M365 file storage & collaboration: OneDrive, SharePoint & Teams
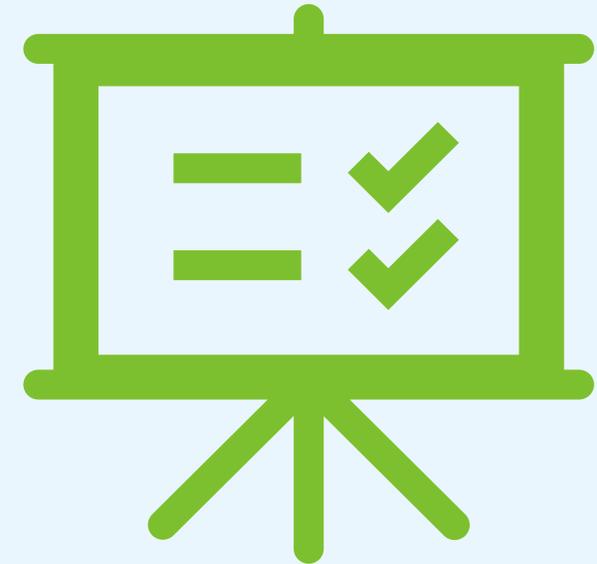
superhighways
harnessing **technology** for **community** benefit

What we'll cover

- Demystifying file storage in M365
  - What are the options?
  - Our suggestions – what to use for what
- Running through the basics of working with files (+ some useful tips)
  - Navigating and finding files
  - Creating, saving & moving files
  - Sharing & collaborating on files
  - Version history
- Q & A

- *Demos + Recording & Slides for reference*

Data challenges Bingo!

I never know where to find anything! **1**	We keep getting messages that we are running out of storage space **2**	I'm confused by all the different licences and subscriptions **3**
We always run into issues when we try and edit a document together **4**	I'm worried I'm not accessing the latest version of a file **5**	One of our laptops 'died' and we lost a bunch of files that were saved locally **6**
Trustees say they can't access documents shared with them **7**	We realised that people in our organisation **8**	A previous CEO left the organisation and we can't find key files **9**

Which subscription?

Find the right Microsoft 365 enterprise plan
for your organization

| Microsoft 365 | Office 365 | Frontline | Government | Nonprofit |

Power your nonprofit with Microsoft 365 grants and discounts

Microsoft Tech for Social Impact is dedicated to providing affordable and accessible technology and tools to help nonprofits of all sizes achieve their missions. That's why we offer grants and discounts for our products and services to eligible[1] nonprofits around the world.

- [See Microsoft's productivity options for nonprofits landing page](#)

Microsoft 365 Licenses

Microsoft 365 Business Basic

- Free for up to 300 users (not volunteers)

- Includes web and mobile versions of Microsoft 365 apps

- 1 TB of cloud file storage per user

Microsoft 365 – Licenses

Microsoft 365 Business Standard

- Costs £2.50 per user per month

- Everything in Business Basic

- Plus desktop versions of Microsoft 365 apps

- Webinar hosting in Teams

- Customer appointment management

Microsoft 365 – Licenses

Microsoft 365 Business Premium

- Free for up to 10 users (not volunteers)

- Costs £4.50 per user per month for additional users (discounted price)

- Everything in Business Standard

- Plus advanced security features, cyberthreat protection, and advanced device management

How to register with Charity Digital

- Provide some basic information about your charity

- Verify your charity status by uploading a copy of your registration document

- Once registered, you can browse the catalogue of software products and apply for the ones that suit your needs

Charity Digital - Home

Data storage

Office 365

My documents — Word, Excel, PowerPoint, other — Team documents

Business documents

OneDrive for Business

Store **business** documents for your own use in OneDrive for Business.

You can find and edit your documents, or you can share them with specific people. And you can sync them to your computer or device.

Business documents

SharePoint

Store **business** documents for a team in a *Team site*. For example, store team plans that everyone updates, or publish meeting agendas.
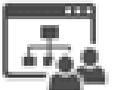
All members of the team can find and edit documents. And team members can work on them from their own computer or device.

