10

File Sharing and Collaborating

Contents at a Glance

Chapter **1**

Up and Running on OneDrive

This chapter introduces you to OneDrive, the Office 365 online facility for storing files, sharing files, and co-editing files with other people. It describes how to sign in and out of OneDrive so that you can get to your OneDrive folders. You also discover how to navigate in OneDrive, manage folders, and upload and download files from your computer to OneDrive. Finally, this chapter shows how to open, delete, and move a file you store at OneDrive.

This chapter describes how to store and share files with OneDrive, a Microsoft website, but you can also store and share files using a software product called SharePoint. With SharePoint, files are maintained on a local network. They are kept on a server that is owned and operated by a company. Chapters 3 and 4 of this minibook describe how to share files with SharePoint.

Signing in to OneDrive

OneDrive is a component of Office 365. Before you can store, share, or co-edit files in OneDrive, you have to sign in to OneDrive. Open a web browser and follow these steps to sign in to Office 365:

1. **Go to this web address:** `onedrive.live.com`.

2. **Click the Sign In button.**

   The Sign In window opens.

3. **Enter the email address of your Office 365 account and click Next.**

   The OneDrive window opens.

4. **Enter your password and click Sign In.**

   The OneDrive window opens in your browser, as shown in Figure 1-1. The first time you open OneDrive, you see two folders only.

Create a folder   Upload files   Folders   Sort and change views
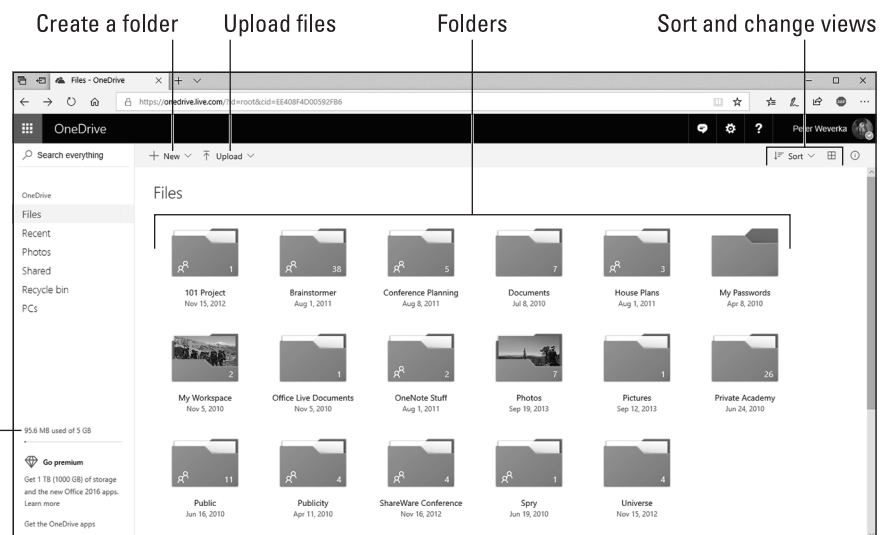
Available storage space

To sign out of Office 365 in a web browser, click your username or picture in the upper-right corner of the screen and choose Sign Out in the My Accounts pane.

Exploring the OneDrive Window

To start with, OneDrive gives you two folders — Documents and Pictures — for storing files, and you can create additional folders as well. OneDrive can store up to 1TB (that's 1000 GB) of files. The lower-left corner of the browser window tells you how much storage space you have for storing files.

You can tell how many files are stored in each folder because folders list how many files they hold. To open a folder and view its contents, click a folder name.

Glance back at Figure 1-1 and take note of these tools in the OneDrive window for managing files:

» **Create folders:** Click the New button and choose Folder to create a folder for storing files. See "Creating a folder," later in this chapter, for details.

» **Upload files:** Click the Upload button to upload files from your desktop or laptop computer to OneDrive. See "Uploading Files to a Folder on OneDrive," later in this chapter.

» **Arranging folders and files in the window:** Use the tools in the upper-right corner of the screen to arrange and locate folders and files. See "Viewing and locating folders in the OneDrive window," later in this chapter.

REMEMBER

To return to the main OneDrive window, click OneDrive in the upper-left corner, or click Files, the first link on the left side of the screen.

Managing Your OneDrive Folders

All folders you create for storing files are kept in OneDrive. OneDrive gives you two folders — Documents and Pictures — for storing files, and you can create folders of your own, as well as subfolders. These pages explain how to create folders, get from folder to folder in OneDrive, and do folder-management tasks such as renaming, deleting, and moving folders.

Creating a folder

Create folders to store and organize your files on OneDrive. Sign in to OneDrive with your web browser and follow these steps to create a folder:

1. **If you want to create a subfolder (a folder inside another folder), open the folder that your new folder will go into.**

   To open a folder, click its name.

2. **Click the New button and choose Folder on the drop-down list.**

   A dialog box appears.

3. **Enter a name for the folder.**

4. **Click Create.**

   Later in this chapter, "Uploading Files to a Folder on OneDrive" explains how to upload files from your computer to a folder in OneDrive.

Viewing and locating folders in the OneDrive window

Use the OneDrive window to store and locate folders, subfolders, and files in OneDrive. The OneDrive window offers these tools for managing folders:

» **Searching:** Enter a search term in the Search Everything box to search for a folder or file. The Search Everything box is located in the upper-left corner of the window.

» **Sorting:** Click the Sort button and choose an option to rearrange folders and files in the OneDrive window. Sorting is helpful for finding a folder or file in a long list.

» **Viewing:** Click the View Options button to switch views, as shown in Figure 1-2:

   ● **List and Compact List views** present detailed information about folders and files — when they were last modified, whether they are shared, and file sizes.

   ● **Tiles view** presents folders and files in thumbnail form.

   ● **Photo view** presents large-size images of folders and files.

» **Displaying the Information pane:** Select a folder or file and click the Information button to open the Information pane (see Figure 1-2). You can also display the Information pane by right-clicking a folder or file and choosing Details.

Selecting folders and files

REMEMBER

Before you can rename, delete, or move a folder or file, you have to select it. Use these techniques to select folders and files:

» **Click the check box (looks like a circle, actually) on a folder or file.** The check box appears when you move the pointer over a folder or file.

» **In List view or Compact List view, click anywhere on a list entry apart from a folder's name or file's name.** Clicking a name opens a folder or file.

You can select more than one folder or file by Ctrl+clicking. To deselect folders and files, press Esc.
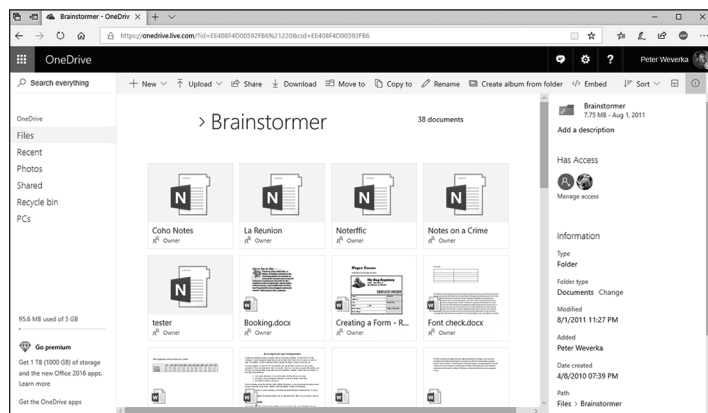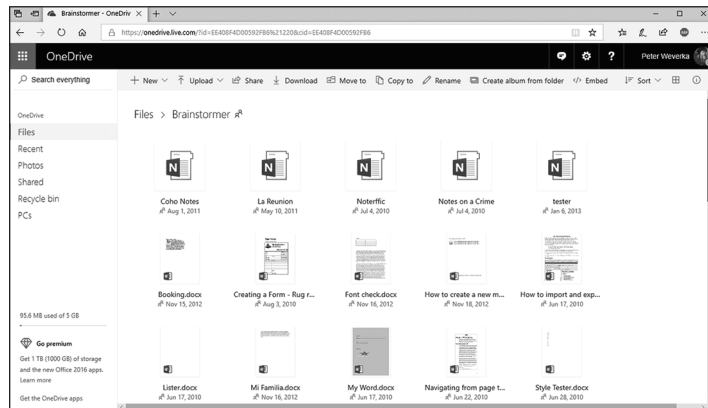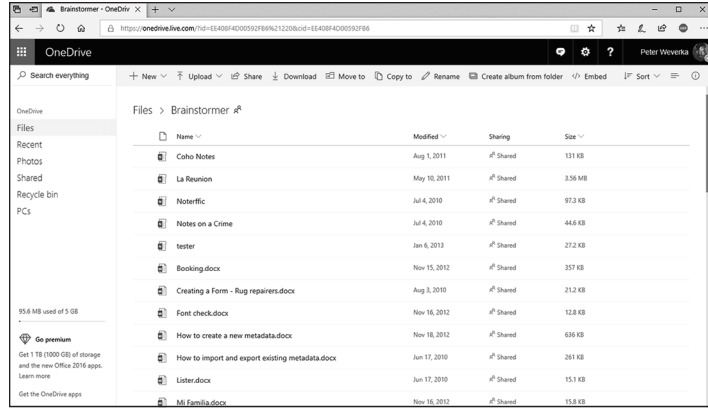
FIGURE 1-2: The OneDrive window in List view (top), Tiles view (middle), and Photo view with the Information pane showing (bottom).

Going from folder to folder in OneDrive

After you accumulate a few folders on OneDrive, getting to the folder you want to open can be an arduous, interminable journey. To help you on your way, OneDrive offers different techniques for going to a folder:

» **The drill-down method:** Starting in the OneDrive window, click a top-level folder to display its subfolders. If necessary, keep drilling down this way until you reach the folder you want to open.

» **The OneDrive Navigation bar method:** The OneDrive Navigation bar — located beside the folder name — lists the path to the folder that is currently open. To backtrack, click the name of a folder on the path, as shown in Figure 1-3.

» **The browser button method:** Click the Back or Forward button in your browser to open a folder you previously opened.

Click a folder name on the path

FIGURE 1-3:
Click a folder name on the Navigation bar to open a folder.
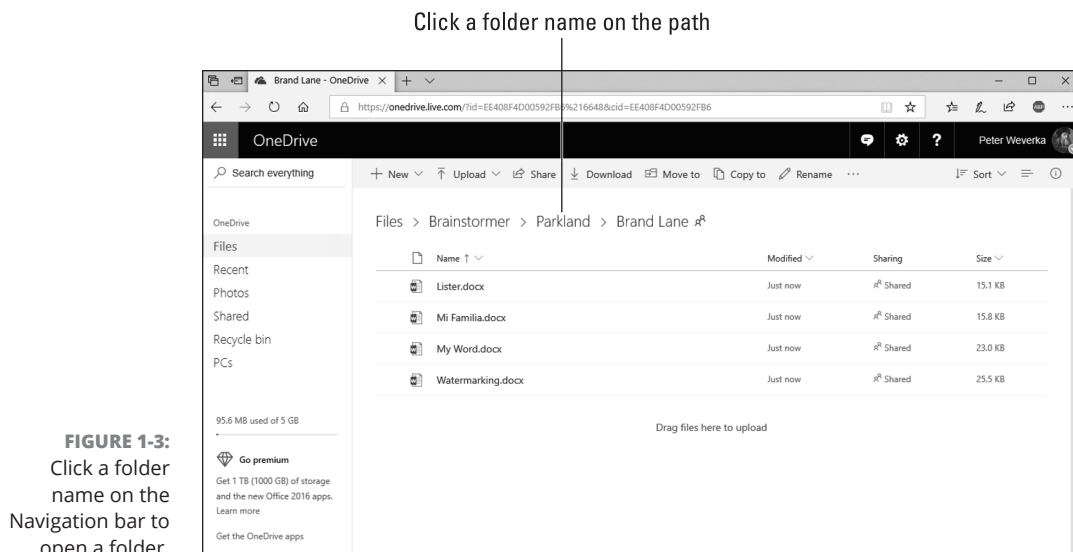
To return to the top-level OneDrive window, click Files in the OneDrive Navigation pane or the word *OneDrive* in the upper-left corner of the screen.

