

# How to use SharePoint and OneDrive

Autore: ICT Service Desk

Data Creazione: 01/08/2018

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	1 di 30

## Sommario

How to use SharePoint and OneDrive .....	4
1 Introduction: what are SharePoint and Team Sites.....	4
1.1 How to get it .....	4
1.2 Open and manage documents in a document library.....	4
1.3 Main features.....	5
1.4 Edit a document .....	10
1.5 Document collaboration and co-authoring.....	10
1.5.1 Start working together in a document.....	11
1.5.2 Options for sharing changes .....	13
1.6 Versioning overview .....	14
2 Assign permissions within a site .....	15
3 Delete items from the SharePoint Online site and Restore items from the SharePoint Online site recycle bin .....	17
3.1 Restore an entire site or workspace.....	20
3.2 How long are deleted items kept in the Recycle Bin? .....	20
3.3 A few basics about restoring from the Recycle Bin .....	20
4 Control documents or items access and changes and restore an old version .....	21
4.1 How to use document versioning.....	21
4.1.1 When versions are created .....	21
4.1.2 Version numbering .....	22
4.1.3 Control how many versions are stored and number of available versions limit .....	23
4.1.4 Determining who can see draft item .....	24
4.2 Enabling, configuring, and using versioning in lists and libraries .....	24
4.3 How does versioning work with required content approval? .....	25
4.4 How does versioning work with file checkout? .....	25
4.5 List or library permissions.....	26
5 References .....	26
6 OneDrive and SharePoint.....	26
6.1 Sync SharePoint files with the new OneDrive sync client .....	27
6.1.1 Set up syncing.....	27
6.1.2 Restrictions and limitations.....	29
6.2 Share and collaborate in SharePoint and OneDrive for Business .....	29

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	2 di 30

## Indice delle figure

Figure 1 - SharePoint document library page list view.....	5
Figure 2 - Document library page main menu .....	5
Figure 3 - New drop down list.....	6
Figure 4 - Upload drop down list.....	6
Figure 5 - Document library view settings .....	7
Figure 6 - Add button .....	7
Figure 7 - Arrange button .....	7
Figure 8 - Add button drop down list.....	7
Figure 9 - Information pane button .....	8
Figure 10 - Information pane .....	8
Figure 11 - File or folder menu in thumbnail view.....	9
Figure 12 - Document menu .....	9
Figure 13 - Edit document .....	10
Figure 14 - Co-authoring view.....	10
Figure 15 - Allow automatic sharing.....	11
Figure 16 - Flags for seeing where co-author is working on document.....	12
Figure 17 - Group chat with everyone is working on the document .....	12
Figure 18 - Activity pane button .....	13
Figure 19 - Activity pane .....	13
Figure 20 - Version history option in drop down list menu.....	14
Figure 21 - Version history from menu bar .....	14
Figure 22 - Configure settings in document library interface .....	15
Figure 23 - Site permission option in drop down list .....	15
Figure 24 - Share site.....	16
Figure 25 - insert user name for sharing site.....	16
Figure 26 - Access level options .....	17
Figure 27 - Recycle bin menu.....	18
Figure 28 - Settings icon .....	18
Figure 29 - Site contents menu.....	18
Figure 30 - SharePoint site recycle bin.....	19
Figure 31 - Deleted versions view .....	23
Figure 32 - SharePoint sync button .....	27
Figure 33 - Start sync window.....	28
Figure 34 - Sharing SharePoint file with external users.....	29
Figure 35 - Sharing SharePoint file with IIT internal users .....	29

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	3 di 30

## How to use SharePoint and OneDrive

In this document, you can find information about SharePoint tools and Office 365 synchronization and sharing and collaborating functionalities, allowed by SharePoint and OneDrive integration.

From ch. 0 to ch. 5, you can find the description of the following SharePoint tools and features:

- Team Sites,
- document collaboration and co-authoring,
- versioning,
- document check in and check out,
- site, document and library permissions,
- site, document and workspace delete and restore.

In ch. 6 you can find the instructions to use OneDrive SharePoint files synchronization functionality and the description about sharing and collaborating in SharePoint and OneDrive.

## 1 Introduction: what are SharePoint and Team Sites

*SharePoint* tools let people to easily create powerful websites that allow users to collaborate, share and storage working documents.

*SharePoint Team Sites* are organized like company, departments or teams' private websites. System provides private access based on permissions for secure collaboration, a central storage and a collaboration space for documents, information and ideas.

It is an alternative to shared folders or flooding emails with messages and attachments that allows a more efficient workflow.

All Team Sites come with documents libraries where you can upload, share, view, edit, and collaborate on files like Word documents, Excel workbooks and PowerPoint presentations.

### 1.1 How to get it

In order to use SharePoint tools send a request to [ict\\_servicedesk@iit.it](mailto:ict_servicedesk@iit.it) asking for Team Sites. You'll be contacted as soon as possible for a meeting in order to collect your specific requests and prepare a specifications document. Once obtained your Team Site web address, just open it with your favorite browser and login with your IIT email address and password.

### 1.2 Open and manage documents in a document library

A document library provides a secure place to store files where you and your co-workers can find them easily, work on them together, and access them from any device at any time. For example, you can use a document library on a site in SharePoint Online to store all files related to a specific project. Adding files or moving files between folders is intuitive and user-friendly (Figure 1).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
03	Terza emissione	ICT Service Desk		01/08/2018	4 di 30

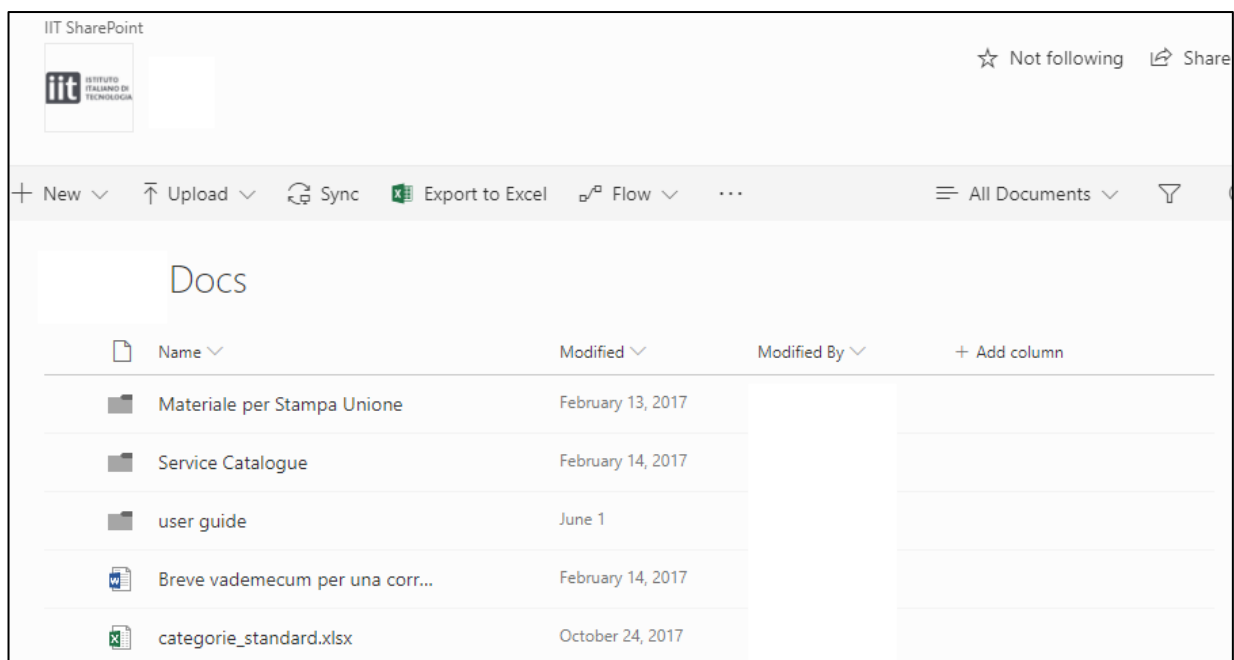


Figure 1 - SharePoint document library page list view

In a document library, you can:

- Add, edit, delete, co-author, and download documents.
- Control who has access to a library, a folder or an individual file within a library.
- Track the activity on a file, such as when it was last modified, and receive a notification when something has changed.
- Create a custom view of a document library.
- Share files or folders with others.
- Add a link in a document library to something that is stored outside the library, for example, a link to a file located in a different library or even a link to an external web page.
- Highlight a link, file or folder in a document library so you and others can get to them quickly.

