

# NAVIGATING ONEDRIVE, SHAREPOINT, & TEAMS







UNLOCK THE POWER OF MICROSOFT 365





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# File Management

Organizations and teams come in all different shapes and sizes, and team members can be local or spread across the globe. They can include vendors and contractors along with full-time employees. Initiatives and work can span enterprises, organizations, and small project teams.

Microsoft 365 — including Teams, SharePoint, and OneDrive — is designed to be a universal toolkit to give your team members integrated and flexible ways to work on their projects and tasks.

We'll focus on the powerful capabilities of Teams, SharePoint, and OneDrive, including document storage, collaboration, sharing, and conversations. You don't have to use just one tool to get your work done — each works together to provide optimal productivity.

Here's an example of how you can use these services together:

- When you create a team, an Office 365 group and a SharePoint team site is automatically created for you. You can upload your documents to the SharePoint team site.
- Then, when a draft of your specifications document is ready for review, it's easy to add the file to your Teams team and use the chat-based system to let everyone know it is ready for review.
- Team members can open the file right in Teams and start making changes or commenting.
- If a team member stores a file in OneDrive, it can also be added to the Teams channel by using the Files tab in Teams.
- Best of all, you can go mobile with Teams, so your project members can work from anywhere.

## Teams and SharePoint Files

Every Teams channel has a SharePoint team site, and every SharePoint team site has a Teams channel. SharePoint is great for storing files in the cloud and making them accessible to a broad audience. And you can take advantage of robust file permission management, document process flows, retention policies, and more. Here are ways to work with SharePoint:

 Collaborate on files in Teams, create pages, use a shared notebook, and use the integrated Office 365 group to bring together conversations, calendars, and tasks.



- Spread ownership and permissions across a wider collection of people. If a
  document is important to the success of a project, it's a good idea for there to be
  people other than yourself who can control what happens on the site.
- Grant permissions on a site basis, instead of on individual documents. If people
  have access to the team site, then they have access to documents stored in the
  site.
- Create attractive and effective site pages to organize information, post news, provide contact information, and provide navigation to documents, media, and other types of information.

# Microsoft SharePoint

SharePoint is a website-based collaboration system that uses workflow applications, "list" databases, and other web parts and security features to empower business teams to work together. SharePoint also gives the company using the platform the ability to control access to information and automate workflow processes across business units.

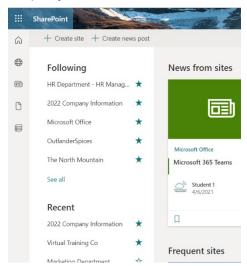
SharePoint Sites are like websites. They can contain pages that you access by clicking on a link, document libraries, apps, etc. The term Site refers to an individual "website" based on SharePoint.

You can use the sites as a secure place to store, organize, share, and access information from any device. All you need is a web browser, such as Microsoft Edge, Internet Explorer, Google Chrome, or Mozilla Firefox.

In a SharePoint site you can view News, Announcements, Timeline, Calendars, Document Management, Images, and so much more.

SharePoint can be used as an intranet portal to share company information to all

employees. **SharePoint Online** - The Microsoft Cloud version of SharePoint, SharePoint Online, has many additional integration capabilities with other cloud applications. It is paired in functionality with many of the other offerings Microsoft packages with an Office 365 or Microsoft 365 license.





## Working with Documents in SharePoint

Your SharePoint document library offers many ways to work with your files, from creating files to copying and moving them between folders. You can view the work that you and others have done on the files and save earlier versions that you can restore if needed. You and your team have a lot of control over where, what, and how you work with your files.

 Libraries - A library is a special type of list that stores files as well as information about files. You can control how files are viewed, tracked, managed, and created in libraries.

#### Create a New Document

After you create a SharePoint document library, you'll need to add content. You can start by creating or uploading documents and files.

When you choose a new Microsoft 365 document, a generic file is created in the library (Document.docx, book.xlsx, etc.), and a blank document is opened in the respective app.

#### Upload a Folder or Files

You can upload files to a document library in SharePoint by dragging them from your computer and dropping them into the document library.

