

# Working Out of SharePoint Folders

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## **1 Scope**

This document will provide procedural information about working with documents from within the DCS-BI > General > Files folder and other SharePoint folders. The intent is to minimize churn, better control versioning, and effectively maintain documents from a central repository without saving files to individual contributor computers.

## **2 Synopsis**

Syncing files to the local PC is the recommended method of working with files on the network. When generating documents for the first time it is permissible to create them on the local PC.

However, once the files have been created, they should be saved to the DCS BI > General SharePoint. This allows users to avoid working on files from the local PC desktop and having to ask others for the latest version of a file and/or having to send a static version of the file back and forth via email. Other advantages include:

- The version history of the file is available from SharePoint
- The entire Team always has access to the latest saved version of the file
- It's easier to share the latest version of the file with others outside of the Team
- With Office 365 apps (Word, Excel, PowerPoint) multiple users can collaborate and work on the same file simultaneously with live edits

Once the folder structure is created in SharePoint and the pertinent file(s) are saved to that folder, from that point forward the files should only be opened and edited from SharePoint.

### 3 Target Audience

All users of the DCS-BI > General > Files SharePoint site.

### 4 Document Conventions

- Mouse clicks are performed with the left mouse button unless otherwise instructed.
- Variables are [bracketed].
- Notes are *italicized*.
- Buttons, zones, and items to be clicked on are boxed.

### 5 Process

#### 5.1 Sync Files in Teams

*NOTE: It is possible to sync individual files and folders. For the purposes of this document a folder is synced as an example instead of individual files, but the procedure is the same whether syncing folders or individual files.*

