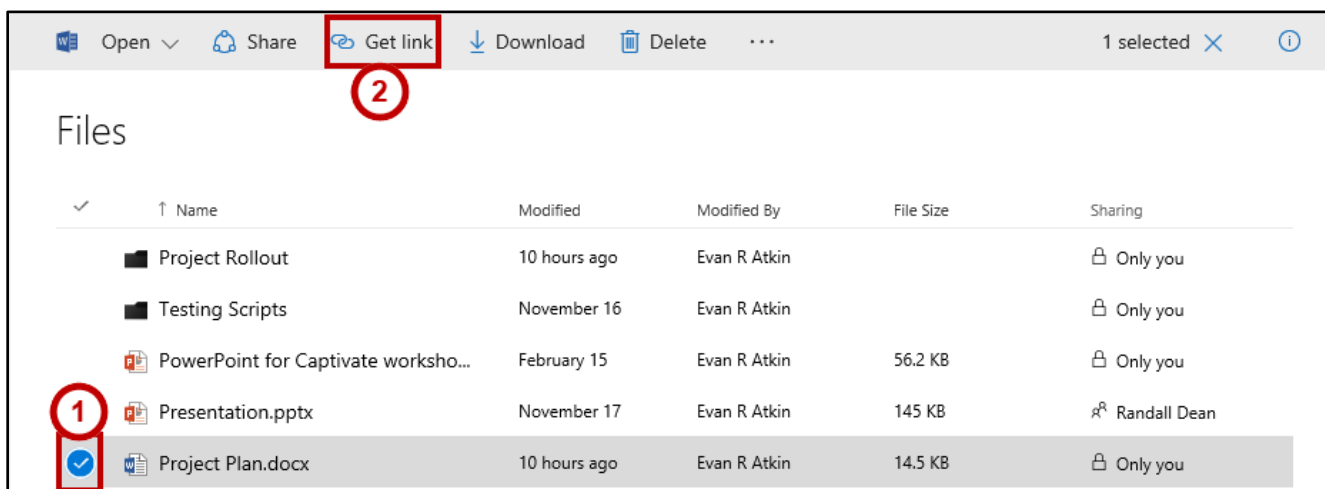


Figure 37 – Generate a Guest Link



3. The *Share* window will open. Click **Shared With** to open additional sharing options (see Figure 38).

**Note:** Users who are only granted view privileges will not see who else is on the share.

4. The *Shared With* tab will open and display who the file/folder is currently shared with. Click the **drop-down** for additional options (see Figure 38).

5. The drop-down will display options to change the share to an edit or view share, and an option for stopping the share with the user (see Figure 38).

6. To stop sharing the file/folder with everyone, click **Stop Sharing** (see Figure 38).

7. When finished making your selection, click **Close** (see Figure 38).

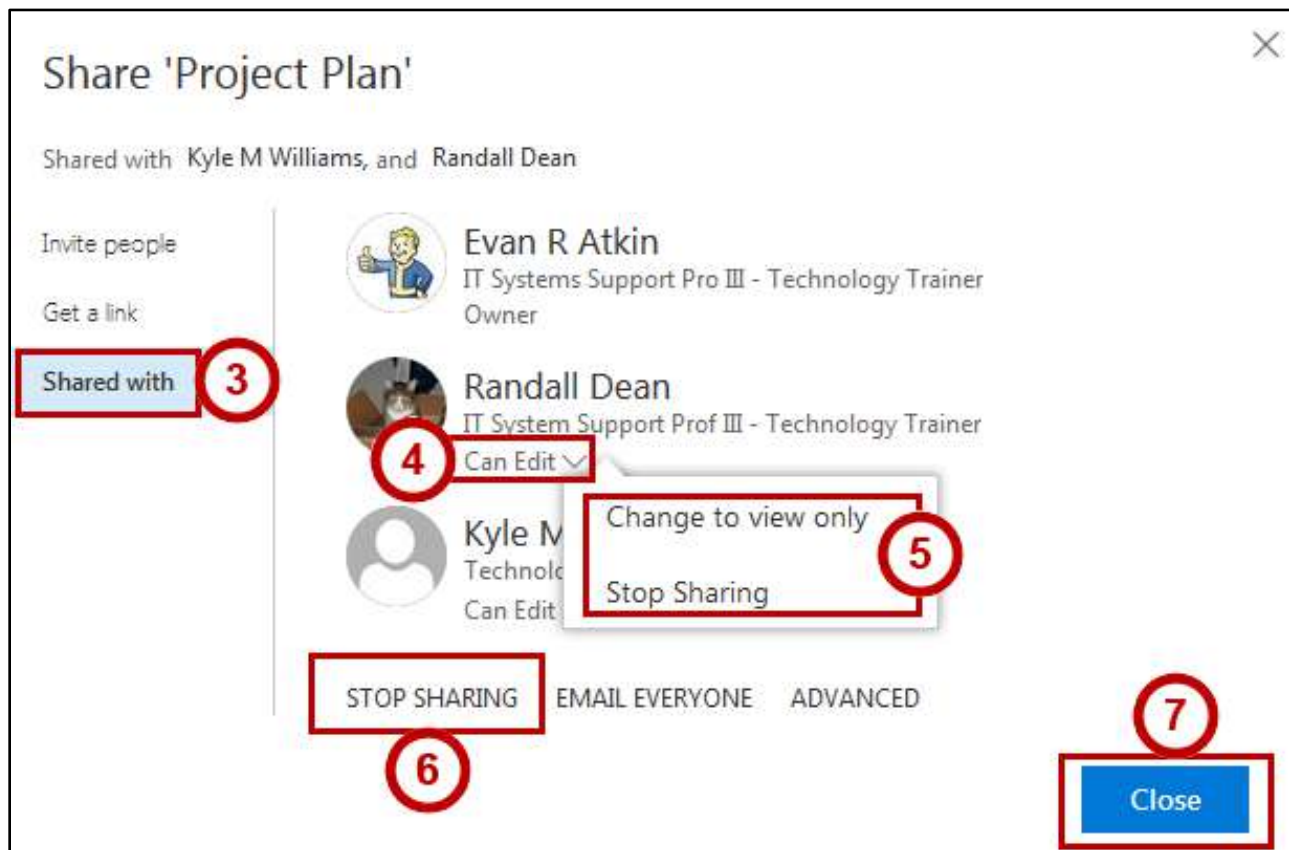


Figure 38 - Shared With Options

## Sharing Files That Have Been Shared With You

In addition to sharing your own files, you can also request that others be allowed access to a file from the original author on files/folders that you have been granted edit permissions on. The following explains how to request someone be granted share permissions:

1. Click **Shared with me** from the menu to the left.

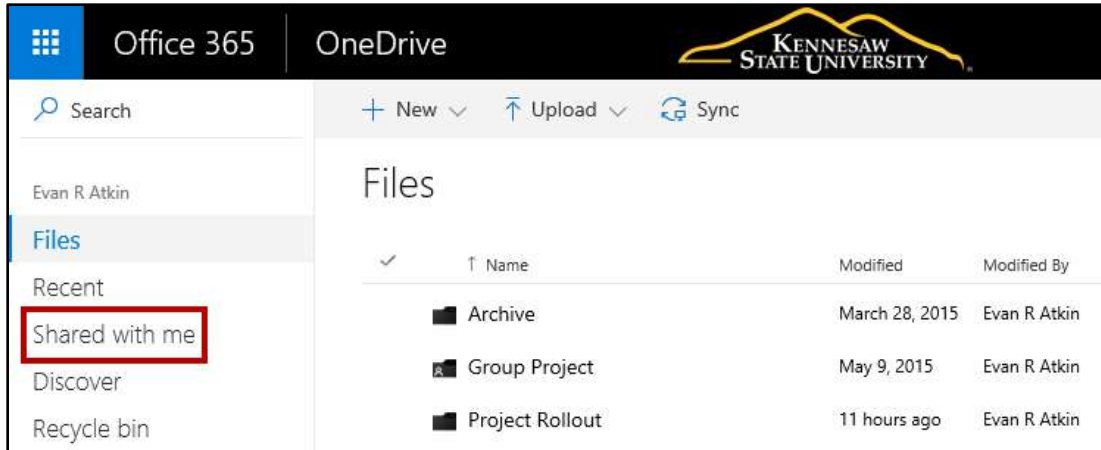


Figure 39 - Access Files Shared with you

2. Click to the **left** of the document(s) you want to alter the permissions on (see Figure 40).
3. Click **Share** (see Figure 40).

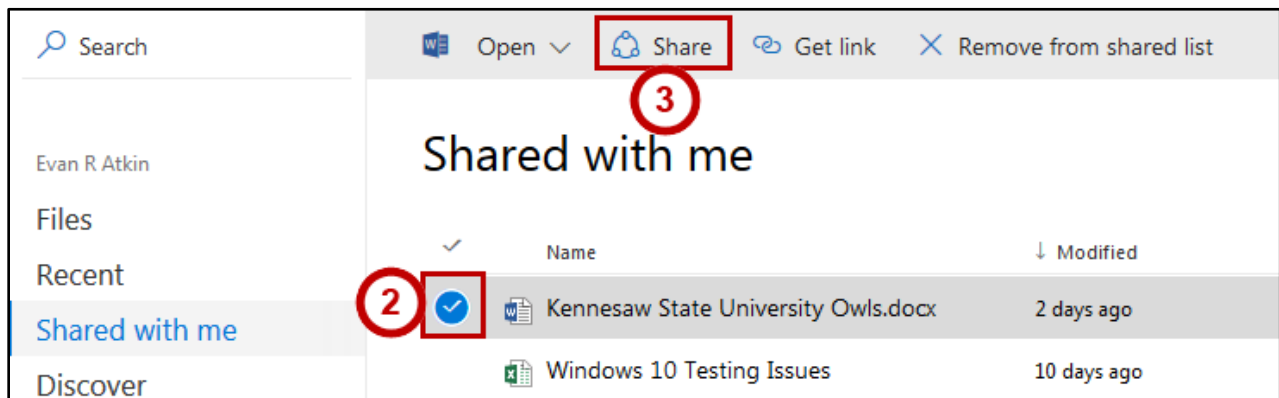


Figure 40 – Sharing a File/Folder Already Shared with You

4. The *Share* window will open and will display the *Invite People* tab (see Figure 41).
5. Enter the **email addresses** of the individual(s) you wish to share with (see Figure 41).
6. From the drop-down, select the **permissions** to grant (edit or view) (see Figure 41).
7. Type a **message** to be sent to the recipients of the share (optional) (see Figure 41).
8. Click **Share** to share the document(s) (see Figure 41).