## Drag and Drop to Document Library

- 1. Open the document library where you want to upload a folder or files.
- 2. Select files or folders on your computer and drag and drop the folder or files onto the document library page.

## **Edit Files**

Files associated with Microsoft 365 apps like Word, Excel, and PowerPoint can be opened and edited online when you click the file name in a document library. When you edit in Microsoft 365, all changes are automatically saved.

When you have a desktop app such as Word, it will show up when you open or edit the file. If you choose a desktop app, the document will open in the app and you can edit it like any other file. Unlike the online version of Word, Excel, or PowerPoint, to keep changes, you need to explicitly save the document before you exit.

+ New ✓ ↑ Upload ✓
Folder

Word document

Excel workbook

PowerPoint presentation

OneNote notebook

Excel survey

Link

P
Edit New menu

Add template



When a file is selected, you can use the toolbar at the top of the window or if you hesitate on the name, click on the show actions, you will get a popup menu of more choices.



## **Delete Files**

If an item in a document library is no longer needed, you can delete it. When you delete a folder, SharePoint also deletes any files or folders that are contained in it.

If you delete something but need to get it back, you may be able to restore it from the recycle bin.

#### To Delete a File:

- Select the file then use the tools at the top, click Delete.
- Or hesitate on the file name, click on the show actions, then click Delete.

#### Check Files In or Out

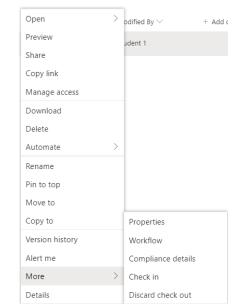
When you check out a file, you lock out others from making any changes. This helps prevent coworkers from undoing or overwriting each other's changes.

While you have a file checked out, nobody else can check it out or edit it. When you check the file back in, others can see the changes you've made.

#### To Check Out or Check In a File:

Select the file, then from the tools at the top, click on Check Out or Check In.

Or

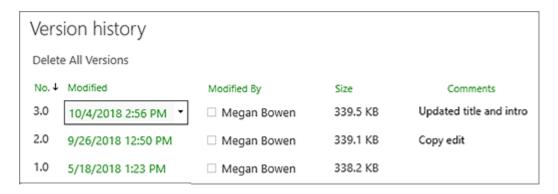


Select the file, then from the eclipse menu, hesitate on More then click on Check Out or Check In.



## View and Work with Version History

The SharePoint Online version history creates a new version of files that are saved or checked in to a document library.



In the Version History, you can view comments that were added when the file was checked in, the file size, and the date when it was checked in or saved to a document library. You can also choose to restore or delete a version of the file.

#### View version history in SharePoint

1. Open the list or library from the Quick Launch bar.

If the name of your list or library does not appear, click **Site contents** or **View All Site Content**, and then click the name of your list or library.

Right click on the space between the item or document name and date, and then click **Version History** from the menu. You might need to scroll the menu to see **Version History**.

If you don't see Version History, click the ellipsis (...) in the dialog and then click **Version History**.

- 3. In the Version History dialog, hover next to the version you want view and click the down arrow on the right side to get a list of options.
- 4. Click View.



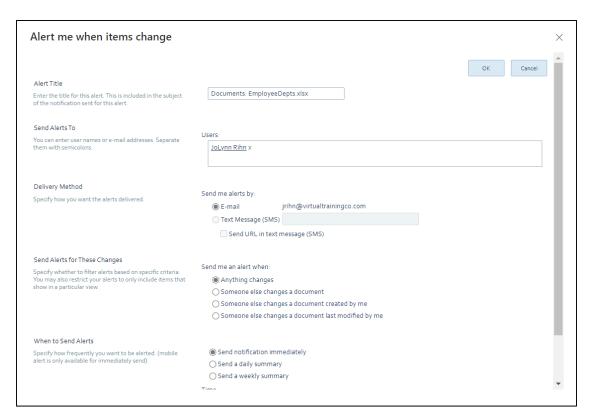
#### Alert Me

To stay updated when your SharePoint documents or items on your site change, create alerts. You can set up an alert for a list, library, folder, file, or list item. For example, you can set up an alert for a specific folder in a library, without receiving alerts when changes occur in the rest of the library.

