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Working with Files in MS365

Major Concepts to Understand

One of the major conceptual hurdles we found in setting up MS365 is that you can access files (and often other elements) from multiple ways. You can choose to only ever interact with MS365 via your web browser. For Linux desktop users, this will be the **ONLY** way you can access it.

If you are a Mac or Windows user, you can also install the OneDrive (and Teams) apps on your local computer, and with a few other small steps, see those same files from the web groups and teams you participate in on your local computer. As well, where you can edit them locally and then they will sync back to the cloud.

And you can use either method once you have them set up and enabled. Which can be powerful, but also confusing.

Why would you want to use the Desktop over the Web Browser Approach?

If you stick 100% with the web approach it is likely less confusing in the end. However, using the OneDrive app to create local sync'd copies has a number of advantages

- for those already familiar with MS Office apps, there will be less of a learning curve
- Often times there is functionality in the thick desktop editing apps (Word, Excel etc) that is richer and more full functioned (note this is not always the case, and in some cases you will find you **MUST** log into the web version to do certain functions.)
- There may be differences in Accessibility between the desktop apps and the web apps that makes it easier for certain users to use one over the other.

On the flip side - if you want to synchronously edit a document with another user, as in you both see the edits in real time (as was the case with Google Docs) then using the Web app is your **ONLY** choice. Otherwise, if you edit a document on your local machine, it needs to be sync'd back to the cloud, and possibly "Track Changes" employed if you want to work on it with another user.

In the end, the important thing to understand is - they are ultimately the "same" document, but with the desktop approach it is a "copy" of the document on the server that must (usually automatically) get sync'd back up.

"Your" OneDrive versus Shared OneDrive Folders

Another thing that is confusing at first when you start to use the OneDrive application on your local machine is that initially it sets up a personal OneDrive folder. These are **YOUR** files. By default, while they sync to the cloud, they are not shared with others. You **can** share these, but you are the owner and in control of these.

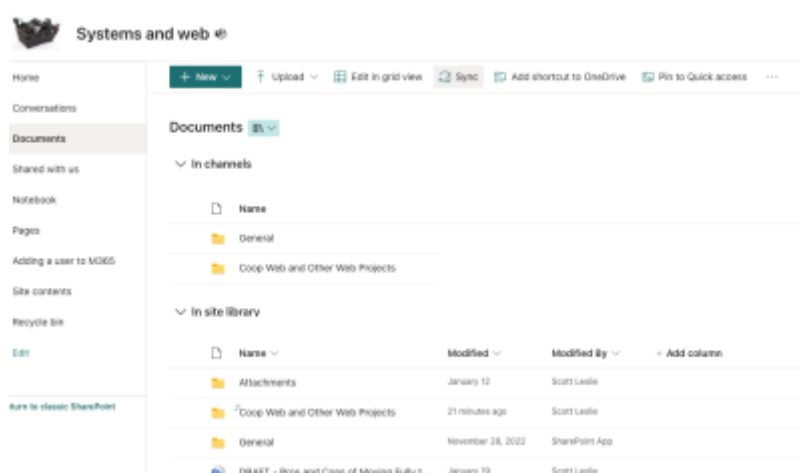
This is distinct from files that have been shared from Groups or Sharepoint or Teams. Those are shared _with you_ but will appear in a different folder than your personal OneDrive. And they will only be sync'd (i.e. a copy brought down off the cloud to your local machine) locally if you choose to actively instruct Microsoft to do so.

I'm still lost, can you try again?

Well, here is a document from a famous site that tries to explain MS365 that might be helpful, the [The Document Circle of Life in Office 365](#).

How do I tell MS I want a group or team folder to be replicated locally?

If you go to the group's sharepoint site and select "Documents" from the left-hand menu, it will list both the "site Library" documents as well as the "Channel Documents" for the group/team.



At the top of that list are 4 links to "Add Shortcut to Onedrive" and "Sync." If you perform both of these actions in that order, in your local One Drive -Shared Folders you will now see a folder with the group/teams name that contains these files.

