



# SharePoint File Sharing Site User Guide

Spring 2020, Version 1

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## Benefits

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Using a SharePoint site to store and collaborate on documents with your colleagues has several benefits compared to a traditional file share or network drive:

- You can create and edit Office documents such as Word, Excel, and PowerPoint directly in a web browser without installing any Office applications.
- You can access documents from anywhere with any device that has an internet connection.
- You can recover deleted files from the recycle bin or deleted file content from the version history.
- You can manage user permissions for the site.

## Work with Files

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A SharePoint document library provides a secure place to store files where you and your colleagues can work on them together and access them from anywhere with any device.

## Upload Files or Folders

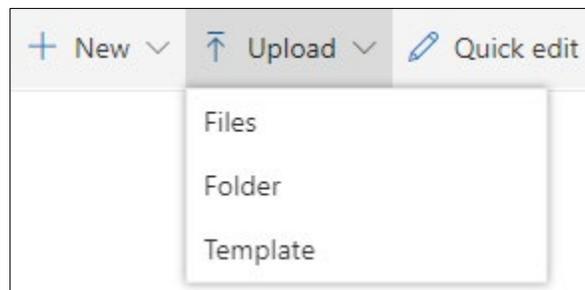
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You can upload files and folders from your computer to a SharePoint document library.

**NOTE:** Internet Explorer 11 does not support uploading folders.

### To upload a file:

1. Go to the SharePoint site and open the document library where you want to upload a file.
2. On the menu bar, click **Upload**, and then click **Files** (see Figure 1).



**Figure 1 – Upload Menu**

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

**NOTE:** You can upload multiple files by holding down the **Ctrl** or **Shift** key as you select each file.

### To upload a folder:

1. Go to the SharePoint site and open the document library where you want to upload a folder.
2. On the menu bar, click **Upload**, and then click **Folder** (see Figure 1).
3. In the **Select Folder to Upload** dialog box, select the folder you want to upload, and then click **Upload**.
4. In the confirmation dialog box, click **Upload**.

### To upload files or folders using drag and drop:

1. Go to the SharePoint site and open the document library where you want to upload files or folders.
2. Select the files or folders on your computer, and then drag and drop them into the document library.

**NOTE:** If you upload a file that has the same name as an existing file in a SharePoint document library, an error message will appear indicating that the file was not uploaded (see Figure 2). You can click **Replace** to replace the existing file. This will not overwrite the existing file; it will create another version.

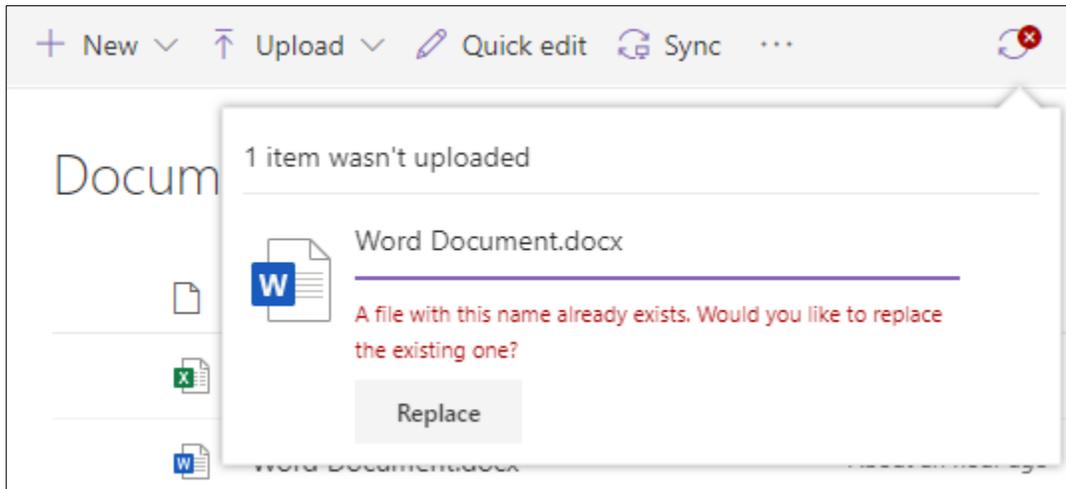


Figure 2 – Error Message Indicating That the File Was Not Uploaded

## Create Folders

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You can use folders to organize the files in a SharePoint document library.

### To create a folder:

1. Go to the SharePoint site and open the document library where you want to create a new folder.
2. On the menu bar, click **New**, and then click **Folder** (see Figure 3).

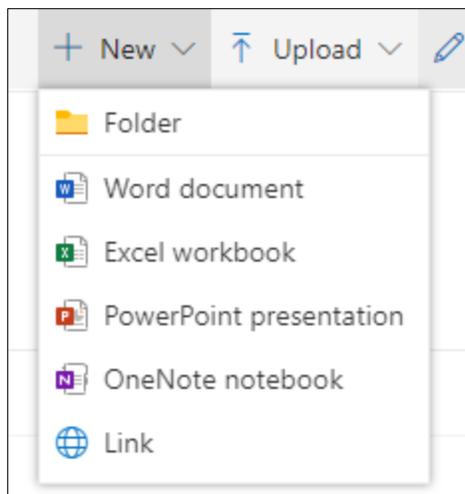
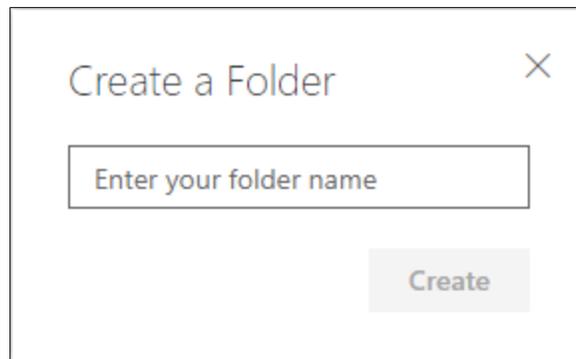