5.1.1 Open the DCS BI > General tab in Teams.

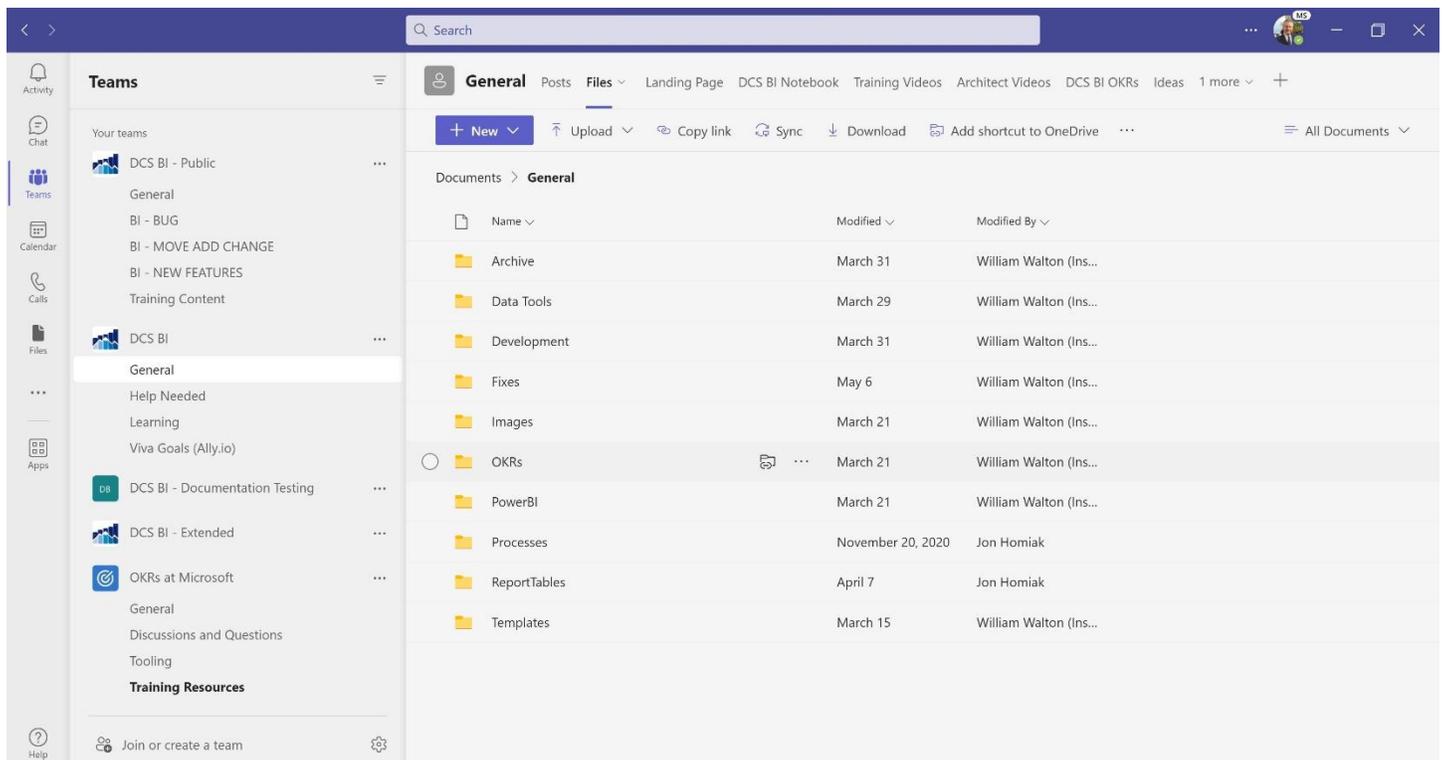


FIGURE 5.1.1. DCS BI > GENERAL TEAMS PAGE.

5.1.2 In the Menu Bar at the top of the DCS BI > General Teams page, click **Files**.

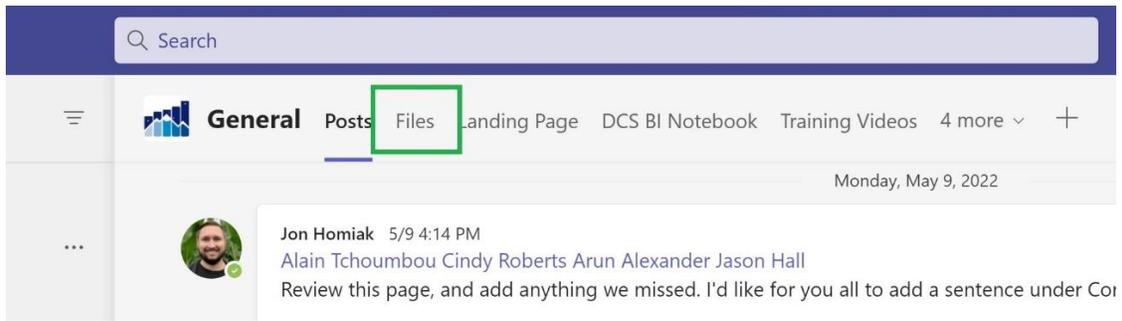


FIGURE 5.1.2. FILES HIGHLIGHTED IN THE DCS BI > GENERAL TEAMS PAGE.

5.1.2.1 The Files Menu is displayed in the DCS BI > General Teams page.

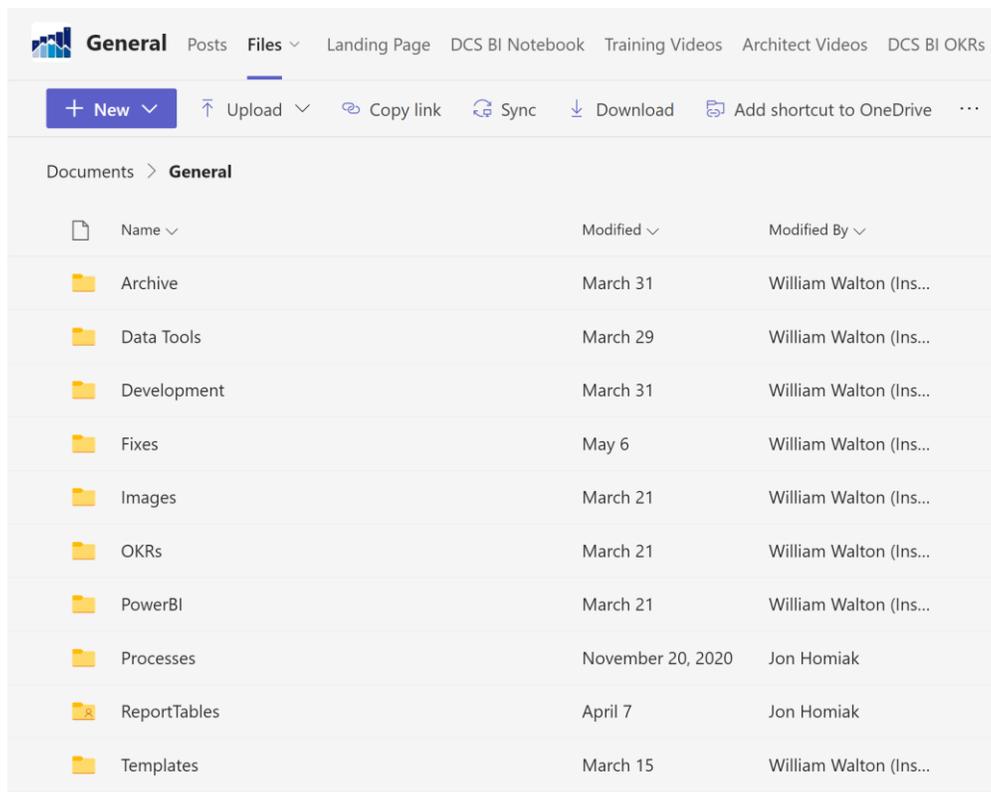


FIGURE 5.1.2.1. THE FILES MENU IN IN THE DCS BI > GENERAL TEAMS PAGE.

