

IT Applications Training & Support



MS Office 365 & OneDrive

File Sharing and Collaboration with MS Teams



SAN BERNARDINO CITY
UNIFIED SCHOOL DISTRICT
Making Hope Happen

Revised – 8/22/2019

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Support for MS Office 365

You may contact the following office for assistance with MS Office 365:

Training – SBCUSD Training Specialists - techtraining@sbcusd.com - (909) 386-2550

Revisions

1/25/2019 – corrections, minor interface mods

4/11/19 – Added share editing and version history

INTRODUCTION

WHAT IS OFFICE 365?

MS Office 365 is the cloud based version of the popular Microsoft Office. You only need an Internet connected device and a browser in order to use it. It can be accessed with a PC, Mac, desktop, laptop, tablet, or phone – anytime, anywhere. (Yes, it works on Chromebooks.)

WHO CAN USE OFFICE 365?

Every SBCUSD employee. All you need is a District email address. Once you login to Office 365, you can download the full Microsoft Office Desktop Suite for free. You'll have the full power and functionality of Excel, Word, PowerPoint, and OneDrive.

ONEDRIVE

OneDrive lets you easily and securely store and share files, videos, documents, and more – anywhere, on any device. Collaborate with Word, Excel, PowerPoint, and OneNote from your desktop or mobile device. OneDrive offers native desktop, browser and mobile experiences on your devices. Access and make changes that sync automatically in the cloud or sync local copies of files for offline viewing and editing on your PC or Mac. Confidently share your files so other people can access them seamlessly and securely.

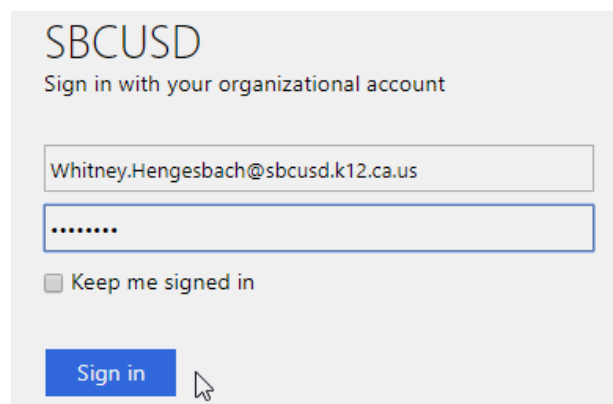
YOUR LOGON AT ONEDRIVE

User Name = firstname.lastname@sbcusd.k12.ca.us

Password = SamePasswordAsYourSBCUSDPassword

LOGGING INTO ONEDRIVE

1. Run a **Web Browser** (Chrome, Firefox, Etc.).
2. In the **Web Address bar**, enter the following web address: **http://onedrive.com**
3. **Click on Sign in**
4. In the Sign in window enter your email account (firstname.lastname@sbcusd.k12.ca.us)
5. **Click on Next**
6. **Enter your district password** (same as your logon here at work)
7. **Click on Sign in**



SBCUSD
Sign in with your organizational account

Whitney.Hengesbach@sbcusd.k12.ca.us

.....

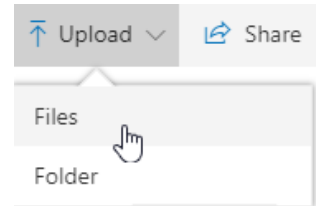
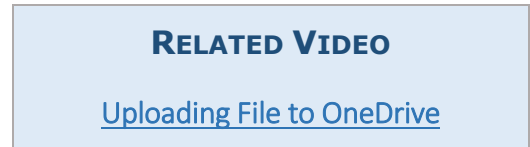
Keep me signed in

Sign in

UPLOADING AND DOWNLOADING FILES

UPLOAD FILES

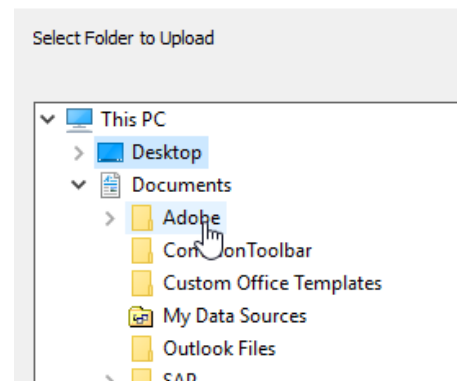
1. From within the **OneDrive window**, click on the **Upload button** above and choose **Files**
2. In the **Open window**, locate the folder maintaining the files you wish to upload
3. **Click** on a **file** or hold **Control** and **click** on **multiple files**
4. **Click** on the **Open button**