TIP By bookmarking a folder in your browser, you can go straight to a folder without having to navigate to it in OneDrive. After you choose the bookmark (and enter your ID and password if you haven't yet signed in), the folder opens.

THE OFFICE WEB APPLICATIONS

As an Office 365 subscriber, you are entitled to use the Office Web applications — Word, Excel, PowerPoint, and others. These applications are available from the Office 365 toolbar. Click the Navigation button (the button to the left of the word *OneDrive*) to open this toolbar. Then choose Word, Excel, PowerPoint, or another Web application from the drop-down list.

To open a file in a Web application, select it in the OneDrive window, click the Open button, and choose an online option for opening the file. For example, choose Open in Word Online to open a file in the Word Web App.

Users of Office Web Apps can collaborate online with one another to create Word documents, Excel worksheets, and PowerPoint presentations.

The Web applications are lightweight versions of Office desktop applications. You store the files you create with Office Web applications on OneDrive.

Deleting, moving, and renaming folders

To delete, move, or rename a folder, start by selecting it in the OneDrive window (see "Selecting folders and files," earlier in this chapter). Then use these techniques:

» **Moving a folder:** Click the Move To button. The Move Item To task pane opens. It lists your folders on OneDrive. Select a folder in the list and click the Move button at the top of the task pane. You can also right-click a folder and choose Move To.

>> **Deleting a folder:** Click the Delete button. You can also right-click and choose Delete.

>> **Renaming a folder:** Click the Rename button and enter a name. You can also right-click and choose Rename.

Uploading Files to a Folder on OneDrive

Upload a file from your computer to OneDrive so that you can share the file with others or be able to access it when you are not at the computer you normally use. Sign in to OneDrive with your web browser and follow these steps to upload files from your computer to a folder you keep on OneDrive:

1. **On OneDrive, open the folder where you want to store the files.**

2. **Click the Upload button and choose Files on the drop-down list.**

   The Open dialog box appears.

3. **Select the files.**

4. **Click the Open button.**

   The file or files are uploaded to the folder you selected in OneDrive.

TIP Another way to upload files is to drag them from File Explorer. Open File Explorer, locate the files you want to upload, and select them. Then drag them into the OneDrive window.

You can also upload an Excel, Word, or PowerPoint file by opening it in an Office 365 program and saving it to a OneDrive folder. See "Saving a File from Office 365 to OneDrive," the next topic in this chapter.

Saving a File from Office 365 to OneDrive

Starting in Word, Excel, or PowerPoint, you can save a file to a folder on OneDrive. In effect, saving a file this way is the same as uploading it to OneDrive.

Follow these steps to save an Office file on your computer to a OneDrive folder:

1. **In Word, Excel, or PowerPoint, open the file on your computer that you want to save to a OneDrive folder.**

2. **On the File tab, choose Save As.**

   The Save As window opens.

3. **Choose OneDrive.**

   As shown in Figure 1-4, the Recent Folders list shows the names of folders on OneDrive (if you recently opened folders on OneDrive).
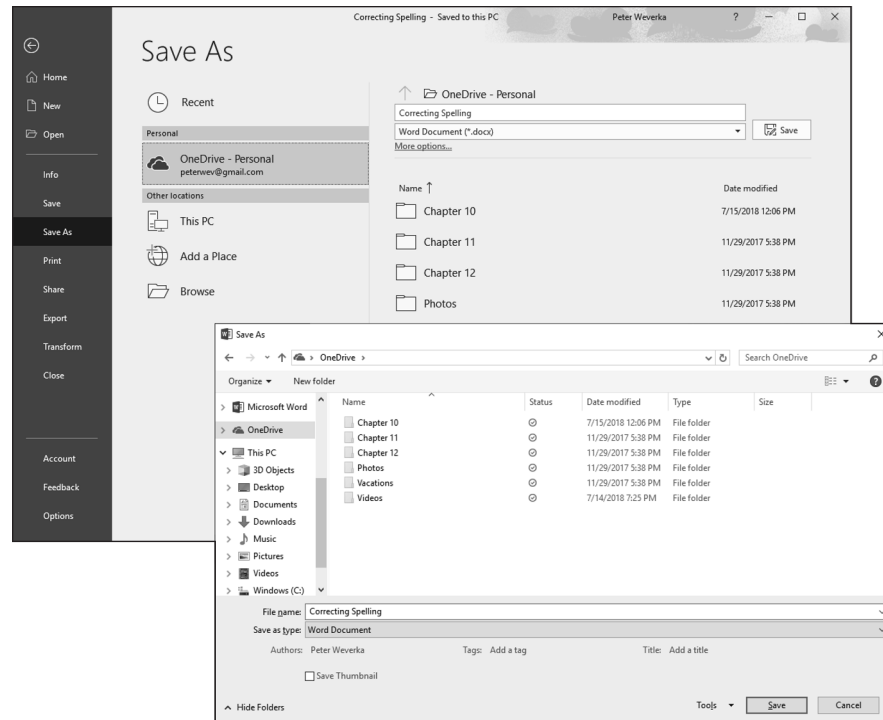
FIGURE 1-4: Choose OneDrive in the Save As window to save a file from your computer to a OneDrive folder.

4. **Select the OneDrive folder where you want to save the file.**

   Select the folder from the Recent Folders list or browse for the folder.

   - **Recent folder:** Click the name of the folder on the Recent Folders list. The Save As dialog box lists the path to the folder on OneDrive.

   - **Click the Browse button:** The Save As dialog box appears. On the left side of the dialog box, scroll to and select OneDrive. Then select the OneDrive folder where you want to save the file.

5. **Click the Save button in the Save As window or the Save As dialog box.**

REMEMBER

Take a look at the Save button on the Quick Access toolbar after you save your file. It looks a little different from the conventional Save button. Those circular lines on the Save button tell you that the file is stored at OneDrive. When you click the Save button, you save your work as well as refresh the file with work done by people who share the file with you.

WARNING

When you save an Excel, Word, or PowerPoint from your computer in a OneDrive folder, you create a second copy of the file. Be careful not to get the two copies mixed up — the one on your computer and the one on OneDrive.

Opening a File from OneDrive

Read on to find out the different ways to open a file that you keep on OneDrive.

Starting in an Office desktop application

Starting in an Office desktop application, follow these steps to open an Office file that you keep on OneDrive:

1. **On the File tab, choose Open.**

You see the Open window. If the file you want to open is on the Recent files list, select it there and be done with it.

2. **Choose OneDrive.**

You see your OneDrive folders.

3. **Select the folder where the file you want to open is stored.**

4. **Select the file you want to open.**

The file opens in your Office 365 application.

Starting in OneDrive

To open a file you keep on OneDrive in an Office desktop application, start by selecting the file. Then use these techniques to open it:

» Open the drop-down list on the Open button and choose an Open option (Open in Word, Open in Excel, or Open in PowerPoint).

» Right-click the file and choose an Open option.

Downloading Files from OneDrive to Your Computer

Follow these instructions to download files to your computer from OneDrive:

» **Downloading a file:** Select the file you want to download and click the Download button. You see the standard dialog box for downloading files from the Internet. Choose to open or save the file after you download it to your computer.

» **Downloading several files or all the files in a folder:** Select several files or, to download all the files in a folder, select the folder. Then click the Download button. The standard dialog box for downloading files appears. Click the Save option button and click OK to download the files in a zip file.

Chapter **2**

File Sharing and Collaborating

S tarting in the OneDrive window, you can collaborate online by sharing Word documents, Excel worksheets, and PowerPoint presentations. This chapter explains how file sharing works. It shows you how, using OneDrive, you can share your folders and files with others, and how to change how files and folders are shared.

Sharing Files: The Big Picture

OneDrive generates a link for each file that is shared. This link is the means by which the people who share the file open it. Someone who has the link can click it and, in their web browser, open the file for viewing or editing in an Office desktop application (or Office Web application).

The owner of a folder or file can share it using these methods:

» **Invite people by email.** Send the link by email on a person-by-person basis to the people with whom you will share the folder or file. Figure 2-1 shows an example of sending links by email to share a folder. The recipient of this email message can click a link to open a folder at OneDrive and from there open a file. In this case, the sender shared a folder with two files in it.

» **Get a link.** Generate a link and distribute it on your own or post it on a blog or web page.

» **Share with embedded HTML code.** Generate HTML code that you can embed in a blog or web page.
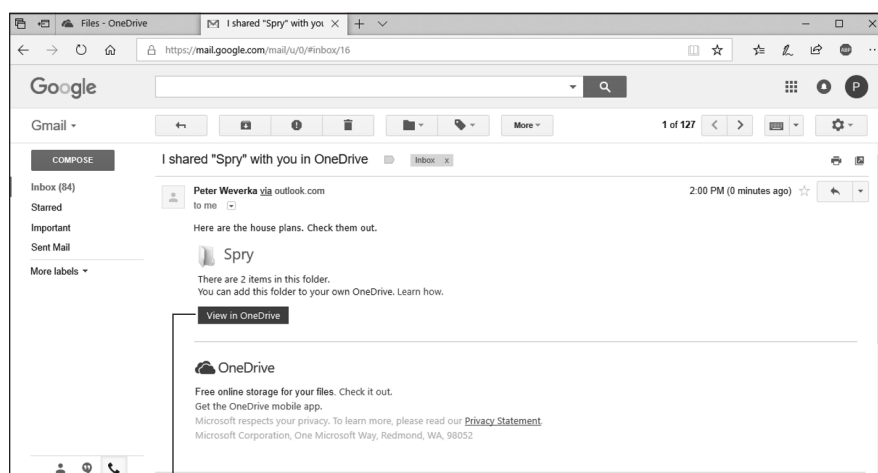
FIGURE 2-1:
An email invitation to share files stored on OneDrive.

Click to open a folder in OneDrive

REMEMBER You don't have to click the Save button to save files shared on OneDrive. OneDrive saves the files automatically. To stop saving files automatically, drag the AutoSave mechanism on the Quick Access toolbar to the Off position. Click the Version History button (located in the upper–right corner of the screen next to the Share button) to open an earlier version of a file you're working on.

Sharing Your Files and Folders with Others

Share files with others so that they can view and edit or simply view your work. Sharing is a way to collaborate with others on Office files. Starting in the OneDrive window, you can share a folder (that is, all the files in the folder) or an individual file. When you share a file, you give others permission either to view your file or view as well as edit it.

Inviting people by email

Follow these steps to share a file (or all the files in a folder) by sending out an email message with links to the files (see Figure 2-1). All the recipient of your email message has to do to read or view the file is click a link.

