



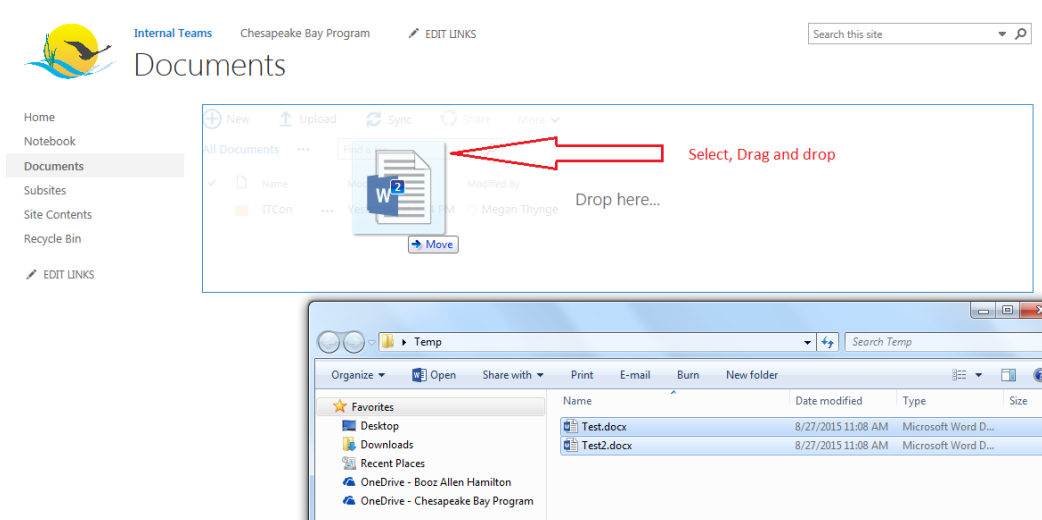
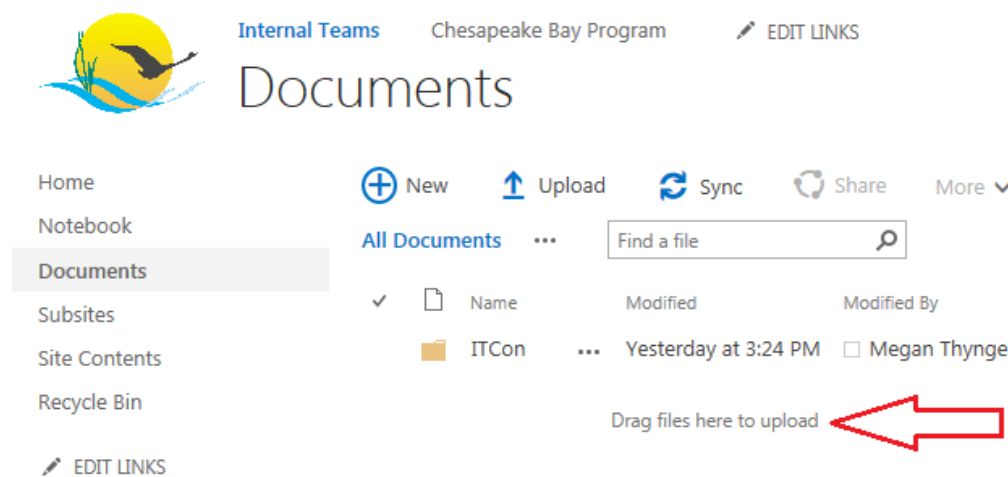
How to work with Documents in CBP SharePoint

This document contains information and procedures that describe how CBP's SharePoint collaboration tool can help you safely store, share and use documents.

How to upload files to SharePoint?

You can upload files, to your SharePoint team site, by just dragging them from your computer.