UPLOADING FOLDERS

1. From within the **OneDrive window**, click on the **Upload button** above and choose **Folder**
2. In the **Browse For Folder window**, locate the folder maintaining the files you wish to upload
3. **Click** on the **folder** you wish to upload
4. **Click** on the **Upload button**

Browse For Folder

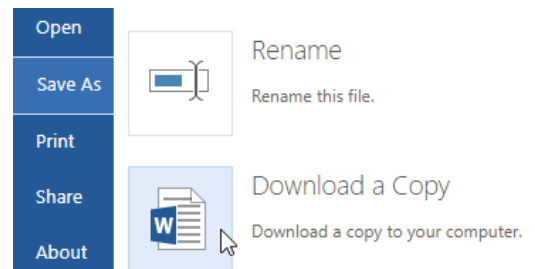


DOWNLOADING FILES

1. From within the **OneDrive window**, **double-click** on **folders** to navigate to the file wish to download
2. **Click** on the **file icon** you wish to download to select the file
3. **Click** on the **Download button** above

OR

1. From within the file's application, with the file open, **click** on the **file menu** and choose **Save as**
2. **Click** on **Download a Copy**
3. **Click** on the **Download button** in the Ready window



NOTE – Downloaded files show up in your Downloads folder in Windows Explorer.

FILE/FOLDER MANAGEMENT

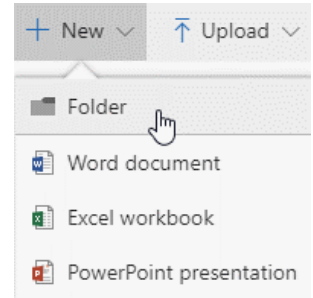
OneDrive is the file storage, file management, and sharing application for all your Office files. With OneDrive you can organize, rename, delete, download, upload, and create file sharing/access rights for other file collaborators.

CREATING FOLDERS

1. From within the **OneDrive window**, **double-click** on **folders** to navigate to the folder location where you wish to create a folder
2. **Click** on the **New button** in upper left and choose **Folder**
3. In the **Folder window**, **enter a name** for the folder and **click on Create**
You may create folders within folders in order to maintain the desired folder structure.

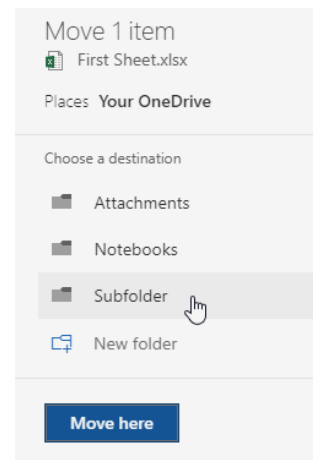
RELATED VIDEO

[OneDrive for Business Overview](#)



MOVING FILES/FOLDERS

1. From within the **OneDrive window**, **double-click** on the **folder** to locate the folder or file you wish to move
2. **Click** on the **file icon** to select the file
3. **Click** on the **Move to** button above
4. In the **Move Panel** at the right, **click** on the **Your OneDrive** button
5. **Click** on **folders** to navigate to the folder location you wish to move the folder of file to
6. Click on the **folder** and **click** on the **Move here** button

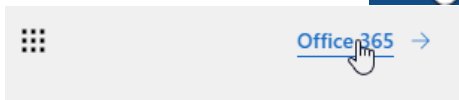


IMPORTANT: In many cases, when managing files and using other OneDrive features, you may need to use the browser's refresh button in order to confirm these actions.

CREATING OFFICE 365 FILES

ACCESSING THE OFFICE 365 HOME PAGE

1. From within any Office 365 application or location, **click on the Application Launcher button** in the upper left and **click on Office 365**



APPS

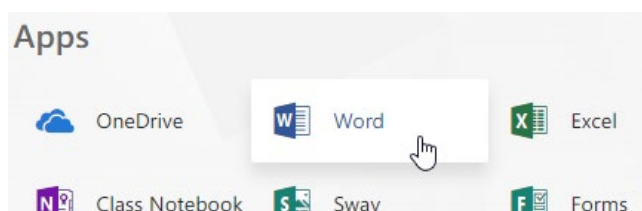
Access the many applications available in the entire Office 365 Suite. OneDrive, Word, Excel, PowerPoint and the Forms application are available and supported in the District.

