BENTLEY UNIVERSITY

SharePoint Tips!

LOGIN AND HELP INFO:
LOGIN: portal.office.com
Web: https://www.bentley.edu/offices/client-services
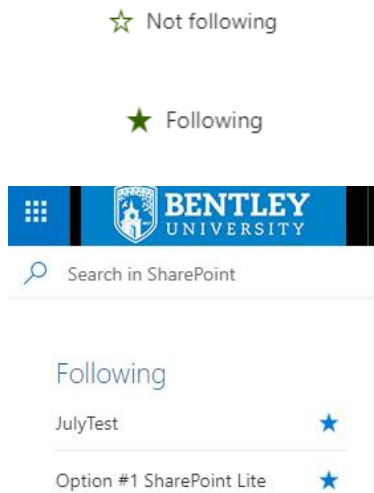CALL: 781.891.2854
EMAIL: helpdesk@bentley.edu

Follow a SharePoint Site for easy navigation

In the top right corner of the site, you will see a star and if the star is unclicked it will say Not Followed. When you click the star and Follow the site, it is easier to find on the main SharePoint page.


Use Sync to add content to Windows explorer

Sync will take your cloud site or specific folders in the site, and copy them locally on your computer and visible in Windows Explorer or Finder on the Mac. Having those local copies available make it easy to open, save and copy to your SharePoint site. Anything you do on the local copy, syncs to the cloud.

Step 1 – Click Sync on the command bar

Step 2 Notice this message box. If One Drive sync does not start up, you will need to install the latest version by clicking the link at the bottom of this message.
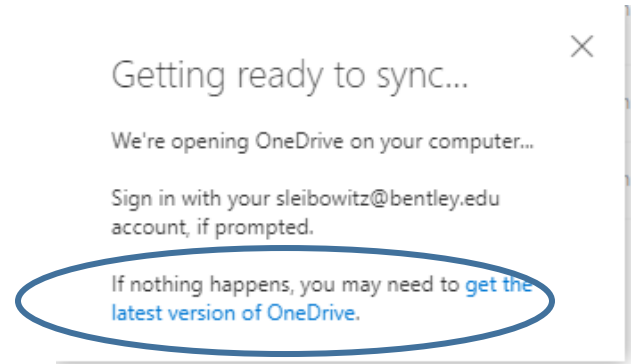
A One Drive Set Up file will download and you need to click and Run it. After it runs, close the "Getting Ready..." box and click on Sync again, the same way you started. You'll be prompted to open One Drive and log in to the sync tool.

After you sync, the SharePoint content you chose will show up in Windows Explorer under Bentley University
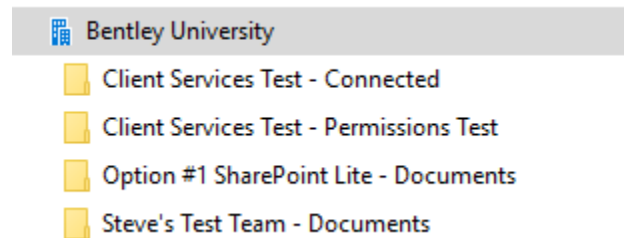
You can now open and edit files from here or drag and drop files to a folder to upload to the SharePoint site.

If you had files on the N Drive that linked to other files, syncing your files to your hard drive and re-doing the links from those local copies is the only way to re-establish those connections.

Sharing Files from SharePoint

While most of the people who need access to a particular file or folder, likely have that access already, you might find the need to give edit or view access to someone else. This can be internal or external to Bentley University.

Step 1- Click to the left of the file or folder name to check mark it

Step 2- Select Share on the command bar
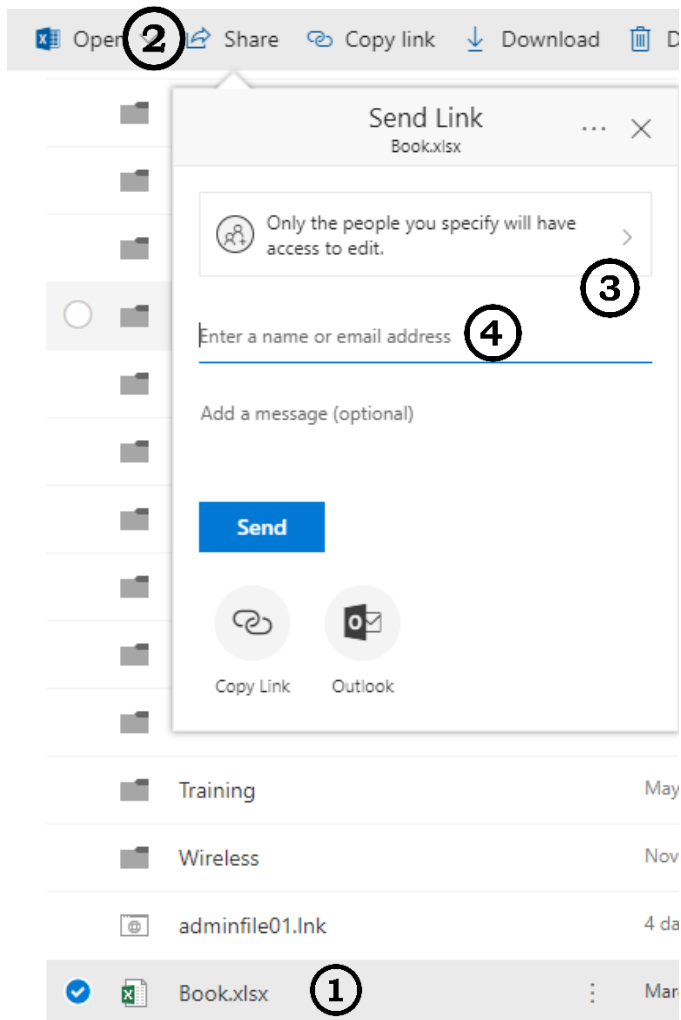
Step 3 – the default is to give people the ability to Edit. If you only want them to View, click on the arrow at the permissions box to change it.

Step 4- Enter email addresses & an optional message to your recipients.

Quick Hits!

- When you click on the file name in SharePoint, it will open directly in the desktop version of the application

- When you create a new file that you want to save to SharePoint, you can use Save As and Browse to find your SharePoint site, after you have synced.

- When you save to your local synced copy, the sync tool automatically is set to continuously work and save any changes locally to the cloud and any changes in the cloud to your local copy

- When a folder or document is selected, there is an Alert Me command available to you. This allows you to set up notification to you if the selected item is changed, based on criteria you determine

- When you are in One Drive, you can also access your files from Followed SharePoint sites from there and work on them from One Drive. There is no difference working on the file from One Drive versus SharePoint

- If you have created any Teams, those are also accessible in SharePoint. Files will show by clicking Documents in the left side navigation and each Channel in the Team has its own folder there.

- Remember, you have access to all your files stored in the cloud anywhere you have internet access and logging in to portal.office.com

- One of the best shortcuts to use on a file or folder in SharePoint (or One Drive) is right clicking on it. You'll see all the options as to what you can do with that object in one place.