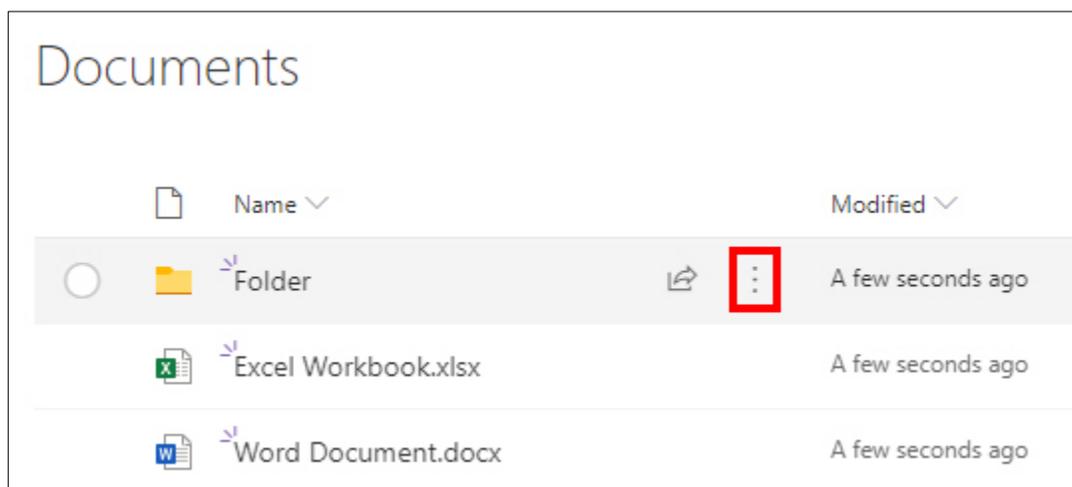
Figure 3 – New Menu

3. In the **Create a Folder** dialog box, enter a folder name, and then click **Create** (see Figure 4).



**Figure 4 – Create a Folder Dialog Box**

**NOTE:** To rename a folder in a SharePoint document library, hover over the folder you want to rename, click the **Show actions** icon  to the right of the folder name, and then click **Rename** on the menu (see Figure 5). In the **Rename** dialog box, enter the new name, and then click **Save**.



**Figure 5 – Document Library Showing the Show Actions Icon**

## Open and Edit Files

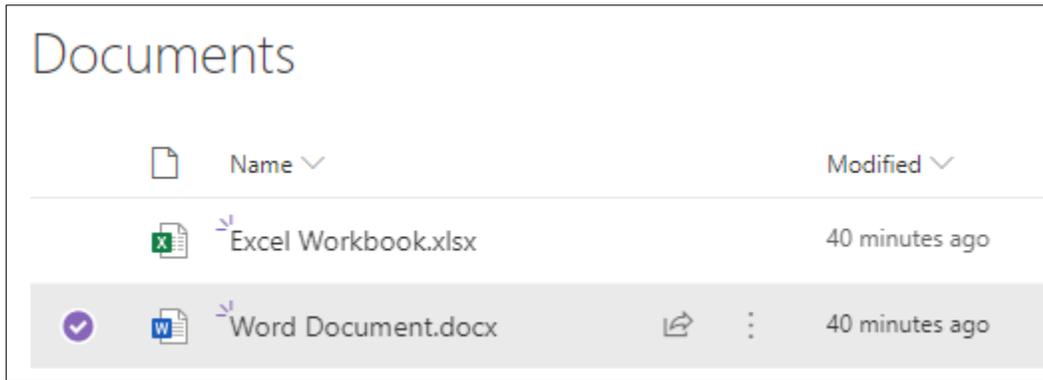
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Files stored in a SharePoint document library that are associated with Office 365 apps like Word, Excel, and PowerPoint can be opened and edited directly in the web browser or in a desktop app.

**NOTE:** Other files types can be previewed in the browser by clicking the file name in the SharePoint document library. You can edit these other file types by downloading them to your computer, editing them, and then uploading them back to the document library.

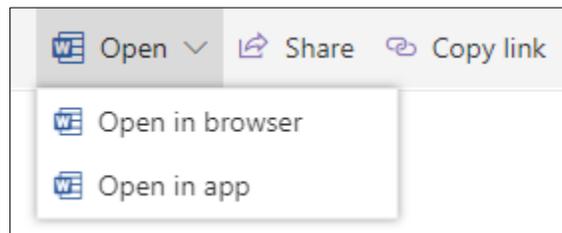
### To open and edit an Office file:

1. Go to the SharePoint site and open the document library that contains the Office file you want to edit.
2. Select the Office file by hovering over it and then clicking the check box to the left of the name (see Figure 6).



**Figure 6 – Document Library Showing Selected File**

3. On the menu bar, click **Open**, and then do one of the following (see Figure 7).
  - To edit the file in an Office web app, click **Open in browser**. The file opens in a new tab.
  - To edit the file in an Office desktop app, click **Open in app**. If prompted, confirm to open the app.



**Figure 7 – Open Menu**

4. Edit the file in the selected Office web app or desktop app.

**NOTE:** When you edit a file in an Office web app, changes are automatically saved. If you edit a file in an Office desktop app and you want to automatically save changes, check the left side of the title bar and make sure **AutoSave** is set to **On** (see Figure 8). Every time the file is saved in the app, it is saved back to the document library.



**Figure 8 – Title Bar Showing AutoSave Button**

5. When you are done, make sure the file is saved, and then close the browser tab or desktop app.

## Co-author Documents

The co-authoring feature in SharePoint enables multiple people to work together on a document at the same time. You can co-author Word, Excel, and PowerPoint files that are stored in a SharePoint document library. During a co-authoring session, you can see who else is working on the file and which part of the file they are editing. To see who is co-authoring with you, look in the upper-right corner of the window for initials or photos. To see their edits, look for colored flags or selections tagged with initials, or hover over a flag or selection to reveal the person’s name. Each author is assigned a different color so you can easily identify them (see Figure 9).