1. In OneDrive, select the file or folder you want to share.

2. Click the Share button.

You can find the Share button on the OneDrive toolbar along the top of the screen.
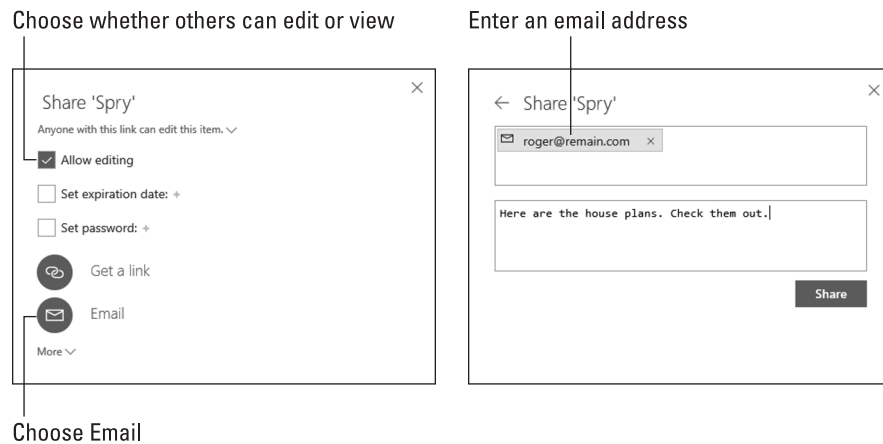
As shown in Figure 2-2, you see the Share window.

Choose whether others can edit or view   Enter an email address

FIGURE 2-2: File sharing by email.   Choose Email

3. **Select or deselect Allow Editing to determine whether others can view and edit or just view the file.**

    Your choice here determines what kind of access privileges sharers have.

    Optionally, you can set an expiration date and clamp a password on the files you intend to share.

4. **Choose Email.**

    The Share window offers text boxes for entering an email address and message (refer to Figure 2-2).

5. **Enter the email addresses of the people with whom you will share the file or folder.**

6. **Click the Share button.**

    Switch to List view in the Files window to see whether files and folders are shared. When they are shared, the Sharing column reads "Shared." You can return to the File window at any time to unshare files or folders as well as change how files and folders are shared. See "Investigating and Managing How Files and Folders Are Shared," later in this chapter, for details.

Generating a link to shared files

Follow these instructions to share a file (or all the files in a folder) by generating a hyperlink. After OneDrive generates the link, you can post it or send it to others. Anyone who clicks the link can view (or view and edit) the file.

1. **In the OneDrive window, select the file or folder you want to share.**

2. **Click the Share button.**

    As shown in Figure 2-3, you see the Share window for generating a link to a file or folder.

3. **Select or deselect Allow Editing.**

    Your choice determines whether others can view and edit or just view the file.

    Optionally, establish an expiration date and put a password on the files you intend to share.
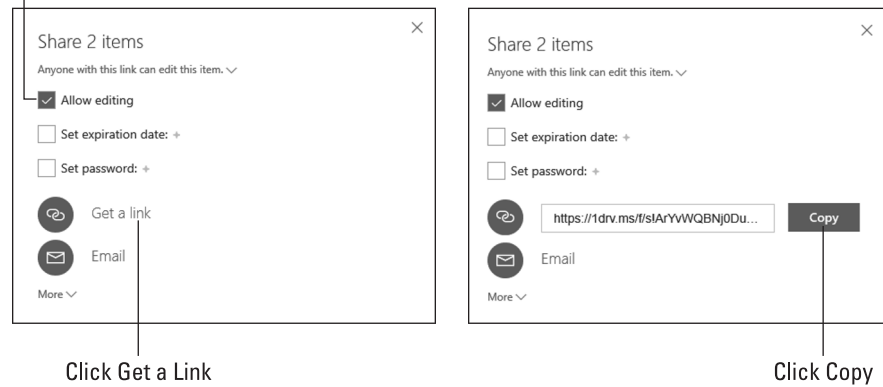
Choose whether others can edit or view

FIGURE 2-3:
File sharing by
generating a link.

Click Get a Link   Click Copy

4. **Click Get a Link.**

   OneDrive generates the link. It appears in the Share window, as shown in Figure 2-3.

5. **Click the Copy button.**

   You can now paste the link where you will — to a blog, web page, or email message. Later in this chapter, "Investigating and Managing How Files and Folders Are Shared" explains how to unshare files and change how they are shared.

Generating HTML code

Yet another way to share files is to generate HTML code for a link and embed the HTML code in a web page or blog. A visitor to the web page or blog can click the link and open the file you want to share. Follow these steps to generate HTML code for file–sharing purposes:

1. **In the OneDrive window, select the file you want to share.**

2. **Click the Embed button on the OneDrive toolbar.**

   The Embed pane opens.

3. **Click the Generate button.**

   OneDrive generates the HTML code.

4. **Right-click the code and choose Copy.**

   Embed this code into a web page to create the link.

SHARING A FILE DIRECTLY

Word, Excel, and PowerPoint offer the Share button (it's located in the upper-right corner of the screen) for sharing a file without having to visit the OneDrive window. After you click the Share button and choose OneDrive in the Share window, the Share pane opens. From there, you can invite people by email to share a file or generate a sharing link:

- **Sharing the file by email:** Enter the sharer's email address in the Invite People text box. Then choose Can Edit or Can View to determine what editing privileges the sharer has and click the Share button. (Rather than enter a sharer's email address directly, you can click the Search the Address Book button and choose names in the Address Book dialog box.)

- **Sharing the file by generating a link:** Click Get a Sharing Link (located at the bottom of the Share pane). Then click a button to create an Edit link or a View-only link. Finally, click the Copy button to copy the link to the Clipboard. From there you can paste the link on a web page or email message.
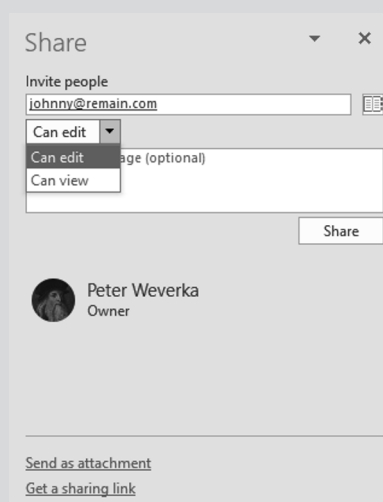

Seeing Files and Folders Others Shared with You

Go to the Shared window to see the names of folders and files that you shared with others and that others shared with you. To go to the Shared window, click Shared in the OneDrive Navigation pane (located on the left side of the window).

EDITING IN AN OFFICE APPLICATION

When you click the link to open a shared file, the file opens in a Web App browser window, as shown in this illustration. At this point, if you have editing privileges, you can edit the file in an Office desktop application instead of an Office Web application.

To edit in an Office desktop application, click the Open In button. What this button is named depends on the type of file you're dealing with. In the illustration shown here, the file in question is a Word document, so the button is named Open in Word.
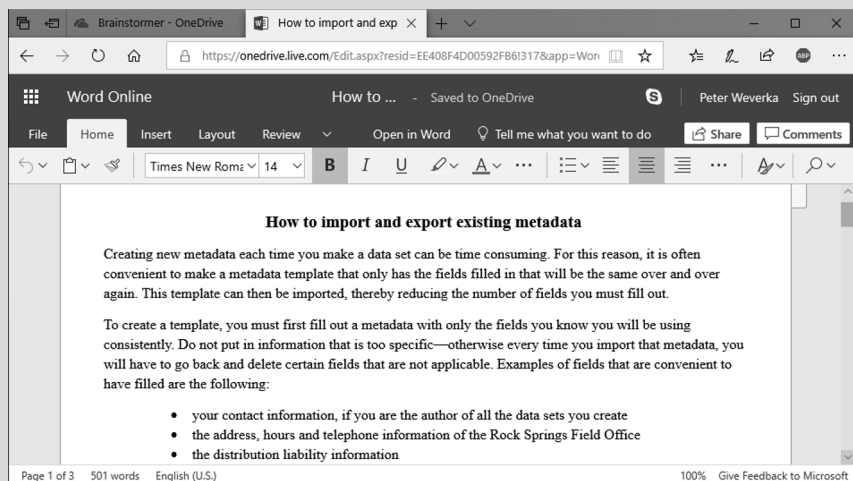
Open files and folders in the Shared Window the same way you open them in the Files or Recent window — by clicking. You can also right-click and choose Open on the shortcut menu.

Investigating and Managing How Files and Folders Are Shared

As shown in Figure 2-4, the Details pane tells you everything you need to know about who shares a file or folder and how it is shared. To open the Details pane, select a shared file or folder and click the Open the Details Pane button (located in the upper-right corner of the screen).
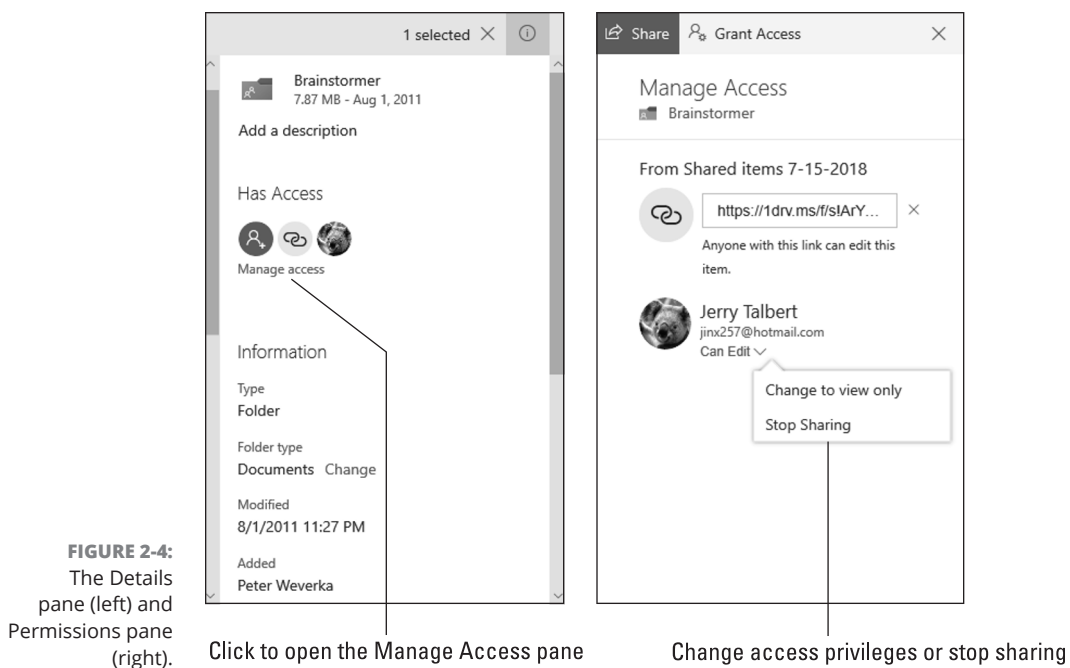
Click to open the Manage Access pane   Change access privileges or stop sharing

Follow these steps to stop sharing a file or change how you share a file with others:

1. **In the OneDrive window, select the file or folder in question.**

2. **Click the Open the Details Pane button.**

    The Details pane opens, as shown on the left side of Figure 2-4. It tells you who shares the file with you and what the link for sharing the file is (if a link was generated).