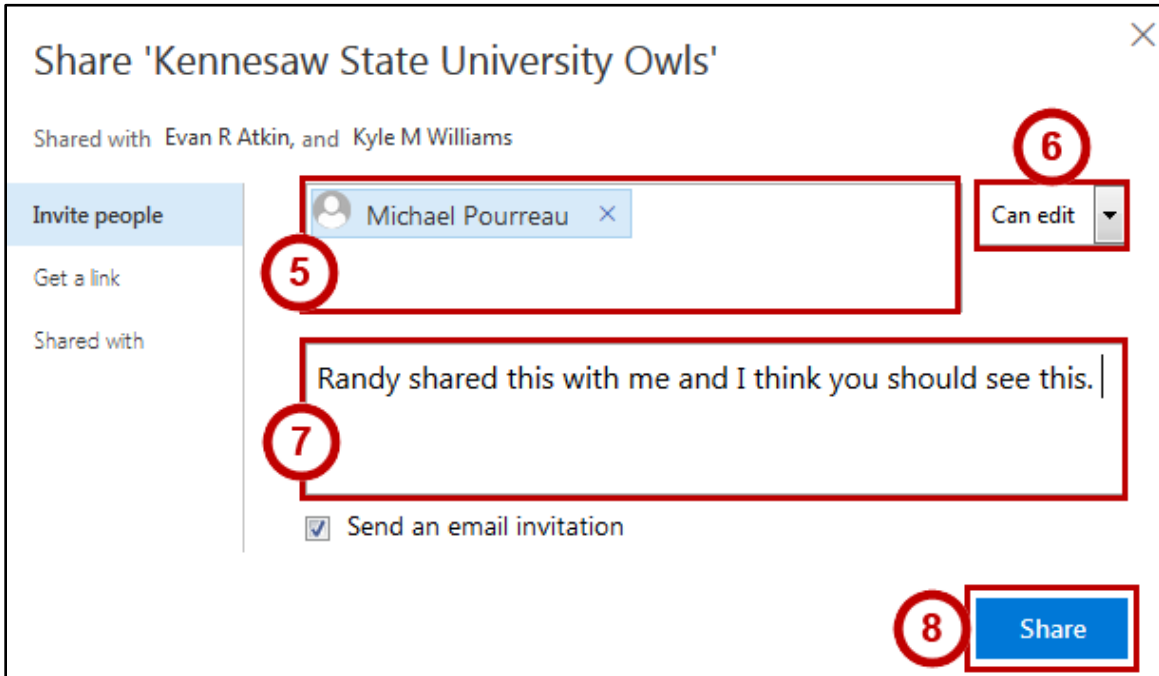


Figure 41 – Setting up the Share

**Note:** If you only have view access to the file/folder, your options will be limited to emailing individuals and sending the share. Once sent, the owner of the file/folder will receive a notification asking them to approve the request.

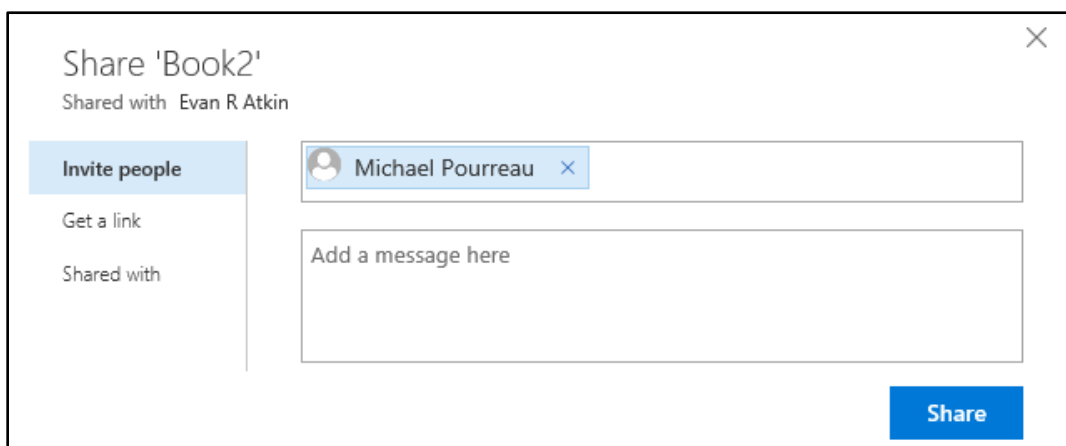


Figure 42 - Sharing a File/Folder with View Only Permission

- An email will be sent to the file's owner notifying them that a file/folder has been shared with them (for owners, see the section on Managing Pending Access Requests for information on managing requests).



Figure 43 - Notificaion of File/Folder Share

## Manage Shared Access to your Files

To see who a file/folder is shared with, and manage shared access:

- Click to the **left** of the document(s) you want to mange your shared access for (see Figure 44).
- Click **Share** (see Figure 44).

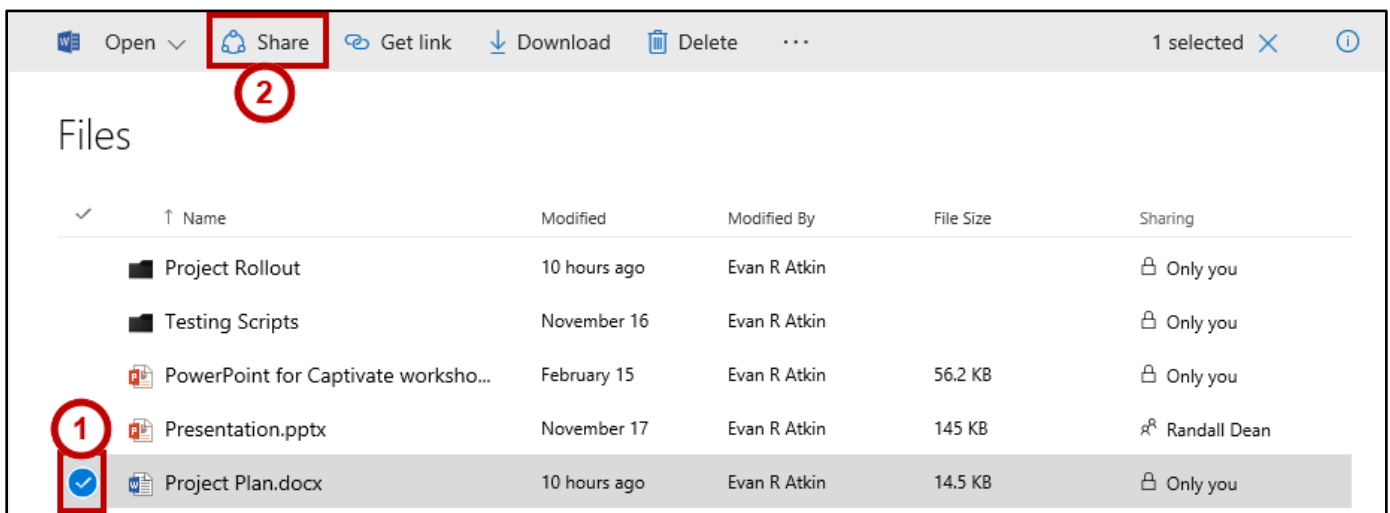


Figure 44 – Sharing Documents

3. The *Share* window will open. Click the *Shared with* tab (see Figure 45).
4. The *Shared with* tab opens and displays all the users who have received a file share (see Figure 45).
5. Under a user, click the **drop-down** to alter view/edit permissions, or remove the user from the share (see Figure 45).
6. Click **Stop Sharing** to remove all users from the share at once (see Figure 45).
7. Click **Email Everyone** to send a notification message to all shared users (see Figure 45).
8. Click **Close** once finished managing your share (see Figure 45).

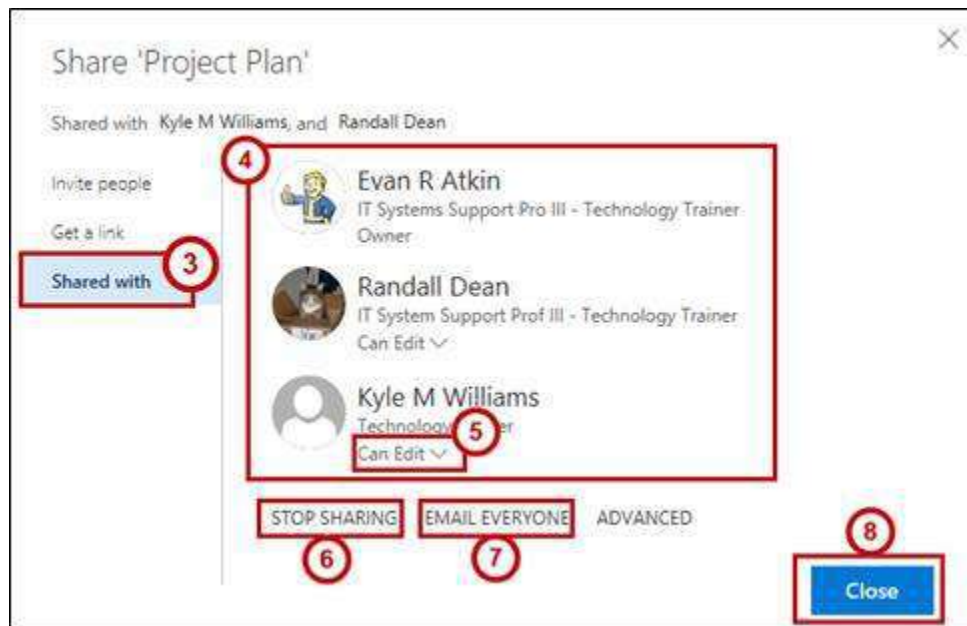


Figure 45 - Shared With Options

**Note:** Your *OneDrive for Business* account will show how many people you are sharing a file with on the *Documents* screen. You can also click the **names** under the *Sharing* column to manage shared access.