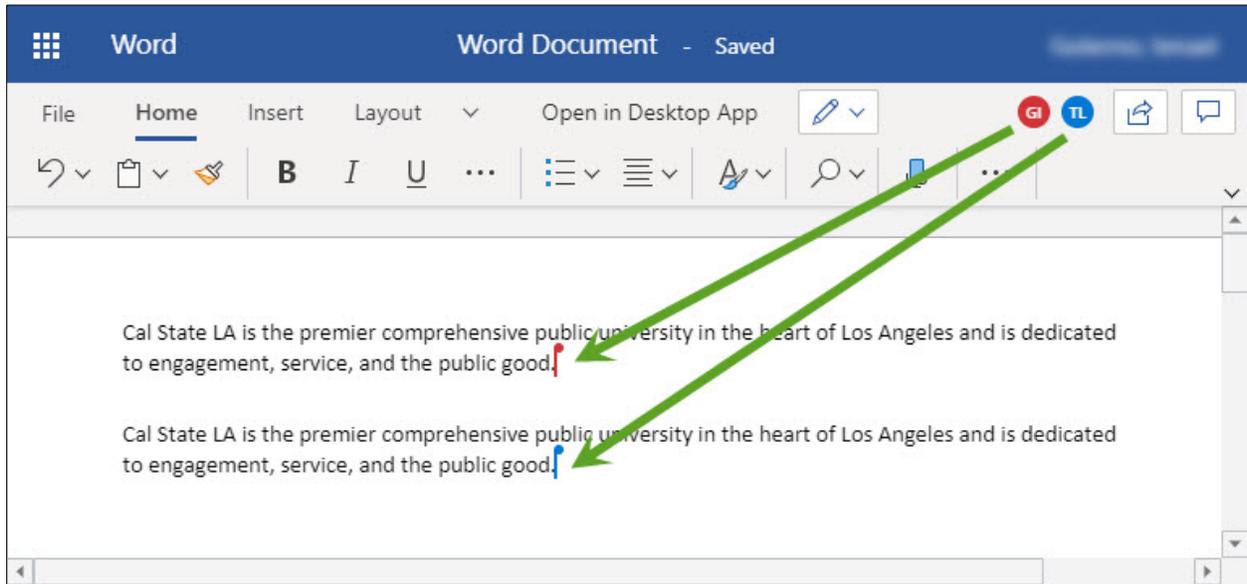


Figure 9 – Word Document Showing Visual Indicators for Co-authors

## Download Files or Folders

You can download files and folders from a SharePoint document library to your computer.

**NOTE:** When you are collaborating with colleagues, instead of downloading a file for editing, you should open and edit the file directly from the SharePoint document library.

### To download a file or folder:

1. Go to the SharePoint site and open the document library that contains the file or folder you want to download.
2. Select one or more items by hovering over each item and then clicking the check box to the left of the name (see Figure 6).

**NOTE:** To select all files in a folder, hover over the header row and click the check box to the left of the row.

3. On the menu bar, click **Download** (see Figure 10).



Figure 10 – Menu Bar Showing the Download Button

## Move or Copy Files or Folders

You can move or copy files or folders in a SharePoint document library to another location within the current library, to your OneDrive, or to another SharePoint site.

**NOTE:** When you use **Move to**, the history of the document is copied to the new destination. When you use **Copy to**, only the latest version is copied. When a file is moving, it continues to appear in the source directory until it is fully moved to the destination, and then it is deleted. After the move is complete, the file remains in the source site's recycle bin and is subject to the normal recycle schedule unless a user recovers it from the recycle bin.

### To move or copy a file or folder:

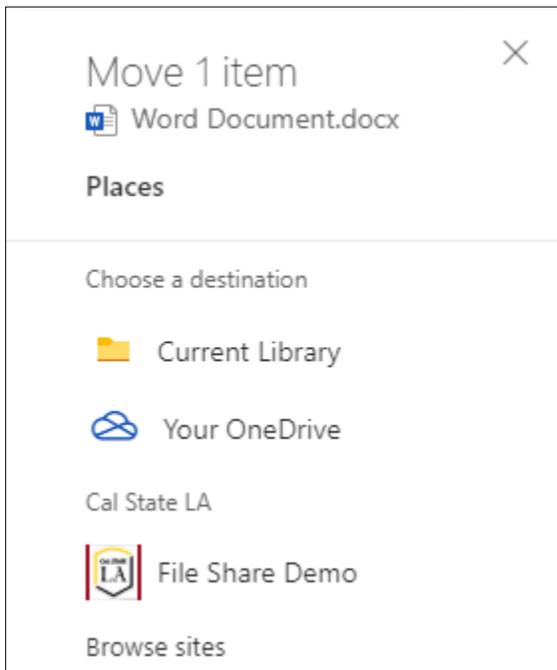
1. Go to the SharePoint site and open the document library that contains the file or folder you want to move or copy.
2. Select one or more items by hovering over each item and then clicking the check box to the left of the name (see Figure 6).
3. On the menu bar, click **Move to** or **Copy to** (see Figure 11).

**NOTE:** If the **Move to** or **Copy to** buttons are not visible on the menu bar, click the **More** icon , and then click **Move to** or **Copy to** on the menu.

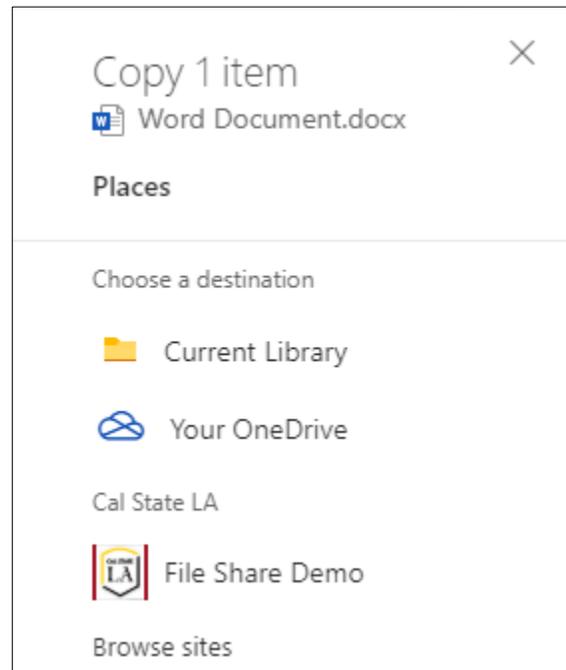


**Figure 11 – Menu Bar Showing the Move to and Copy to Buttons**

4. In the **Move** or **Copy** pane, select a destination such as the current library, your OneDrive, or another SharePoint site (see Figure 12 and Figure 13).



**Figure 12 – Move Pane Showing Destinations**



**Figure 13 – Copy Pane Showing Destinations**

5. In the **Move** or **Copy** pane, select a folder, and then click **Move here** or **Copy here** (see Figure 14 and Figure 15).

**NOTE:** If you want to move or copy files to a new folder, click **New folder**, enter a folder name, click the check mark icon to create the new folder, select the new folder, and then click **Move here** or **Copy here**.