#### Get alerts on item changes in SharePoint Online

You can get an alert whenever a file, link, or folder is changed in a SharePoint Online document library. Depending on the item (file, folder, link), you may see different options when you set an alert.

- 1. Go to the list or library.
- 2. Select the file, link, or folder for which you want to get an alert.
- 3. From the list of options for the list or library, select the ... (ellipses), and then select **Alert Me**.
- 4. In the **Alert me when items change** dialog, select and change the options you want.
- 5. To save, select **OK**.





## Sharing Files with Other Users

Your cloud based files can be shared with anyone, even if they don't have a Microsoft Account. Sharing files allows you to securely collaborate with people outside your organization such as your business partners, vendors, clients, or customers — with or without a Microsoft 365 subscription. When you enter the name(s) of who you want to share a file with, enter their email address or name if saved in your contacts.

- 1. Select the file or folder you want to share, and then select Share
- 2. Enter a name or email address.

**Note:** Select the drop-down to change permissions. **Allow editing** is checked by default. To change permission to view only, uncheck this box and select **Apply**.

Select Send.

#### Create a Link for Secured Sharing

If you want to secure your content and get a link that only works for the people you invite,

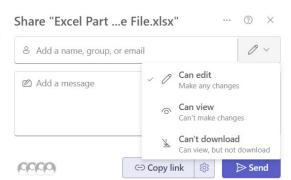
select Specific people in Link settings when creating the sharing link.

The recipient will then need to verify their identity before they can view the content, but the process depends on their account:

## Managing Access to Files

Share items with lots of people you might not even know personally. For example, you can use these links to post to Facebook, Twitter, or LinkedIn, or share in email or IM. Anyone who gets the link can view or edit the item, depending on the permission you set. Users with the link cannot upload new items. Keep in mind that the link can also be forwarded and sign-in is not required.

- 1. Open the Document Library or OneDrive.
- Pick the file or folder you want to share by selecting the circle in the upper corner of the item. You can also pick multiple items to share them together (sharing multiple items at the same time is not available for OneDrive for work or school accounts).
- 3. Select Share at the top of the page.
- 4. Enter the names or email address of who you want to send the link To: .





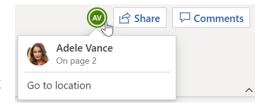
- 5. Select Anyone with the link can edit to customize the link options.
- 6. Set the options you want on your link, then select Apply when you're done.
  - Allow editing When you share items with this type of link, people can edit
    files, and can add files in a shared folder if they're signed in with a Microsoft
    account. Recipients can forward the link, change the list of people sharing the
    files or folder, and change permissions for recipients. If you're sharing a
    folder, people with Edit permissions can copy, move, edit, rename, share, and
    delete anything in the folder.
  - Unchecking this box means that people can view, copy or download your items without signing in. They can also forward the link to other people. However, they cannot make change to the version on your OneDrive.
  - Set expiration date The link will only work until the date you set. After that, the link will be invalid, and you will need to create a new link for users requiring access to your file or folder.
  - Set password When a user clicks the link, they will be prompted to enter a
    password before they can access the file. You'll need to provide this
    password separately to users.
- 7. When finished, click Apply. This will return you back to the main window.

#### Live Collaboration on Files

When you open a file that is stored on a SharePoint site, others can open the file at the same time as you. Unless there are restrictions on the file, multiple people can add, edit, delete content on the file at one time.

# Collaborate in real-time using the Microsoft 365 Integration

When you share a file from OneDrive with other Microsoft users, multiple people can access the file at one time. This is called real-time collaboration.