✓	↑ Name	Modified	Modified By	File Size	Sharing
	Project Rollout	Yesterday at 12...	Evan R Atkin		🔒 Only you
	Testing Scripts	November 16	Evan R Atkin		🔒 Only you
	Office 365 Word Test.docx	November 15	Evan R Atkin	10.7 KB	🔗 Evan Atkin and 1 more
	PowerPoint for Captivate worksho...	February 15	Evan R Atkin	56.2 KB	🔒 Only you
	Presentation.pptx	November 17	Evan R Atkin	145 KB	🔗 Randall Dean
	Project Plan.docx	Yesterday at 12...	Evan R Atkin	14.5 KB	🔗 Kyle M Williams and 1...
	Tongue Twisters.docx	November 21	Evan R Atkin	10.7 KB	🔒 Only you

Figure 46 - Number of Shares

## Managing Pending Access Requests via Email Notification

Other users can share your files with other people. When a user who is not the owner shares your file, you will receive a notification email telling you that the user would like to share the file with someone else.

1. Click the **link** in the email to be redirected to your *Access Requests* in *Office 365*.

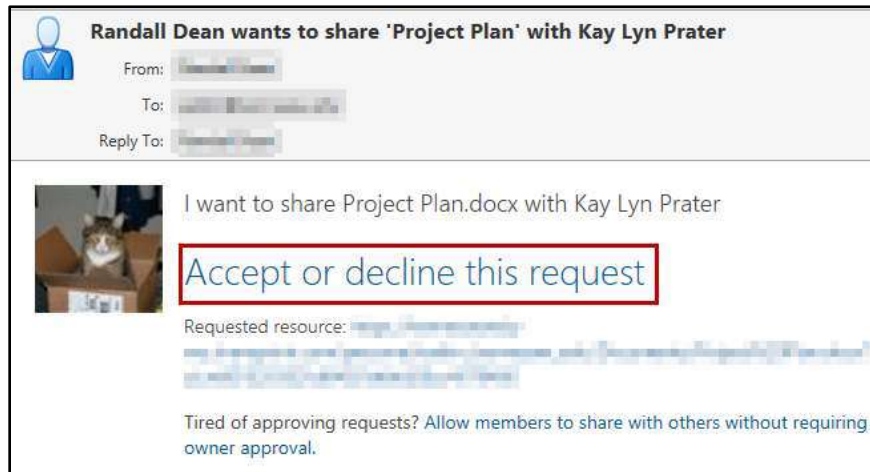


Figure 47 - Request to Share with Another User

2. *Office 365* will open and display the *Access Requests* page. All pending access requests will be displayed here with the following information: (see Figure 48)
  - a. The *users* who are requesting access to the file (see Figure 48).
  - b. Additional options for adjusting the level of permission with the share (see Figure 48).
  - c. The *file/folder* that the request is for (see Figure 48).
  - d. How long ago the request was made (see Figure 48).
  - e. Approve or decline the request (see Figure 48).
3. Click the **ellipsis** to access additional options for the share (see Figure 48).

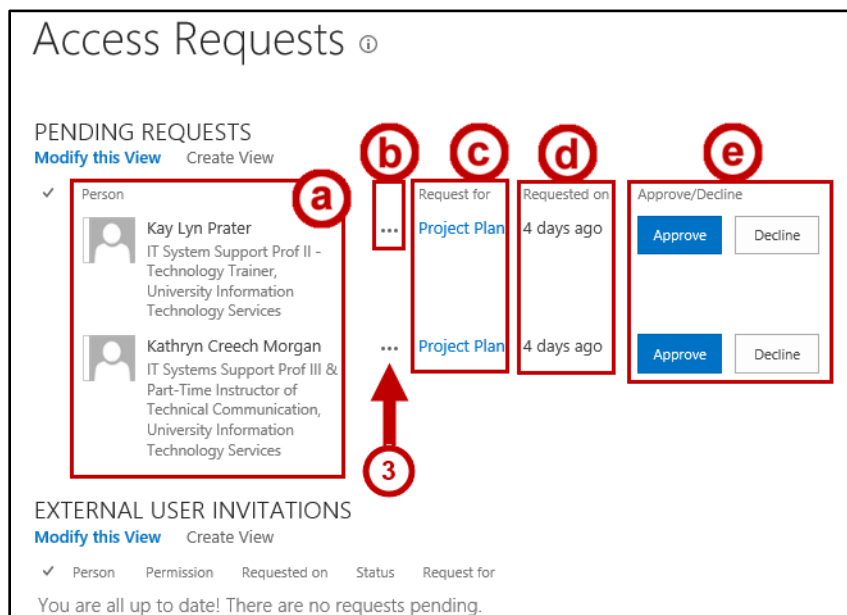


Figure 48 - Access Requests for All Pending Requests

4. The *Additional options* window will open and display more information about the pending request.
  - a. From the drop-down, select a **permission level** (see Figure 49).
  - b. Under the *Conversation* field, enter a message to send to the pending user and click **Send** (see Figure 49).
  - c. Click **Approve** or **Decline** (see Figure 49).

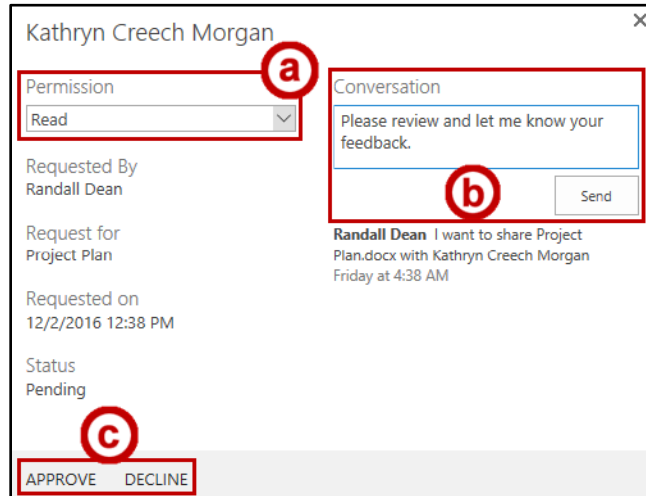


Figure 49 - Additional Request Options

**Note:** The following permission levels can be granted:

<b>Full Control</b>	By default, this permission level is assigned to the Owners group. It can't be customized or deleted.
<b>Design</b>	Create lists and document libraries, edit pages and apply themes, borders, and style sheets on the site.
<b>Edit</b>	Add, edit, and delete lists; view, add, update, and delete list items and documents.
<b>Contribute</b>	View, add, update, and delete list items and documents.
<b>Read</b>	Can view pages and items in existing lists and document libraries. Can download documents.

Figure 50 - List of Permissions

5. The *Additional Options* window will close and the pending request will be removed from the *Access Request* list.

Alternatively, you can also access your pending share request from within the OneDrive for Business program. To access your pending share request within OneDrive for Business:

1. From within your *OneDrive for Business* account, click the **settings** icon.

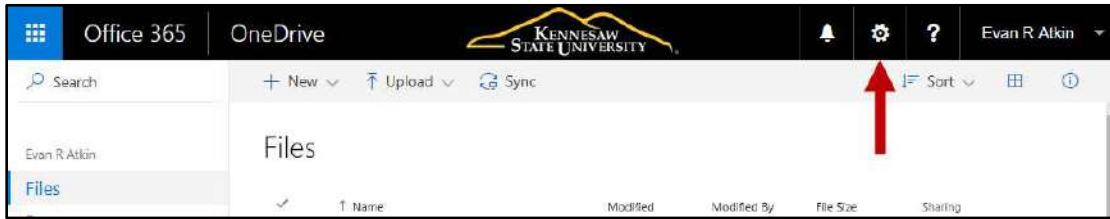


Figure 51 - Click Settings

2. From the drop-down, click **Site Settings**.

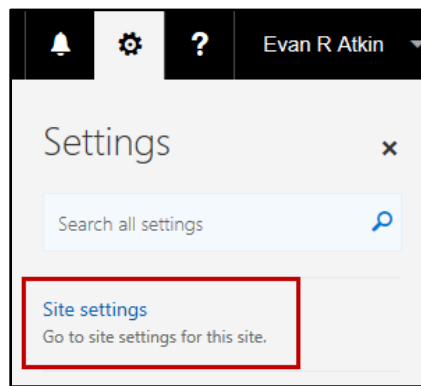


Figure 52 - Access Site Settings

3. The *Site Settings* page will open. Click **Access requests and invitations**.

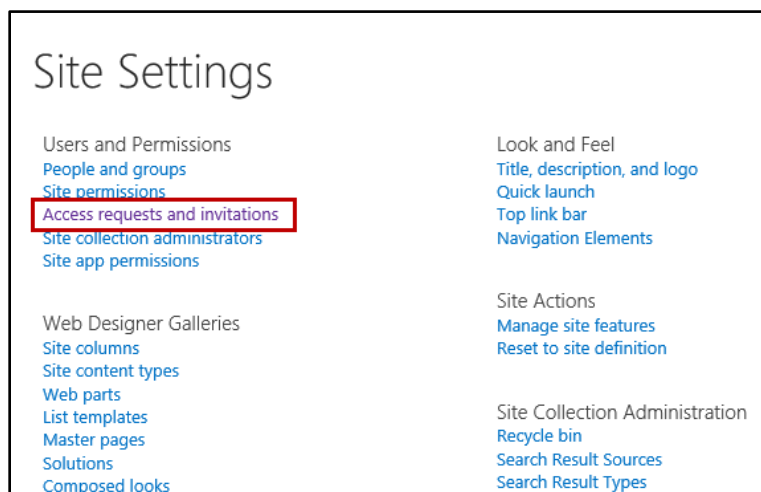


Figure 53 - Access Storage Metrics

4. The Access Requests page will open. See the section on Managing Pending Access Requests for more information.



# Signing Out of OneDrive

The following explains how to log out of your *OneDrive for Business* account:

1. Click your **name** in the upper-right corner.

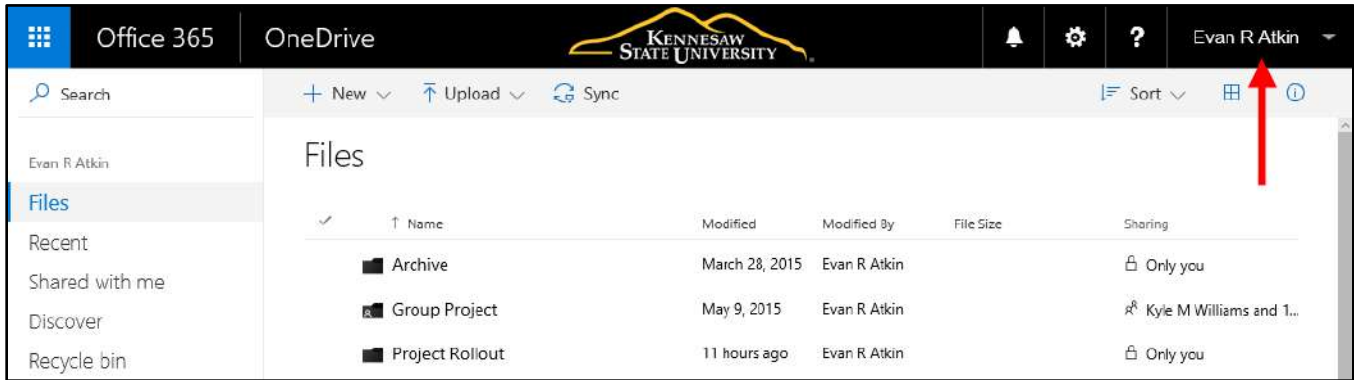


Figure 54 - Click your Name

2. From the dropdown menu that appears, click **Sign out**.

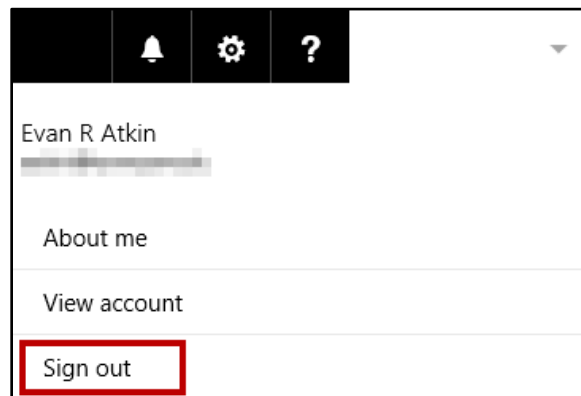


Figure 55 - Sign Out

3. You are now signed out of your account.

## Additional Help

For additional support, please contact the KSU Service Desk:

### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: [service@kennesaw.edu](mailto:service@kennesaw.edu)
- Website: <http://uits.kennesaw.edu>





University Information  
Technology Services

# SharePoint Online with Office 365

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Getting Started

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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# University Information Technology Services

## SharePoint with Office 365

### Getting Started

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## **Introduction**

SharePoint is a Microsoft tool to create web sites to securely store, organize, share, and access information. Only those with whom you share your site can access the information; however, SharePoint site can be accessed from virtually any device using a web browser.

## **Learning Objectives**

After completing the instructions in this booklet, you will be able to:

- Access a SharePoint Site
- Become familiar with the SharePoint Online Interface
- Upload documents to a SharePoint site
- Create and open documents in a SharePoint Online site
- Sync a document library to your computer
- Share a document via link
- Sign out of SharePoint Online

## Accessing a SharePoint Site

You can access a SharePoint site from within Office 365 through the SharePoint app:

1. From the Office 365 home page, click the **SharePoint** app.

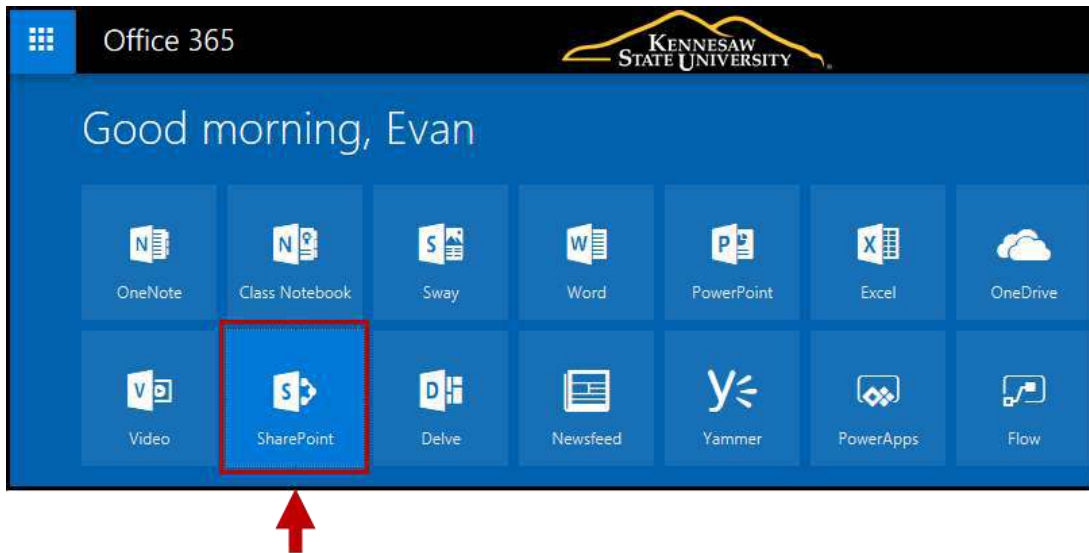


Figure 1 - Access the SharePoint App

2. The SharePoint app will open and display available sites to you. Click the **site** set-up for you by your administrator for your group.

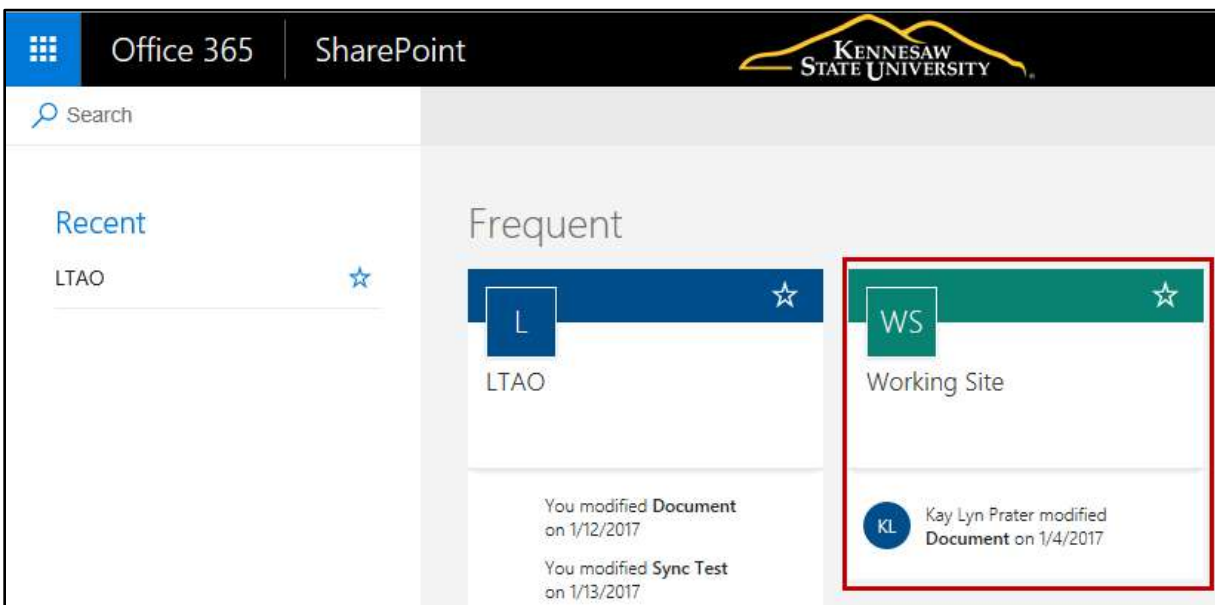


Figure 2 - Access your SharePoint Site

3. Your SharePoint site will open.

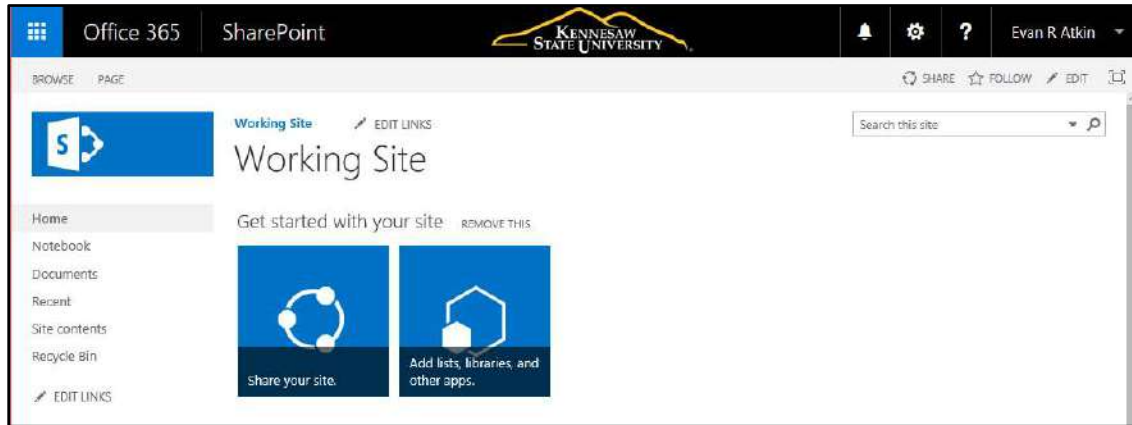


Figure 3 - SharePoint Site

## The Interface

This booklet includes an introduction to the Microsoft SharePoint interface and covers the various aspects of creating and managing content in SharePoint. The following sections will describe the SharePoint interface in Office 365:

1. **Quick Launch:** displays links to pages, libraries, and other various content on your site (See Figure 4).
2. **Top Link Bar:** contains links to your site home page and other sites and subsites as configured by your administrator (See Figure 4).
3. **Personal Menu:** access your personalize page feature for various site content, display the shared view, and sign out of SharePoint (See Figure 4).