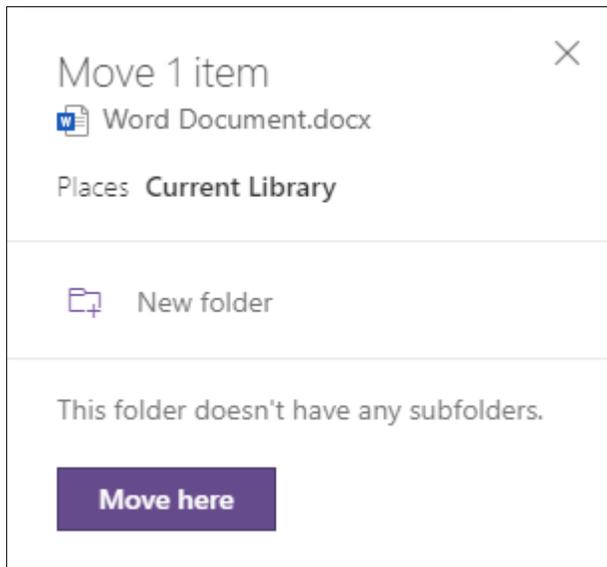


Figure 14 – Move Pane Showing Move Here Button

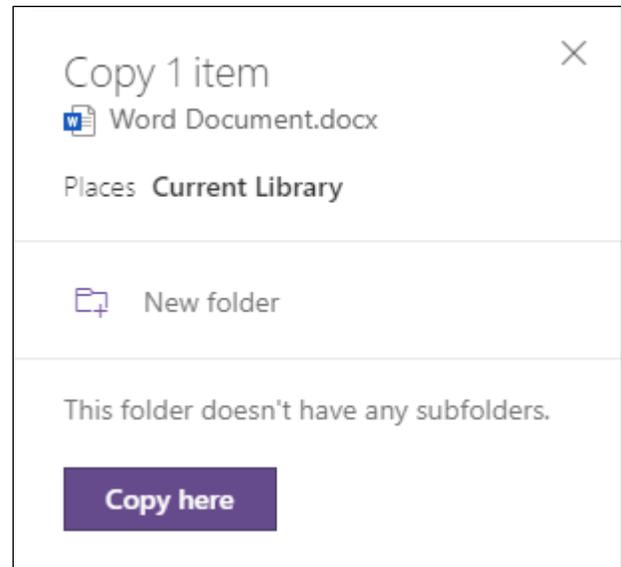


Figure 15 – Copy Pane Showing Copy Here Button

## View Version History

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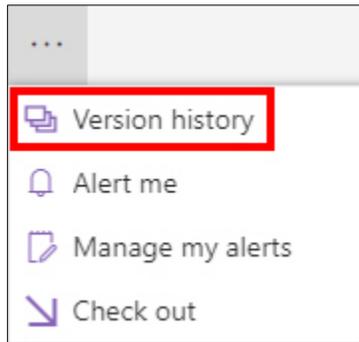
By default, versioning is enabled in a SharePoint document library so each time you edit a file, a version is created. You can use versioning to:

- **Track history of a version:** When versioning is enabled, you can see when a file was changed and who changed it. You can also see when file properties were changed.
- **Restore a previous version:** If you made a mistake in the current version, if the current version is corrupt, or if you simply like a previous version better, you can replace the current version with a previous one. The restored version becomes the new current version.
- **View a previous version:** You can view a previous version without overwriting the current version. If you are viewing version history within a Microsoft Office document, such as a Word or Excel file, you can compare the two versions to determine what the differences are.

### To view the version history of a file:

1. Go to the SharePoint site and open the document library that contains the file for which you want to view the version history.
2. Select the file by hovering over it and then clicking the check box to the left of the name (see Figure 6).
3. On the menu bar, click the **More** icon , and then click **Version history** (see Figure 16).

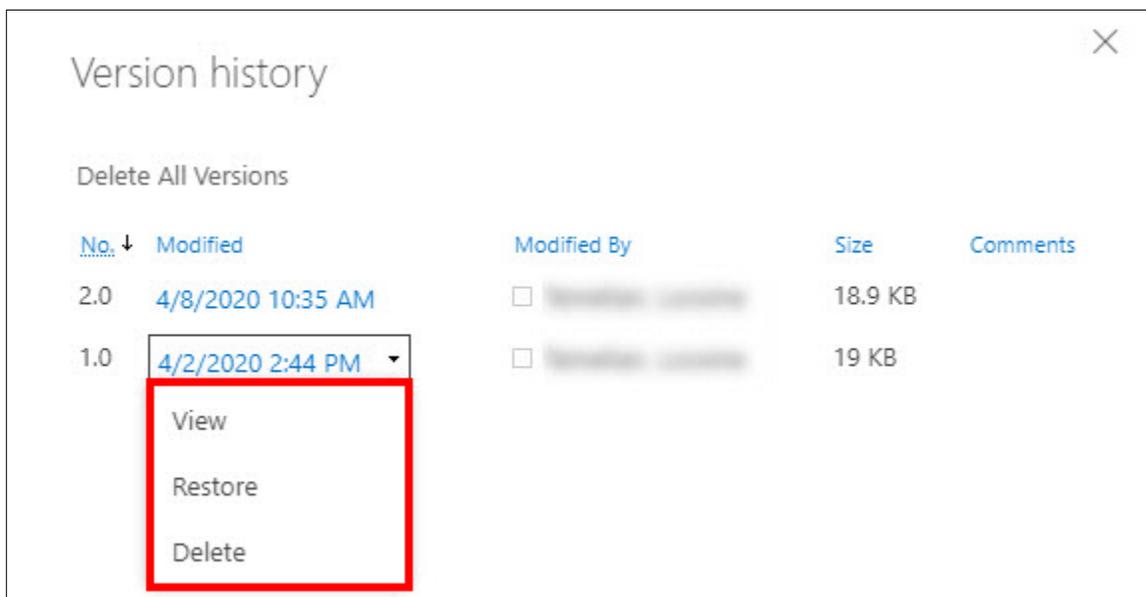
**NOTE:** You can also click the **Show actions** icon  to the right of the file name, and then click **Version history** on the menu.



**Figure 16 – More Menu Showing Version History**

4. In the **Version history** dialog box, in the **Modified** column, hover over a version, click the down arrow, and then select one of the following options (see Figure 17):
  - To view the selected version, click **View**. The dialog box displays actions you can take which vary based on whether you selected the current version or an earlier version.
  - To replace the current version with the selected version, click **Restore**, and then click **OK**. The restored version is added as a new version.
  - To delete the selected version, click **Delete**, and then click **OK**. The deleted version is moved to the site recycle bin.