**Benefits of real-time collaboration -** The benefits are becoming clear as more businesses and groups implement and adopt online collaboration tools such as online whiteboards. Here are just a few proven benefits of real-time collaboration:

- Improved participation and knowledge sharing from working together as a team just as you would if you were in the same room.
- Increased efficiency and productivity from a simplified and seamless process
  that eliminates back-and-forth communications and replaces the chaos of
  multiple versions with a single, shared document living in the cloud.
- Higher employee morale and job satisfaction and decreased feelings of isolation and loneliness associated with remote work.



- Streamlined workflow with meetings, conversations, and file sharing all happening simultaneously.
- Greater cost-effectiveness over traditional methods of collaboration which require office space, equipment, and travel.
- Expansive reach and scope from the ability to connect anyone inside and outside your business including employees, clients, and vendors.

When more than one person is in a file, you will see their profile circle at the top right of the window.

#### Work with others on the same document, at the same time

- 1. Open the document for editing in Office for the web.
- 2. The number of people currently editing the document appears at the top of the document in Office Online.
- Search for a person's files, for example "Daisy Philips' files", and then press
  Enter. You'll get a list of the files that the person has shared with you. This is
  useful if you two are collaborating on files together, or you'd like to find back to
  files the person has shared with you.

# Microsoft Teams

Microsoft Teams is the ultimate messaging app for your organization—a workspace for real-time collaboration and communication, meetings, file and app sharing, and even the occasional emoji! All in one place, all in the open, all accessible to everyone.

# **Navigation Pane**

On the left-hand side you can navigate to different areas within Teams, such as Chats, Meetings, Files and Activity.

- Activity: Shows you the last activities of the Teams that you are part of.
- **Chat**: This holds your Team conversations, providing a complete chat history. However, for a chat within a Team you should use the Teams menu and hold the group chat in 'Conversation'.
- **Teams**: An overview of all your Teams that you are part of and allows you to drill-down into each Channel within the Teams. This is also where you can create Teams.
- **Calendar**: In Teams you can schedule meetings or do a meeting anytime from the Calendar.

Activity

Chat

Calendar

Calls

Calls

Admin

Meet



- Calls: History of incoming and outgoing calls along with voicemail are stored in the Calls.
- OneDrive: Within Files you can quickly find and view files across OneNote, OneDrive and within Teams (stored in their own SharePoint sites). There's also a very helpful 'Recent' tab so you can quickly access the latest documents you were working on, as well as a shortcut to your Downloads.
- Admin: Only available to Administrators.

#### Modify the Navigation Pane

The navigation pane on the left side of the windows in Teams, can be customized to include other apps. If you want quick easy access to the apps you use the most. Follow these steps.

- 1. Click the ... menu to display a list of Microsoft apps.
- 2. Click on the one you want to open.
- 3. Once it's open it can be pinned by right clicking on the icon in the navigation bar.

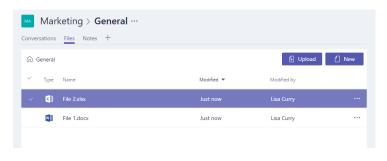
Manage the icon by right clicking on it. You can unpin it if you no longer want to use it through Teams.

#### Files Tab

Microsoft Teams helps you manage your documents by providing a Files tab in every channel. Always keep your critical files visible to the team by pinning them to the top of this Files tab.

The Files tab in a Teams channel gives you a secure place to keep files that your team needs to access, which are all backed up automatically in SharePoint. This makes the Files tab a popular place for document storage, but this convenience comes at a cost: You can no longer find files easily once you've got a large number of them in the list.

In your Teams window, you can perform a variety of tasks directly within that window or browser, so that you avoid flicking between different applications. These tasks include the ability to delete, download, move files, open, copy, edit or get a link to share with others



– giving you all the key features you would get in the native apps.



You can also start a Group chat alongside the file, to allow team discussions while all working on the files - and this conversation will appear in your Conversation thread.

When you're collaborating in real time, it is a great time-saver to easily access files that are important to your project. Files shared on Microsoft Teams are available right where you are having conversations and meeting, and your team can own them together. Documents shared in Microsoft Teams are stored in SharePoint, so you get the best of both worlds.