RELATED VIDEO

[Create and Save Files in OneDrive](#)

CREATING AND EDITING WORD FILES

1. **Click on the Application Launcher button** and **click on Office 365**
2. Under Apps, **click on the Word icon**
3. **Click on the New Blank document template** or a desired Doc template to begin a new Doc



CREATING AND EDITING EXCEL FILES

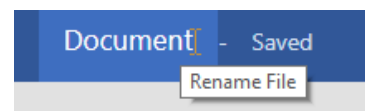
4. **Click on the Application Launcher button** and **click on Office 365**
5. Under Apps, **click on the Excel icon**
6. **Click on the New Blank workbook template** or a desired Workbook template to begin a new Workbook

CREATING AND EDITING POWERPOINT FILES

1. **Click on the Application Launcher button** and **click on Office 365**
2. Under Apps, **click on the PowerPoint icon**
3. **Click on the Blank presentation template** or a desired Presentation template to begin a new Presentation

SAVING FILES IN OFFICE 365

1. In either Word, Excel or PowerPoint, **click in the Filename field** at the top of the window
2. **Enter the desired file name** and press **Enter**



The file will be saved in the Files root of your OneDrive space. You can easily use OneDrive's move feature to move the file into another folder if you wish.

NOTE – While you enter a name for the file in the Filename field you will not have to periodically save the file with any steps. Office 365 file activity is constantly saved automatically as you work. Changing the file name at any time simply changes the filename. It does not create a copy with a different name. And, It's shared status is not changed.

WORKING WITH OFFICE 365 FILES

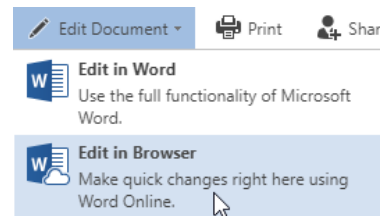
OPENING FILES IN 365 – WORD/EXCEL/POWERPOINT ONLINE

1. From within any Office 365 application or location, **click on the Application Launcher button** in the upper left and **click on OneDrive**



2. **Double-click on folders** to navigate to the folder location where the file resides and **click on the file name**
The file will open in its associated online (cloud based) application.

3. If you see the file but you don't see the application's toolbar, **click on the Edit Document button** in the upper right and choose **Edit in Browser**



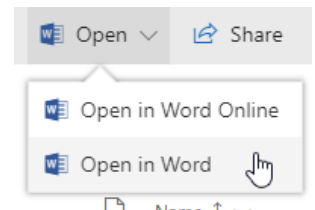
OPENING FILES IN DESKTOP OFFICE – WORD/EXCEL/POWERPOINT

1. From within any Office 365 application or location, **click on the Application Launcher button** in the upper left and **click on OneDrive**



2. **Double-click on folders** to navigate to the folder location where the file resides and **click on the file icon** to select the file

3. **Click on the Open button** above and choose **Open in Word, Excel, or PowerPoint**

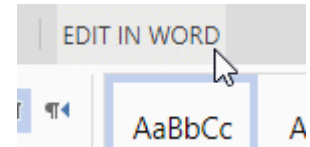


SWITCHING BETWEEN OFFICE 365 AND LOCAL DESKTOP OFFICE

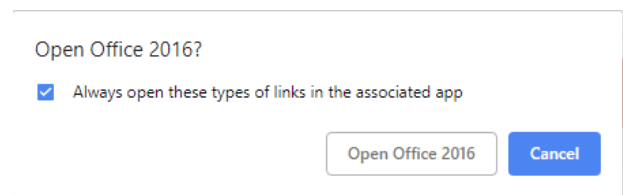
Because Office 365 is cloud and browser based, you'll notice that the Office 365 applications don't harbor all of the features that a local installation of the desktop MS Office. However, Office 365 account holders can download a free copy of the desktop MS Office Suite to their desktop or laptop at any time. As a result, you will often edit office documents in 365 and in your local desktop version of MS Office as well.

SWITCH BETWEEN WORKING WITH OFFICE 365 AND DESKTOP OFFICE

1. If and when working with a file online in Office 365 (cloud) and needing to switch to the Desktop Office, **click on the Edit in Word/Excel/PowerPoint button**



2. **Click on the Office 2016 button**



3. If you are prompted about virus security, **click on Yes**
Your local desktop version of the application will run and open the file.

4. Make the necessary changes in the local Desktop Office application and **click on Save**

5. Close your local desktop version of the file

The file will update with the changes in Office 365 (cloud).

NOTE: Remember there is no auto saving occurring when you are working locally. You'll need to manage saves when working locally.