5.1.3 In the Menu Bar at the top of the DCS BI > General > Files page, click **Sync**.

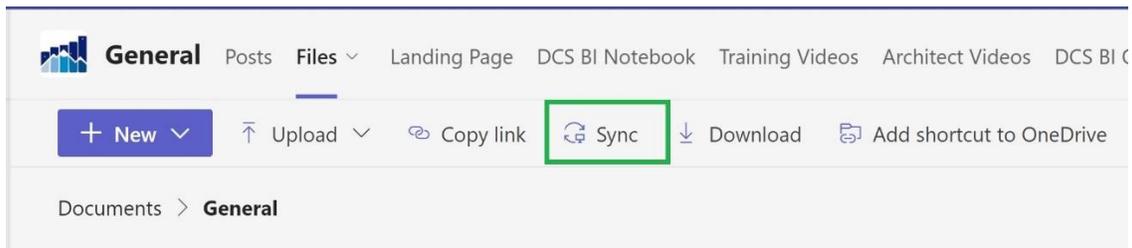


FIGURE 5.1.3. SYNC HIGHLIGHTED IN THE DCS BI > TEAMS PAGE.

#### 5.1.3.1 A OneDrive dialog box appears indicating the status of the syncing process.

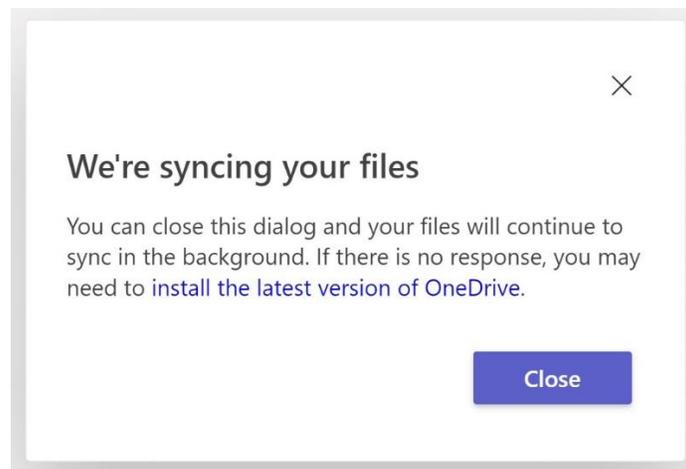


FIGURE 5.1.3.1. THE ONEDRIVE DIALOG BOX.

#### 5.1.4 Click Close in the OneDrive dialog box to remove it.

#### 5.1.5 The DCS BI > General files are now being synced to the local PC.

Once the desired folders and/or files are synced to the local PC it no longer necessary (or desirable) to download files to the local PC or to work with files on the local PC instead of working from within the Teams page (actually the SharePoint page). Syncing the files to the local PC allows the user to access the files, edit them, and share them without moving the files.

*NOTE: Do not drag and drop files from the DCS BI – General folder in SharePoint to File Explorer on the local PC. The pinning procedure described below is the only safe method of adding SharePoint file accessibility to the to the local PC.*