#### **Accessing via Microsoft Teams**

You can reach your files by first going into the channel, and then selecting the *Files* tab to the right of the *Posts* tab at the top. All the folders and files are listed with their *Modified* and *Modified by* columns (which can be clicked to change the sort order).

The interface is similar to SharePoint. At the top, you can create new files and folders, upload files, download files, and so on. You can also select different *Views*, which mimic those created in SharePoint, filter the view, and use the 'i' icon to open the details pane.

You can also open the associated site directly from Microsoft Teams. Select **Open in SharePoint** from the *Files* tab menu. The associated SharePoint site will open in a browser and show the contents of the channel folder.

In case you only want to open a specific file, this is also possible. This time, navigate to the *Files* tab of the channel, click on the ellipses (...) that appears when you *mouseover* a file, and select **Open in SharePoint** from the menu that appears. Although you'd think it would filter the view for only that document, or select it or something, it doesn't. You will still need to scroll or filter or search in the SharePoint library.

#### Who can access or see my files?

As with all content in Microsoft 365, *security trimming* applies to these files. Users can view and search only content they have access to, which is totally respected between Microsoft Teams and SharePoint Online. Therefore, when you add or remove users from a Team, their access is also added or removed from the SharePoint site.

#### Are my changes reflected?

Yes. Wherever you are making changes to files and documents, they are saved. And you always have the latest version of the document, whether you are in Microsoft Teams or in SharePoint Online.



**Note**: Make sure to use the **Files tab at the top of the channel** conversation window instead of the Files button on the left side of the app. That button on the navigation pane gives you access to ALL of your cloud files, rather than just the files for a specific channel.

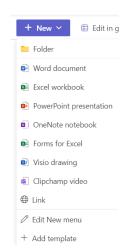
#### Create a New File

You can add a new file at anytime to the Team Channel document library by clicking on New. Then choose from a Folder, Word Document, Excel Workbook and more.

The file will be saved by default in the current location.

#### **Upload Existing Files**

There are two primary ways to upload existing files into your library. Both methods start by going to the files folder for your channel and both methods, by default, upload copies of your files to the channel file folder.



Go to the Team, then the Channel and click on the File tab. Do one of the following:

- **Drag and drop** Using your mouse, drag the file from where it's currently located and drop it on the Teams window among the files.
- Upload Select Upload, then select the file (or files) you'd like to upload and select Open.

Any files you upload will be accessible by any member of your team. And just like in SharePoint, you can pin specific files to the top of your list for easy access.

#### But where are my files exactly?

The exact location depends on which Team channel you share(d) them in. By default, there's a *General* channel (which can't be deleted), and the files shared in this channel will be stored in the SharePoint site, in the *Documents* library, within the *General* folder. If you create a Team channel called "Project A", files shared in this channel will be stored in SharePoint under the folder called "Project A", and so on...





#### Add Shortcut to OneDrive

In the options bar at the top of the window, click **Add shortcut to OneDrive**. If you do not see this option, click on the three-dot icon, and select Add shortcut to OneDrive from the drop-down menu. You will see a notification pop up in your Teams window, indicating that a shortcut has been added.

#### Open in SharePoint

From the menu at the top, you will have access to opening the current document library in the SharePoint site is connected to.



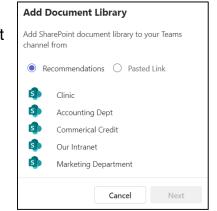
The SharePoint site will open directly the document library from Teams. You will have all the file management capabilities that are offered in SharePoint.

You will also have access to the entire SharePoint site. By using the navigation on the left side, you can access other pages, lists, libraries, etc. that reside within the site.

#### **Add Document Library**

Bring team resources to one central place so that team members can focus,

communicate, and collaborate to get work done. Add the SharePoint tab in Teams to quickly paste any published page, news post, or list from a SharePoint site. In Microsoft Teams, you can add published SharePoint pages, lists, and document libraries as individual tabs in a Teams channel. Team members can view pages, edit lists, work with their shared files, and add comments in the Teams tabs.