FILE SHARING - ONEDRIVE

SHARE YOUR FILE(S) WITH OTHERS

1. From within the **OneDrive window**, **double-click** on folders to navigate to the file you wish to share

2. **Click** on the **file icon** to select the file

3. **Click** on the **Share button** above

OR

4. From within the file you wish to share, **click** on the **Share button** in the upper right

5. In the **Send Link window**, **click** on **Anyone with this link can edit** button

6. **Click** on **Specific people**

7. Place a **checkmark** for **Allow editing** and **click** on **Apply**

8. Enter the **email address** of an SBCUSD team member and press **enter**

9. Repeat entering more SBCUSD user email addresses for each member you wish to share the file with

10. Add a message if you wish

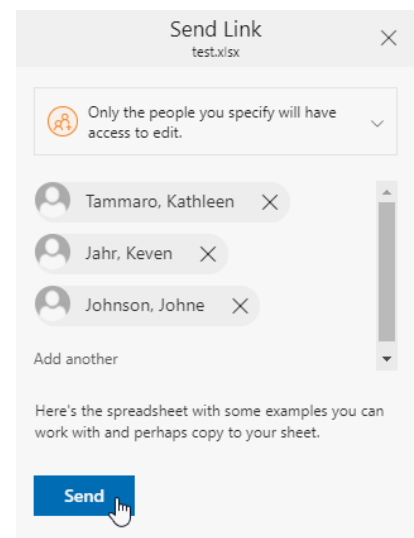
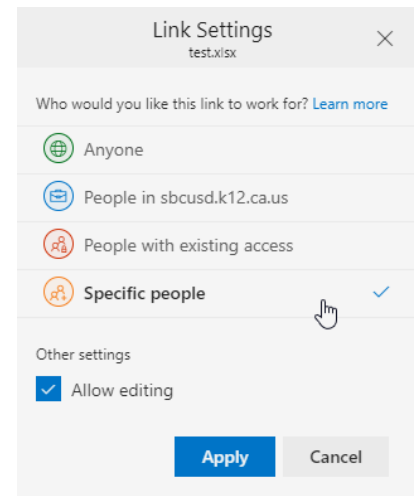
11. **Click** on **Send**

The shared user(s) will receive an email containing a link to the file in question.

NOTE – If you wish to distribute a link to the shared users rather than use an email, click on Copy Link and use any link distribution technique you wish (social media).

RELATED VIDEO

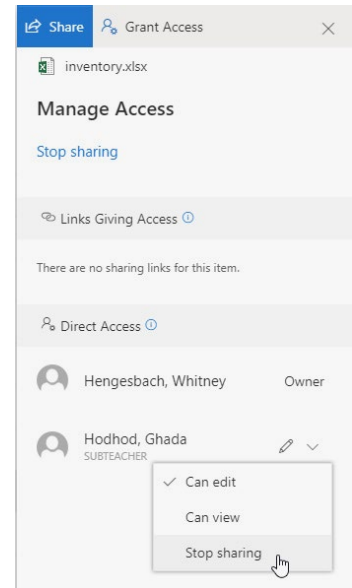
[Share Files and Folders](#)



EDIT SHARE SETTINGS

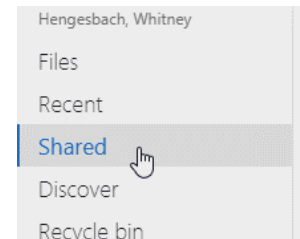
EDIT SHARE SETTINGS

1. **Click on the file icon** to select the file you wish to edit it's share settings
2. **Click on the Share button** above
3. **Click on the Triple Dot More Options icon** and choose **Manage Access**
4. Use the **Grant Access button** above to add further sharees
5. **Click on the Down arrow** next to a sharee and select **Stop Sharing** to remove them as a share



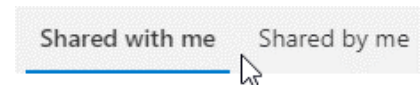
LIST FILES YOU'VE SHARED WITH OTHERS

1. From within the **OneDrive window**, **click on Shared** in the left panel
2. **Click on the Shared by me tab** above



LIST FILES OTHERS HAVE SHARED WITH YOU

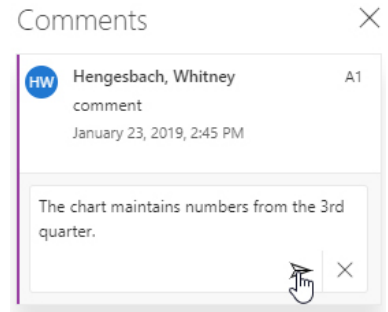
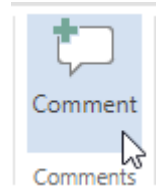
1. From within the **OneDrive window**, **click on Shared** in the left panel
2. **Click on the Shared with me tab** above