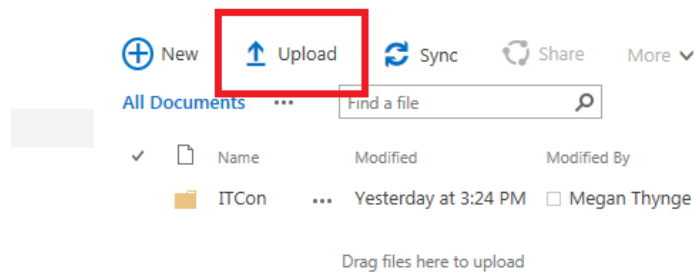
First, open your team site documents library. Then find the documents that you want to upload in File Explorer and drag them to the space in the library where it says **Drag files here to upload**.



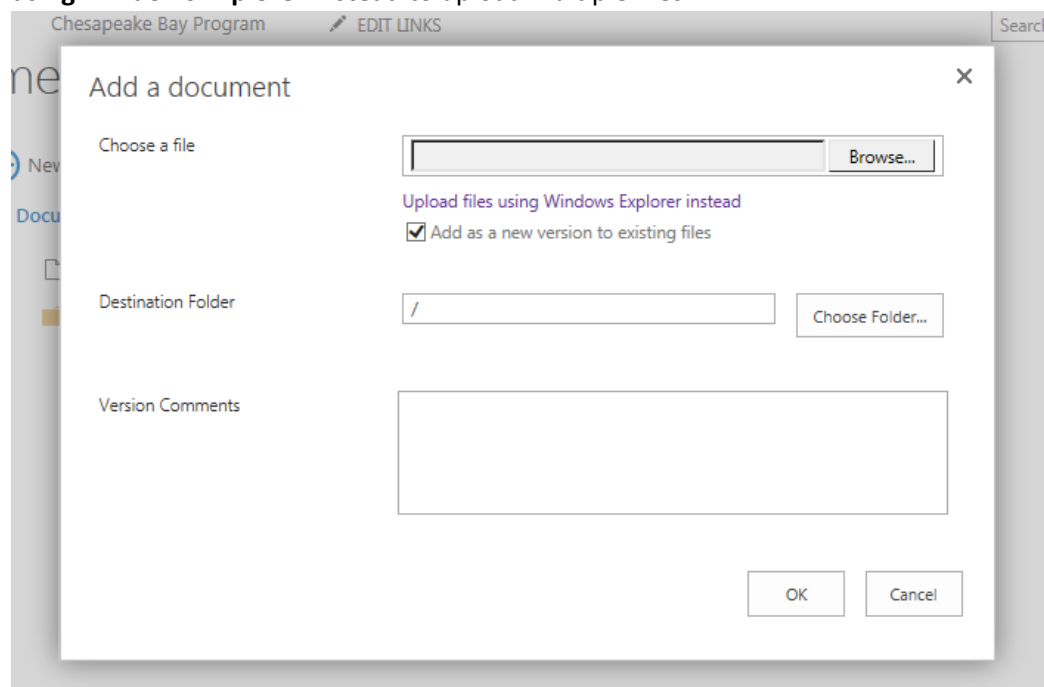


Instead of dragging files, you can also select **Upload**.

Documents



In the **Add a document** dialog box, you can click **Browse** to upload an individual file or click **Upload files using Windows Explorer instead** to upload multiple files.