Team site

Things to consider

- Ownership

- Permissions management

- Access

- Privacy

- Sharing

- Collaboration

- Exit

As a rule of thumb

- Create and store all organisational docs in Sharepoint or Teams

- These are then available to everyone (with permissions)

- Only create and store 'in progress' or personal files in your One Drive

- These are by default private to you so not accessible to others – you have to share at an individual File level

- If you leave the organisation – OneDrive files are deleted with your account (although a warning is given and you can assign access to someone else)

- Don't save files locally to your laptop (if your laptop fails or is lost or stolen – your files are lost)

A likely scenario

Sharepoint ⟷ **Teams**

One Drive

Personal files

Organisational files

Laptop
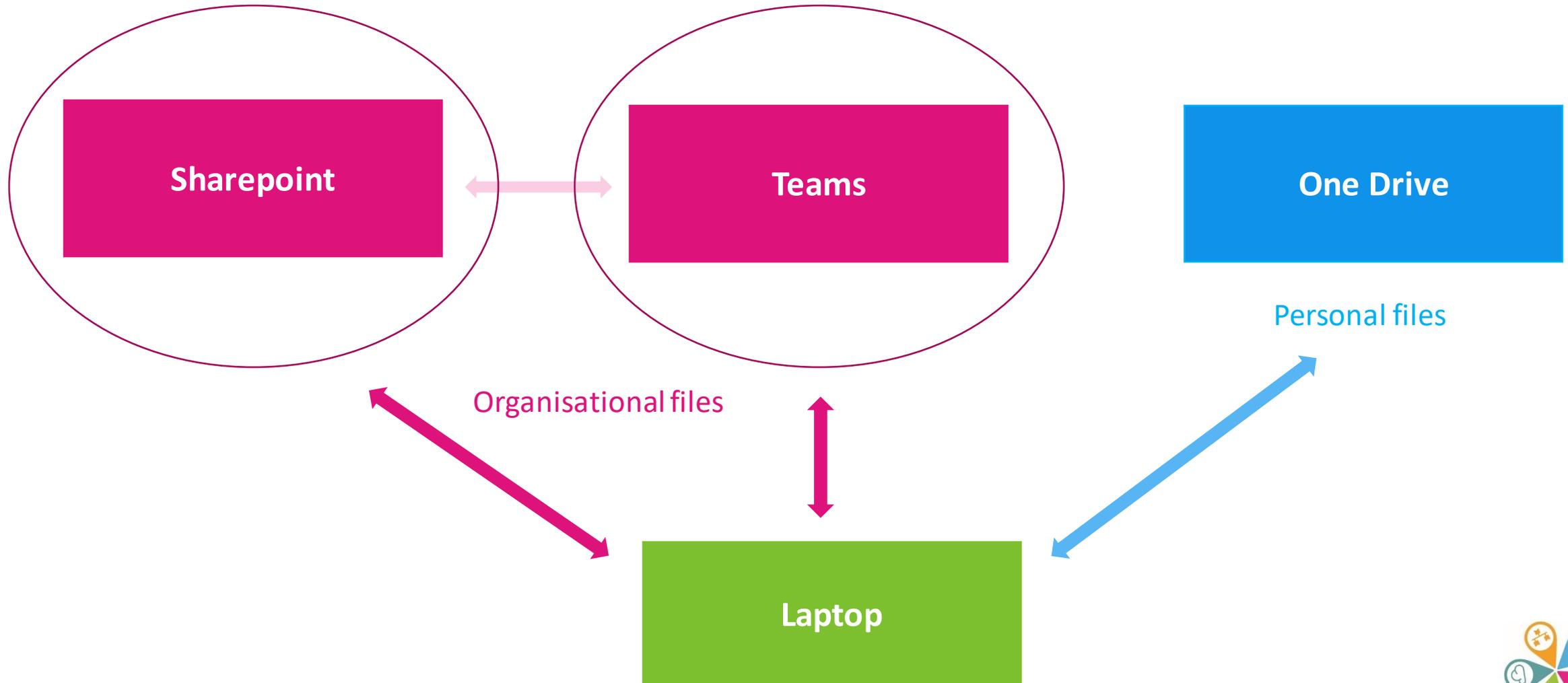
Microsoft 365 Training

START WITH 6 SIMPLE STEPS >

Outlook   OneDrive   Word   Excel   PowerPoint   OneNote   SharePoint   Microsoft Teams   Yammer

More Office apps →

Learn the basics

Get going quickly and easily with Microsoft 365 video training.