FILE COMMENTING

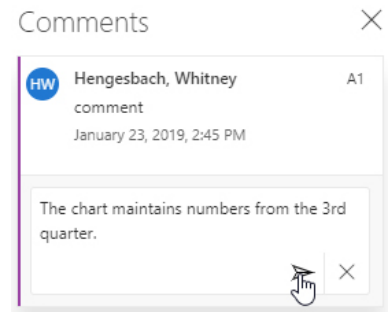
ADDING COMMENTS IN OFFICE 365 - WORD, EXCEL AND OR POWERPOINT

1. From within an open **Office file**, place your **cursor** at a location, highlight a selection, or select an object where you wish to place a comment
2. **Click** on the **Insert menu** and choose **Comment**
3. In the **Comments panel** at the right, **enter a comment** for other file collaborators to see in the file
4. **Click** on the **Post button**



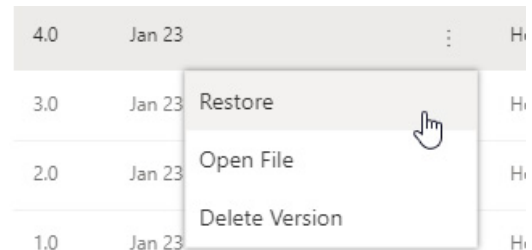
REPLYING TO COMMENTS

1. **Click** on the **Balloon Comment Icon** in Word, Excel and or PowerPoint files
OR
2. In Excel, **click** in a **cell** with a comment icon indicator in it
3. **Click** on the resulting **Balloon Comment icon**
4. **Click** in the reply field in the **Comments panel** at right, type your reply
5. **Click** on the **Post button**



FILE VERSION HISTORY

1. **Click** on the **file icon** to select the file you wish to edit it's share settings
2. **Click** on the **Version history button** above
3. In the Version History panel, **click** on the **triple dot icon** and select **Restore**

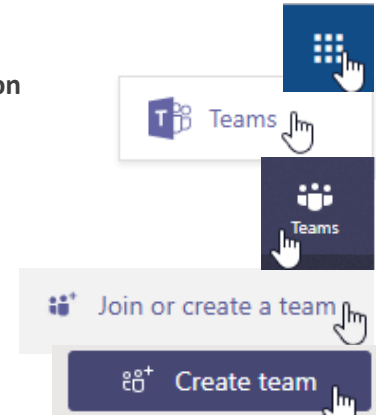


GROUP COLLABORATION WITH MS TEAMS

Microsoft Teams is a platform that combines workplace conversations, files, and notes. Unlike files in your individual OneDrive account, files in a Team Site belong to a team instead of an individual. The service integrates with Office 365 office productivity suite, including Microsoft Office and features extensions that can integrate with non-Microsoft products (Flow, Forms, Smartsheet and more).

CREATING A PRIVATE TEAM SITE

1. From within any Office 365 application or location, **click** on the **Application Launcher** button in the upper left and **click** on **Teams**
2. **Click** on the **Teams** tab at the left
3. In the lower left, **click** the **Join or create a team** button
4. **Click** on the **Create Team** button
5. **Click** on the **Staff Members** button
6. **Enter a name** for this site
7. Enter a **Description**
8. In the **Privacy** drop-down, select **Private – only team owners can add members**
9. **Click** on **Next**
10. Enter **District emails** for team members you wish to invite as members to the site and **click** on **Add**
11. **Click** on **Close**

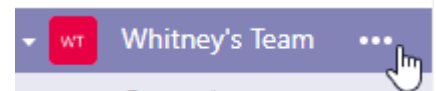


All invited owners and members will receive an email inviting them to the site.

NOTE: Best practice for a Team is to have at least two owners in the group. This way the Team is not owned solely by one person, who could potentially leave the District.

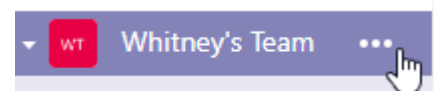
ADDING MEMBERS

1. To add new members at any time, **click** on the **More Options triple dot** icon per the Team you wish to add members
2. Choose **Add member**
3. Enter **District emails** for team members you wish to invite as members to the site and **click** on **Add**
4. **Click** on **Close**



MEMBER PERMISSION SETTINGS

1. In the Team listing at the left, **click** on the **More Options triple dot** icon per the Team you wish to manager member permissions
2. Choose **Manage team**
3. **Click** on the **Settings Tab**
4. **Click** on **Member permissions**
5. Select which permissions you wish the Site's team members to carry



NOTE – You may wish to remove the first 5 listed permissions if you wish to remain in control of the scope of Team's collaborative tools and overall management approach.