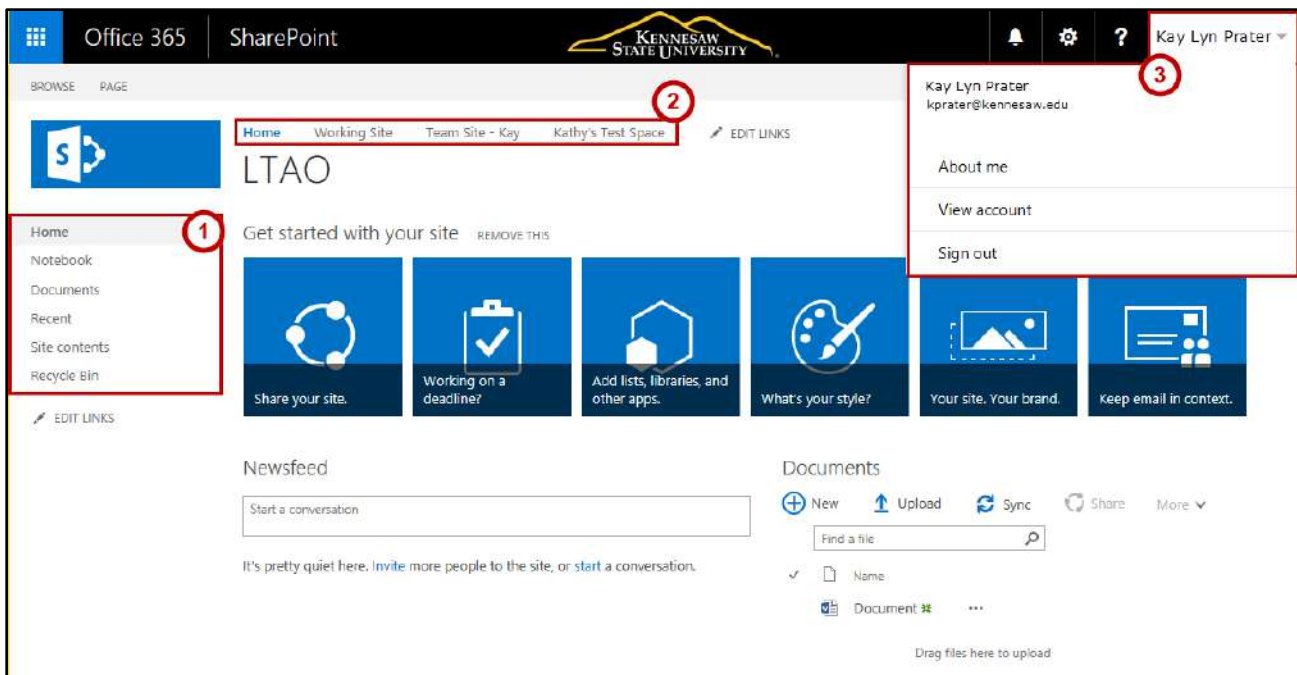


Figure 4 - SharePoint Interface



## Working with Documents

Documents in SharePoint are stored in Document Libraries. Document Libraries are listed in the *Quick Launch* bar on the left-hand side of the site window. Clicking on a Document Library displays the list of documents stored in that library. In addition to the name of the document, other information about the document, such as the author and the created date, is displayed.

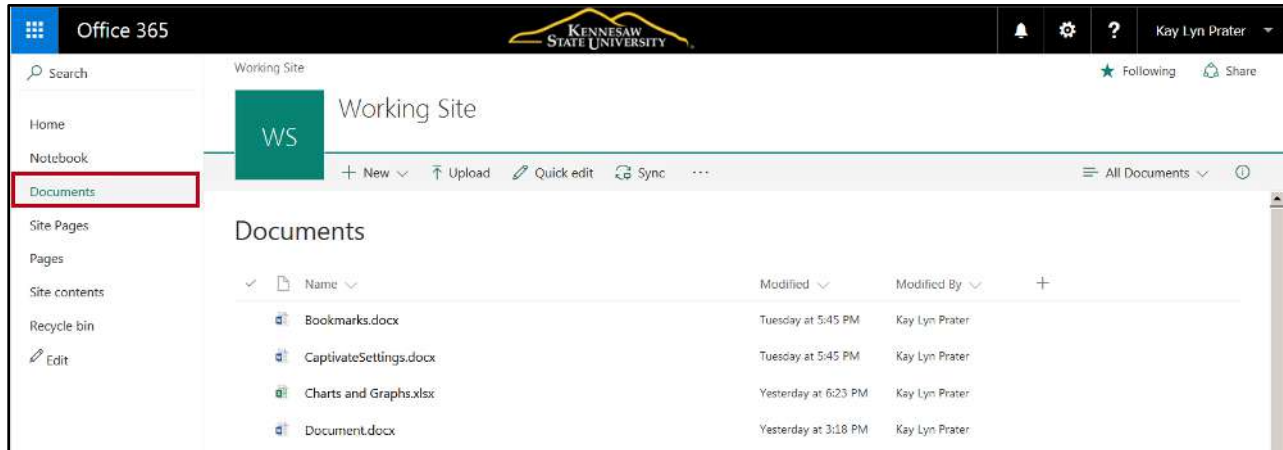


Figure 5 - Document Libraries

## Uploading Documents to a SharePoint Document Library

The easiest way to upload files is to simply drag the file into your document library file list. The file will automatically be uploaded to your library. To upload using the drop and drag method, use the following steps:

1. In the *Quick Launch* panel, click the **Document library** where you want the document to be stored (See Figure 6).
2. From the location on your computer where the file is located, click and drag the **file(s)** you want to upload onto the document library (See Figure 6).

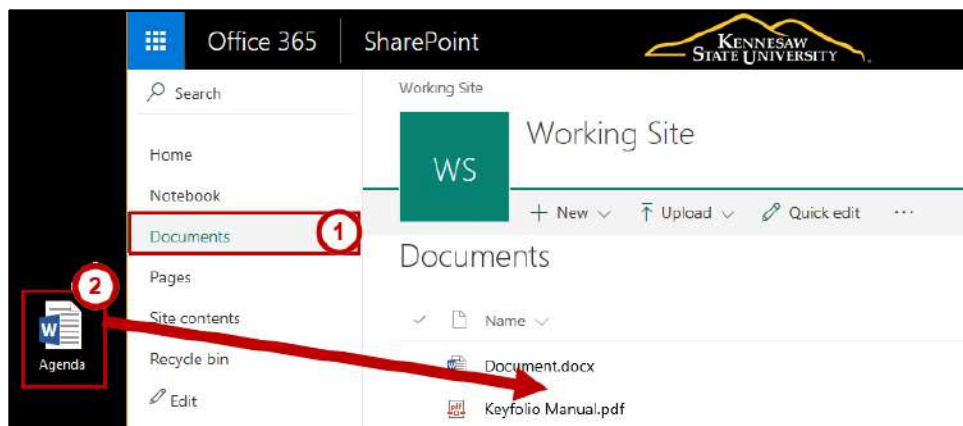


Figure 6 - Click and Drag

3. The file is now uploaded to the document library.

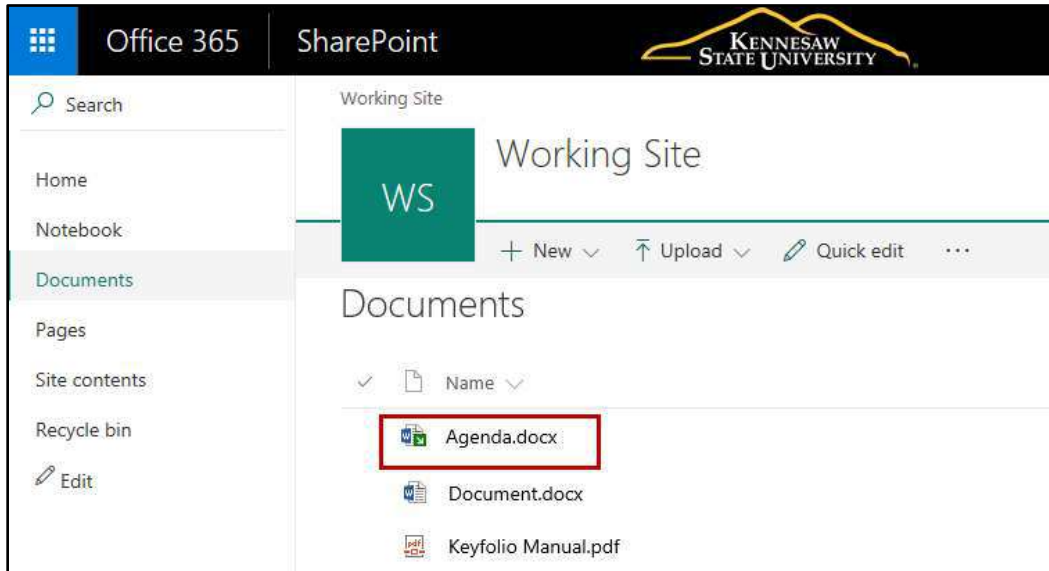


Figure 7 - Document Uploaded

### Creating a New Document in a SharePoint Document Library

SharePoint is integrated with Microsoft Word, Excel, PowerPoint, and OneNote. As such, SharePoint uses these online apps to create new documents. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online*, etc). Once created in the online app, if you have Microsoft Office installed on your computer, then you may open with the corresponding Office program.