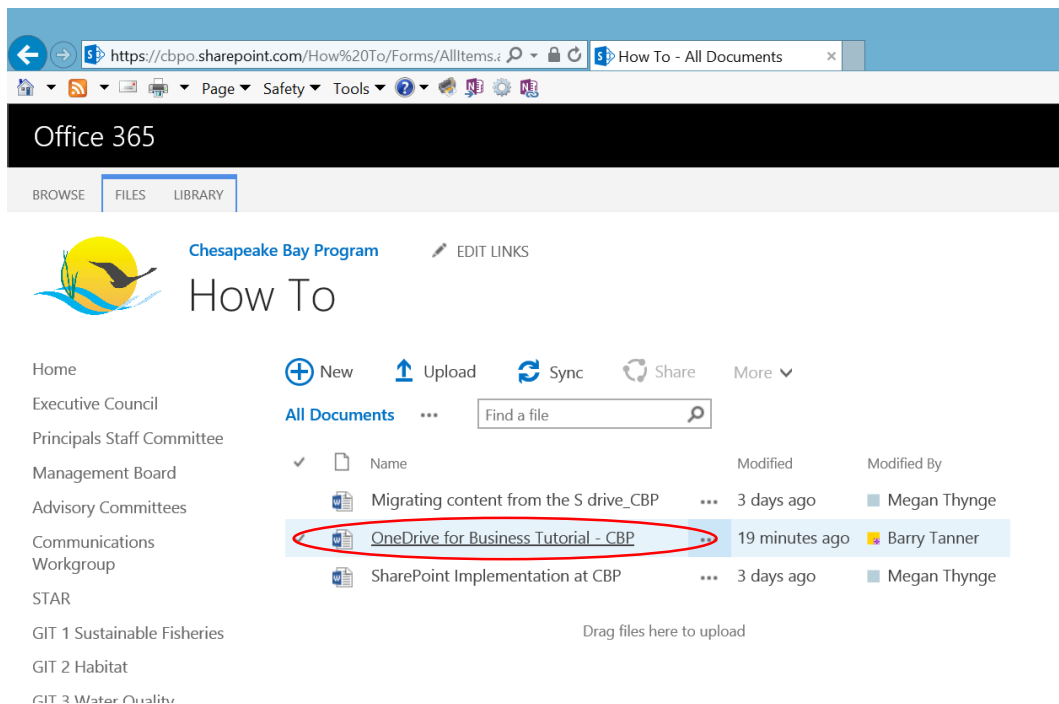
🔄 Upload 100 or fewer files. You cannot upload more than 100 files at a time. Avoid uploading files larger than 2GB, which is the maximum file size by default.



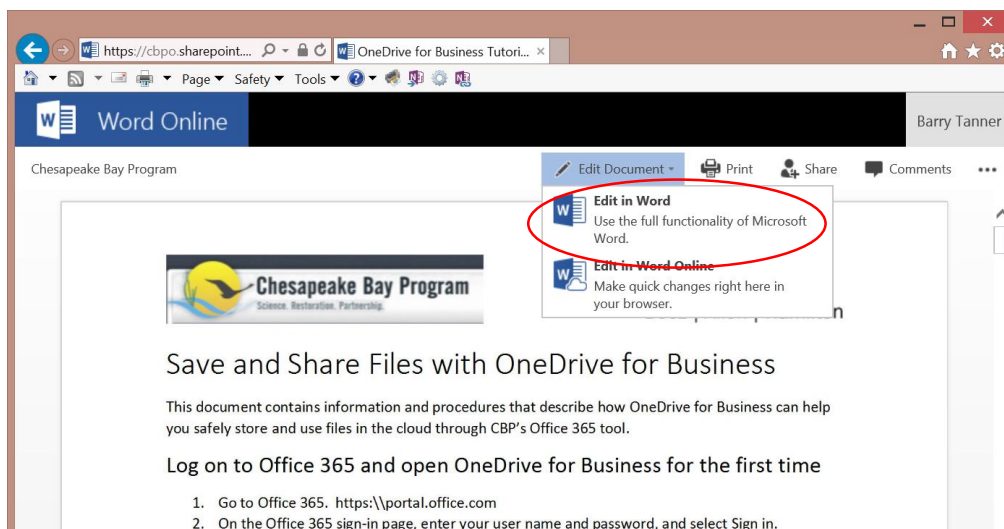
How do I open a document from SharePoint and update it?