JOINING A TEAM

YOUR LOGON AT TEAMS.MICROSOFT.COM

User Name = firstname.lastname@sbcusd.k12.ca.us

Password = SamePasswordAsYourSBCUSDPassWord

RESPONDING TO AN INVITE

1. **Click** on the **Open Microsoft Teams** button inside the Microsoft Teams email you've received

2. **Click** on the **use web app instead** button

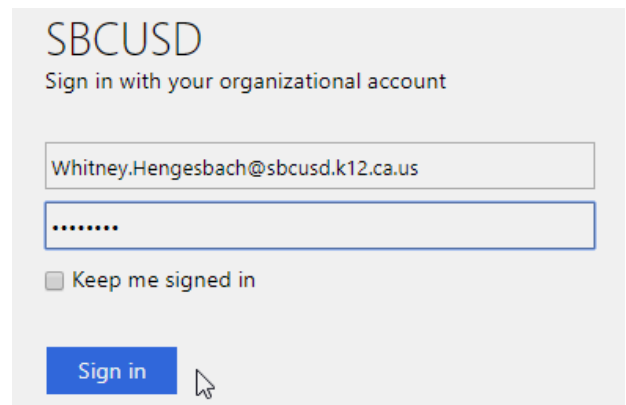
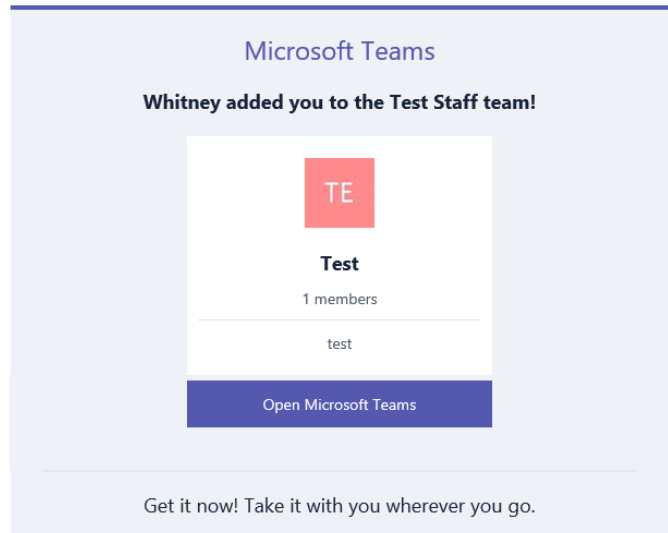
3. In the **Sign in window** enter your **email account**
(firstname.lastname@sbcusd.k12.ca.us)

4. **Click** on **Next**

5. **Enter** your **district password**
(same as your logon here at work)

6. **Click** on **Sign in**

Any and all Teams you own or are a member of are listed in the Team Sites panel at the left.

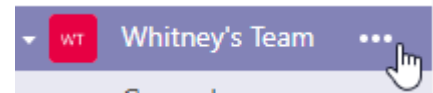


ADDING CHANNELS/PROJECTS TO THE TEAM

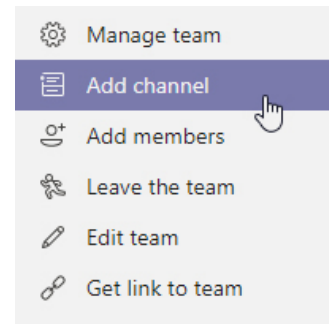
An MS Team maintains a number of lite collaboration tools for team members to help them manage projects together. An MS Team can harbor numerous channels (projects). Each individual project channel maintains its own individual instance of those collaboration tools and their data/content.

ADDING A CHANNEL

1. In the Team listing at the left, **click** on the **More Options triple dot** icon per the Team you wish to add an individual project channel to



2. Choose **Add channel**



3. **Enter a Channel name** for the project that team members can collaborate over within this MS Team

4. Place a check mark on **Automatically favorite this channel for the whole team**

5. **Click on Add**

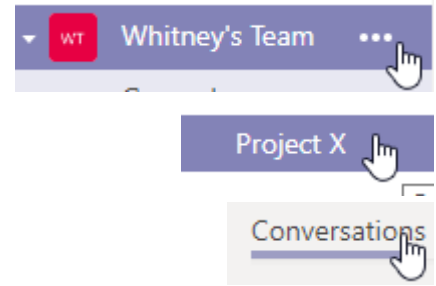
A project channel and it's collaboration tools are added to the team site.