- 1. In Teams, select the channel page. To the right of the channel name, select the + on the tab bar.
- 2. Select the SharePoint tab.
- 3. Select the Document libraries to see existing SharePoint lists available from your team site. You can also pick a document library from Recommended section SharePoint content to add as a tab in the Teams channel.

Or click the + Add Document Library icon from the menu at the top.

Add shortcut

Copy to

Adobe Document Cloud



#### Managing Files in Teams

From the ... menu or by right clicking on a file, you will have access to a list of options for managing your file.

Options will include Share, Delete, Rename, Pin to Top, and more. **Options** are very similar to those in a SharePoint Document Library.

If an option you use in SharePoint is not on the list, you can open the document in SharePoint to have access to all the features.

# Microsoft OneDrive

Microsoft OneDrive gives you one place to store, share, and sync your files. As part of your organization's Microsoft 365 subscription, or SharePoint Server, you can save your files in OneDrive and then work with them from almost any device.

With OneDrive you can:

- Upload files from your PC or Mac.
- Share files with others.
- Give others permission to edit files and work on them at the same time.
- Get your files from anywhere, on your computer, tablet, or phone.
- Sync OneDrive to your PC or Mac, so you can access your files even when you're offline.

You can use OneDrive from the app by logging into your Microsoft Account online. But OneDrive is also available through Teams and File Explorer.

## OneDrive Online User Interface

The OneDrive navigation menu on the left side of the window gives you access to all your files and folders within OneDrive but also document libraries from SharePoint and Teams by using the Quick Access. The menu offers filtered options like Shared, People and Meetings to limited the items you are seeing.

My files
Shared

☆ Favorites
Ŵ Recycle bin

Browse files by

8 People

**Ouick access** 

Company Intranet

m Clinic - Legal Documents



#### Home

Includes new filters that were made to quickly discover the files you need by their file format (Word, PDF, Excel, etc).

Recent All Word Sexcel PowerPoint PDF

#### My Files

The My Files category is used to view your entire OneDrive folder and file structure.

#### **Shared**

In OneDrive, the **Shared view** is a feature that allows you to see all the files and folders that have been shared with you, as well as the ones you have shared with others. Here's a quick overview:

- Files Shared with You: When someone shares a file or folder with you, it appears under the Shared section in OneDrive. You can access these items by selecting Shared in the left navigation pane.
- Files You Shared: Similarly, any files or folders you share with others will also appear in this view. This makes it easy to manage and keep track of your shared content.

#### People View

OneDrive's People view organizes your files in terms of you are working with. You can pin people to top of the view for quick access. Activity previews help keep you up-to-speed on collaboration without having to open the file.

Sometimes it is easier to recall a file based on the person we associate it with, rather than the name of the file or even the project it's for. OneDrive's context-aware, adaptive experience can help you and your collaborators quickly find files you're working on together.

#### **Meetings View**

A Meetings view in OneDrive shows all files shared during your meetings and in your meeting chats, including files that will be used in upcoming meetings.

Hunting through meeting invites, recordings, and chats is not an ideal way to find files. To bring these files to you, OneDrive's Meetings view surfaces the files shared during meetings, related chats, and available files that will be used in upcoming meetings. This



view is organized by upcoming meetings, followed by recent meetings, and it contains all files shared in your meeting, even ones you were not able to attend.

#### OneDrive Sorting and Views

At the top right of the window, you will have access to the Sorting and View options.

- Sorting by type, name, modified, modified by, file size both A/Z or Z/A.
- View Options List, Compact List or Tiles

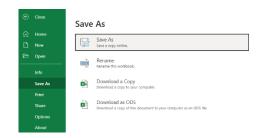
## Saving Files to OneDrive



You can save files into OneDrive multiple ways. If you are using the online versions of Microsoft 365, they default to saving to your OneDrive or you can drag n drop files onto OneDrive.

Microsoft 365 apps have autosave that will save your files to OneDrive but if you want to save to another location you can go to the File menu, click on Save As and navigate to the location.

From a desktop version of your apps, you can choose OneDrive from your Save As options.