### 1.3 Main features

At the top of the document library page is the main menu (Figure 2).



Figure 2 - Document library page main menu

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	5 di 30

Click *New* button and a drop down menu appears. Here you can create a new folder, document, or a link to something that is located outside the document library (Figure 3).

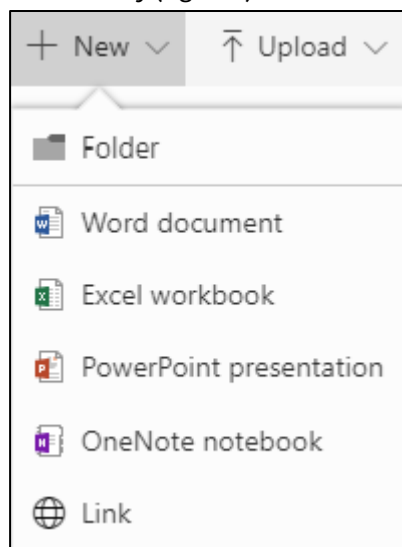


Figure 3 - New drop down list

Click *Upload* button and a drop down menu appears. Here you can upload folder or files (Figure 4).

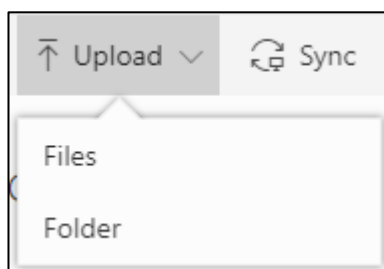


Figure 4 - Upload drop down list

You can also synchronize files with the new *OneDrive sync* client or create an alert to receive a notification when something has changed (see *sync* and *alert me* buttons in Figure 2). For more information about syncing SharePoint files with the new OneDrive sync client see par. 6.1.

At the top right of the document library page, you can change the document library view to either list view or grid view. If using Internet Explorer, you can open the document library in Windows File Explorer, by clicking "View in File Explorer". You can also save a custom view by clicking "Save view" or, if you are a library owner or administrator, you can manage views on the library settings page by clicking "Manage views" (Figure 5).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	6 di 30

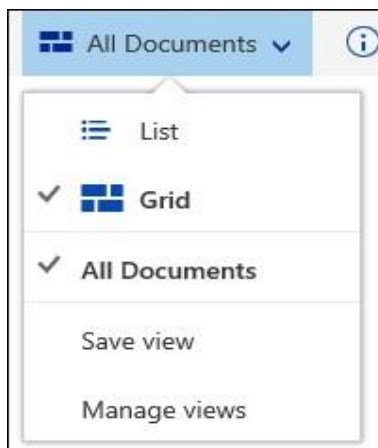


Figure 5 - Document library view settings

You can add new columns and select the columns to display by clicking button in Figure 6 on the far right side of the column headers if you're in list view or, if you're in grid view, by clicking button in Figure 7 and then clicking button in Figure 6 on the far right side of the column headers (Figure 8).



Figure 6 - Add button



Figure 7 - Arrange button

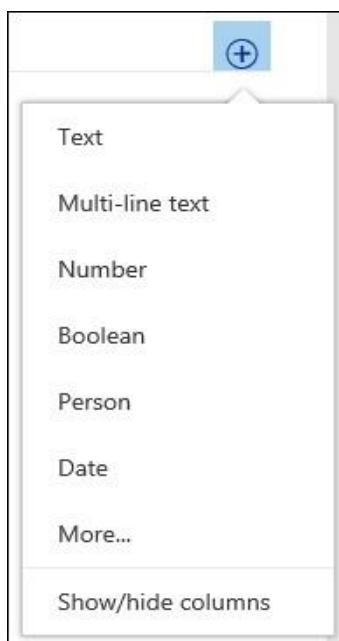


Figure 8 - Add button drop down list

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	7 di 30

You can view and edit information about a file or folder, such as required properties, recent activity or whom a file is shared with, in the information pane. To show or hide the information pane (Figure 10), select a file or folder and click button in Figure 9 on the right-hand side of the main menu. You can also view the information pane by right clicking a file or folder and selecting Details.



Figure 9 - Information pane button

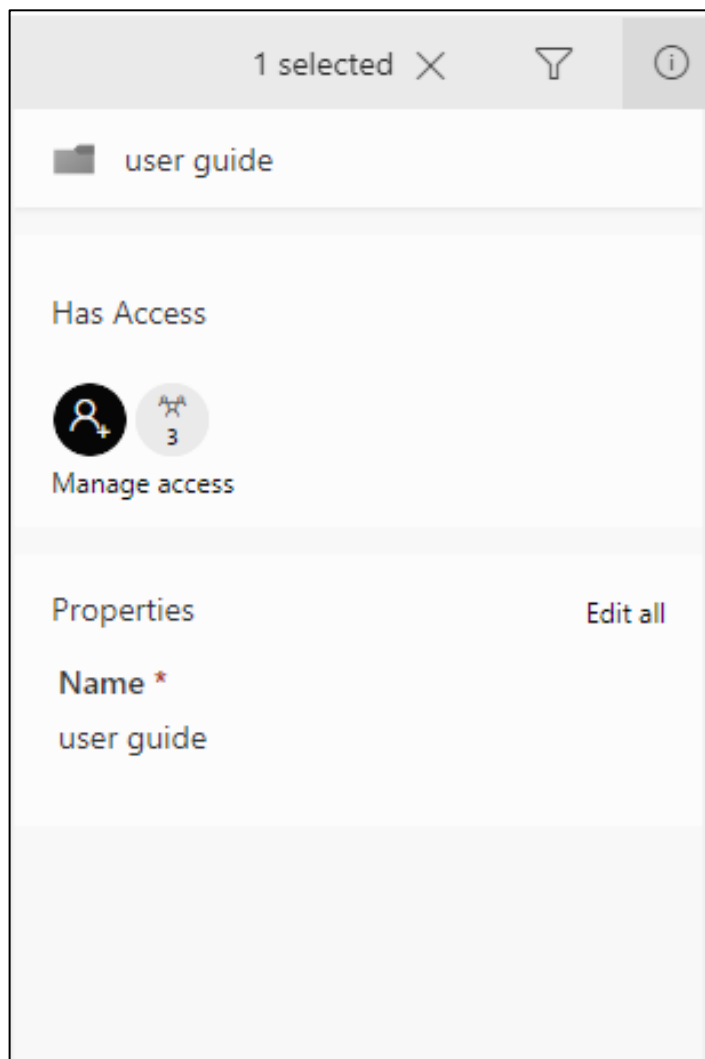


Figure 10 - Information pane

When you select a folder or file, the menu at the top left of the document library changes to a list of actions you can perform on that folder or file.

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	8 di 30



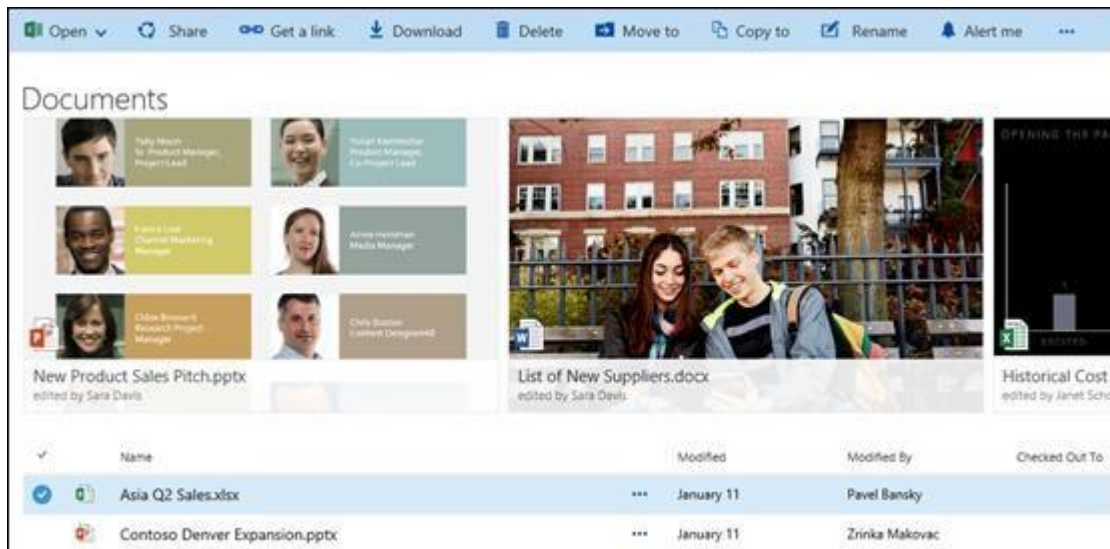


Figure 11 - File or folder menu in thumbnail view

Note: To expose the file or folder menu when in thumbnail view, click the top right corner of the thumbnail (Figure 11).