When working with documents in SharePoint, you open it directly from the team site:

1. Go to your team site and click on the document you want to edit:



2. The document will open in the browser for you to view. If you want to edit the document, click on the Edit Document menu and select "Edit in Word"



3. The document will then open in Microsoft Word and you can edit it directly. When you save the document, it will automatically update the current version in your team site – there is no need to rename the file.



How to create a local “Sync” folder from SharePoint

You may want to have a local copy of your files from SharePoint in order to work directly with them in Windows Explorer. To set up your local Sync folder, do the following:

1. Go to the folder you want to set up in SharePoint and click on “Sync” at the top

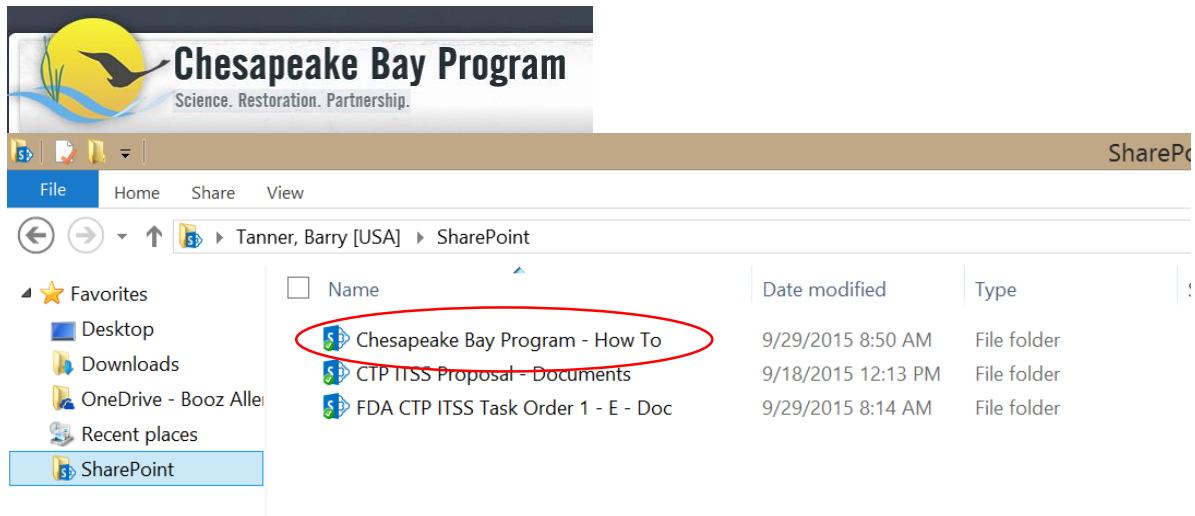
The screenshot shows the Office 365 SharePoint interface for the 'Chesapeake Bay Program' site. The top navigation bar includes 'Office 365', 'BROWSE', 'FILES', and 'LIBRARY'. The main content area shows the 'How To' library with a table of documents. The 'Sync' button in the top action bar is circled in red. Below the table, there is a 'Drag files here to upload' area.

Name	Modified	Modified By
How to use CBP SharePoint	Yesterday at 1:03 PM	Barry Tanner
Migrating content from the S drive_CBP	4 days ago	Megan Thyng
OneDrive for Business Tutorial - CBP	4 minutes ago	Barry Tanner
SharePoint Implementation at CBP	4 days ago	Megan Thyng

2. In the box that pops up click on “Sync Now”

The dialog box contains the text 'Sync this library to your device for easy access.' and a prominent blue button labeled 'Sync now'. Below the button is a link: 'Get the OneDrive for Business app that's right for me'.