NOTE – *Once you have at least one project channel within the MS Team, you'll use the collaboration tools in the General channel for "general" group activity. Use the collaboration tools within each individual project channel for collaboration involving that particular channel/project at hand.*

CONVERSATIONS

START A CONVERSATION

1. Click on the **Team Site** you wish start a conversation in
2. Click on the **Channel/Project** you wish start a conversation in
3. Click on the **Conversations Tab**



4. At the bottom, click in the **Start a new conversation field** and enter a comment, sentence(s), etcetera, and press **enter**

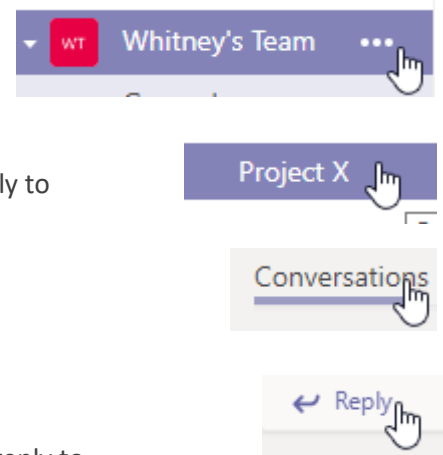
All team members are able to see and or reply to this entry/conversation upon logging into the Team Site and viewing the channel, and its conversation tab in which this conversation was started.

NOTE – You can begin a comment with the @ symbol and follow it with a team member username and that member will see a comment indicator in the channel you've tagged them in, helping them center in on comments directed at them.

NOTE – The Chat tab at the far left allows you to chat privately with anyone in the organization.

REPLYING TO CONVERSATIONS

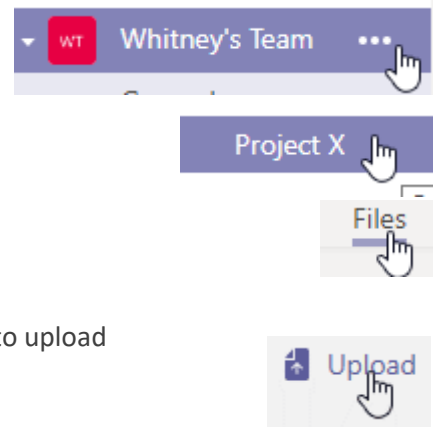
1. Click on the **Team Site** you wish view conversations and or reply to conversations in
2. Click on the **Channel/Project** you wish view conversations and or reply to conversations in
3. Click on the **Conversations tab**
4. Click on **Reply** for any comment in the any conversation you wish to reply to
5. Enter a **reply** and press enter



FILES

UPLOAD FILES

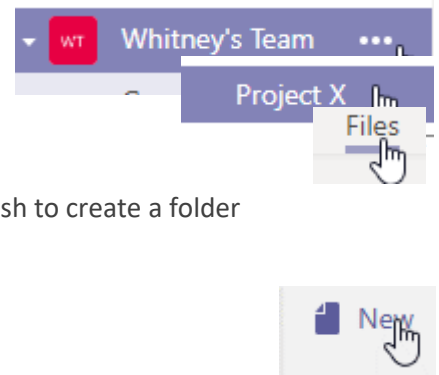
1. **Click** on the **Team** and **Channel** you wish to upload files to
2. **Click** on the **Files** tab
3. **Click** on the **Upload** button
4. In the **Open window**, locate the folder maintaining the files you wish to upload
5. **Click** on a **file** or hold control and **click** on multiple **files**
6. **Click** on the **Open** button



NOTE – Files uploaded to the Files tab are editable by any and all team owners and team members.

CREATING FOLDERS

1. **Click** on the **Team** and **Channel** you wish to create a folder for files
2. **Click** on the **Files** tab
3. **Click** on **folder names** to navigate to the folder location where you wish to create a folder
4. **Click** on the **New** button and choose **Folder**
5. In the **Create a new Folder window**, enter a **name** for the folder and **click** on **Create**

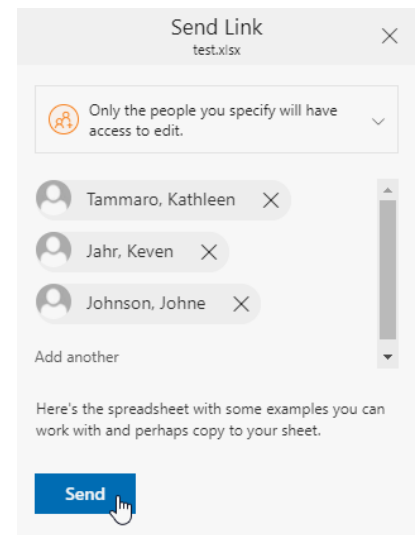


You may create folders within folders in order to maintain the desired folder structure.