You can see another version of the document menu by right-clicking the file name or, if in list view, by clicking **\*\*\*** next to the file name. This menu contains additional actions such as Pin, which highlights files so you and others can find them quickly (

Figure 12).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	9 di 30



Figure 12 - Document menu

## 1.4 Edit a document

If you wish to edit a document, click the document you want to work on and it will open in Office Online. If you have the application installed on your computer and you want to use it, click Edit Document > Edit in <application name> (Figure 13).



Figure 13 - Edit document

## 1.5 Document collaboration and co-authoring

Using Office and OneDrive or SharePoint, multiple people can work together on a Word document, Excel spreadsheet, or PowerPoint presentation. Office has tools, such as comments, track changes, and activities for

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	10 di 30

communication, clarity, and consistency. When everyone is working at the same time, that's called co-authoring. When you're using Office and your document is on SharePoint or OneDrive, when everyone has done, you have a finished document, there's no need to copy and reformat.

When you're working together, you can see where everyone is and what they're typing - as though they're typing on your device. Co-authoring allows to see where others are working on document and what they are typing (Figure 14).

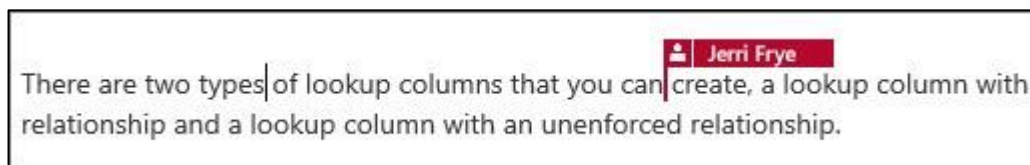


Figure 14 - Co-authoring view

If you use Skype, work remotely while feeling like you're sitting in a meeting room. Skype lets you talk to the other people and see them working on your documents. Instant messaging lets you ask questions without interrupting, or send links or files to the group.

There are two types of co-authoring that are supported in Office, regular and real-time co-authoring. Both let multiple people collaborate and work together on documents.

There are just a few differences between the two types:

- Regular co-authoring: you and others can simultaneously work on a document not blocking each other. You can see who is working on the document (in the collaboration corner), and the paragraph that was worked on is locked. When others make new changes, you see an "Updates Available" status in your document or presentation. When you save, you see changes that others have made. Your document is refreshed with changes that everyone else has saved since the last time you saved.
- If you are using an application that can do regular co-authoring, you can co-author with someone who is using a version that supports real-time co-authoring.
- Real-time co-authoring: two or more people can type at the same time and automatically see text changes as they happen. You can see the cursor location where someone is working and what they're typing as they type, just as if they are working on your computer or device. Text and the location or presence of the person appears almost instantly, with formatting catching up shortly. You can hover over the cursor location and see who is making the changes. If you co-author with someone who's using a version that supports only regular co-authoring, you won't see edits from them in real time, but you can still work together.

When you and your colleagues want to collaborate on a document, use real-time co-authoring to see everyone's changes as they happen.

It is sufficient that you save the document to OneDrive or SharePoint Online, so others can work on it and invite people to edit it with you. When they open and work on the document in Word 2016 or Word Online, you'll see all co-author changes as soon as they're made and while people are working on the document you can chat with them instantly by using Skype for Business.

### 1.5.1 Start working together in a document

In order to work together with other persons on a document follow these steps:

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
03	Terza emissione	ICT Service Desk		01/08/2018	11 di 30

How to use SharePoint and OneDrive

1. Open and edit the document in Word 2016 or Word Online.
2. If you are using Word 2016 and you have not already agreed to let others see your changes, choose "Yes" to allow automatic sharing (Figure 15).
3. A link is automatically sent to your collaborators.

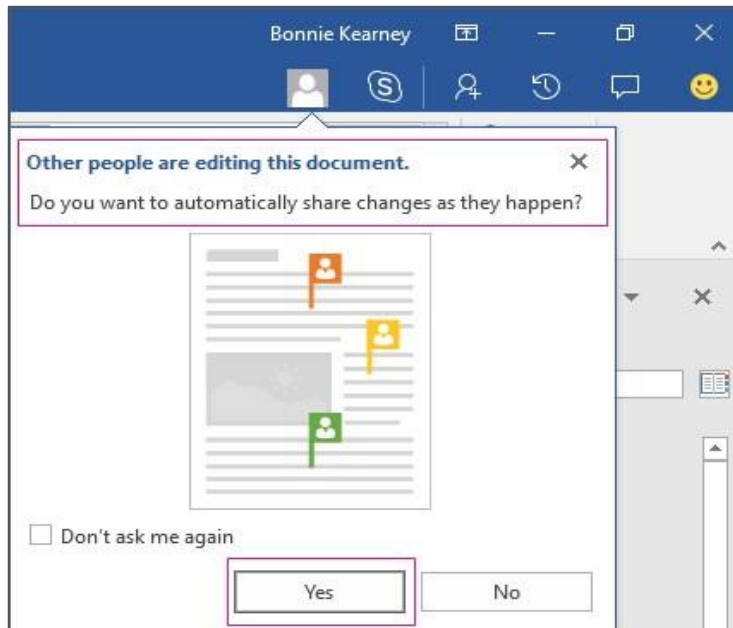


Figure 15 - Allow automatic sharing

4. When people follow the link you sent, your document will open in their version of Word, or on Word Online. If they are also using Word Online or Word 2016 and they have agreed to automatically share changes, you will see their work as it happens because colored flags will show you exactly where in the document each person is working (Figure 16).
5. Choose the Skype for Business button to start a group chat with everyone is working on the document. You can instantly chat with people who are working on the document by using Skype for Business. It opens a chat window for instant conversation (Figure 17).



Figure 16 - Flags for seeing where co-author is working on document

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	12 di 30

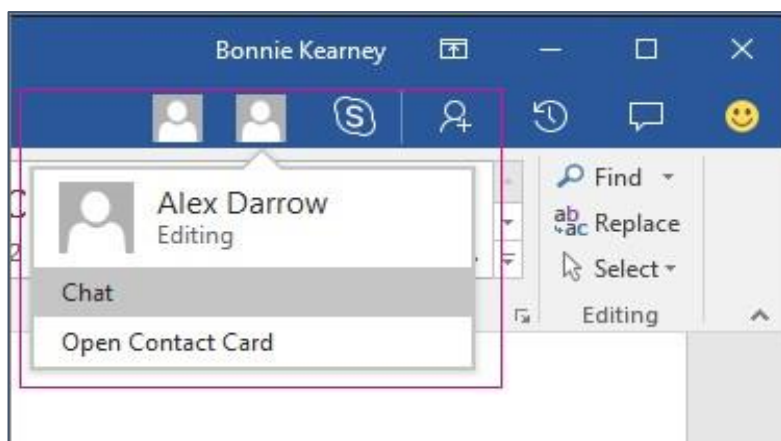


Figure 17 - Group chat with everyone is working on the document

6. Choose Comments on the ribbon to make or view comments, because you can reply to or resolve comments and then mark them as complete.
7. Word will alert you when people enter or leave.

Note: If someone who didn't opt in to real-time co-authoring is working in the document when you are, you'll see that they're in the document, but you won't see their changes until they save the document.

8. Select Activity pane button (Figure 18) to see the Activity pane (Figure 19). The Activity pane lets you see the complete list of changes made so far, and gives you access to the earlier versions.