3. **Click the Manage Access link.**

    The Manage Access pane opens, as shown on the right side of Figure 2-4.

4. **Change how or whether the file is shared.**

    You can make links invalid and change a sharer's access privileges:

    - **Invalidating a link:** Click the Remove Link button to make a link invalid. Anyone who has the link can no longer use it to view or edit the file.

    - **Changing access privileges:** Open a sharer's drop-down list (refer to Figure 2-4) and choose Allow Edit, Change to View Only, or Stop Sharing. If you choose Stop Sharing, the person is no longer permitted to view or edit the file.

5. **Close the Manage Access pane.**

Chapter **3**

Collaborating in SharePoint

SharePoint is Microsoft's web-based team collaboration platform. Businesses employ SharePoint Online to store documents, manage projects, and permit coworkers to collaborate with one another.

Ubiquitous means present or found everywhere. SharePoint Online isn't necessarily ubiquitous, but it tries to be. SharePoint Online sites are designed to be accessible from everywhere — from a desktop computer, a laptop, a tablet device, or a smartphone. No matter the device you use, the content is supposed to be accessible and user friendly.

This chapter introduces SharePoint Online, tells you how to find your way around a team site, upload and work with files in document libraries, share files with coworkers, sync files, and update your Office 365 profile.

Introducing Team Sites

A SharePoint team site is a collaborative workspace where colleagues can work on the same files, track projects, and interact with one another.

Figure 3-1 shows a typical SharePoint Online team site in the Office 365 window. These sites can look different depending on how site administrators set them up, but they have the same tools in common. A team site provides the means to open Office 365 applications, upload and download files, and collaborate with coworkers. These pages explain how to log in to a team site and find your way around the screen.
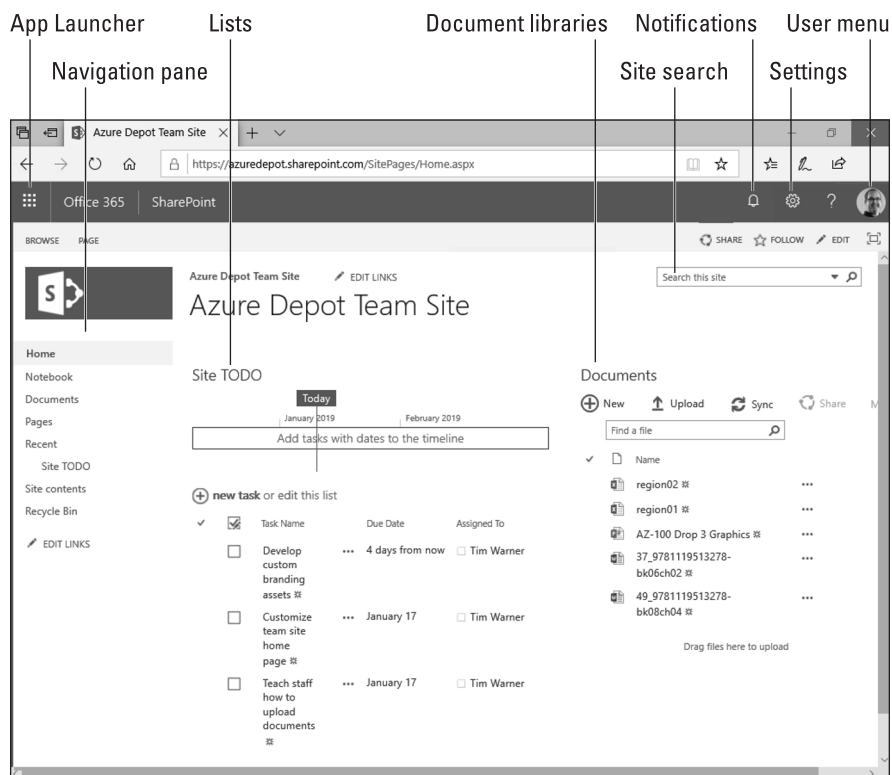

App Launcher   Lists   Document libraries   Notifications   User menu

Navigation pane   Site search   Settings

FIGURE 3-1:
A SharePoint Online team site.

Logging in to a team site

You need a password and network address to log in to a SharePoint team site. You're likely to get these items from your friendly neighborhood system administrator. Follow these steps to log in to a SharePoint team site:

1. **Open a web browser and navigate to your organization's team site.**

What your team site's web address looks like depends on whether your company uses its own domain name (such as *company.com*) or the Office 365 default naming format (which looks something like *yourcompany.sharepoint.com*).

2. **If you are prompted for credentials, enter your username, enter your password, and click OK.**

   What happens next depends on what your local (on-premises) environment looks like and how the administrator configured SharePoint. You may land in the team site without having to enter your username and password.

Finding your way around a team site

Refer to Figure 3-1, shown previously, as I take you on a short tour of a typical Sharepoint team site:

» **App Launcher:** For launching Office 365 Web applications. Because of its appearance, it is sometimes called the waffle menu.

» **Notifications:** For receiving administrative and user-defined alerts.

» **Settings:** For changing user settings. Which options you get depends on your privilege level.

» **User menu:** For signing in, signing out, and viewing your profile.

» **Site search:** For finding content on the site.

» **Navigation pane:** For accessing popular content on the team site. Usually a site administrator determines what appears on the Navigation pane.

» **Lists:** For listing tasks that need doing, including project work items and general-purpose "to do" items. SharePoint offers prebuilt templates for different kinds of lists, many of which allow you to assign list items to specific SharePoint users.

» **Document libraries:** For hosting files that you and other team members can open and work on.

A SharePoint site is a website like any other. You can create bookmarks in your browser to the places in SharePoint that you visit often.

TIP

Working with Document Libraries

The *document library* is the fundamental data repository in a SharePoint site. Don't let the word *document* fool you. You can store any type of file in a document library.

Use the document library to store files for the purpose of collaboration. These pages explain how to open files in the document library, upload files, co–edit files, and share files.

Opening a file in a document library

Follow these steps to locate and open a file:

1. **Use the Navigation bar to find and select the file you want to open.**

The administrator may have placed a shortcut to the document library on the Team site home page or elsewhere on the site.

2. **Click the Open button (the three dots) next to the name of the file you want to open.**

A pop-up window appears, as shown in Figure 3-2. It shows you a preview of the file so that you can make sure you open the right one.

3. **Click the More Actions button (three dots, again).**

Figure 3-2 shows where the More Actions button is located. A pop-up menu appears with all possible actions you can take with the file, as shown in Figure 3-2.

4. **Open the file.**

You can open the file in an Office desktop application or an Office Web App:

- **Office desktop application:** Choose the first option on the pop-up menu. For example, if you're dealing with a Word document, choose Open in Word. The file is downloaded to your computer so that you can work on it there. Changes you make to the file on your computer are uploaded automatically to the copy stored on SharePoint.

- **Office Web App:** Choose the second option on the pop-up menu, the option with the word *online* in its name. A Web App opens so that you can edit the file.

TIP

Here's a shortcut: To open a file in an Office Web App, simply click its name in a document library.

Working with coworkers on the same file

Sometimes when you try to open a file, you can't do it because someone got there first. Administrators decide whether more than one person can edit a file at the same time.
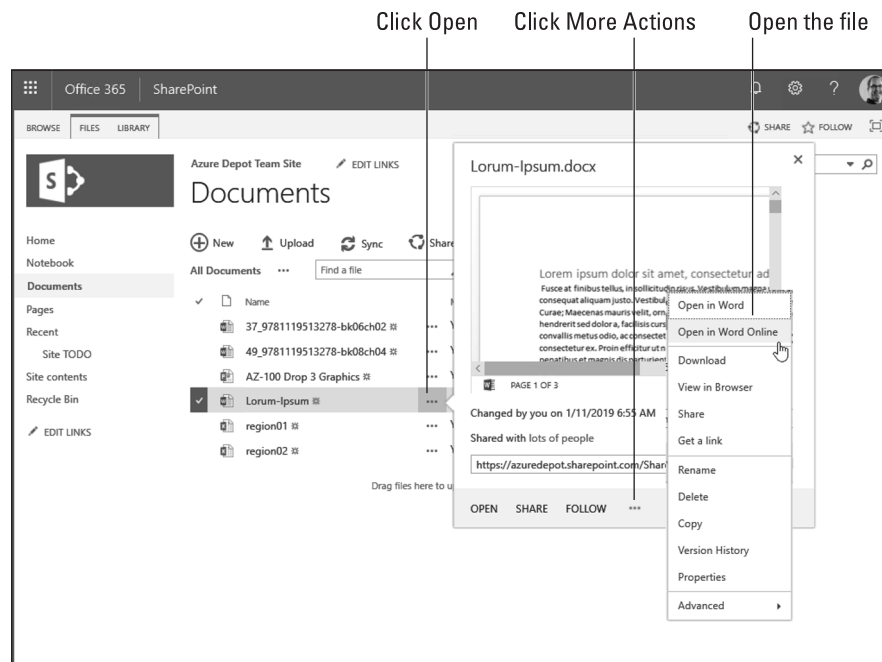
Click Open   Click More Actions   Open the file

FIGURE 3-2:
SharePoint gives
you many options
for accessing files
on a team site.

If a file permits more than one editor, follow these steps to open a file that is currently being edited and make your own contributions:

1. Open a file in the document library.

The previous topic in this chapter explains how to open a file. Figure 3-3 shows a Word file open in the Word Web App.

2. Look for indications that the file is currently being edited by a colleague.

As shown in Figure 3-3, the Word Web App tells you the name (or names) of others working on the file. If you look carefully, you can also see the cursor location of other editors. SharePoint is perfectly fine letting multiple people collaborate on the same file.

3. Make your editorial changes to the file.

4. When you finish editing, click the web browser's Back button or the Office 365 App Launcher to return to the team site.

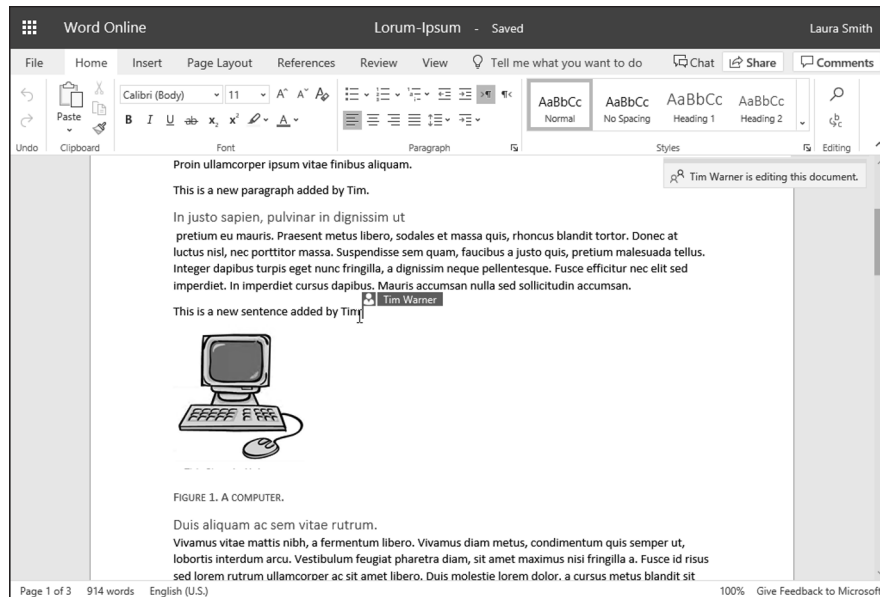Don't worry about saving changes to a file. Office 365 saves your changes automatically.