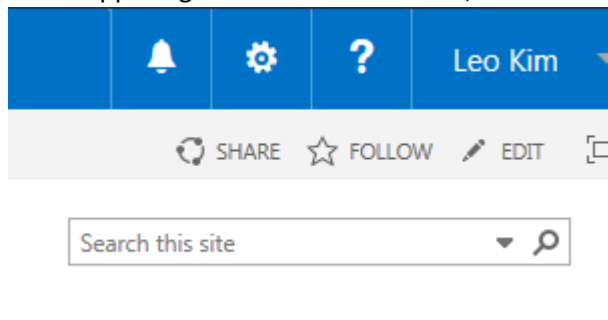
3. A local copy of the files and folders in your site will be created in Windows Explorer under the “SharePoint” header. Anything you add or change locally from this folder will be automatically synchronized to the SharePoint site.



How do I share access to a site in SharePoint?

You may need to share access to your team site with other users who don't already have access to it:

1. Go to the site you want to share.
2. In the upper right corner of the screen, select **Share**.



3. In the **Share** dialog box, type the emails of the users you want to invite.
4. Type a message to include with the invitation.
5. To assign the user to a specific permissions group, select **Show Options**, and then select the group you want. **NOTE:** Be sure you understand what permissions each group has before you share access to your site.



Share 'Chesapeake Bay Program' ✕

Shared with [lots of people](#)

Invite people

Shared with

someone@hotmail.com ✕ Someone@epa.gov ✕

Some people are outside your organization. [Show](#)

I'm inviting you to our CBP SharePoint site.

Thanks,
Leo

HIDE OPTIONS

Send an email invitation

Select a permission level

Team Site Members [Edit] ▼

Share Cancel

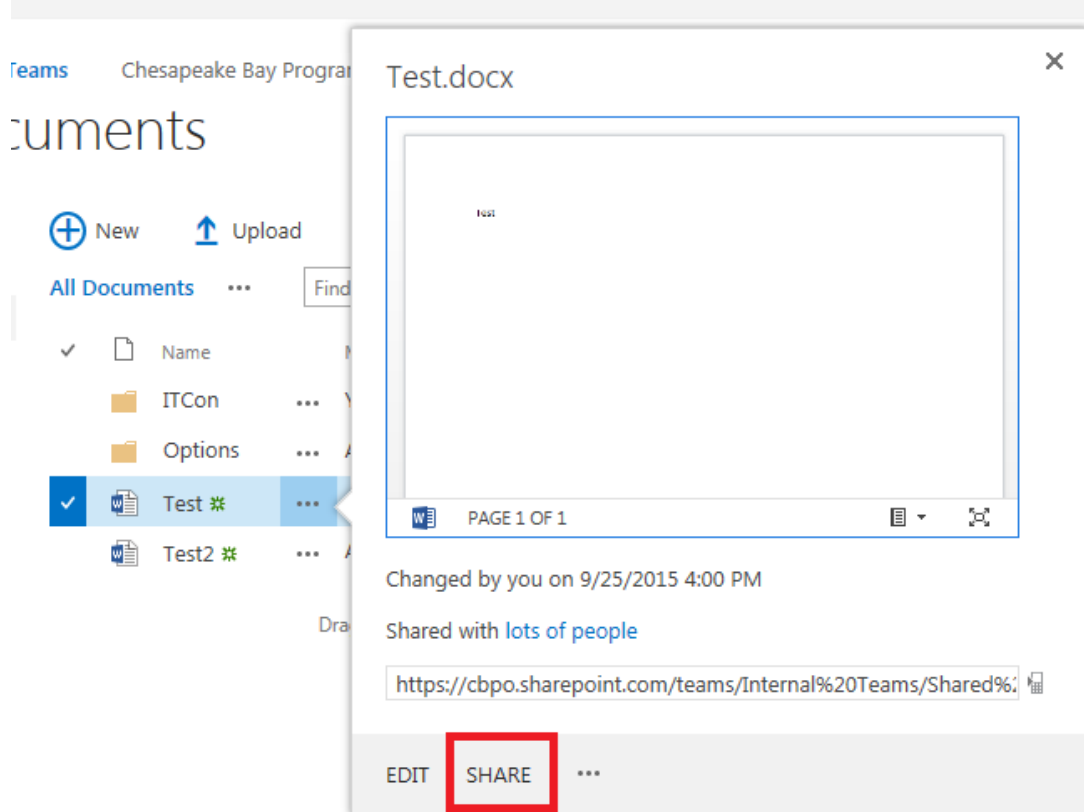
6. Select **Share**.
 7. An email will be sent to those you invite to your site with a link for them to follow – once they access the site they will have permissions based on the group you assigned them to.
- 🔄 By default, any invitations you send to users will expire in 7 days. If an invitee does not accept the invitation within 7 days, and you still want that person to have access to your site, you will need to send a new invitation.