Figure 18 - Activity pane button

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	13 di 30

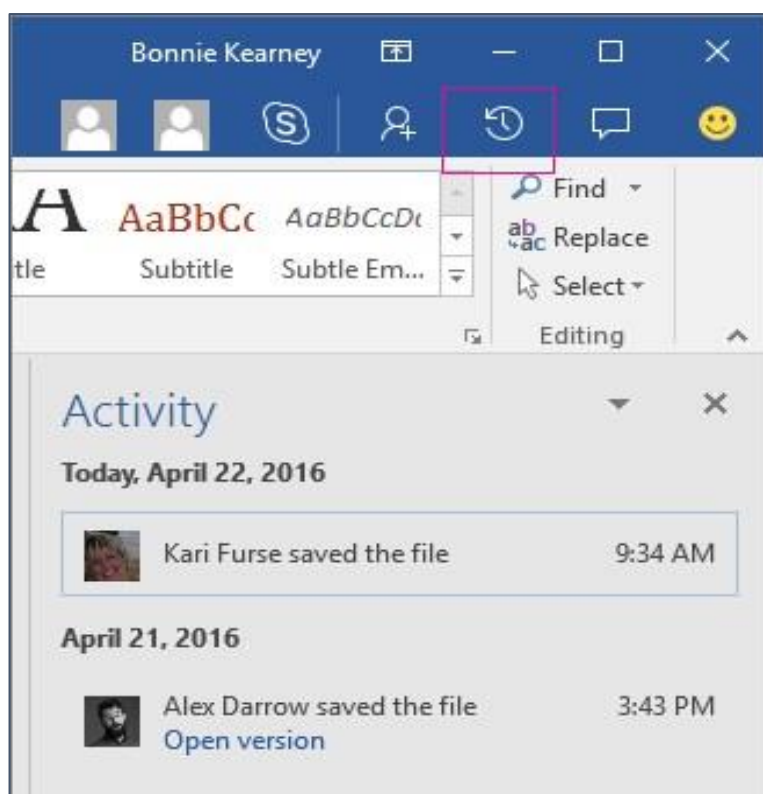


Figure 19 - Activity pane

## 1.5.2 Options for sharing changes

In this section you can find the description of the Automatically share changes options and what they mean.

If you choose to share changes, others who have agreed to share their changes will always be able to see yours.

If you have never used real-time co-authoring before, you will be asked whether you want to automatically share your changes as they happen:

- choose Yes to always allow automatic sharing when you're working with others. Clear the "Don't ask me again" check box if you want to be asked the next time you open a document in which someone else is sharing their changes otherwise check it.
- Choose Never if you opt out of real-time co-authoring for this and all other documents. In this case only you will be able to see your changes until you save your document back to its online location. Nor will you see theirs as they happen. However, you will be able to see who else has a document open.

Note: Each setting affects Word, not just the document you're working on. To change settings, go to File > Options > General > Real-time collaboration options.

## 1.6 Versioning overview

You can use versioning to:

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	14 di 30

- Track history of a version: when versioning is enabled, you can see when an item or file was changed and who changed it. You can also see when properties (information about the file) were changed. For example, if someone changes the due date of a list item, that information appears in the version history. You can also see the comments people make when they check files into libraries.
- Restore a previous version: if you made a mistake in a current version, if the current version is corrupt, or if you simply like a previous version better, you can replace the current version with a previous one. The restored version becomes the new current version.
- View a previous version: you can view a previous version without overwriting your current version. If you are viewing version history within a Microsoft Office document, such as a Word or Excel file, you can compare the two versions to determine what the differences are:
  - a) Right-click the document and then click Version History (you might have to scroll the menu like in Figure 20).
  - b) Select the document, on the Files tab, click Version History (Figure 21).

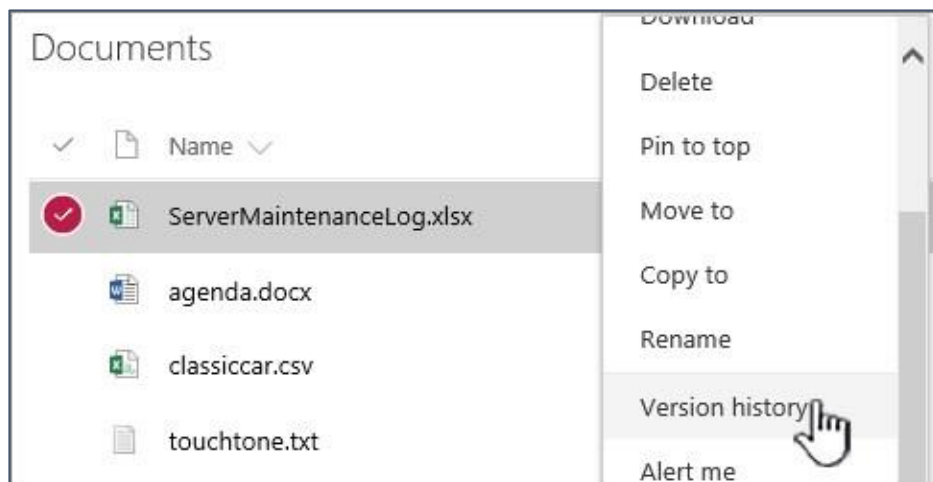


Figure 20 - Version history option in drop down list menu

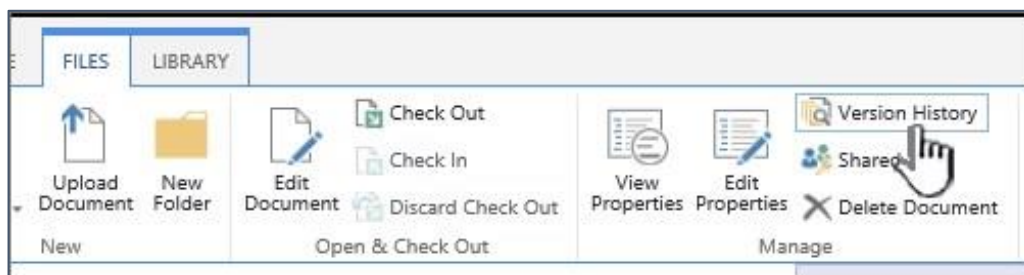


Figure 21 - Version history from menu bar

For more information about versioning, see par. 4.1.

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	15 di 30

## 2 Assign permissions within a site

In order to assign permissions within a site follow these steps:

- 1) Open the library you need to configure and click the gear icon (settings icon) like in Figure 22.

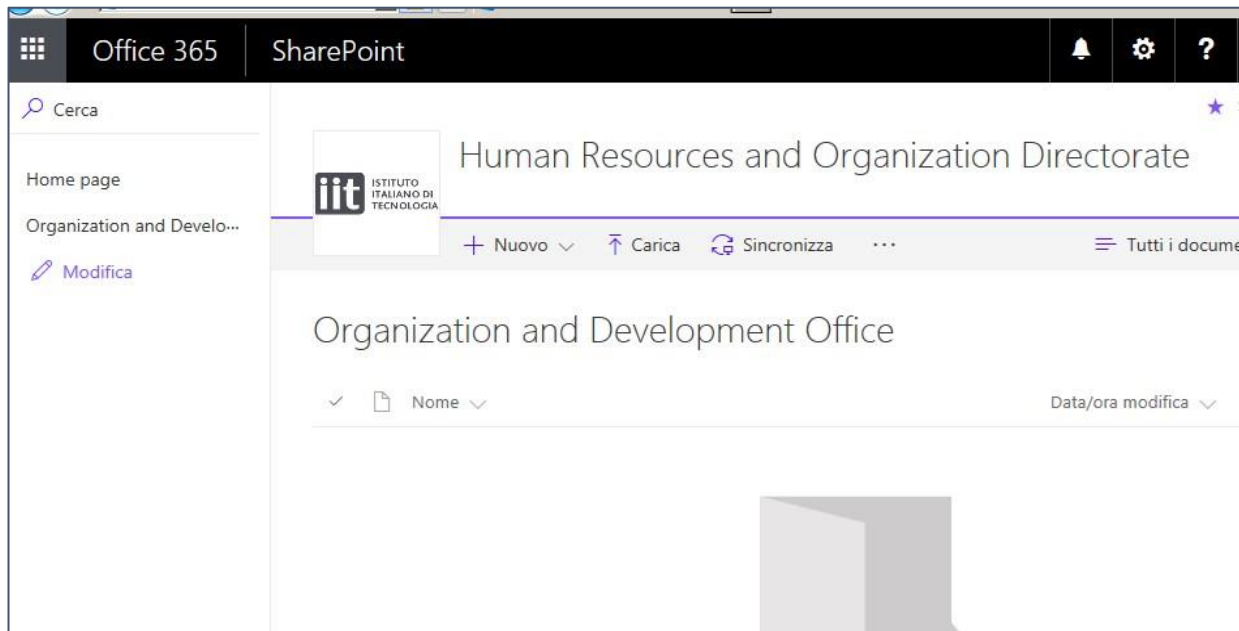


Figure 22 - Configure settings in document library interface

- 2) Select Site permissions (Figure 23).