SHARING INDIVIDUAL FILES WITH NON-TEAM MEMBERS

Team channel files are formally located in the SharePoint arena for that team. You can create individual file shares for non-team members there.

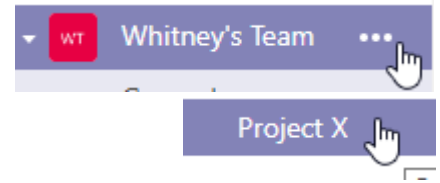
1. From within any Office 365 application or location, **click** on the **Application Launcher** button in the upper left and **click** on **SharePoint**
2. **Click** on the **SharePoint “Team Site”** you wish to share files to non-team members
3. Browse the site’s Document Library (you’ll see it mirrors the team’s channels and their files feature)
4. Select the file you wish to produce a share for a person who is not and should not be a team member
5. **Click** on the **Triple dot icon** and **Click** on **Share**
6. In the **Send Link window**, **click** on **Anyone with this link can edit** button
7. **Click** on **Specific people**
8. Place a **checkmark** for **Allow editing** and **click** on **Apply**
9. Enter the **email address** of an SBCUSD team member and press **enter**
10. Repeat entering more SBCUSD user email addresses for each member you wish to share the file with
11. Add a message if you wish
12. **Click** on **Send**



NOTE – The sharee will receive an email with a link to the file or folder shared. Shared folders allow for the sharee to upload files to the folder.

NOTES – ONENOTE

1. Click on the **Team** and **Channel** you wish to create note in

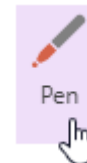
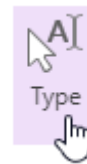


2. Click on the **Notes tab**

This is the cloud based version of OneNote.

INSERTING NOTES/CONTENT

1. To insert text, **click** on the **Draw** menu
2. **Click** on the **Type** button and **click anywhere** on the page you wish to enter text
OR
3. To insert annotations or free hand drawings, **click** on the **Draw** menu
4. **Click** on the **Pen** button and **click and drag** to draw anywhere on the page
OR
5. To insert images, **click** on the **Insert** menu and **click** on the **Picture** button
6. **Click** on **Choose File**, browse to the image file, select it and **click** on **Open**
7. **Click** on **Insert**



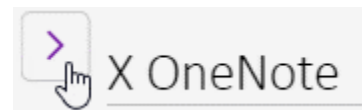
ADDING NEW PAGES

1. To insert a new page in the cloud version of OneNote, **click** on the **Insert** menu
2. **Click** on the **New Page** button
3. In the upper left corner of the new page **enter a page name** and press **enter**



NAVIGATING WITHIN PAGES

1. If the Notes tab maintains multiple pages, **click** on the **purple arrow** button in the upper left of any page
2. A page menu appears
3. **Click** on the **page** you wish to view and or edit

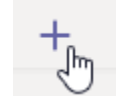


ADDING SMARTSHEETS TO A PROJECT CHANNEL

Team owners who are also Smartsheet project managers can embed Smartsheets into Team Channels allowing team members direct access to Smartsheet project sheets right from within the Team site.

ADDING A SMARTSHEET TAB TO A CHANNEL

1. **Click** on the **Plus** icon to the right of the channel tabs
2. In the Add a tab window, enter Smartsheet into the search field
3. **Click** on the **Smartsheet** icon
4. **Click** on **Install**
5. **Click** on **Log in**
6. Enter your Smartsheet account credentials and **click** on **Log In**
7. **Click** on **Allow**
8. **Click** on **Sheets**
9. **Select** the **Sheet** you wish to embed in this new Smartsheet tab
10. Select **Editable by Anyone**
11. Place a check mark on **Publish this sheet as Editable to Anyone**
12. Under Access Control, select **Only available to users in the owner's account**
13. **Click** on **Save**



Smartsheet
About ×

▼
TestProject

Should this sheet be editable?

Editable by Anyone

Read Only

Display Options

View sheet in full screen

This sheet needs to be published in order to use it in a tab. Publishing this sheet allows anyone with a link access. [Learn more.](#)

Publish this sheet as Editable by Anyone

Access Control

Available to anyone with the link

Only available to users in the owner's account

Post to the channel about this tab

Back
Save

You now have a new tab in this channel which harbors the Smartsheet per this channel/project.

14. **Right-click** on this new **Smartsheet tab** and choose **rename**
15. Name the tab Smartsheet and **click** on **Save**

NOTE – Team members who have been shared to the Smartsheet will have editable access to the sheet right here in the Team site.