START NOW >

Training templates

Learn what's possible with Word, Excel, and PowerPoint.

DOWNLOAD NOW >

Quick Starts

Get up to speed in no time with these popular guides.

GET STARTED >

Save time with tips

Work smarter and get more out of your Office apps.

GET TIPS >

Accessing M365 via the web portal

Microsoft 365

Outlook   OneDrive

Word   Excel

PowerPoint OneNote

SharePoint Teams

Power Autom... Partner

Calendar   To Do

Forms   Planner
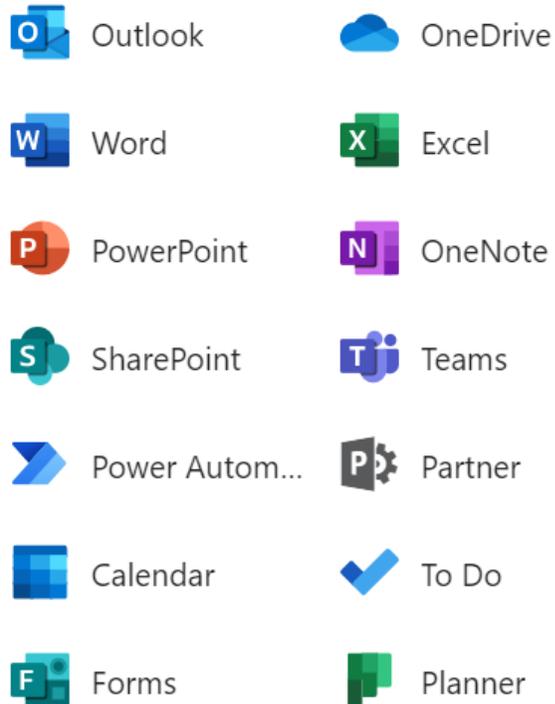
- Log in at www.office.com with your email and password

- Choose the apps from the landing page or the App launched grid of 9 squares always at the top right of your screen

Launching local M365 apps
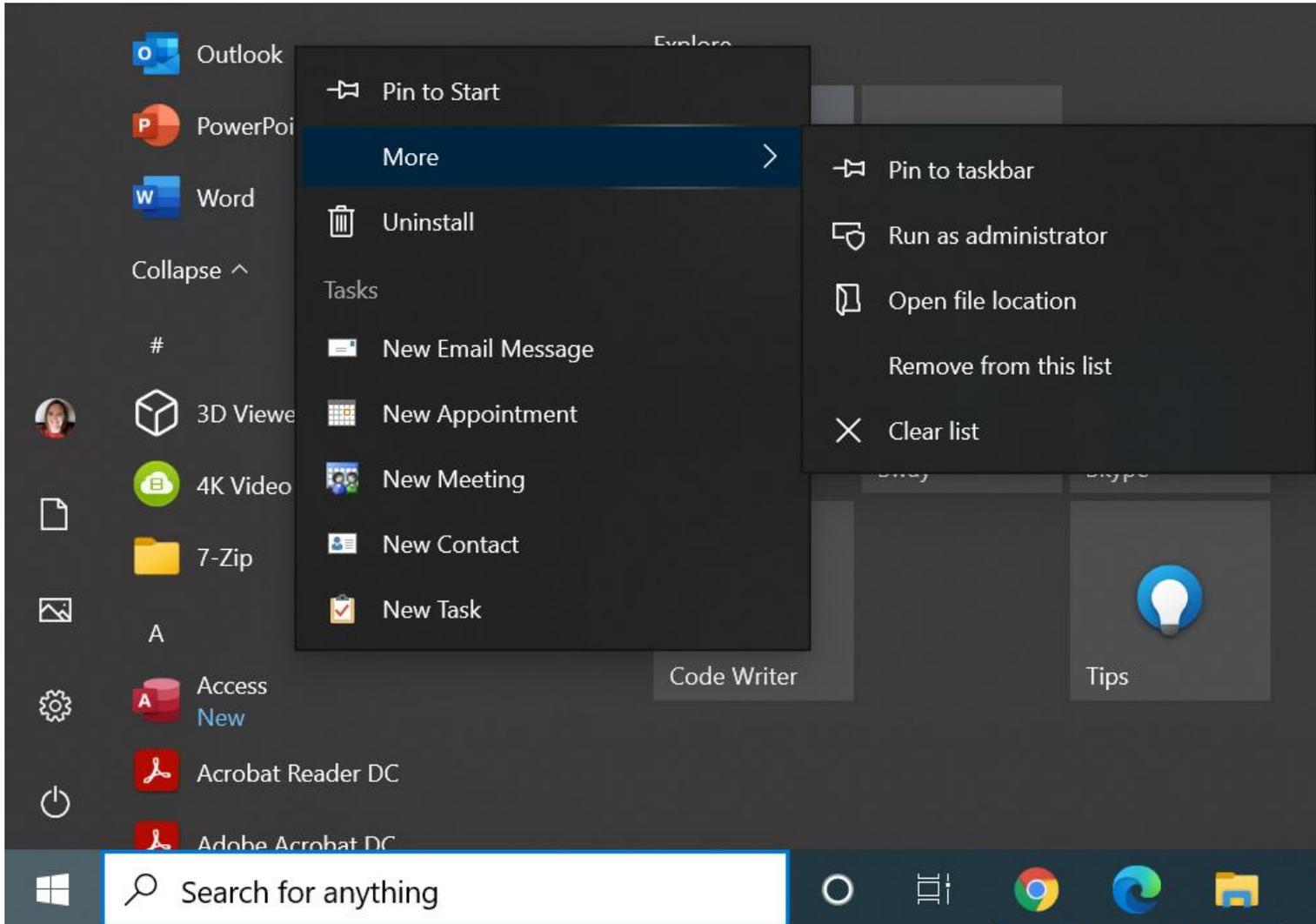
Using the Windows Start Menu, or Search for anything box.