REMEMBER

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Uploading files to a document library

Follow these steps to upload a file from your computer to a SharePoint Online document library:

1. **In SharePoint, go to the document library where you want to upload the file.**

2. **Click Upload.**

As shown in Figure 3-4, the Add a Document dialog box appears.

If you don't see the Upload button in a document library, speak to your administrator. You might not have permission to upload files.

3. **In the Add a Document dialog box, click the Choose Files button.**

4. **In the Open dialog box, select the file you want to upload and click Open.**

You can upload more than one file by selecting more than one in the Open dialog box.

5. **In the Add a Document dialog box, enter version comments, if necessary.**

SharePoint can be configured to store multiple versions of the same document. Your administrator may require you to enter comments to describe the file you upload.

6. **Click OK.**

While you're at it, have a look to see whether the file you uploaded appears in the document library.

FIGURE 3-4:
Uploading one or more documents to a SharePoint Online document library.
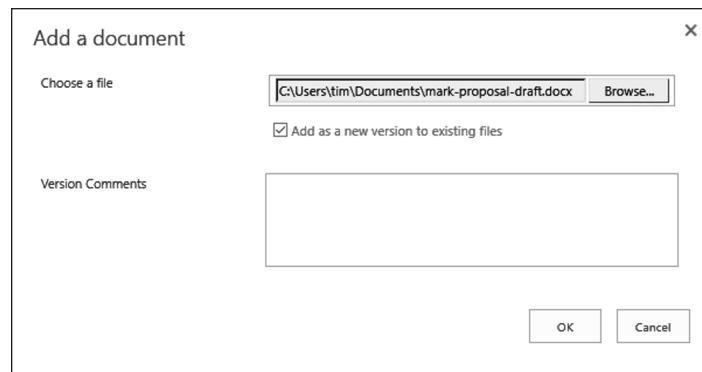
> To upload files, you can drag one or more files from a File Explorer window on your computer and drop them into a document library. How convenient!
>
> **TIP**

Sharing files with coworkers

In SharePoint terminology, sharing means to make coworkers aware of a file they can edit. After you share a file, you can alert coworkers by email that the file has been shared. Sometimes administrators don't allow someone to share a file, but if you can share files, follow these steps to share a file with a coworker:

1. **Locate the file you want to share and click its Open button.**

Look for the three dots next to the file's name to find the Open button. A pop-up window appears (refer to Figure 3-2 earlier in this chapter).

2. **Click Share at the bottom of the pop-up window.**

You see the Share dialog box, as shown in Figure 3-5.

3. **Enter the name of the person with whom you want to share the file.**

SharePoint opens a drop-down list as soon as you begin typing. You can choose a name from the list.

4. **Enter a descriptive message.**

You might explain what the file is and why you want to share it.

5. **Select or deselect the Require Sign-In option.**

Deselect the Require Sign-In option if you want to share the file with people outside your organization. For ordinary business use, select this option to make sure that only team site members can view the file.

6. **Select the Send an Email Invitation option.**
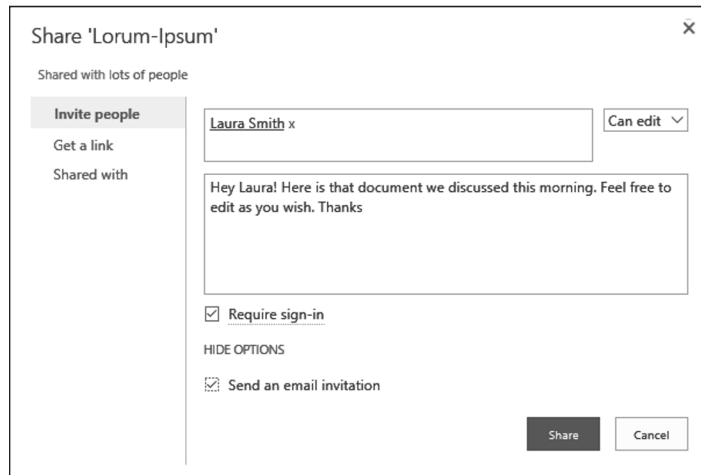
7. **Click the Share button.**

Figure 3-6 shows what a share message looks like to the person who receives it. The recipient can click the Open button to open the file and get to work on it.
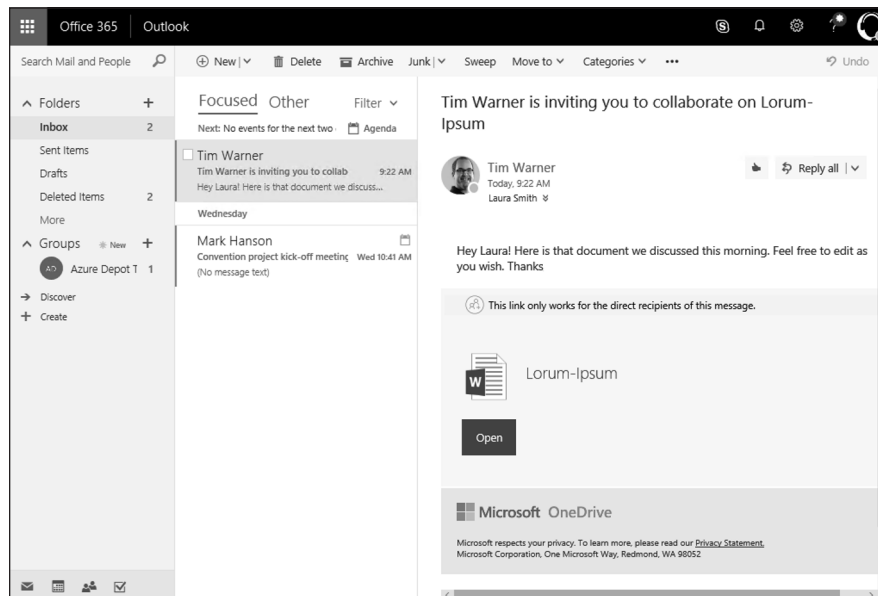
Viewing files offline

At times, your computer can't access the SharePoint Online portal. For example, imagine you're on an airplane and need to update some work files but you're not connected to SharePoint. To solve this problem of offline document access, Office 365 gives you the opportunity to sync files. Syncing enables you to access SharePoint–based files on your local computer and not have to worry about hav–ing an Internet connection. After you reconnect to the Internet (after the airplane lands), OneDrive syncs the files with their online counterparts.

It's important to understand that OneDrive synchronizes two copies of each file, one copy stored in a SharePoint Online document library and the other copy stored locally on your computer.

Follow these steps to sync SharePoint files with files of the same name on OneDrive:

1. In SharePoint, locate the document library you want to synchronize with your computer.

You don't have to synchronize every team-site document library. Synchronize only the files that you want to be able to access offline.

2. From the document library menu, click Sync.

Figure 3-7 shows where the Sync button is located. A pop-up notification tells you that SharePoint is downloading the document library content and synchronizing it with your OneDrive for Business client.

3. From the notification area of the Windows 10 taskbar, click the OneDrive icon.

As shown in Figure 3-7, this icon looks like a cloud. A list of recently synchronized files appears, in this case files from the document library.

4. From the OneDrive window, click Open folder to view your local file copies.

From now on, you can work on these files either locally or directly from SharePoint. OneDrive will keep all changes in sync automatically.
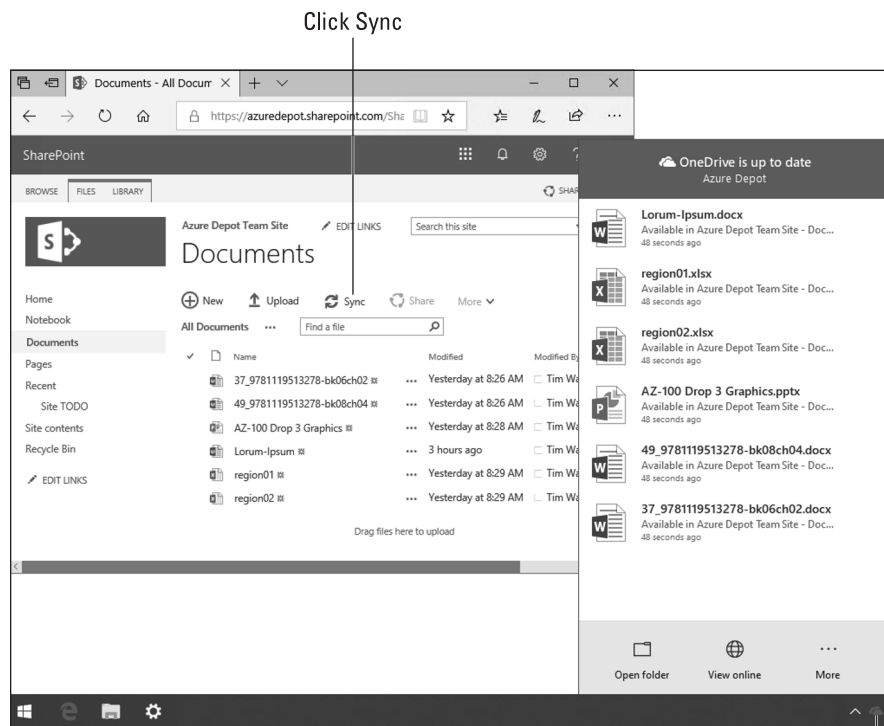
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Click Sync

OneDrive icon

FIGURE 3-7:
Sync allows you to take SharePoint files offline for local access.

ONEDRIVE VERSUS ONEDRIVE FOR BUSINESS

Microsoft offers two versions of OneDrive, one called OneDrive and one called OneDrive for Business:

- OneDrive is installed by default on Windows 10 computers.

- OneDrive for Business works exclusively with Office 365 and SharePoint Online.

Both versions can sync files on a Windows 10 computer with files in an Office 365 document library. Both versions can be installed on a Windows 10 computer simultaneously, which can cause a great deal of confusion.

Many IT administrators disable the Windows 10 OneDrive version on corporate computers so that users exclusively sync files with OneDrive for Business. If you have any questions or doubts about what version of OneDrive is installed on your computer, talk to your IT administrator.

Delving Deeper into Office 365

Office 365 offers the Delve screen to update your profile and communicate better with team members. Depending on the size of your organization, making sure that your Office 365 profile is up to date can be enormously helpful. Coworkers can look at your Office 365 profile to see whether you are the right fit for a project. They can look at your profile to discover how to find you. The Delve screen is a bit like a social media portal in that it offers a convenient way to communicate with your team.

Follow these steps to delve deeper into Office 365:

1. **In SharePoint Online, open the User menu and click My Profile.**

The user menu is located in the upper-right corner of the Office 365 screen. The Delve screen opens, as shown in Figure 3-8.

2. **Use the controls in the Delve screen to update your profile and interact with colleagues.**

You can customize this screen to make yourself more presentable to your coworkers.