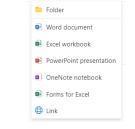


#### **Create New Files**

You don't always have to start a new Word doc or Excel workbook directly in the app, you can create new directly in OneDrive.

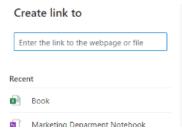
Open OneDrive and from the Menu Bar at the top, click on New.

From the Menu, choose:



↑ Upload \

- Folder create a new Folder to store files or other folders
- Word document, Excel workbook, PowerPoint presentation, OneNote notebook, Forms from Excel
- Link create a link to a webpage or file.



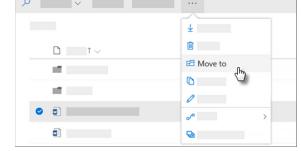


### Access to all files in OneDrive

When your users use OneDrive, they can access their SharePoint or Microsoft Teams files on the web or in the mobile app without leaving OneDrive.

Because individual libraries in OneDrive are powered by SharePoint, users can easily

move files between locations. For example, if a user drafts a file in their individual library in OneDrive, and later wants a team to own the file, the user can simply move the file to the team's library.



- Select the files or folders that you want to move, and then select **Move to** from the ... menu.
- Select the location you want to move to. Sites appear under the Quick Access section.
- 3. Select the location where you want the items to go, then select **Move here** to start moving the items.

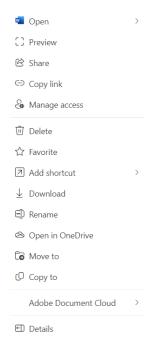
# Manage Files in OneDrive

When using files in OneDrive, you can manage them by clicking on the ... menu or right clicking the file or folder. You will see a menu of options like Share, Delete, Rename, etc.

# Accessing OneDrive with File Explorer

Like other storage locations, you can access your OneDrive directly in File Explorer. You can use OneDrive like your other drives, C:/Drive, network drives, etc.

- When you open File Explorer, on the left side of the window, click on OneDrive.
- On the right side of the window you will see your folders and files that are saved in OneDrive.
- You can open the files, copy, cut, etc. just like any other file or folder.





#### Always Keep on This Device

The OneDrive always keep on this device feature enables users to access their files for offline use.

With the OneDrive feature **always keep on this device**, your files are stored and can be accessed from the personal cloud without downloading them on your device. Further, once you are signed into the OneDrive app, this feature enables you to access your files from any PC anywhere in the world.

In addition, once the feature is enabled, the data for the selected files are not physically downloaded, which means, the files show on your device, but they take up almost no space, regardless of how big they are.

However, only files stored in OneDrive can be set to always keep on this device.

Your files will have these statuses in File Explorer:

**Online-only** files don't take up space on your computer. You see a cloud icon for each online-only file in File Explorer, but the file doesn't download to your device until you open it. You can't open online-only files when your device isn't connected to the Internet.

When you open an online-only file, it downloads to your device and becomes a **locally available** file. You can open a locally available file anytime, even without Internet access. If you need more space, you can change the file back to online. Just right-click the file and select **Free up space**.

Only files that you mark as **Always keep on this device** have the green circle with the white check mark. These files download to your device and take up space, but they're always there for you even when you're offline.

## Free up space

The free up space feature on OneDrive allows you to save local storage on your device by converting files to online-only status. When you use this feature, the selected files are removed from your local storage but remain accessible in the cloud. You can still see these files in your OneDrive folder, but they won't take up space on your device until you open them again.

This is particularly useful if you're running low on disk space but still want to keep your files accessible. You can always download the files again when needed, if you have an internet connection.



# Create, Save, and Open Files from an App

Using the SharePoint Document Libraries, Teams and OneDrive are great ways to create, save and open files but you can also do so directly from within the app itself like Excel, Word, PowerPoint, etc.

Open the app, create the file then save.

#### To Save to a Cloud

- 1. From the File menu, click Save (CTRL S).
- 2. In the Save As dialog box, choose OneDrive or Sites.
- 3. This will open the dialog box where you can choose the Site (SharePoint or Teams) that you want to save the file to.
- 4. Give it a name and Save.