How to locate the OneDrive folders for Mac Users

Mac users - when OneDrive is installed locally, the actual physical file paths to the folders are

- /Users/_username_/Library/CloudStorage/OneDrive-BCLibrariesCo-operative for your PERSONAL onedrive, and
- /Users/_username_/Library/CloudStorage/OneDrive-SharedLibraries-BCLibrariesCo-operative for any shares from groups or teams **that you have opted to sync to your desktop**

Note that last part is important - unless you specifically go into the various sharepoint group documents folders and teams document folders and tell them to "sync" those will remain on the

server only.

How to locate the OneDrive folders for Windows Users

Windows Users - when OneDrive is installed locally, the actual physical file paths to the folders are

- C:\Users_username_\OneDrive-BCLibrariesCo-operative for your PERSONAL onedrive, and
- C:\Users_username_\OneDrive-SharedLibraries-BCLibrariesCo-operative for any shares from groups or teams **that you have opted to sync to your desktop**

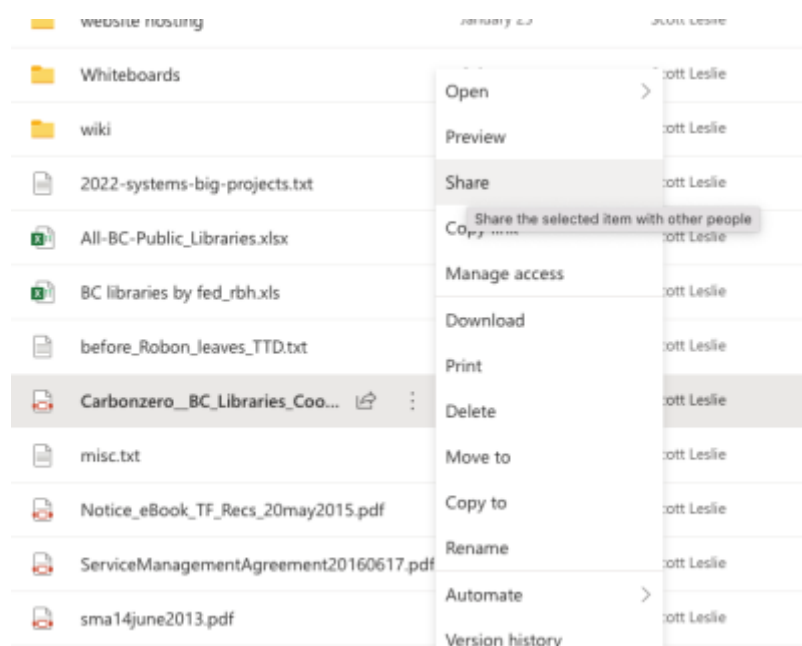
Note that last part is important - unless you specifically go into the various sharepoint group documents folders and teams document folders and tell them to "sync" those will remain on the server only.

How to share/collaborate on files with other people in the organization?

If the file is in your own personal OneDrive folder, you can either

a) move the file into a Shared folder from one of the Sharepoint Groups or Teams, and this will automatically give access to the people in that group or team (you may still need to let them know you've moved it there), or

b) Share the file from where it is by clicking on the three stacked dots after the filename in Onedrive or Sharepoint and selecting "Share"



and then either enter in a person's email address



or further select "People you can specify can view" and then change who and what they can do with

the file

Sharing settings

Carbonzero_BC_Libraries_Cooperative_03.03.2021.pdf

Share the link with

☐ Anyone ⓘ

☐ People in BC Libraries Co-operative ⓘ

☐ People with existing access ⓘ

☒ **People you choose**
Share with specific people you choose inside or outside of BC Libraries Co-operative, using their name, group, or email.
To: Name, group or email

More settings

☒ Can view

☐ Block download ☐ Off

Apply **Cancel**

How to share/collaborate on files with someone outside the organization?

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