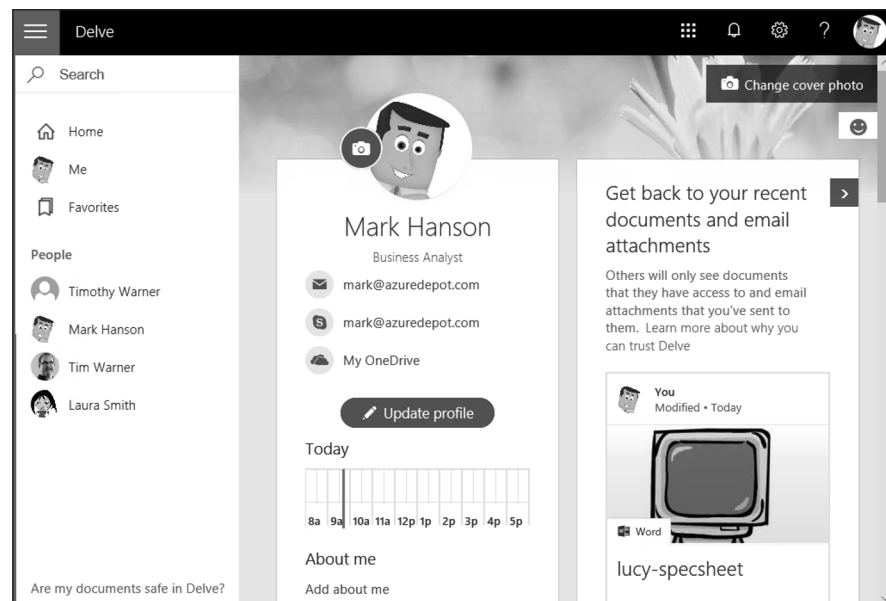**3.** **Click Update Profile when you finish making your changes.**

FIGURE 3-8:
The Delve screen.

Chapter **4**

Working Together in Teams

T he purpose of Teams is to help colleagues work collaboratively by sharing files, having chats, and even participating in voice and video calls.

Whereas SharePoint document libraries and task lists (covered in Chapter 3 of this minibook) represent more or less permanent data repositories, Microsoft Teams is meant to serve the ever-changing modern workplace. In the course of a year, you may find yourself on several different teams. Within the same team, you may find yourself participating in several channels.

This chapter explains what teams and channels are. It shows how to tell cowork-ers when you are busy or available for collaborations, how to engage in a con-versation, and how to chat privately. You also discover how to conduct searches, share and co-edit files, and have in-person meetings, audio meetings, and video meetings.

Introducing Microsoft Teams and Channels

How you run the Teams application is up to you. Run it as a desktop application, a web browser app, on a Macintosh computer, or on a mobile phone. The Teams interface is nearly the same across all formats, which is one reason that businesses like Teams.

In most instances, a systems administrator or manager assigns individuals to teams. If you have the proper privileges, however, you can create a team of your own. Each team can have one or more channels. A *channel* is a workspace devoted to a specific project or a specific group of employees. Typically, administrators invite coworkers to participate in previously created channels. Depending on the privileges assigned by the administrator, individuals can sometimes create and archive channels on their own.

These pages explain how to visit teams and channels and declare a team or channel a "favorite" so that you can revisit it easily.

Opening a team and viewing its channels

Follow these steps to go to a team and visit its channels:

1. **Click Teams on the Navigation bar.**

The Teams tab appears, as shown in Figure 4-1. You see the names of teams to which you've been assigned. Starting on this tab, you can create a team (if you have permission to do so) and join a team by entering the team's redemption code.

2. **Select the name of a team to which you're assigned.**

Each team consists of one or more channels. Channel creators choose the name and purpose of each channel. You can create a channel if you have permission to do so.

3. **Select a channel and browse its content.**

Channels offer the following tabs:

- **Conversations:** Discuss topics online with coworkers.
- **Files:** Upload and edit files for a project.

- **Meeting Notes:** Track meeting notes in a collaborative, multi-editing environment.

- **Add a Tab:** Add new tabs to the channel if you have permission.

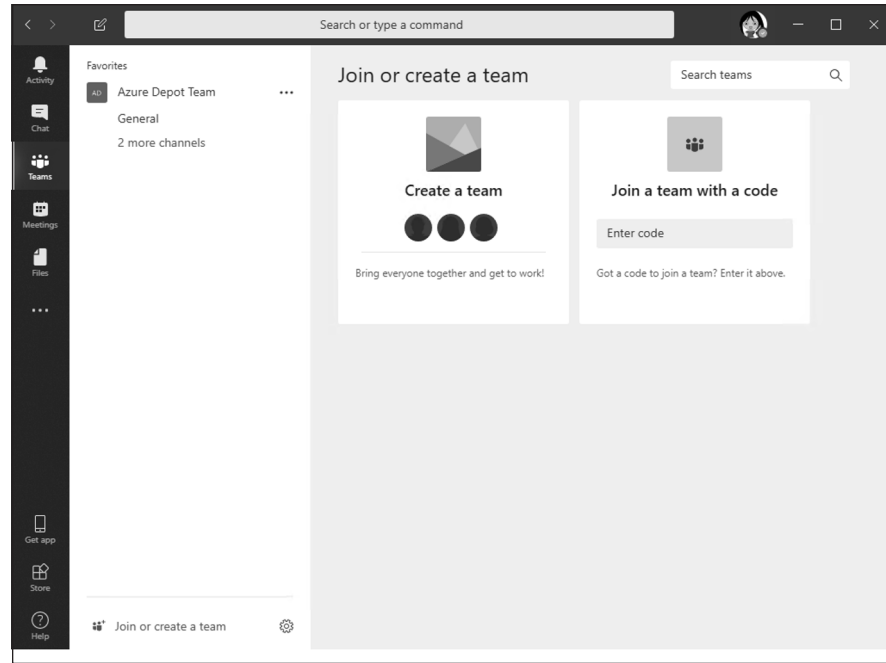4. **Click Teams to go back to the Teams list.**

Putting a team or channel on the Favorites list

Put the name of a team or channel on the Favorites list so you can revisit it in a hurry. Figure 4-2 shows the Favorites list. To see this list, all you have to do is click Teams on the Navigation bar. From the list, you can click the name of a team or channel and go there directly. Follow these steps to bookmark a favorite team or channel you intend to revisit often:

1. **Click the Teams tab on the Navigation bar.**

   You see the lists of teams you belong to.

2. **Select a team.**

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3. **Click the ellipsis link next to a team to add a team to the Favorites list.**

The team you made a favorite appears first in your team list.

4. **Browse to a channel you visit often.**

5. **Click the star icon to the right of the channel's name to add your channel to the Favorites list.**

As shown in Figure 4-2, the start icon is filled in to show that the channel is a favorite. Favorite teams and channels are listed first on the Favorites list to make it easier to find the teams and channels you need.

FIGURE 4-2:
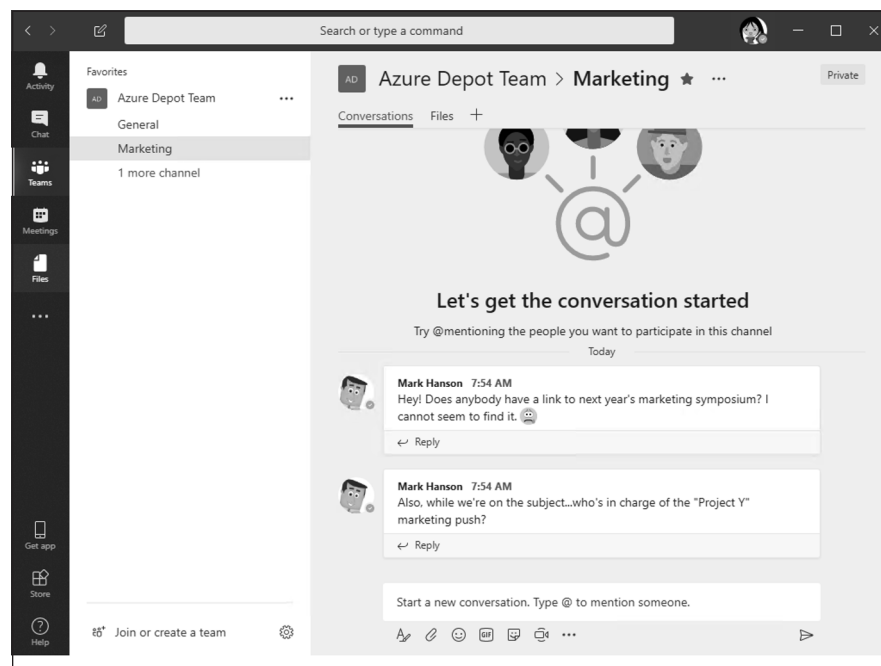Put teams and channels you visit often on the Favorites list.

TEAMS VERSUS YAMMER

Office 365 newcomers often confuse Microsoft Teams with Yammer. At first blush, both applications appear to offer the same functions (conversations, chats, and shared files, among others). However, Yammer is aimed at organization-wide communications, whereas Teams is meant to foster intimate, project-based collaboration.

Setting Your Status

Indicating your status makes it easier for colleagues to check your availability for communication. Get in the habit of setting your status so that team members know whether and how they can reach you. Follow these steps to manage your status in Teams:

1. **Open your user menu.**

   This menu is located in the upper-right corner of the screen. When you open it, you see a drop-down menu similar to the one in Figure 4-3.

2. **Move the pointer over the status option, the first option on the menu, to see a drop-down list of status options.**

   Figure 4-3 shows the status list. Choose Available, Busy, or another option.

TIP Suppose you want to find out whether a colleague is available, busy, or away. Place your cursor in the Search bar at the top of the screen and start typing your colleague's name. The name of your colleague should appear on a drop–down list. Select your colleague's name to go to his or her conversation page.
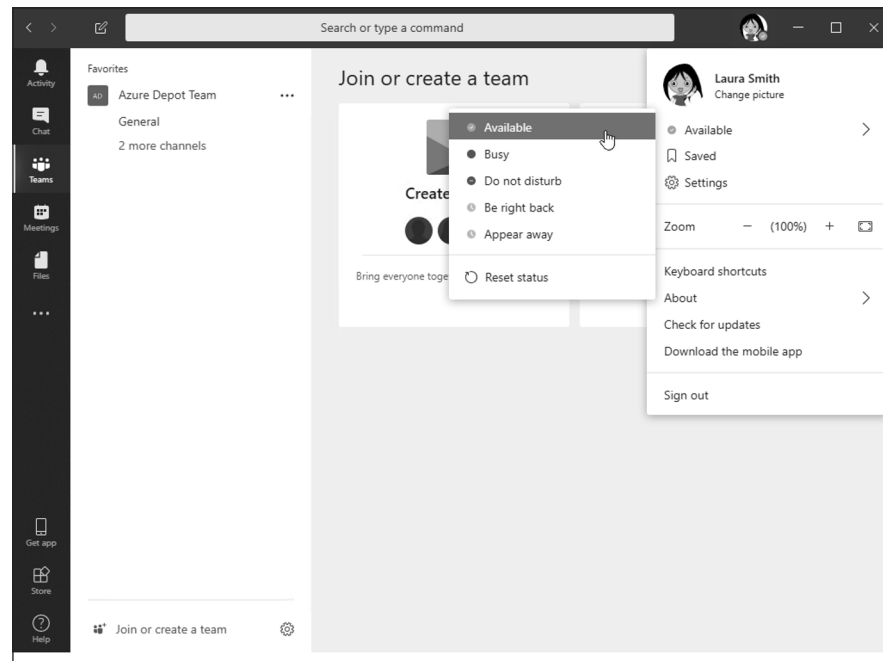

FIGURE 4-3: Declare your status so that coworkers know whether you're available.