Right click to **Pin to Start** or click **More** and also **Pin to taskbar**

SharePoint demo

- Navigating your folders and files
- Opening, editing & collaborating on documents
- Sharing files with others
- Version history

- [SharePoint download guide](#)

- [SharePoint videos](#)

Navigating & managing files SharePoint via web

AutoSave

- If AutoSave is On at the top right of your screen, as indicated, changes to your document will automatically be saved

- If you want to create a new version of a document, remember to Save As and give the file a new name. Otherwise changes will overwrite the original
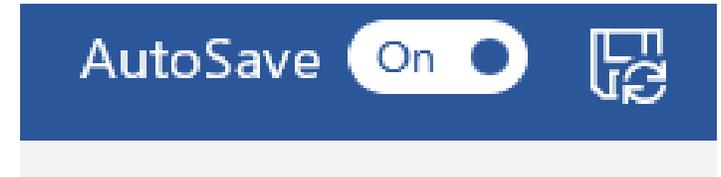
Saving documents

Select **Save As** and navigate to the One Drive or Sharepoint Folder (choose Sites) you need to save the document in.

Sharing docs

Share — Options will depend on Account settings

Send link ··· ✕

People with existing access can use the link

Sorrel Parsons ✕

Add another

Message...

Send

Copy link   Outlook

Link settings ✕

Who would you like this link to work for? Learn more

🌐 Anyone with the link ⓘ

People in Kingston Voluntary Action with the link ⓘ

People with existing access ✓

Specific people

Apply   Cancel

Send link ··· ✕

Requesting access for these specific people

K karen@bvsc.co.uk ✕

Add another

Your organization's p
you to share with the
contact your IT depa

Can edit
Make any changes

Can view
Cannot make changes

Message...

Send

Copy link   Outlook

Version history via the web

Version history via the local apps

Go to File / Options / Version history

Sharepoint Sync

- Using File Explorer ▦ to navigate files
- Files on demand (minimising local device storage space)
- Working on files offline

- [Watch the How to video](#)

Collaborating / sharing externally

- Share files individually from OneDrive (e.g. you are prompted to share via One Drive when attaching a file to an email)

- Switch on file sharing from SharePoint / Teams (if not already) and share with specific people or enable the Share link with anyone option (if appropriate)

- Choose appropriate options for your share e.g. View, Edit, Download (you can also add further authentication e.g. sending passcode)