How do I share documents from SharePoint?

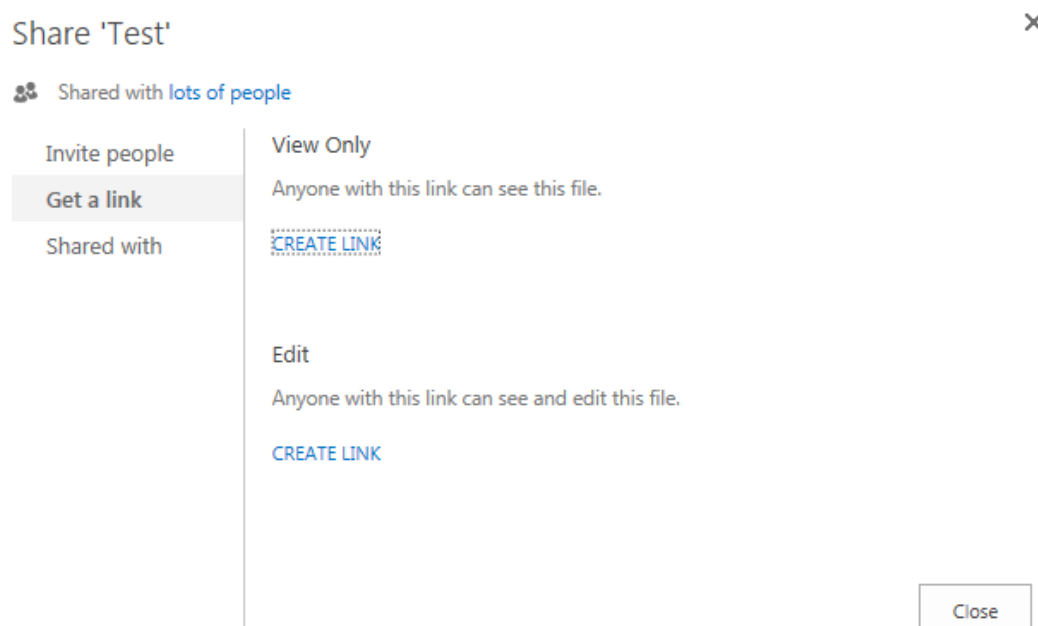
You also may need to share access to a specific document to someone who doesn't already have access to it:

1. Go to Documents library where you want to share documents.

2. Select the “...” link next to the document to open its callout window and then select **Share**.




3. In the Share dialog box, select **Get a link**.
4. Select **Create Link** for the type of permission you want to grant: view only or edit permissions.




5. Select the guest link URL and copy it.

Share 'Test'



 Shared with **lots of people**

 Open to anyone with a guest link

Invite people

Get a link

Shared with

View Only

Anyone with this link can see this file.

<https://cbpo.sharepoint.com/teams/Internal Teams/ layouts/1>

 DISABLE

Edit

Anyone with this link can see and edit this file.

[CREATE LINK](#)

Undo

Cut

Copy

Paste

Delete

Send to OneNote

Select all

Inspect element

Close

You can now paste the guest link URL into email and send it to a person or people.

➡ Anonymous guest links could potentially be forwarded or shared with other people, who might also be able to view or edit the content without signing in. Avoid using anonymous guest links for sensitive content.