**NOTE:** For all document versions except the latest, you will see **View**, **Restore**, and **Delete**. For the latest version, you will only see **View** and **Restore**.



**Figure 17 – Version History Dialog Box Showing Version History Options**

5. Click **Close (X)** in the upper-right corner to close the **Version history** dialog box.

## Delete Files or Folders

If a file or folder is no longer needed, you can delete it from a SharePoint document library. When an item is deleted, it is moved to the site recycle bin and is retained there for 93 days. After 93 days, the item is automatically deleted from the site.

### To delete a file or folder:

1. Go to the SharePoint site and open the document library that contains the file or folder you want to delete.
2. Select one or more items by hovering over each item and then clicking the check box to the left of the name (see Figure 6).

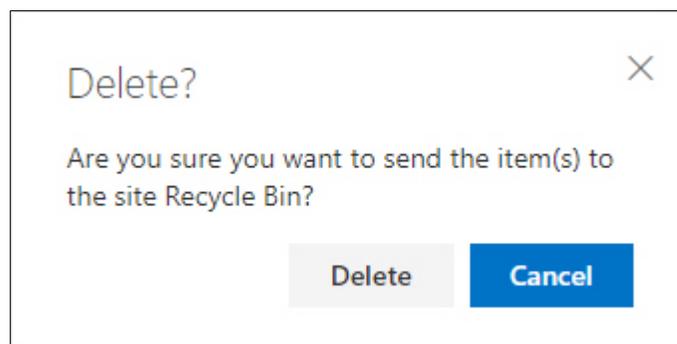
**NOTE:** You can delete up to 100 items at a time.

3. On the menu bar, click **Delete** (see Figure 18).



**Figure 18 – Menu Bar Showing the Delete Button**

4. In the **Delete** dialog box, click **Delete** (see Figure 19).



**Figure 19 – Delete Dialog Box**

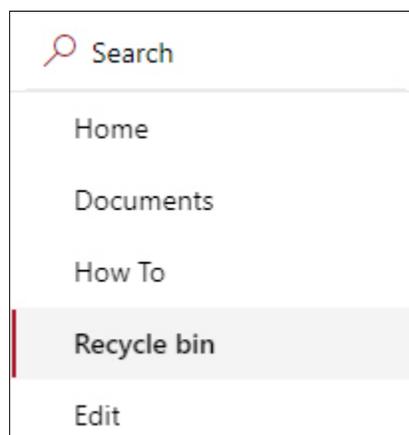
## Restore Deleted Items from the Recycle Bin

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Deleted items are retained in the site recycle bin for 93 days. During that time, you can restore the items you deleted to their original location. You can even restore items that were deleted by someone else, as long as you have edit permissions for the item.

### To restore deleted items from the recycle bin:

1. Go to the SharePoint site where you want to restore deleted items.
2. On the **Quick Launch** menu, click **Recycle bin** (see Figure 20).



**Figure 20 – Quick Launch Menu**

3. In the recycle bin, select one or more items that you want to restore by hovering over each item and then clicking the check box to the left of the name (see Figure 21).

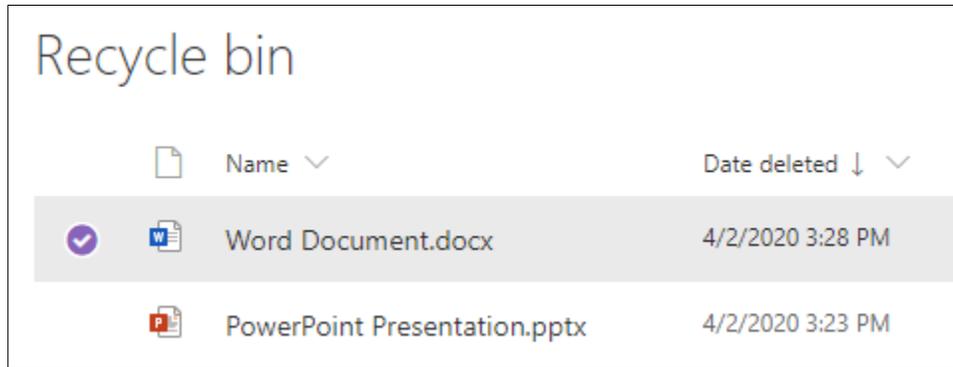


Figure 21 – Recycle Bin Showing Selected File

4. On the menu bar, click **Restore** (see Figure 22).



Figure 22 – Menu Bar Showing the Restore Button

## Sync Files to Your Computer

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You can sync the files in a SharePoint document library to a folder on your computer. Once synced, you can work with these files directly in Windows File Explorer or Mac Finder, and access them even when you are offline. Whenever you are online, any changes that you or others make will sync automatically.

**NOTE:** You only need to set up syncing once for each document library on each computer.

### To sync files to your computer:

1. Go to the SharePoint site and open the document library or folder that contains the files you want to sync.
2. On the menu bar, click **Sync** (see Figure 23).



Figure 23 – Menu Bar Showing the Sync Button

3. In the **Sync** dialog box, click **Sync now** (see Figure 24).

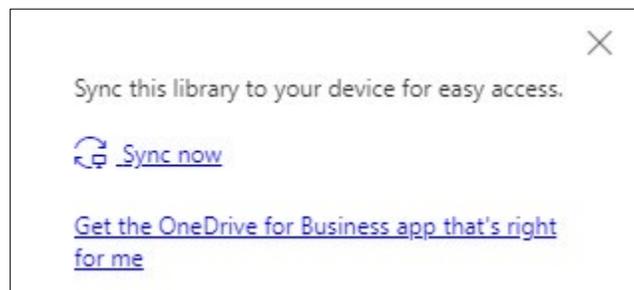


Figure 24 – Sync Dialog Box

4. If prompted, click **Open Microsoft OneDrive** (see Figure 25).

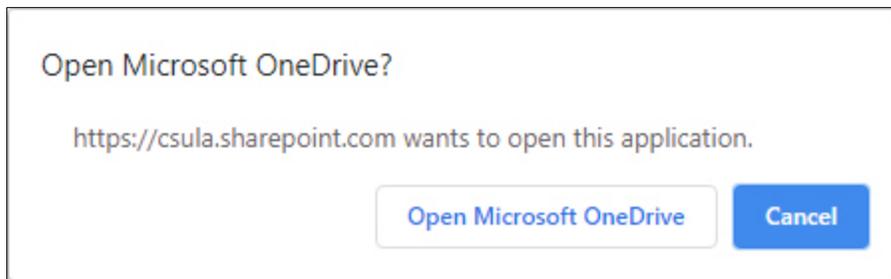


Figure 25 – Open Microsoft OneDrive Dialog Box

5. To access the synced files, open **File Explorer** (Windows) or **Finder** (Mac), select **Cal State LA** in the left pane, and then open the synced folder in the right pane (see Figure 26).