- Set up a Communications site (e.g. volunteer 'intranet' example)

- Switch on ability to invite external Guests into Teams

What is Teams?!
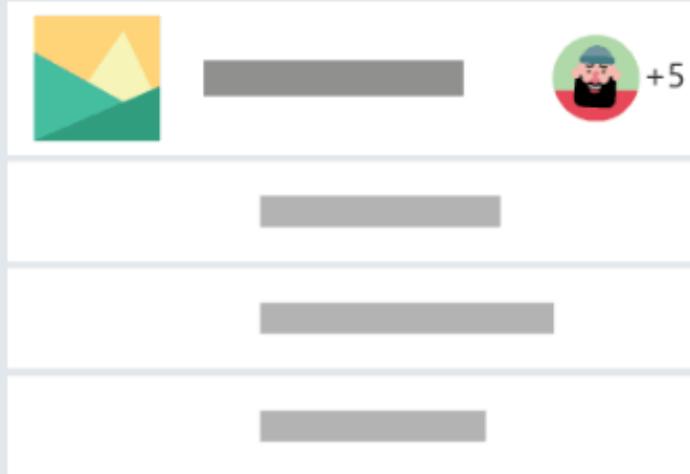
Bring your team together

Create an open, collaborative workspace for your team. Use channels to organize conversations by topic, area, or anything else.

Chat 1:1 and with groups

Outside of open team conversations, chat privately and share files and notes with anyone in your organization.

Make video calls and schedule online meetings

Have impromptu or scheduled meetings in any channel. Or just call someone
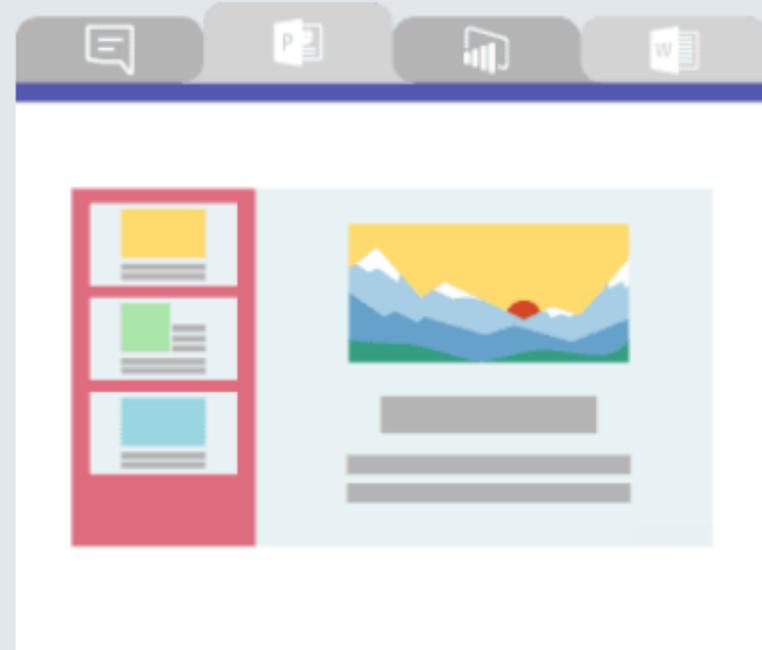
Team files, notes, and apps in one place

Your team's tools are organized and integrated in Microsoft Teams with the power of Office 365.

Files in Teams

- Create folders and upload or create files in public or private channels
- Navigate via Channels and the Files tab or click on Files on the left hand vertical menu
- Share with everyone, specific people or via link (same as SharePoint)
- Invite Guests into your Team to access and collaborate (they'll need to set up a 365 account and be logged in