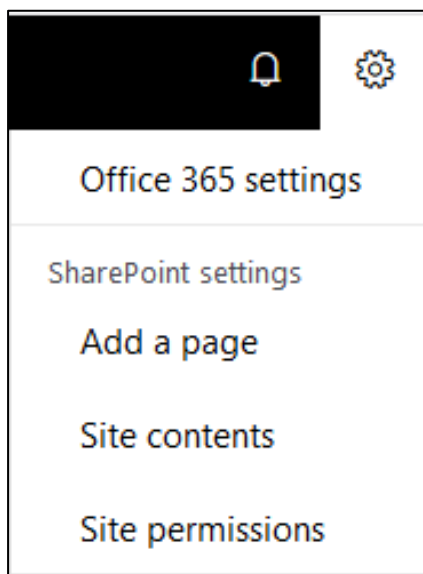


Figure 23 - Site permission option in drop down list

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	16 di 30



- 3) Click "Share Site button" on the right of the page (Figure 24) and then insert user name you want to share to (Figure 25).

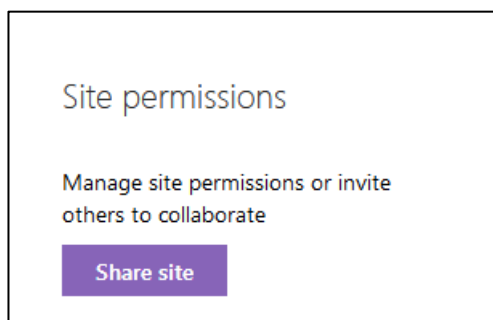


Figure 24 – Share site

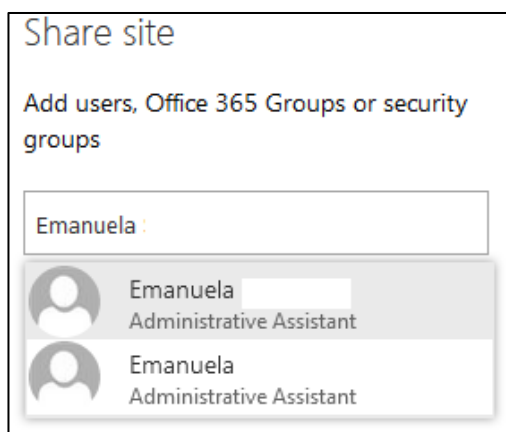


Figure 25 – insert user name for sharing site

- 4) Choose the user access level and click Add(Figure 26).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	17 di 30

Figure 26 – Access level options

### 3 Delete items from the SharePoint Online site and Restore items from the SharePoint Online site recycle bin

When you delete content from a SharePoint site, it's sent to the site Recycle Bin (also called the first-stage Recycle Bin), where you can restore the deleted content if needed. When you delete content from a site Recycle Bin, it's sent to the site collection Recycle Bin (also called the second-stage Recycle Bin).

A SharePoint site collection administrator can view and restore deleted items from the site collection Recycle Bin to their original locations. If an item is deleted from the site collection Recycle Bin, or it exceeds the retention time, it is permanently deleted. For more info, see [How long are deleted items kept in the Recycle Bin?](#)

Important:

- If you delete files or folders that you're syncing, you can restore them from the Windows Recycle Bin on your PC.
- You can restore from the SharePoint Recycle Bin items that you have deleted from SharePoint or items that have been deleted by someone else in IIT from SharePoint.

Follow these steps:

1. Click Recycle Bin in the Quick Launch bar on the left of the screen (Figure 27).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	18 di 30

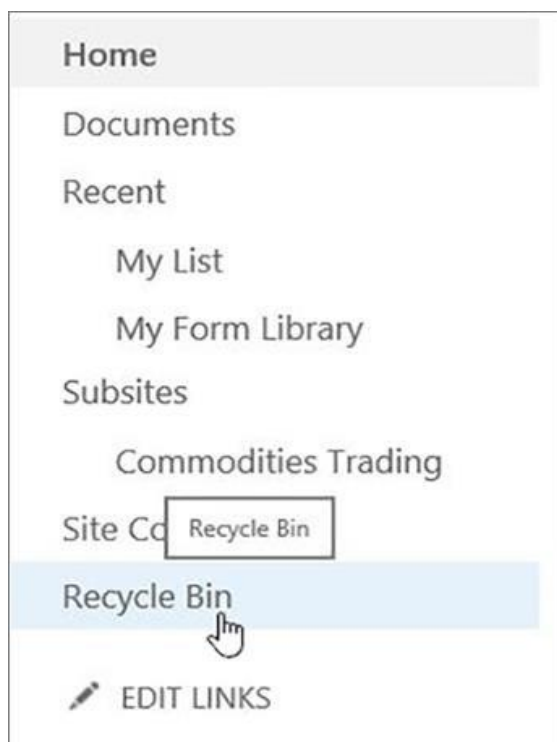


Figure 27 - Recycle bin menu

- a) If you don't see the Recycle Bin on the Quick Launch bar, click Settings icon (Figure 28) and then click Site Contents. The Recycle Bin is in the top right portion of the Site Content page (Figure 29).



Figure 28 - Settings icon

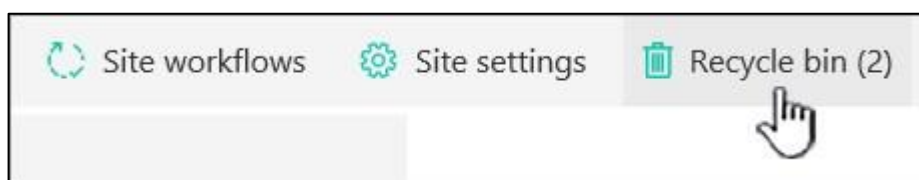


Figure 29 - Site contents menu

- b) If you don't see Recycle Bin anyway it might have been disabled. Write an email to [ICT Service Desk](#).
2. On the Recycle Bin page, check items or files you want to restore (Figure 30).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	19 di 30

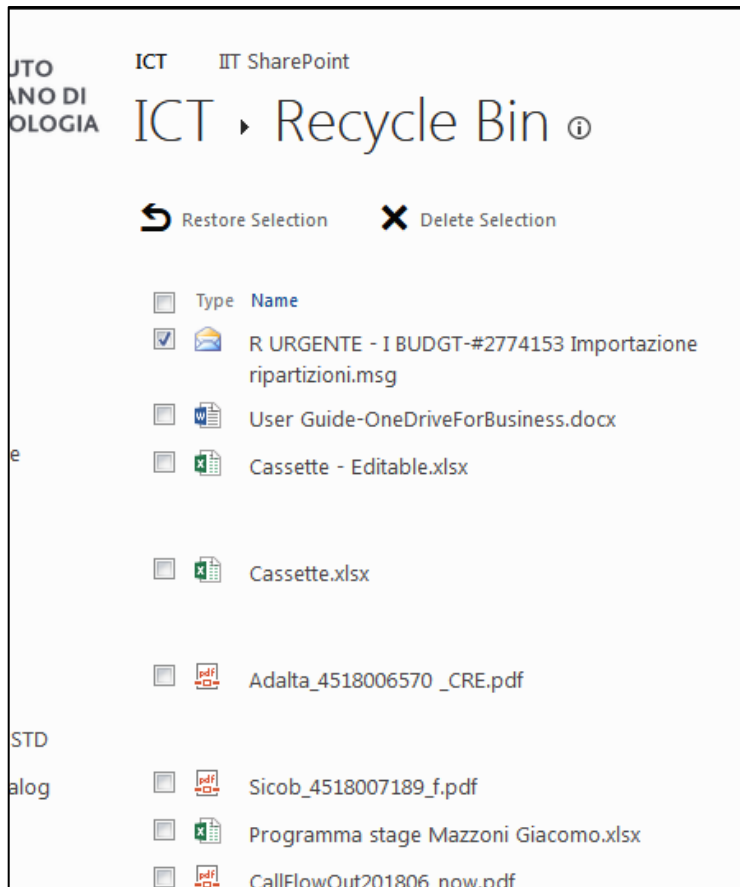


Figure 30 - SharePoint site recycle bin

- Click "Restore Selection" to recover the selected files (Figure 30): you'll get a notification if restore succeeded or failed.

Note: If you don't see items you want to restore, it is possible that they are already deleted because they exceeded the holding time limit. In this case contact [ICT ServiceDesk](#).

When you restore an item, it is restored to the same location that it was deleted from.