All about Conversations

If you know your way around Facebook or LinkedIn, you know what conversations are. You can post to a conversation, respond to others' posts, and like a post.

Conversations are more than a way for coworkers to discuss a topic. A conversation can also be an important record of a topic, its history, and its background. Newcomers to a channel can browse a conversation and thereby get up to speed on a project. Coworkers can examine a conversation to see how a project is progressing, find out what questions were asked in the past, and look into the history of a project to see how it evolved.

These pages explain how to bookmark a conversation, like a conversation, and create and reply to conversations.

Liking and bookmarking conversations

Follow these steps to like and bookmark a conversation in Teams:

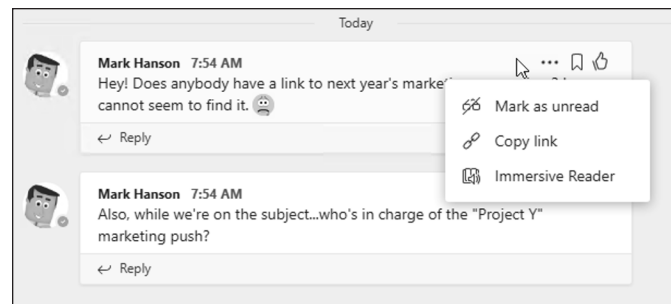1. **Browse to the Conversations page of a channel.**

   Within a channel, the Conversations page appears first.

2. **Hover your mouse over a post.**

   As shown in Figure 4-4, you see three buttons:

   - **More Options:** Opens a drop-down list with options for marking a post as unread, copying a link to the post to the Clipboard, or opening the post in Immersive Reader. Immersive Reader is a separate view in Microsoft Teams that makes reading long conversations easier.

   - **Save This Message:** Saves the post so that you can review it later. To view saved posts, open the user menu and choose Saved.

   - **Like This Message:** Likes the post. Other team members can see posts you liked.

FIGURE 4-4:
You can perform many actions on channel posts, including liking and saving them for future reference.

Starting a conversation

Follow these steps to start a conversation:

1. **Browse to the Conversations page of a channel.**

2. **In the text box, enter a message.**

   Below the text box are tools for entering emoji, hyperlinks, and other goodies, as shown in Figure 4-5. To notify a colleague about the conversation you plan to start, type the at (@) symbol followed by the colleague's name in the text box.

   Besides notifying colleagues, you can link the conversation to other channels. Type the at (@) symbol followed by a channel name.

3. **Press Enter or click the Send button.**

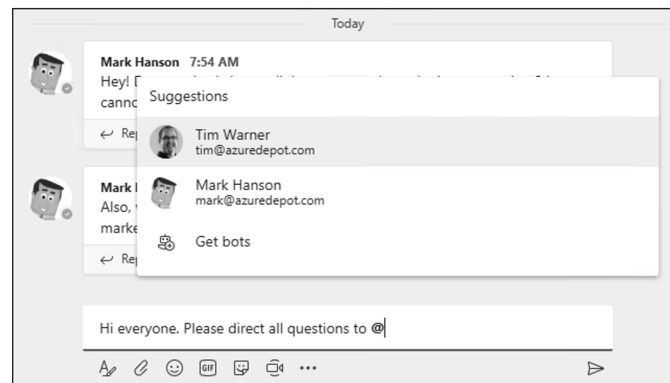   Your conversation is visible to all team members.

FIGURE 4-5: Enter a message in the text box to start a conversation.

Posting to a conversation

Follow these steps to post a reply to a conversation:

1. **Browse to the Conversations page of a channel.**

2. **In the message to which you want to reply, click the Reply button.**

3. **Type your message and press Enter or click the Send button.**

Chatting Privately with a Colleague

Sometimes questions, comments, and concerns are not appropriate for all members of a team. Sometimes what goes on in a conversation is better left to two people or a handful of select coworkers. Use the Chat feature to conduct conversations in private.

WARNING Never enter a comment in Teams that you wouldn't want your boss or IT manager to see. Even a chat message that is supposed to be meant for a select few isn't really private. For security and regulatory compliance reasons, Teams administrators can audit and view all content within a Teams workspace.

Follow these steps to initiate and participate in a private chat with one or two people of your choosing:

1. **Click the New Chat button on the Navigation bar along the top of the screen.**

   To find the New Chat button, look for the pen-and-paper icon to the left of the Search box.

   As you start and participate in chats, a list of recent users appears in the Chat page. You can select a name if you want to pick up on a previous conversation.

2. **Type your message and press Enter.**

   You see a Chat window similar to Figure 4-6.

   REMEMBER A notification pops up in the lower-right corner of the screen when someone wants to chat with you (refer to Figure 4-6). Click this notification to open the Chat window and start chatting.

3. **In the Type a New Message box, enter a message and press Enter or click the Send button.**

TIP Click the Add People button to include more people in a chat. This button is located in the upper-right corner of the screen.
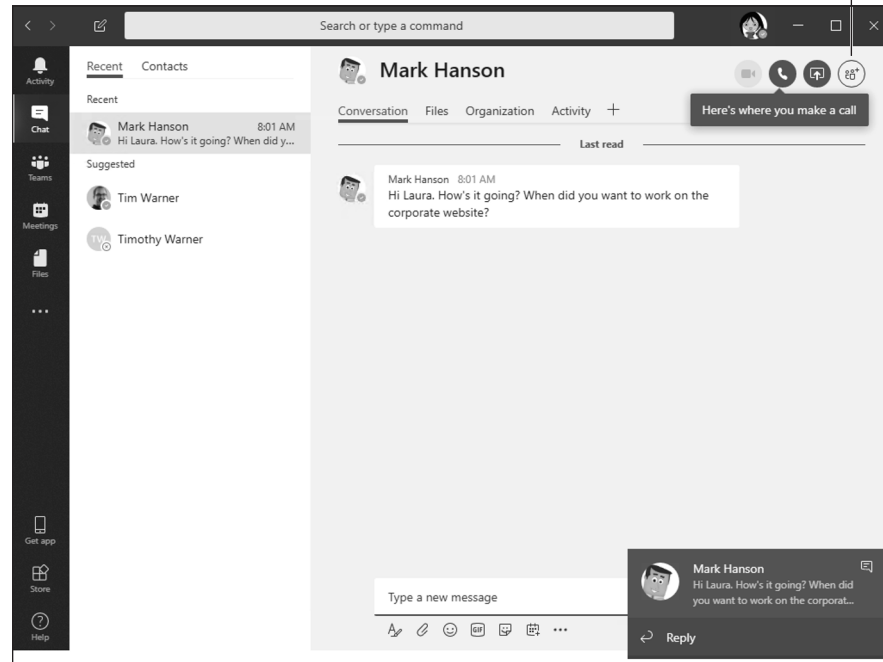
Add People button

FIGURE 4-6:
Conducting
a chat.

Filtering and Searching

Sometimes it pays to cut down on "noise" and drill into content that is relevant to your professional interests. Starting on the Activity tab, you can filter team activity to see only what interests you. You can also conduct powerful searches. The Activity tab is a one-stop shop for pinpointing what is pertinent to you — channels, conversations, chats, files, and so on.

Filtering your activity feed

The activity feed presents actions you can take in the channels to which you participate. Many people start their workday by seeing what's up on the activity feed, where you find mentions, replies, and other notifications.

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Follow these steps to filter your activity feed to focus on the information you need:

1. **Click Activity in the Navigation bar.**

2. **On the Activity selector, choose Feed (if it isn't already selected).**

   The Activity selector is located at the top of the Activity pane, as shown in Figure 4-7. The selector offers two choices:

   - **Feed:** Shows all your mentions and post replies.

   - **My Activity:** Shows posts you initiated.

3. **Click the Filter button and select an option on the drop-down menu.**

   You can filter your activity feed using different criteria, as shown in Figure 4-7.
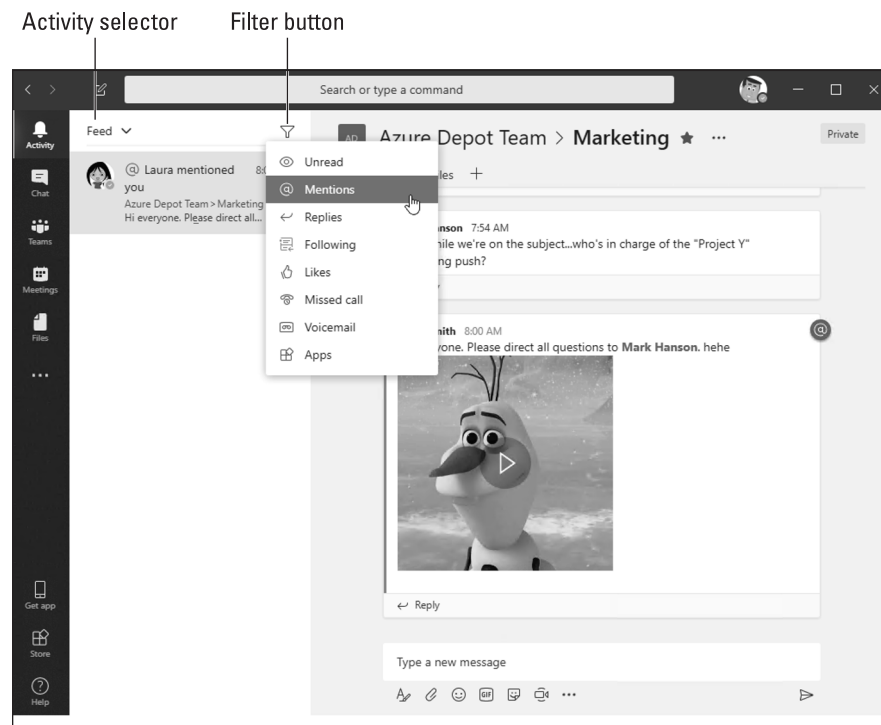
Activity selector   Filter button

Searching for content

How do you find the file your manager mentioned in passing last week? Or recall the name of the movie a colleague suggested during a private chat three months ago? Here's how to search Teams for a specific post, message, or file:

1. **From any page in Teams, place the cursor in the Search or Type a Command box.**

   This text box is located across the top of the screen.

2. **Type a search term or, alternatively, enter a forward slash (/) command followed by a search term.**

   An example of a search term might be "Sales department reports" or simply "reports." Use forward-slash commands to combine a search for a person, channel, group, or file with a concrete action. When you enter the forward slash, a drop-down list of commands appears. Choose a command and enter a search term. For example, choose /chat and send Mark a chat message.

3. **Press Enter.**

   Search results appear on three tabs: Messages, People, and Files.

4. **Select a tab to steer your search in the right direction.**

   I hope you find what you're searching for.

Choosing Notification Settings

Teams can notify you when a coworker mentions your name, posts a particular file type, or does a handful of other things worth knowing about. Follow these steps to tell Teams what you want to be notified about:

1. **Open the user menu and select Settings.**

   The user menu is located in the upper-right corner of the screen, as shown in Chapter 3 of this minibook. The Settings window appears.