**NOTE:** The icons next to each synced folder or file indicate the sync status. For more information about each icon, visit the [What do the OneDrive icons mean](#) page.

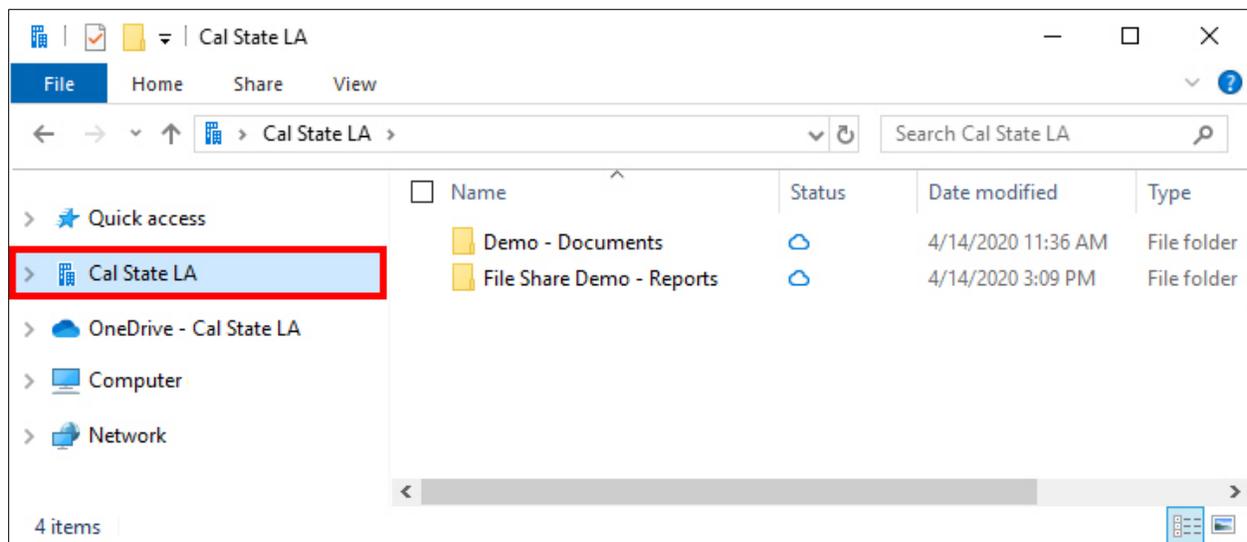


Figure 26 – File Explorer Window Showing Synced Folders

## Manage the Site

Every SharePoint site has at least one owner. Site owners have full control of the site which allows them to configure the site, add and remove members, and assign roles to members. Members can view, add, edit, and delete files within the site, but they cannot make changes to the site's settings or permissions.

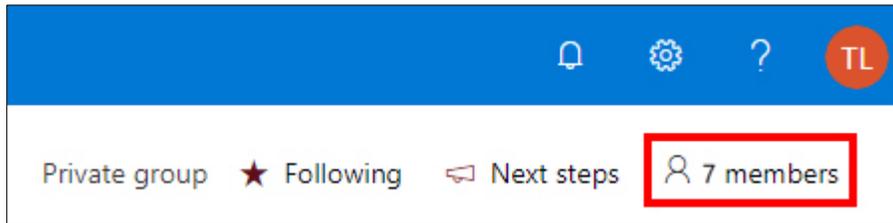
## Add Members

A site owner can give access to a SharePoint site by adding a member to the site.

### To add a member:

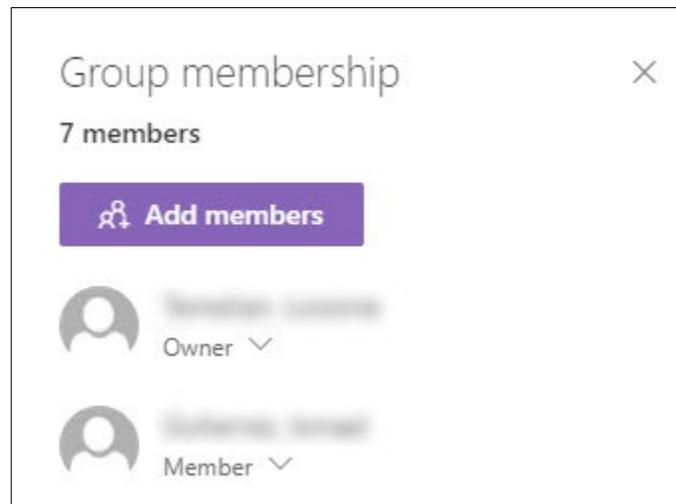
1. Go to the SharePoint site to which you want to add a member.
2. On the right side of the site header, click **member(s)** (see Figure 27).

**NOTE:** The number to the left of **member(s)** indicates how many members are currently in the group.



**Figure 27 – SharePoint Site Header Showing Members Link**

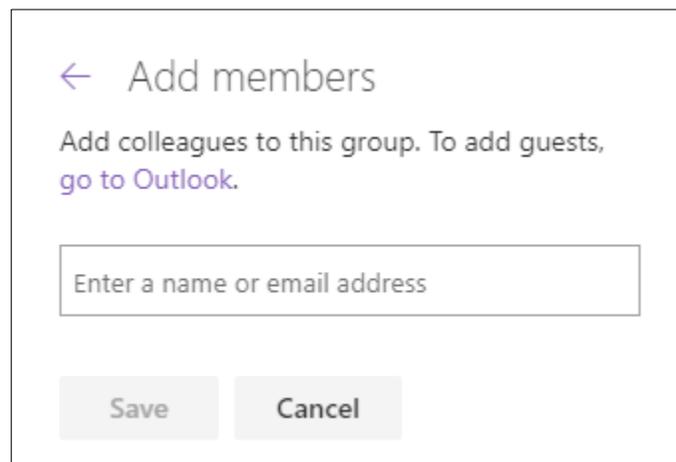
3. At the top of the **Group membership** pane, click **Add members** (see Figure 28).