In SharePoint Server 2010 and later, deleted sites and workspaces are retained in the Site Collection Recycle Bin. From there, a site collection administrator can restore them to their original site collection.

Before you restore, you should be aware that:

- Any content types that are added while a site or workspace is in the Recycle Bin are not added to that site or workspace. Thus, field definitions might not be up to date.
- You can restore a list, list item, library, file or a version of a file to its original location, as long as you have not already deleted its parent. For example, you cannot restore a version of a file if the file itself has been deleted. That's because when you delete a file, you delete all versions of the file.
- Similarly, you cannot restore a file if the library to which it belonged has been deleted. In this case restore the library and then restore the file to the library.

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	20 di 30

Be aware that when you restore a reliable object, you restore the all of the contents of the reliable object. A reliable object is anything to which permissions can be assigned. In this case, we mean a list, list of item, library, or a file. So for example, when you restore a library, all of the files that the library contained are also restored.

Instead if you restore an item that was originally located in a deleted folder, the folder is recreated in its original location and the item is restored in that folder. In this case, the entire content of the folder is not restored.

### 3.1 Restore an entire site or workspace

In SharePoint Server 2010 and later, deleted sites and workspaces are retained in the Site Collection Recycle Bin. From there, a site collection administrator can restore them to their original site collection.

Before you restore, you should be aware of notes described in Ch. 3

### 3.2 How long are deleted items kept in the Recycle Bin?

In SharePoint Online, items are retained for 93 days from the time you delete them from their original location. They stay in the site Recycle Bin the entire time, unless someone deletes them from there or empties that Recycle Bin. In that case, the items go to the site collection Recycle Bin, where they stay for the remainder of the 93 days unless:

- the site collection Recycle Bin exceeds its quota and starts purging the oldest items
- the items are manually deleted by the site collection administrator from the site collection Recycle Bin (for info about doing this, see [Delete items from the site collection recycle bin](#)).

### 3.3 A few basics about restoring from the Recycle Bin

Securable objects (any object to which access can be controlled) bring all their contents back with them. When you restore any securable object, it is restored with all of the objects that it contained when it was deleted. For example, if you restore a list, library, folder, or Document Set, the restored version contains all the documents and other items that it contained when it was deleted. If you restore a file or other item that has multiple versions, the restored file or item includes all the versions it contained when it was deleted.

Most objects can't be restored if their container objects aren't present. If you delete an object and then delete the object that contained it, you must restore the container before you can restore the object. For example, if you delete a file and then delete the library in which it was stored, you must restore the library before you can restore the file. If you delete an earlier version of a file and then delete the current version of the file itself, you must restore the file itself before you can restore the earlier version.

Exception: An object deleted from a folder can be restored without first restoring the folder. The folder is automatically re-created in its former location, but now contains only the object that you restored. Alternatively, you can also restore the folder manually from the Recycle Bin, in which case it's restored with all the contents that it had when it was deleted.

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	21 di 30

## 4 Control documents or items access and changes and restore an old version

When versioning is enabled in your SharePoint list or library, you can store, track, and restore items in a list and files in a library whenever they change. Versioning (par. 4.1), combined with other settings, such as checkout (par. 4.4) and list or library permissions (par. 4.5) gives you the possibility to control documents or items content that are posted on your site and can provide real value if you need to control document or item access and changes or restore an old version.

Versioning is enabled by default in SharePoint libraries but not in SharePoint lists. For more info on setting up versioning, see [Enable and configure versioning for a list or library](#).

### 4.1 How to use document versioning

Anyone with permission to manage lists can turn versioning on or off for a library. Versioning is available for list items in all default list types—including calendars, issue tracking lists, and custom lists. It is also available for all file types that can be stored in libraries, including Web Part pages.

Note: If you are an Office 365 customer, versioning is now turned on by default when you create new OneDrive libraries, and it will automatically save the last 500 versions of a document. This will help you to prevent losing important documents or data. If you have existing libraries on your OneDrive site or on your team site that do not have versioning enabled, you can turn versioning on for them at any time.

For general versioning overview see par.1.6.

In the following paragraphs you can find information about version creation and numbering, number of versions limits, enabling, configuring and using versions and versioning using documents check in and check out functionalities.

#### 4.1.1 When versions are created

When versioning is enabled, versions are created in the following situations:

- When a list item or file is first created or when a file is uploaded. You must check the file in to create its first version.
- When a file is uploaded that has the same name as an existing file and the “Add as a new version to existing files” check box is selected.
- When the properties of a list item or file are changed.
- When a file is opened, edited, and saved. A version is created when you first click Save. It retains the new version number for the duration of the current editing session, even though you might save it several times. When you close it and then reopen it for another editing session, another version is created.
- During co-authoring of a document, when a different user begins working on the document or when a user clicks save to upload changes to the library.

There can be up to three current versions of a file at any given time:

1. the checked-out version,

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	22 di 30

How to use SharePoint and OneDrive

2. the latest minor or draft version,
3. the latest published or major version.

Otherwise there could be different situations for version creation, see par. 4.2, 4.3, 4.4.

All other versions are considered historical versions. Some current versions are only visible to users who have permissions to view them.

Some organizations track both major and minor versions of files in their libraries. Others only track the major versions. Major versions are identified by whole numbers, such as 5.0; minor versions are identified by decimal numbers, such as 5.1.

Most organizations use minor versions when files are under development, and major versions when certain milestones are reached or when the files are ready for review by a wide audience. In many organizations, draft security is set to allow only the owner of a file and people who have permissions to approve files. That means that minor versions cannot be seen by anyone else until a major version is published.

Major versions are available for lists, but minor versions are not available. Each version of a list item is numbered with a whole number. If your organization requires approval of items in a list, the items remain in pending status until they are approved by someone who has permissions to approve them. While in pending status they are numbered with decimal numbers and are referred to as drafts.

For more information on enabling and setting up versioning, including major and minor versions, see [Enable and configure versioning for a list or library](#).

#### 4.1.2 Version numbering

Version numbers are automatically added each time you create a new version. In a list or library that has major versioning enabled, the versions have whole numbers, such as 1.0, 2.0, 3.0, and so on. In libraries, your administrator might enable versioning for both major and minor versions. When minor versions are being tracked, they have decimal numbers such as 1.1, 1.2, 1.3, and so on. When one of those versions is published as a major version, its number becomes 2.0. Subsequent minor versions are numbered 2.1, 2.2, 2.3, and so on.

When you discard a checkout, the version number does not change. If the most recent version was version 3.0, it remains at 3.0 after you discard the checkout.

When you delete a version, the version goes to the Recycle Bin and its number goes with it. The Version History will show the remaining version numbers. The other version numbers do not change. For example, if you have a document that has minor versions 4.1 and 4.2, and you decide to delete version 4.1, the resulting version history shows only versions 4.0 and 4.2, as shown in Figure 31.

For more on enabling and setting up versioning, including major and minor versions, see [Enable and configure versioning for a list or library](#).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	23 di 30

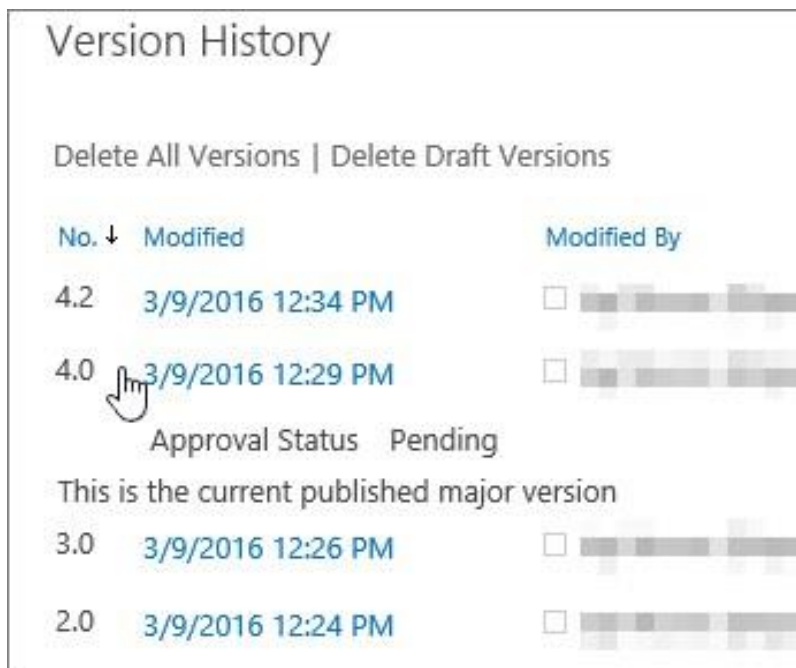


Figure 31 - Deleted versions view

#### 4.1.3 Control how many versions are stored and number of available versions limit

You can limit how many versions of list, items or files are saved in a list or library, which can help to preserve server space. If your team creates a large number of versions, limiting the number of versions may help your team to better manage and locate previous versions.