2. **Select Notifications.**

   Notifications options appear, as shown in Figure 4-8.

3. **Choose notification preferences.**

   Close the Settings window when you finish. Teams saves your settings as soon as you make them.
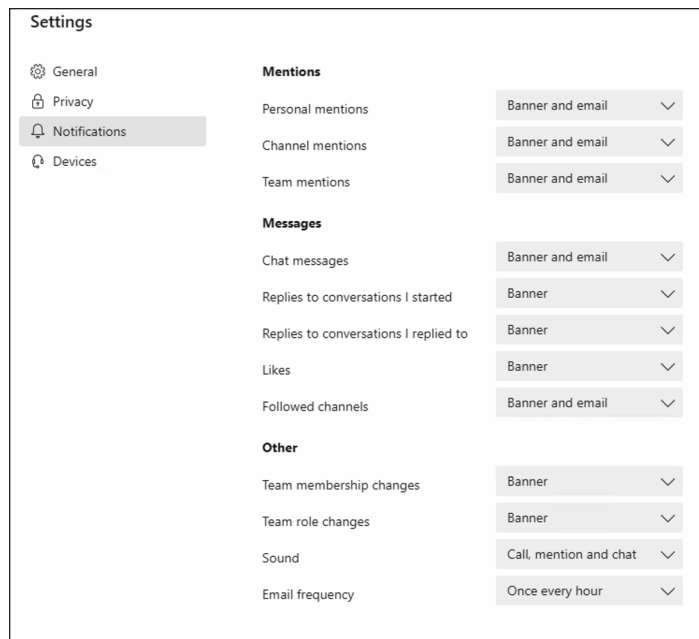
Settings		
⚙ General	**Mentions**	
🔒 Privacy	Personal mentions	Banner and email ∨
🔔 Notifications	Channel mentions	Banner and email ∨
🎧 Devices	Team mentions	Banner and email ∨
	Messages	
	Chat messages	Banner and email ∨
	Replies to conversations I started	Banner ∨
	Replies to conversations I replied to	Banner ∨
	Likes	Banner ∨
	Followed channels	Banner and email ∨
	Other	
	Team membership changes	Banner ∨
	Team role changes	Banner ∨
	Sound	Call, mention and chat ∨
	Email frequency	Once every hour ∨

FIGURE 4-8:
Choosing how
you want to be
notified.

Sharing and Editing Files with Coworkers

Conversations and chats are well and good, but they usually involve dealing with files: sharing them and working on them collaboratively. Herewith are instruc-tions for uploading files to a channel and working together on a file with cowork-ers. One of the cool things about Teams is that you can edit Office 365 documents inside the Teams interface.

Uploading a file to a channel

Follow these steps to upload a file from your computer to a channel:

1. **Visit the Files tab of a Teams channel.**

The names of files that were uploaded to the channel appear in a list, as shown in Figure 4-9.

You can click column headers on the file list to sort the list by file type, name, or modification date.

TIP

2. **Select a file repository.**

A file repository is simply a collection of files that are accessible to you. The Files menu offers a Recent list, a Microsoft Teams entry, and possibly more file location destinations, as configured by the network administrator.

3. **Click Microsoft Teams.**

4. **Click Upload.**

   The Open dialog box appears.

5. **Select the file you want to upload and click Open.**

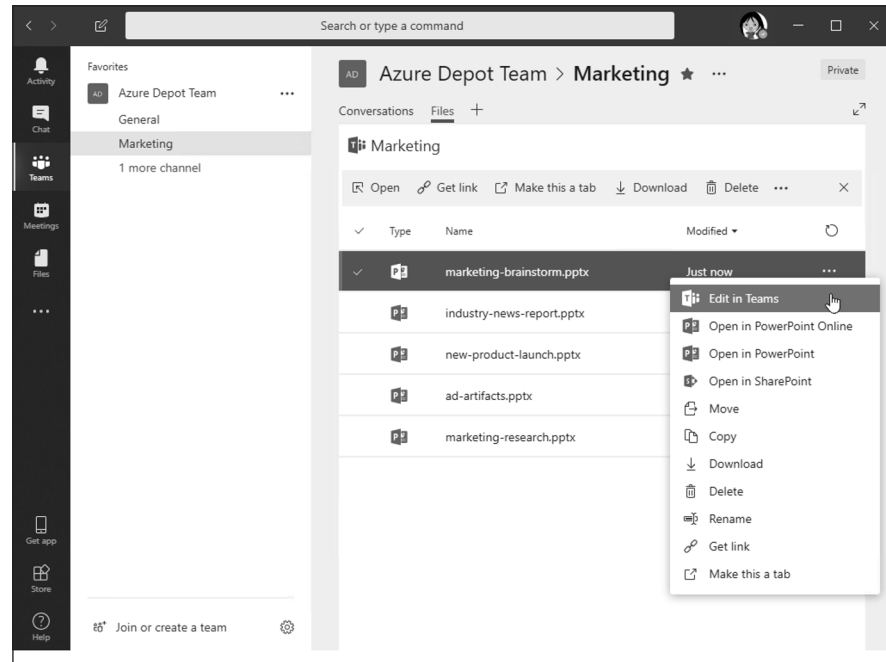   You can upload more than one file at a time by selecting more than one file.

Move the mouse over a filename to see options for handling the file (refer to Figure 4-9). You can open, move, copy, and download files, among other tasks.

REMEMBER

Collaborating on a file

Follow these steps to open an Office 365 file and work on it collaboratively:

1. **In a document library, click the More button next to the name of the file you want to open.**

   The button doesn't say "More"; instead, it appears with an ellipsis (three dots.) A pop-up menu appears.

2. **Select Edit in Teams.**

3. **Edit or co-edit the file.**

   Coworkers can edit a file at the same time. A name badge and icon shows where others are working on a file.

4. **Click the Close button when you finish editing.**

   As well as clicking the Close button, you can click a tab on the Teams sidebar.

REMEMBER

If you look for a Save button in an Office Web application, you will look in vain. Edits are saved automatically as you make them in Web apps.

Holding Meetings with Coworkers

Teams offers two ways to hold a meeting. You can conduct an audio or video meeting with a colleague, or do it the old-fashioned way by scheduling a person-to-person meeting on a specific day at a specific time. Keep reading. (Book 5, Chapter 4 describes how to schedule in-person meetings with Outlook.)

Conducting a video or audio meeting

Follow these steps to conduct a video or audio meeting:

1. **Locate the person you want to meet.**

   Perform a global search or find the person's user icon in your Chat or conversation history.

2. **Click the person's name to open that person's user card.**

   Figure 4-10 shows a user card. The card lists a person's name and shows his or her image.

3. **In the user card, click the Video Call or Audio Call button.**

   The person to whom you made the call gets a notification. At that point, the person can decline or accept the call.
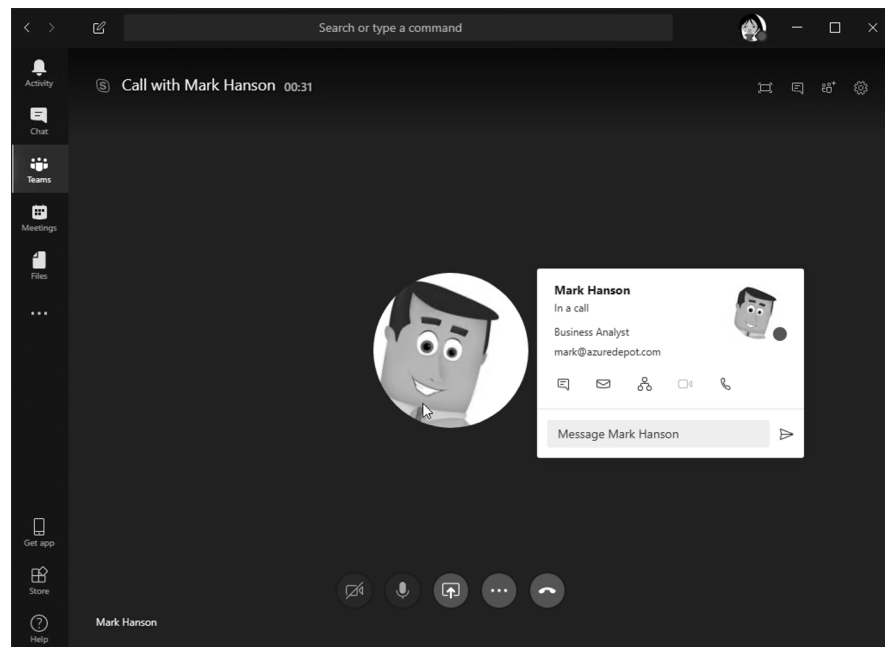
FIGURE 4-10: Initiate a call by clicking a button in the user card.

Use the buttons at the bottom of the Call window to conduct or terminate the conversation:

» **Webcam:** Turns the webcam on or off

» **Microphone:** Mutes or unmutes microphone

» **Sharing:** Shares your screen with participants

» **More Options:** Opens a menu for putting the call on hold, transferring, and invoking the keypad

» **Hang Up:** Hangs up the call

Scheduling a meeting and inviting attendees

Follow these steps to schedule an in-person meeting with a coworker:

1. **Click the Meetings tab on the Navigation bar.**

2. **Click Schedule a Meeting.**

   The New Meeting window appears, as shown in Figure 4-11.

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3. **In the New Meeting window, describe the meeting and invite others to attend.**

   Give the meeting a name, provide a location, declare when it is to occur, and invite coworkers.

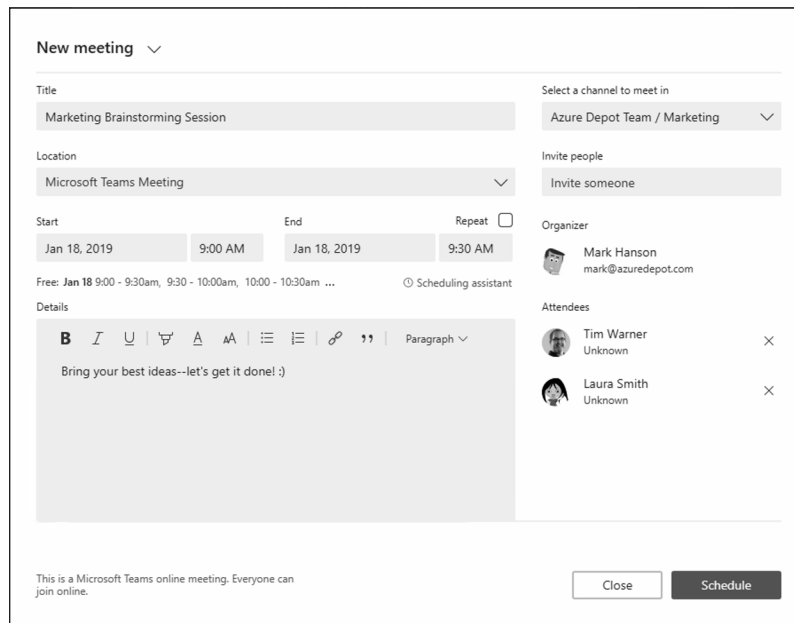4. **Click the Schedule button.**

   The meeting is entered on your Calendar.

Coworkers receive a meeting request in the form of a message. The message includes an Accept, Tentative, and Decline button for invitees to click to RSVP. A meeting that is accepted is entered immediately on the Calendar.