To create a new document:

1. In the *Quick Launch* panel, select the name of the **Document Library** in which you want to store the new document.

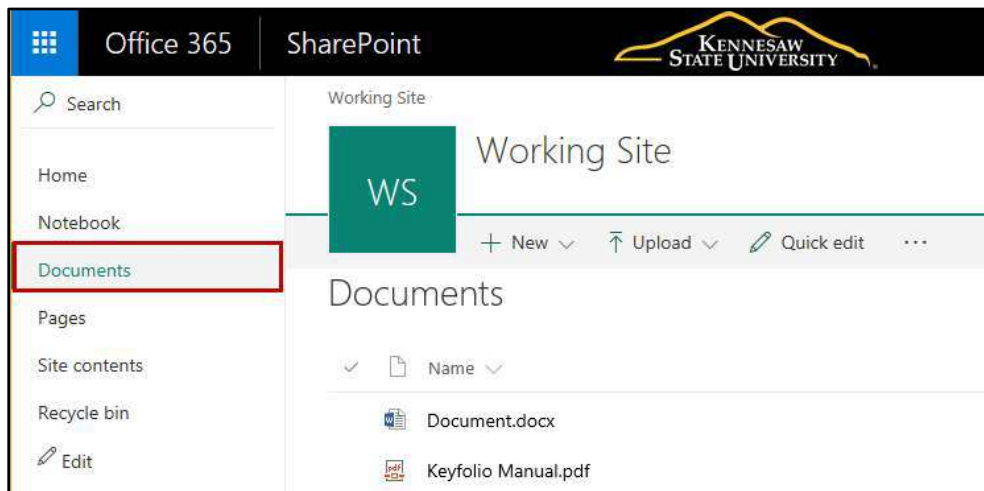


Figure 8 - Access Document Library

2. On the *menu bar*, click **New** (See Figure 9).
3. A list will appear displaying options to create a new folder, web link, or various types of Office documents. For example, click **Word document**. (See Figure 9).

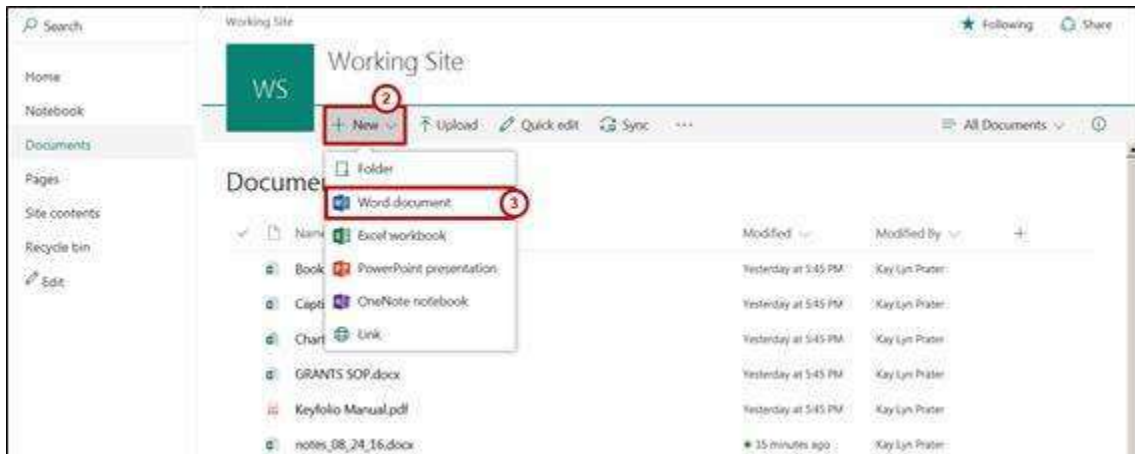


Figure 9 - Create New Document

4. *Word Online* will open with a blank document ready for you to edit.

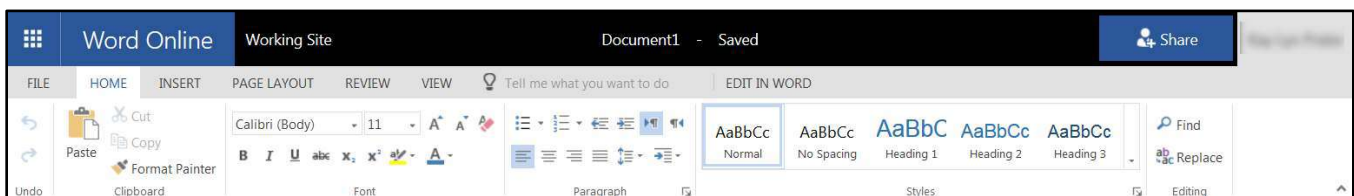


Figure 10 - New Document Created in Word Online

5. To change the document name from within *Word Online*, simply click the **document name**.

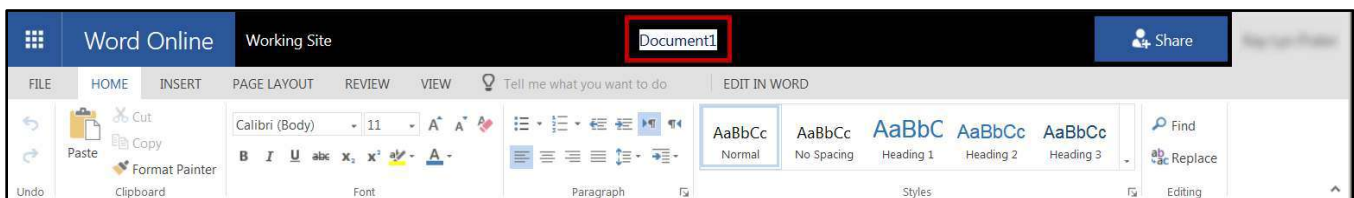


Figure 11- Click the Document Name

6. Enter the **new document name** (See Figure 12).
7. When you have completed your edits and want to return to the document library, click the **site name** next to *Word Online* (See Figure 12).

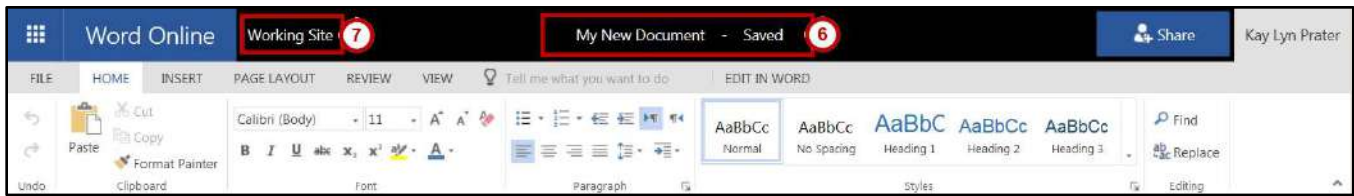


Figure 12 - Change the Document Name and Return to the Document Library

8. Your new document now appears in the selected SharePoint document library.

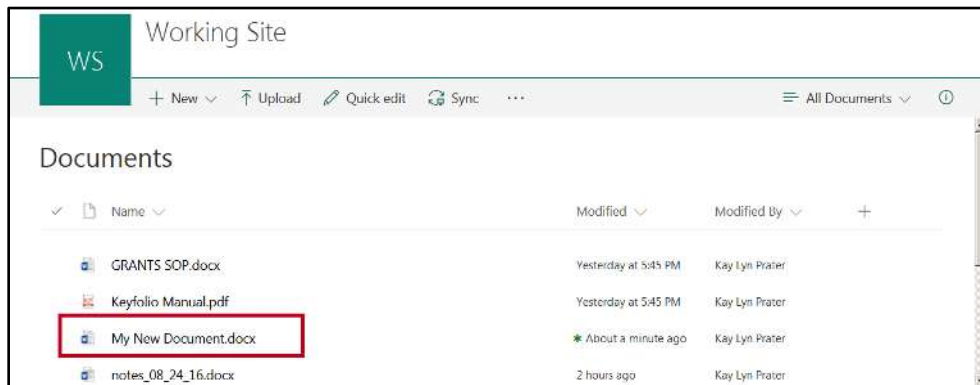


Figure 13 - Your New Document

## Opening Documents in a SharePoint Document Library

SharePoint Document Libraries allow you to access your *Microsoft Office* files and edit them online with the *Microsoft Office Online* set of tools, or open the file in the desktop version of Microsoft Office.

The following example will demonstrate how to open a Word document in Word Online, then continue editing the document in the desktop version of Word:

1. Click the **document name** in the Document Library list.

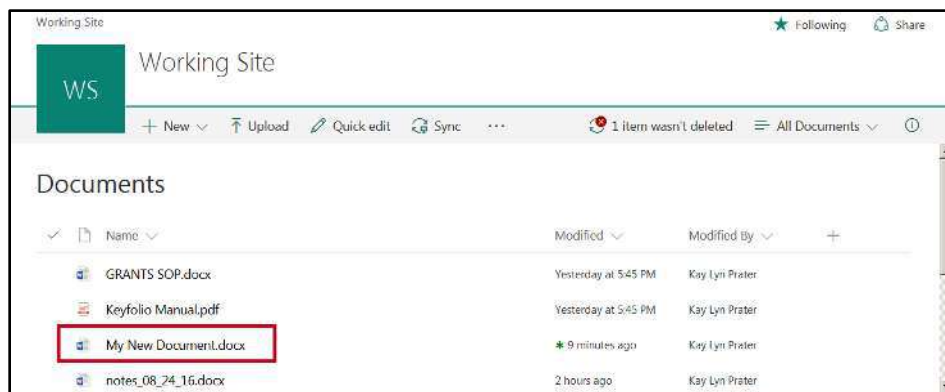


Figure 14 - Click the Document Name

- The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online*, etc). You can preview the document, or choose to edit the document within your browser. Click **Edit Document**.

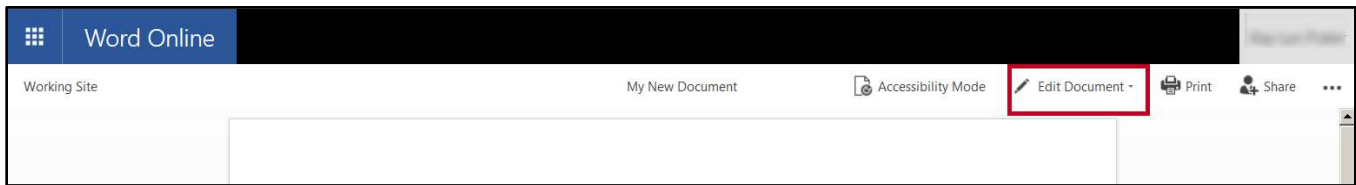


Figure 15 - Edit Document

- A drop down menu will appear with the following:
  - Edit in Word:** If you have Microsoft Office installed on your computer, then the file will open with the corresponding Office program (See Figure 16).
  - Edit in Browser:** You can select to edit the document in *Word Online*, or open the document in your desktop version of *Microsoft Word* (See Figure 16).