- Watch the How to videos

Opening Files options

- By default, double clicking on a file will open within the Teams window

- You can then switch to opening in the Browser or local App

- Alternatively, click on the 3 dots next to the File name and select Open

- Choose to Open in the Browser or App (you can also change the default option)
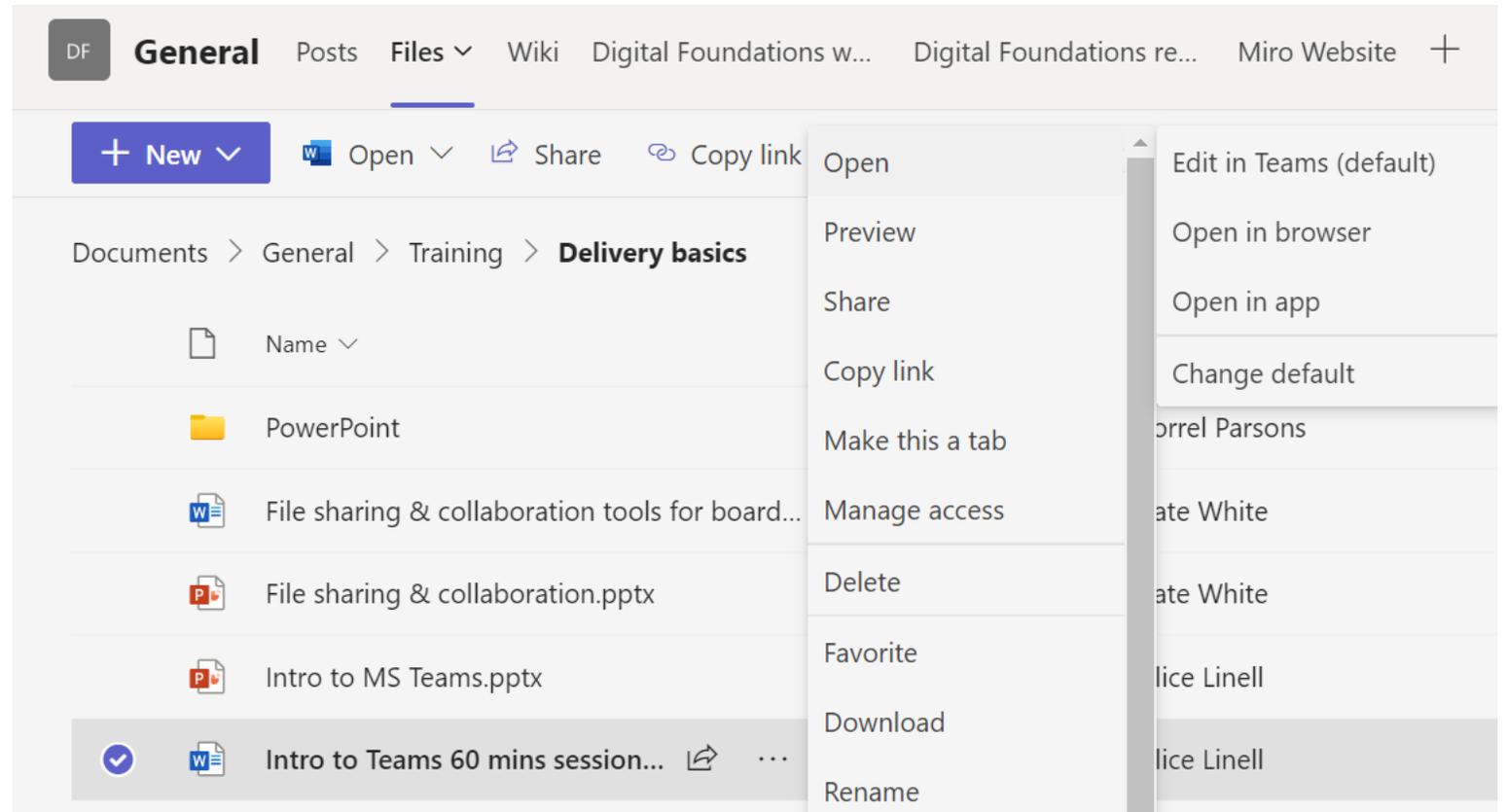
Digital Foundations programme

There are many ways we can help small community organisations make sound choices about the digital tools and technology they use.

Communications made easy

Raise your profile using digital tools to engage supporters and fund your future

Read more »

Digital basics

Work and collaborate online using free and affordable digital tools and technology

Read more »

Websites for communities

Put your website at the heart of your charity or community organisation's story

Read more »

Find out more about the Digital Foundations programme

About Superhighways

Providing tech support to small local charities in London for over 20 years

- ✓ Support
- ✓ Training
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ Datawise London
- ✓ See all services

- ✓ E-news sign up

Thank you for listening!

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