For this reason, organizations allow unlimited versions of files and others apply limitations. You might discover, after checking in the latest version of a file, that an old version is missing. If your most recent version is 26.0 and you notice that there is no longer a version 1.0, it means that the administrator configured the library to allow only 25 major versions of a file. The addition of the 26th version causes the first version to be deleted. Only versions 2.0 through 26.0 remain. Similarly, if a 27th version is added, only versions 3.0 through 27.0 remain.

The administrator may also decide to limit the number of minor versions to just those for a set number of the most recent versions. For example, if 25 major versions are allowed, the administrator might decide to retain minor drafts for only the most recent five major versions. The default number of minor versions between major versions is 511. If you attempt to save another minor version, you will see an error message that tells you that you must first publish the document. Your site administrator can change the default to allow fewer minor versions.

If a list or library limits the number of major versions, the earliest versions are deleted when the limit is reached. For example, if only 20 versions are retained, and your team creates 25 versions, only versions 6 through 25 are kept. If another version is created, only versions 7 through 26 are kept. If your list or library limits versions, you should make sure that contributors are aware that earlier versions will be deleted when the version limit is reached.

In a library that limits the number of major versions that it keeps minor versions for, the minor versions are deleted for the previous major versions when the version limit is reached. For example, if you keep drafts for only 10 major versions, and your team creates 15 major versions, only the major versions will be kept for the earliest versions. The minor versions that are associated with the five earliest major versions — such as 1.2 or 2.3 — are deleted, but the major versions — 1, 2, and so on — are kept, unless your library also limits major versions.

Limiting the number of versions is generally a good practice. It means you can conserve space on the server and reduce clutter for users. But, if your organization is required to save all versions for legal or other reasons, don't apply any limits.

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	24 di 30



Important: If your organization limits the number of versions that it stores, the oldest versions are permanently deleted when the limit is reached. They are not sent to the Recycle Bin.

For more on enabling and setting up versioning, including limits, see [Enable and configure versioning for a list or library](#).

#### 4.1.4 Determining who can see draft item

You can configure who can view drafts of list, items and files.

Drafts are created in two situations:

- 1) When a minor version of a file is created or updated in a library that tracks major and minor versions: when you track major and minor versions, you can specify whether people must have permission to edit files before they can view and read a minor version. When this setting is applied, people who have permission to edit the file can work on the file, but those who have permission only to read the file cannot see the minor version. For example, you may not want everyone who has access to your library to see comments or revisions while a file is being edited. If major and minor versions are being tracked and no one has published a major version yet, the file is not visible for people who have not permission to see draft items.
- 2) When a list, item or file is created or updated but not yet approved in a list or library in which content approval is required: when content approval is required, you can specify if files that are pending approval can be viewed by:
  - people with permission to read,
  - people with permission to edit,
  - the author and people with permission to approve items.

When content approval is required, people who have permission to read content but do not have permission to see draft items will see the last approved or major version of the file.

Regardless of people have permission to edit a file or not, if people search for a file that is in minor version, they won't get results for it.

## 4.2 Enabling, configuring, and using versioning in lists and libraries

Versioning is turned on automatically when a library is created, and not when a list is created.

Anyone with permission to manage lists can turn on or off versioning.

Moreover, because the lists and libraries inherit permissions from the site, in addition to enabling versioning, the site owner (or another person managing the list or library) decides to require content approval or not, who can view draft items and if checkout is required. Each of these decisions has an impact on how versioning works. For example, if the person managing a library decides to require check-out, version numbers are only created when a file is checked in. If content approval is required, major version numbers are not applied until files are approved by someone who has permission to do so.

Important: If the people who work in your library are planning to co-author documents, do not configure the library to require check-out. People cannot work as co-authors when the documents that they need are checked out.

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	25 di 30

To learn how to turn on versioning for a list or library, see [Enable and configure versioning for a list or library](#).

### 4.3 How does versioning work with required content approval?

If versioning is enabled in your library, the person who sets it up determines whether to track both major and minor versions and also determines who can see the minor versions.

In most cases, when content approval is required, only the owner of the file, and people who have permission to approve items can see the minor versions.

In other libraries, anyone who can edit files in the library, or anyone who has read permission to the library, can see all versions. After a version is approved, everyone who has read permission to the list or library can see the version.

Although lists have not major and minor versions, any item that is in pending status is considered a draft. In most cases, only the creator of the item and persons who have full control or design permissions can see drafts. A draft shows up in pending status for those people, but others only see the most recent approved version in the version history.

If the file is rejected, it stays in pending status until someone who has the necessary permissions deletes it.

By default, a pending item or file is visible only to its creator and to the people with permission to manage lists, but you can specify if other groups of users can view the item or file.

If your library is set up to track both major and minor versions, the person who edits the file must first publish a major version of the file.

For more info on setting up approval for documents, see [Require approval of items in a site list or library](#).

Note: Draft security, in some lists and libraries, is configured to allow all site users to see both pending and approved versions.

### 4.4 How does versioning work with file checkout?

When you check out a file from a library that has versioning turned on, a new version is created every time you check it back in. And, if major and minor versions are turned on, you can decide, at check-in, which type of version you are checking in.

There are two different cases:

- 1) In libraries where checkout is required, versions are only created upon check-in. Requiring check-out can help your team to make the most of versioning, because people specifically designate when a version is to be created. A version is created only when someone checks out a file, changes it, and then checks it back in. When check-out is required, people cannot add files, change files, or change the file properties without first checking out the file. When people check in files, they are prompted to provide comments about the changes that they made, which helps to create a more meaningful version history.
- 2) In libraries where checkout is not required, a new version is created the first time you save after opening the file. Each subsequent save overwrites the version that you created with the first save. If you close the application and then reopen the document, the first save will, once again, produce a version. This can cause the number of versions to proliferate very rapidly. Depending on the situation, you might not intend for multiple versions to be created, for example, if you must close a file to attend a meeting before you finish making changes to the file.

For more info on check in and out, see [Check out, check in, or discard changes to files in a library](#).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	26 di 30

Important: if you are co-authoring a document, do not check it out unless you have good reason to prevent others from working on the document.

Note: If the library will be storing Microsoft Project (.mpp) files that are synchronized with task lists on your site, the Require check-out box should be cleared.

For more info on requiring checkout, see [Set up a library to require check-out of files](#).

## 4.5 List or library permissions

Lists and libraries have permissions related to versioning and check-out that change depending on the permission level that is applied to a user or a specific group. Someone who can edit permission levels can configure these permissions differently or can create a new group with customized permission levels.

These permissions enable flexibility in how you manage your library. For example, you may want someone to be able to delete versions of a file without having permission to delete the file itself. The permission to delete versions is not the same as the permission to delete items, so you can provide a customized level of control.

The following table (Table 1) shows the permissions that are related to versioning and check-out and which default permission levels they apply to.

Permission	Default permission level
View Versions	Full Control, Design, Contribute, and Read
Delete Versions	Full Control, Design, and Contribute
Override Check-Out	Full Control and Design
Approve Items	Full Control and Design

Table 1 - Permissions levels

For more info on permissions, see [Understanding permission levels in SharePoint](#).

## 5 References

For further information, please refer to Microsoft KB [Getting started with SharePoint](#).

## 6 OneDrive and SharePoint

Using Office 365 it is possible to synchronize SharePoint files to a folder in your PC using explorer to access SharePoint files and work offline on them. When you are online, changes will be automatically synchronized.

For more information about OneDrive for Business see [How to use One Drive for Business User Guide on our intranet section](#).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	27 di 30

How to use SharePoint and OneDrive

## 6.1 Sync SharePoint files with the new OneDrive sync client

You can sync your SharePoint Online files to a folder on your computer where you can work directly in File Explorer and access the files even when you're offline.

Whenever you're online, any changes that you or others make will sync automatically.

If you have already installed and setup OneDrive on your PC you can start to set up SharePoint document syncing.

See instructions for installing and setting up OneDrive in [How to use One Drive for Business User Guide on our intranet section](#).