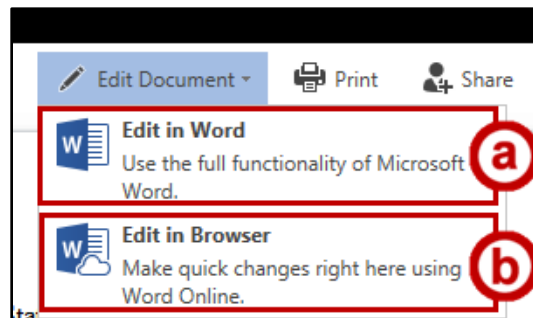


Figure 16 - Edit in Word or in Browser

- When you have completed your edits and want to return to your document library, click the *SharePoint* site name next to *Word Online*.

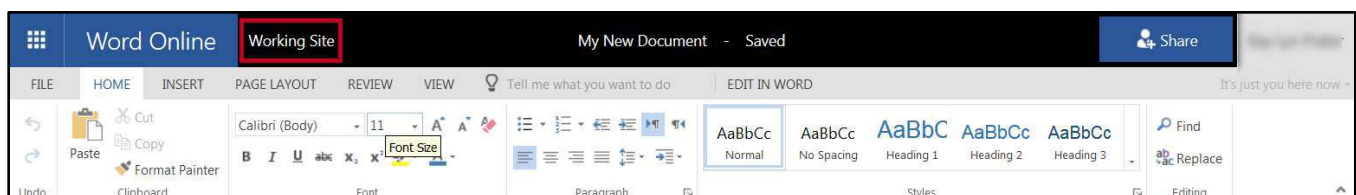


Figure 17 - Click the Site Name

5. You will be returned to your document library.
6. You can also open a document in the library by:
  - a. Clicking the space to the **left** of the document to select it (See Figure 18).
  - b. Clicking **Open** to reveal a drop-down with more options (See Figure 18).

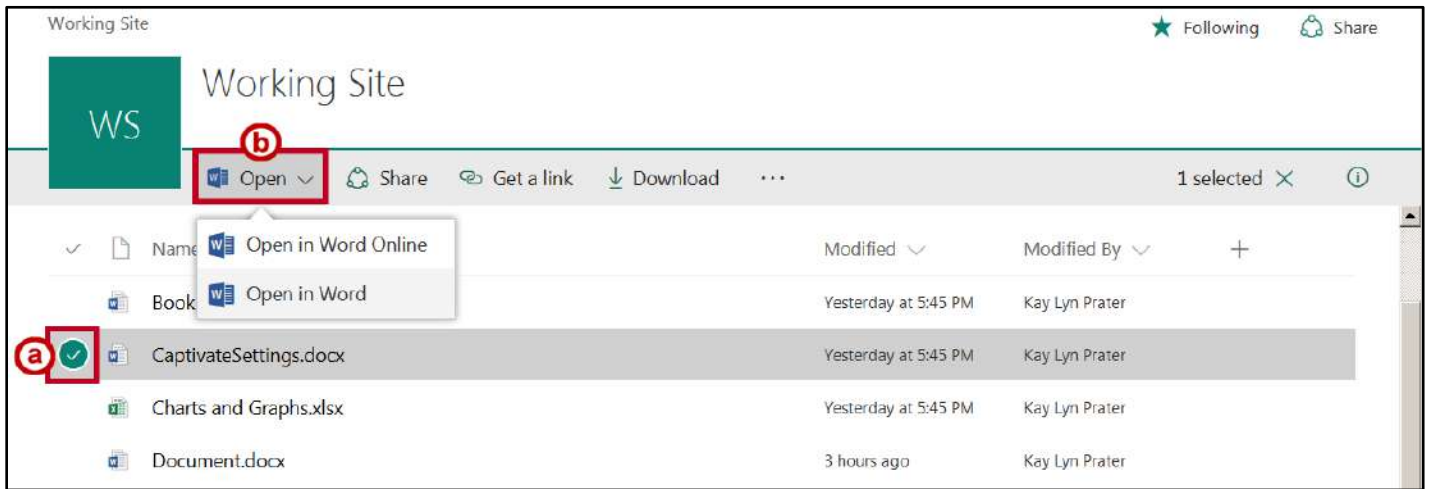


Figure 18 - Open a Document

7. When selecting *Open in Word* as in this example, a window will appear asking if you want to open the file. Click **Yes**.

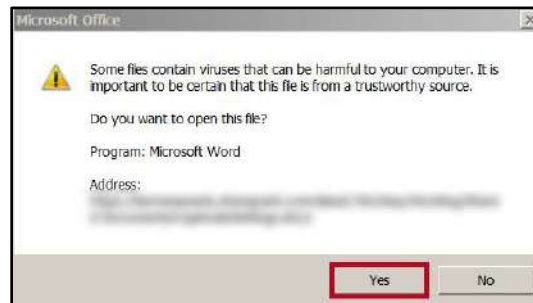


Figure 19 - Open File

8. The document will open in your desktop version of *Microsoft Office*.

## Syncing a Document Library to your Computer

You can sync a document library from SharePoint to your computer. Not only will this make working on documents easier, but it will also help to keep the document library updated when you save your work and will make it easier to share documents with other members who have access to the SharePoint Online site.

In order to use the sync feature, you will need the latest version of the OneDrive Sync Client installed on your computer. If on a PC, you can see if the sync client is installed on your computer by looking for the OneDrive icon in your Taskbar in the lower right corner of your screen.

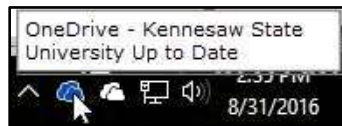


Figure 20 - OneDrive Sync Client Installed

If the OneDrive Sync client is not installed on your machine, or if you have a Mac, please contact the *KSU Service desk* for assistance.

To sync a document library to your computer:

1. After accessing the SharePoint app from the Office 365 portal, click the **SharePoint** site that contains the document library you wish to sync.

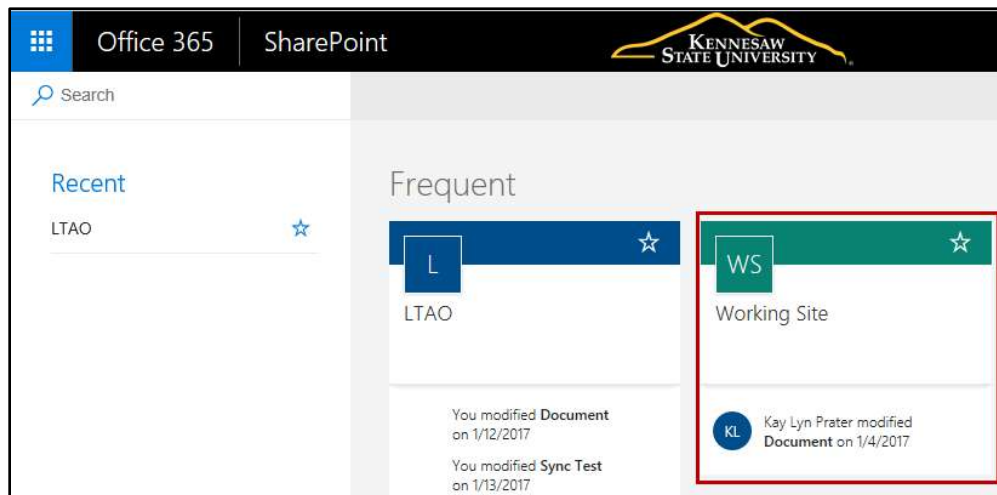


Figure 21 - Access SharePoint Site

2. The selected SharePoint site will open. From the *Quick Launch* bar, click the **document library** you wish to sync (See Figure 22).
3. The document library will open. On the *Menu bar*, click **Sync** (See Figure 22).

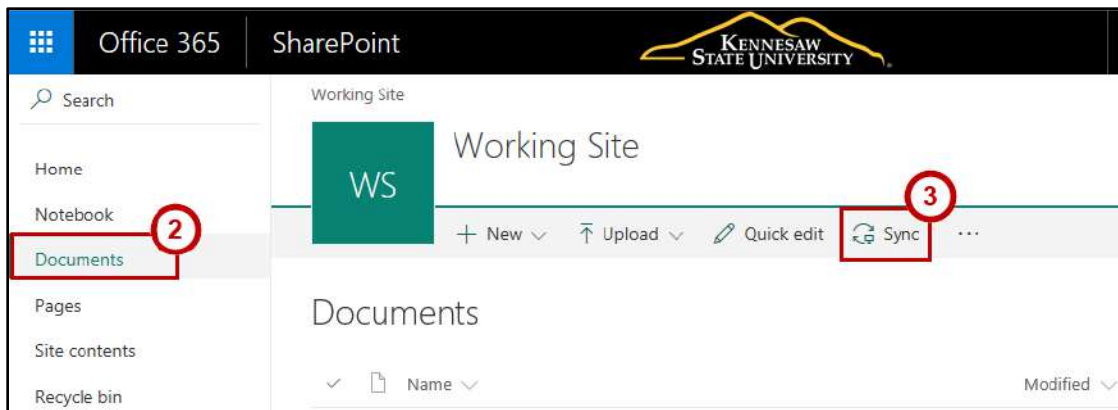


Figure 22 - Sync

4. A confirmation window will appear. Click **Sync now** to begin syncing the document library to your computer.

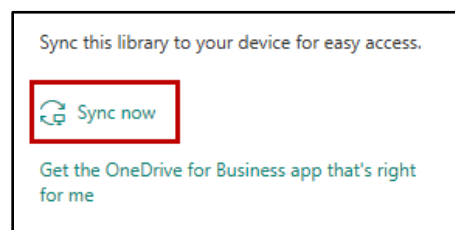


Figure 23 - Sync Now

5. You will be asked to confirm the location on your computer where the files will be stored. Click **Sync Now**.

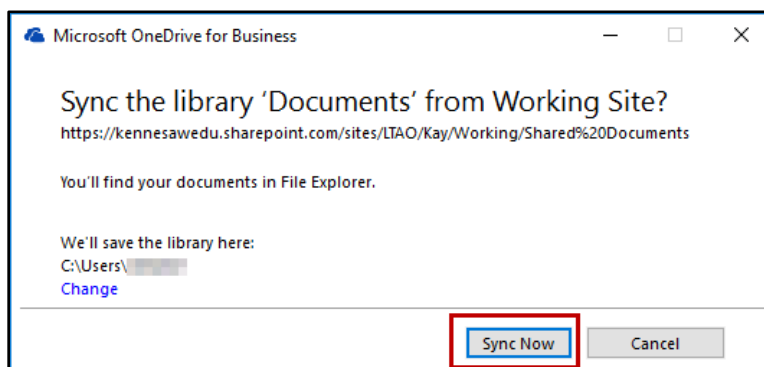


Figure 24 - Sync Now

6. The files from your selected SharePoint site will begin to sync to your computer. As the files are downloaded to your computer, you can access the folder by clicking **Show my files**.