**Figure 28 – Group Membership Pane**

4. In the **Add members** pane, enter the name or email address of the member you want to add, and then select the appropriate person from the list (see Figure 29).
5. Repeat step 4 to add additional members.
6. Click **Save**.

**NOTE:** The new member(s) will receive an email notifying them that they have access to the SharePoint site.



**Figure 29 – Add Members Pane**

7. Click **Close (X)** in the upper-right corner to close the **Group membership** pane.

## Promote Members to Owners

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By default, the person who creates a SharePoint site is the site owner. A site owner can promote any member to owner status.

### To promote a member to an owner:

1. Go to the SharePoint site that includes the member you want to promote.
2. On the right side of the site header, click **member(s)** (see Figure 27).
3. In the **Group membership** pane, locate the member you want to promote, click the down arrow below the member's name, and then click **Owner** on the menu (see Figure 30).

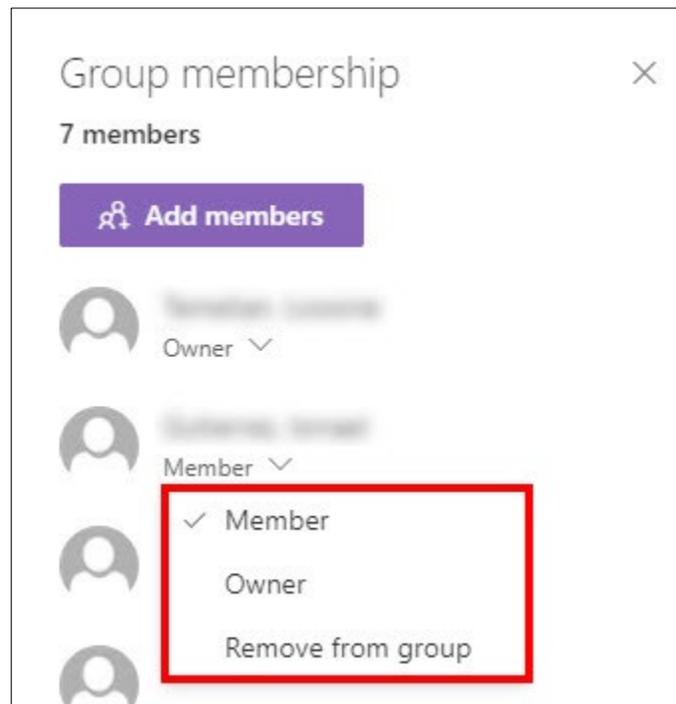


Figure 30 – Group Membership Pane Showing Membership Options

## Remove Members

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A site owner can remove access to a SharePoint site by removing a member from the site.

### To remove a member:

1. Go to the SharePoint site from which you want to remove a member.
2. On the right side of the site header, click **member(s)** (see Figure 27).
3. In the **Group membership** pane, locate the member you want to remove, click the down arrow below the member's name, and then click **Remove from group** on the menu (see Figure 30).

## Secure Folders

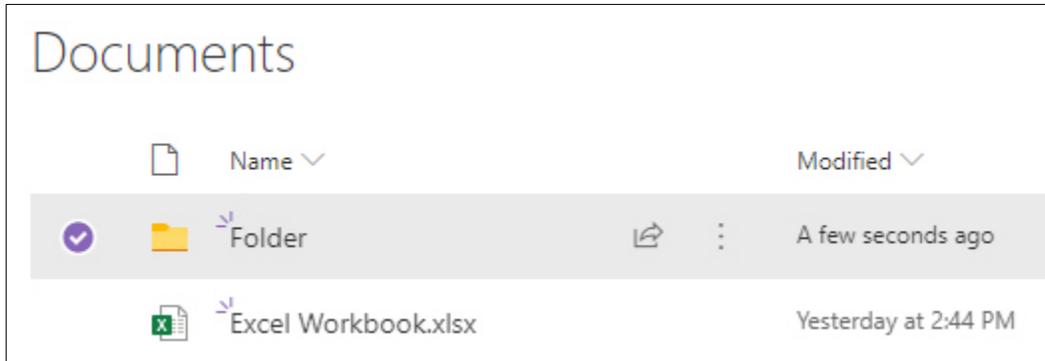
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By default, all members of a SharePoint site have permission to view, add, edit, and delete content. A site owner can restrict access by setting unique permissions on one or more folders in a document library. For example, a folder may include files (such as a document template) that you want site members to view or copy, but not edit. Or a folder may include files (such as financial reports) that should only be visible to certain site members (such as department managers).

## To secure a folder:

1. Go to the SharePoint site and open the document library where you want to secure a folder.
2. Select the folder you want to secure by hovering over it, and then clicking the check box to the left of the name (see Figure 31).

**NOTE:** If the folder to be secured does not exist, create a new folder, and then select it.



**Figure 31 – Document Library Showing Selected Folder**

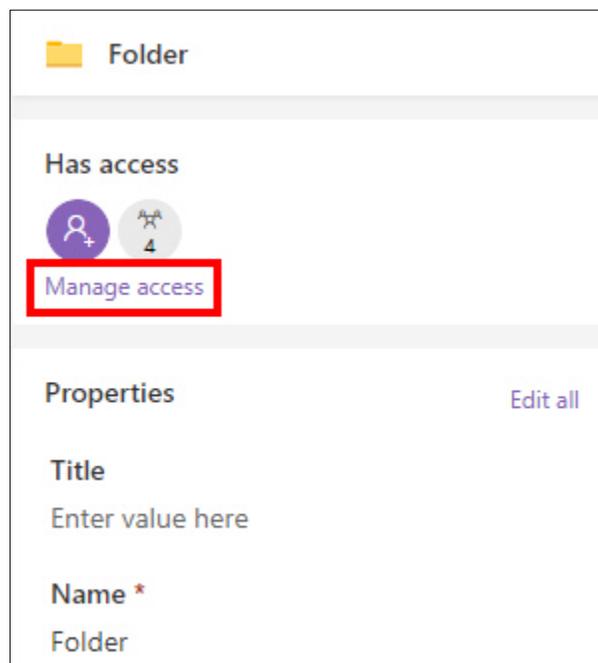
3. On the right side of the menu bar, click the **Information** icon to open the **Details** pane (see Figure 32).