### 6.1.1 Set up syncing

In order to synchronize SharePoint files follow these steps:

1. On the Office 365 app launcher, choose SharePoint, and then click the site with the files you want to sync.
2. Click Documents or navigate to the subfolder you want to sync.
3. Click Sync button (Figure 32). You only need to do this once to set up syncing on your PC and the files sync automatically.

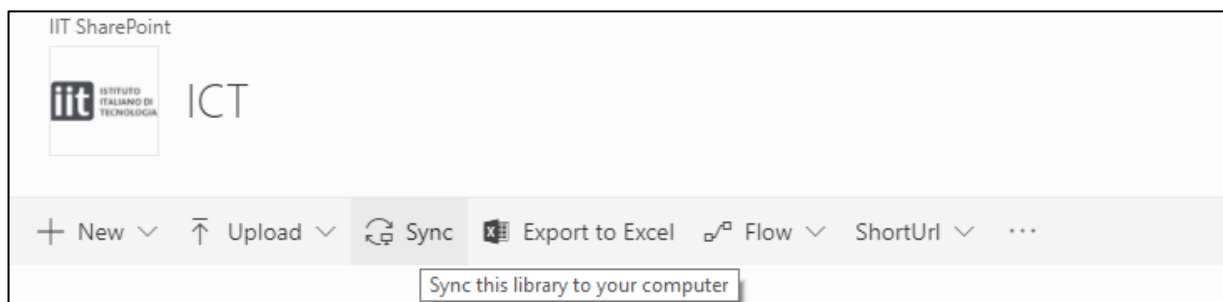


Figure 32 - SharePoint sync button

4. If your browser requests permission to use "Microsoft OneDrive," confirm and click ok.
5. Choose the folders that you want to sync, and then click Start sync (Figure 33).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	28 di 30

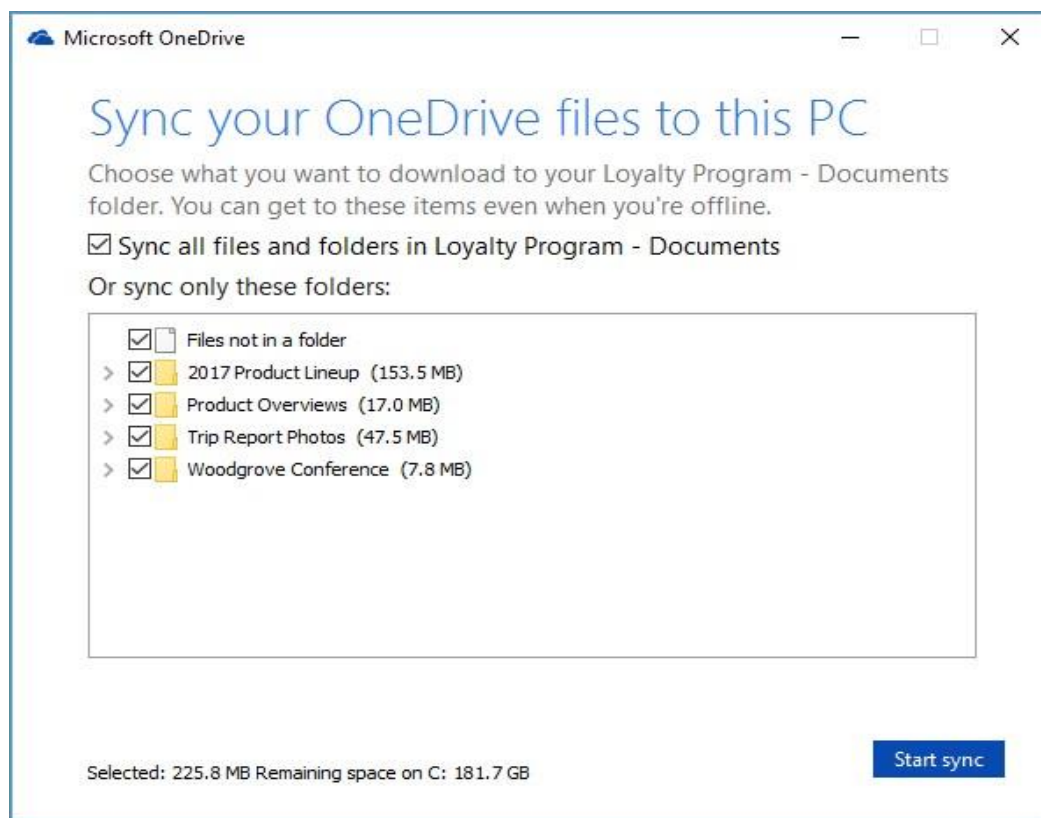


Figure 33 - Start sync window

1. The files will sync to a folder on your PC. This folder is automatically added to the left pane in File Explorer. You can't select to sync to a different location.
2. To sync the files on another computer, go to that computer and follow the steps again.

Notes:

- If you see a lock icon on synced files in File Explorer, it means the files are synced read-only. You might not have permission to edit the files, or the library might require checkout or have required columns or metadata. If you change the files on your computer, the changes won't sync.
- If a site name includes a character such as ":" that isn't supported in folder names in Windows, files on the site can't be synced.
- If you used the previous OneDrive sync client, the folder structure for your synced folders might change when you begin syncing with the OneDrive sync client. On Windows 7 computers where you used the previous OneDrive sync client, you might still see an old "SharePoint" folder under Favorites in File Explorer. You can remove the extra "SharePoint" favorite by right-clicking it and selecting Remove.

By default, when you turn on the sync client for OneDrive it will only sync the folders in your OneDrive to your computer.

However, you can also sync folders that other people have shared with you which gives you offline access to these files in addition to yours. The only requirement is that the folder was shared giving you the "Can edit" permission, following these steps:

- 1) Login to Office 365 portal.

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	29 di 30

- 2) Browse to your OneDrive. (At the top bar, select the Office 365 app launcher icon, and then select OneDrive).
- 3) Click "Shared with me", from the left panel.
- 4) Click on the folder you want to sync to your computer.
- 5) Click "Sync".
- 6) Follow the prompts to complete the process.
- 7) This folder will show up on your computer under the path "C:\Users\{login user name}\SharePoint\".

### 6.1.2 Restrictions and limitations

Sync using the OneDrive app is not possible for shared documents and folder with users outside of IIT organization (e.g. free Microsoft accounts or Office365 accounts from other organizations).

Please note that current IIT subscription does not allow editing of Office (Excel, Word and PowerPoint) files with mobile apps. It is possible to edit those documents using the web editor in Safari.

Please refer to this online documentation for the restrictions and limitations that apply when you use OneDrive

<https://support.microsoft.com/en-us/help/2933738/restrictions-and-limitations-when-you-sync-sharepoint-libraries-to-your-computer-through-onedrivefor-business>

## 6.2 Share and collaborate in SharePoint and OneDrive for Business

Sharing in Office 365 is the act of making content available to someone inside or outside of your organization. If the web address of the folder or document you wish to share contains "/sites/ext/" after <https://istitutoitalianotecnologia.sharepoint.com> it means that you can share with external and anonymous users (Figure 34), otherwise you can only share content with IIT users (Figure 35).



Figure 34 - Sharing SharePoint file with external users

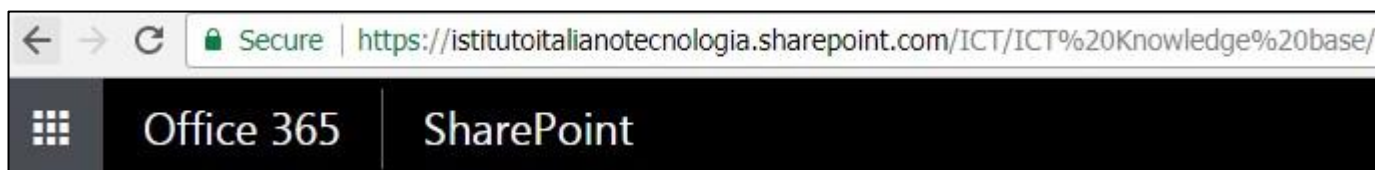


Figure 35 - Sharing SharePoint file with IIT internal users

For more information about share and collaborate in SharePoint and OneDrive refers to ch. 2.9 in [How to use One Drive for Business User Guide on our intranet section](#).

Revisione	Descrizione Modifica	Autore	Approvazione	Data	Pagina
.03	Terza emissione	ICT Service Desk		01/08/2018	30 di 30