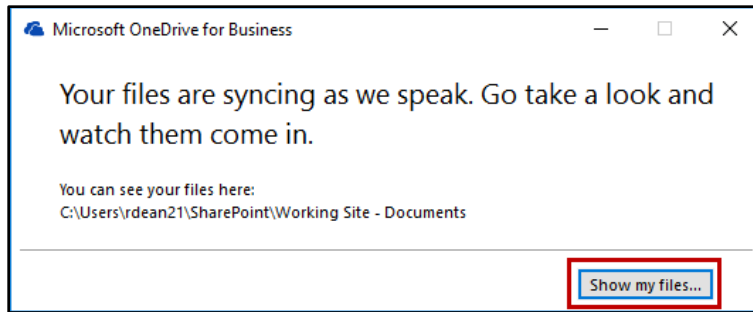


Figure 25 -Show my Files

- The file explorer will open and show a new *SharePoint* link under your quick access links. Clicking on the **SharePOINT** icon will show the SharePoint Site – *Documents* that you chose to sync to the computer.

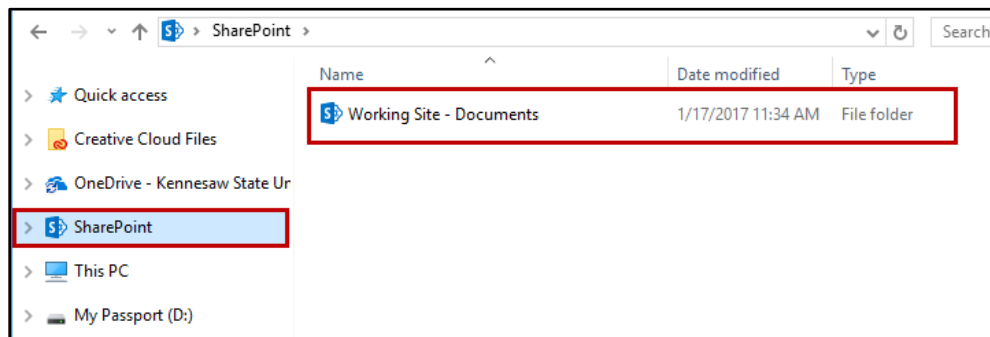


Figure 26 - Accessing SharePoint Site from File Explorer

- After clicking the *Documents* link, the documents folder will open to display all files/folders on the synced SharePoint site.

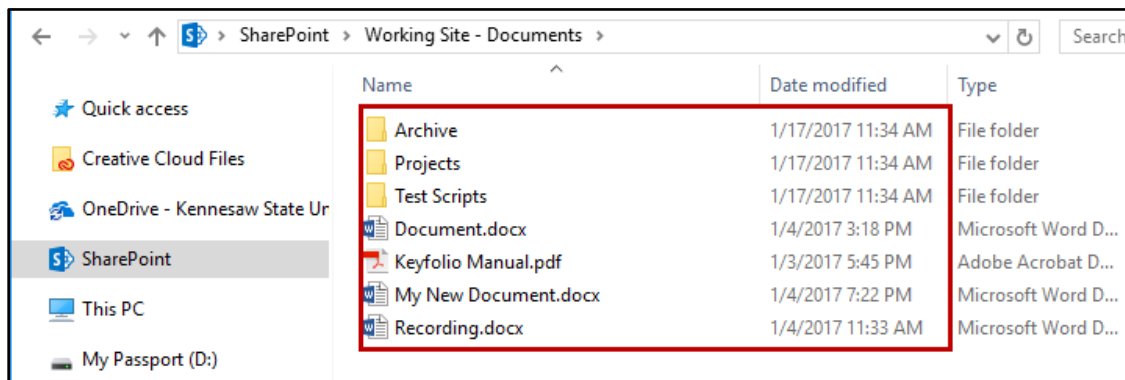


Figure 27 - Synced Documents

## Sharing a SharePoint Link via Email

You can send a link to a SharePoint file via email if you would like a colleague to access the file without having to download a file. To get the link to include in your email:

1. After accessing the document library in your SharePoint site, click **next to the file** you wish to share (See Figure 28).
2. Click **Get a Link** (See Figure 28).

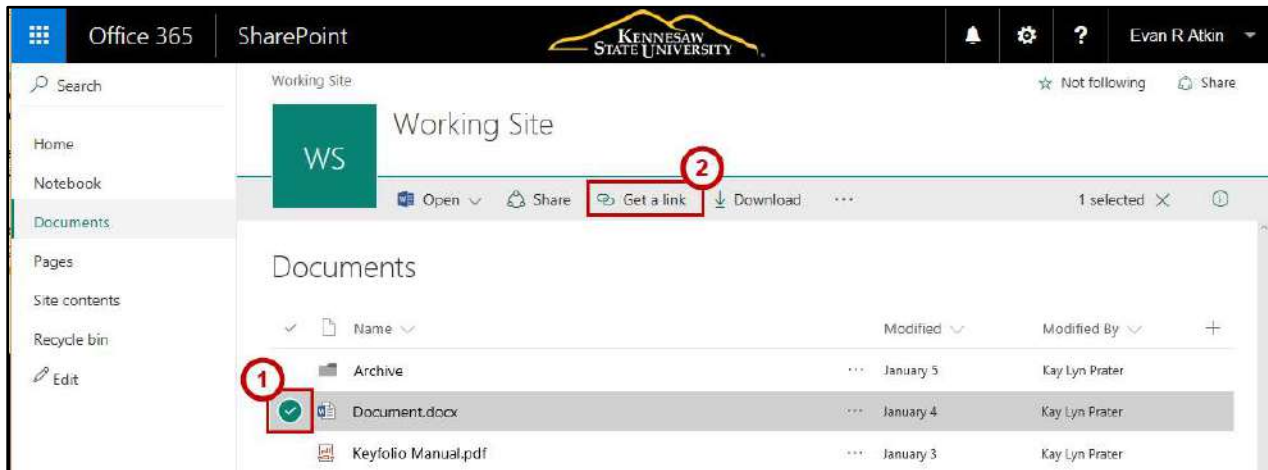


Figure 28 - Generating Links

3. The *Share 'Document'* window will open with a *Restricted Link* created by default. Copy the **link** in the field below *Restricted Link* (See Figure 29).
4. Once you have copied the link, click **Close** (See Figure 29).

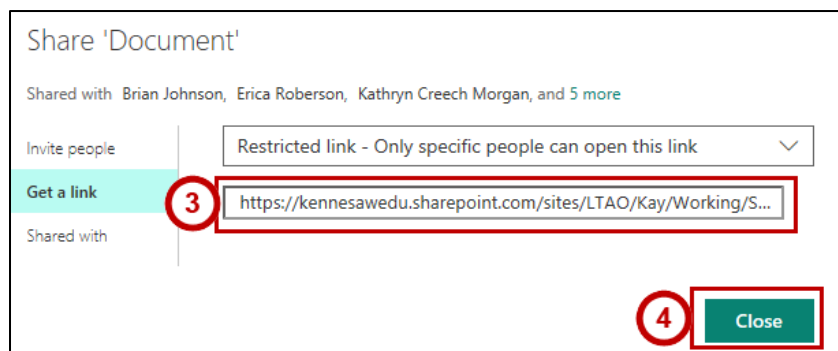


Figure 29 - Copy Share Link

5. You can now paste the link in an email to a colleague.

**Note:** The recipient will need to have permission to access the SharePoint site that the document is originally from.

## Signing out of SharePoint

1. Click the drop-down arrow in the *Personal* menu at the top right of the screen (See Figure 30).
2. From the drop-down menu, click **Sign Out** (See Figure 30).

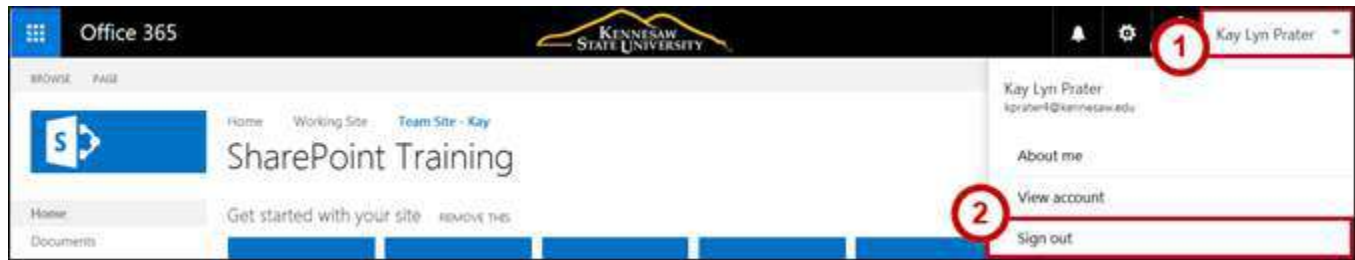


Figure 30 - Sign Out

## Additional Help

For additional support, please contact the KSU Service Desk:

### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: [service@kennesaw.edu](mailto:service@kennesaw.edu)
- Website: <http://uits.kennesaw.edu>