**NOTE:** You can also open the **Details** pane by clicking the **Show actions** icon  to the right of the folder name, and then clicking **Details** on the menu.



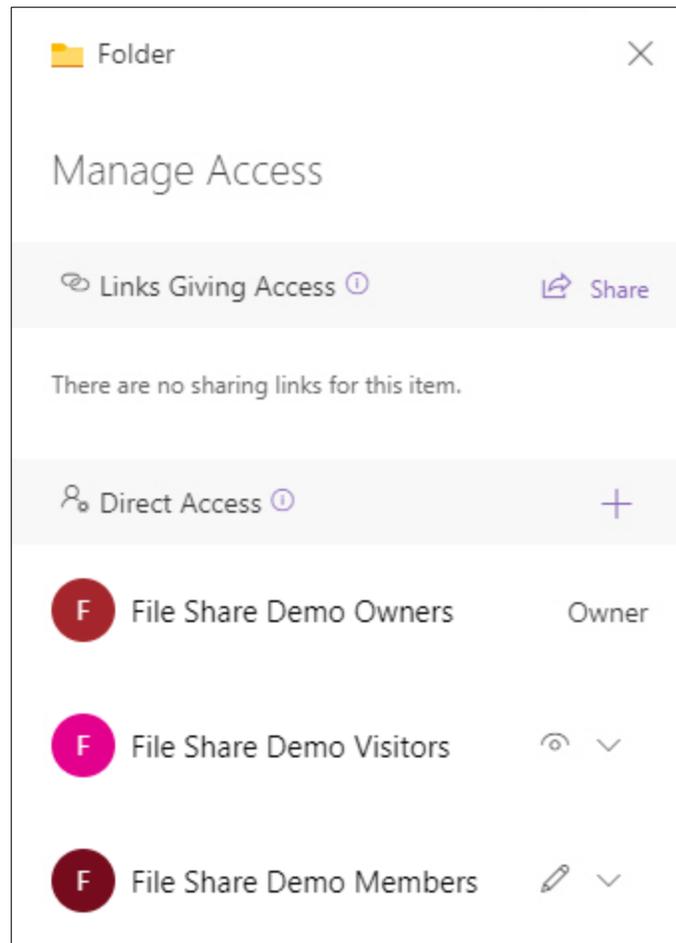
**Figure 32 – Menu Bar Showing the Information Icon**

4. In the **Details** pane, click **Manage Access** (see Figure 33).



**Figure 33 – Details Pane**

5. In the **Manage Access** pane, do one or more of the following (see Figure 34):
  - To change the access level for a group, click the down arrow next to the **Visitors** or **Members** group, and then click **Can view** or **Can edit** on the menu.
  - To remove access for a group, click the down arrow next to the **Visitors** or **Members** group, and then click **Stop sharing** on the menu.
  - To give access to individual users, click the **Grant Access** icon  next to **Direct Access**, add one or more users, select their access level, and then click **Grant Access**.



**Figure 34 – Manage Access Pane**

6. Click **Close (X)** in the upper-right corner to close the **Manage Access** pane.

## Change the Site Name or Logo

There are several things a site owner can do to customize a SharePoint site. This section covers how to change the name and logo of a site.

### To change the site name or logo:

1. Go to the SharePoint site that you want to customize.
2. In the upper-right corner, click the **Settings** icon , and then click **Site information** (see Figure 35).

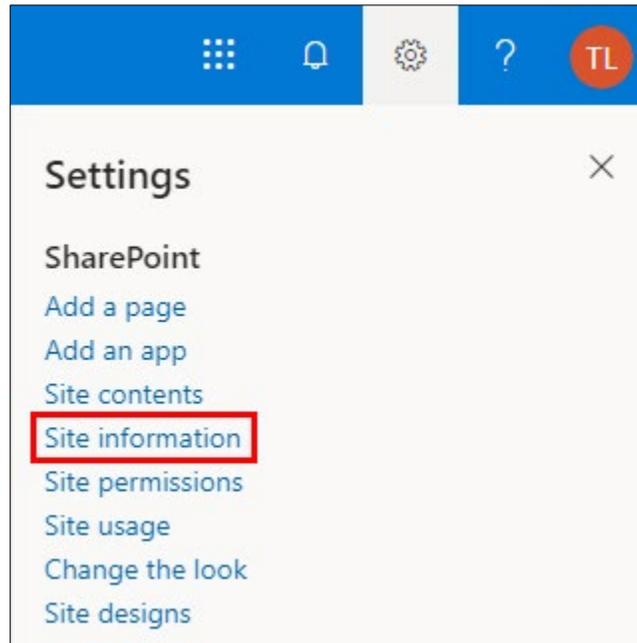


Figure 35 – Settings Menu

3. The **Site Information** pane opens on the right side of the screen (see Figure 36).
  - To change the site logo, click **Change** under **Site logo**, select the image you want to use, and then click **Open**.
  - To change the site name, enter a new name in the **Site name** box.

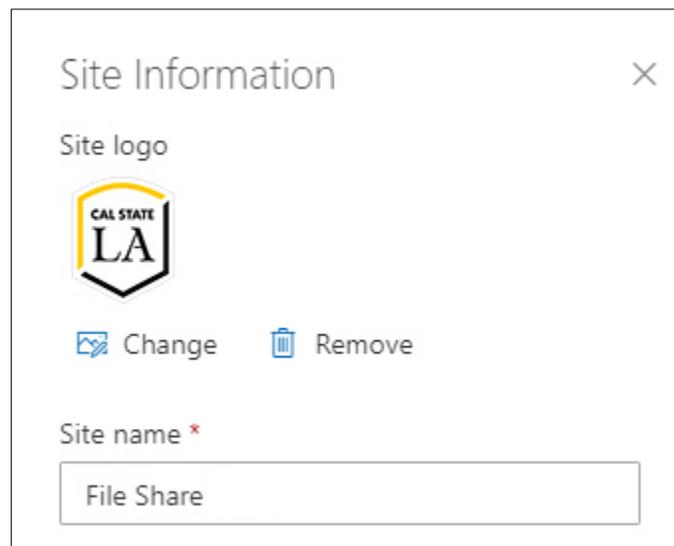


Figure 36 – Site Information Pane

4. Click **Save** at the bottom of the **Site Information** pane.