## 5.2 Pin SharePoint Folders to Quick Access

### 5.2.1 Open File Explorer on the local PC.

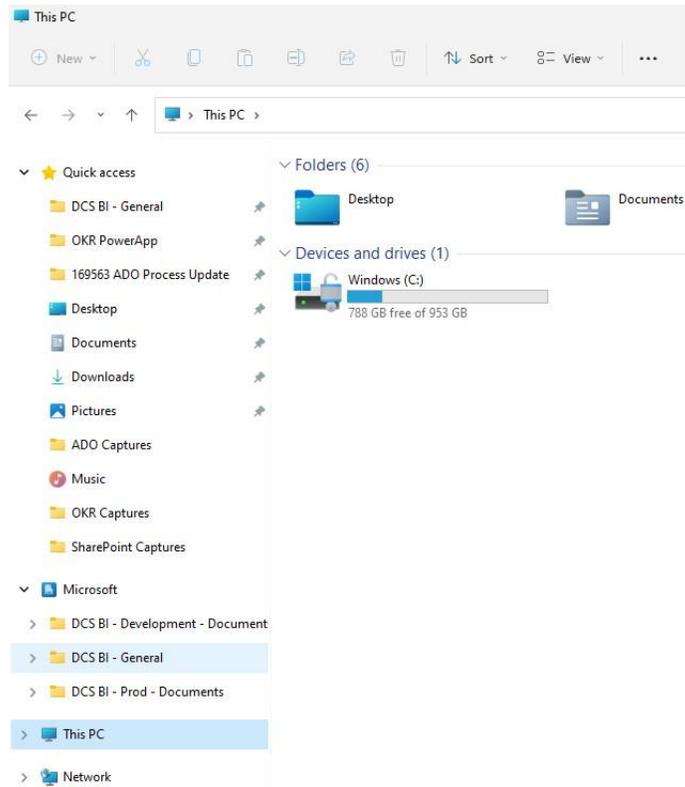


FIGURE 5.2.1. FILE EXPLORER OPEN ON THE LOCAL PC.

## 5.2.2 Navigate to the Microsoft > DCS BI > General folder.

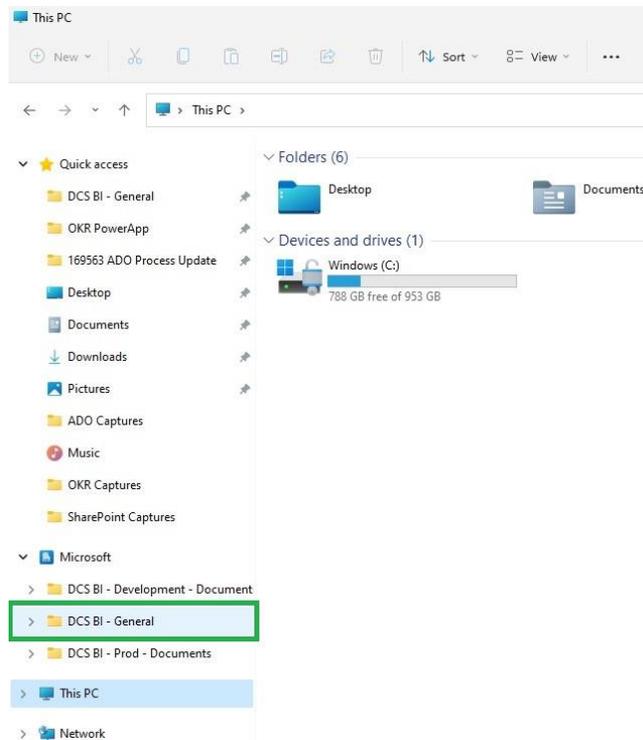


FIGURE 5.2.2. THE DCS BI – GENERAL FOLDER HIGHLIGHTED IN FILE EXPLORER

### 5.2.3 Open the DCS BI > General folder.

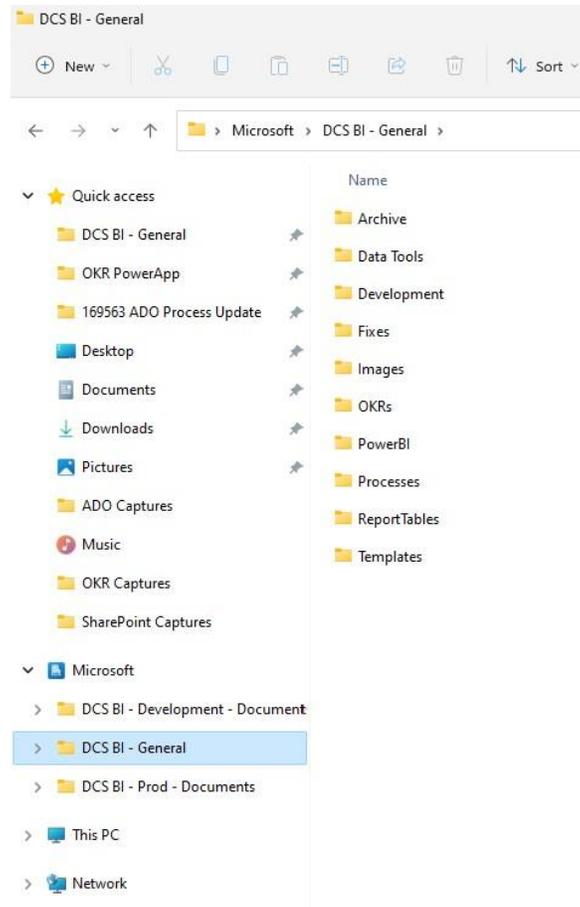


FIGURE 5.2.3. THE DCS-BI > GENERAL FOLDER OPEN IN FILE EXPLORER ON THE LOCAL PC.

### 5.2.4 Select the folder to be pinned to the Quick Access section of File Explorer.

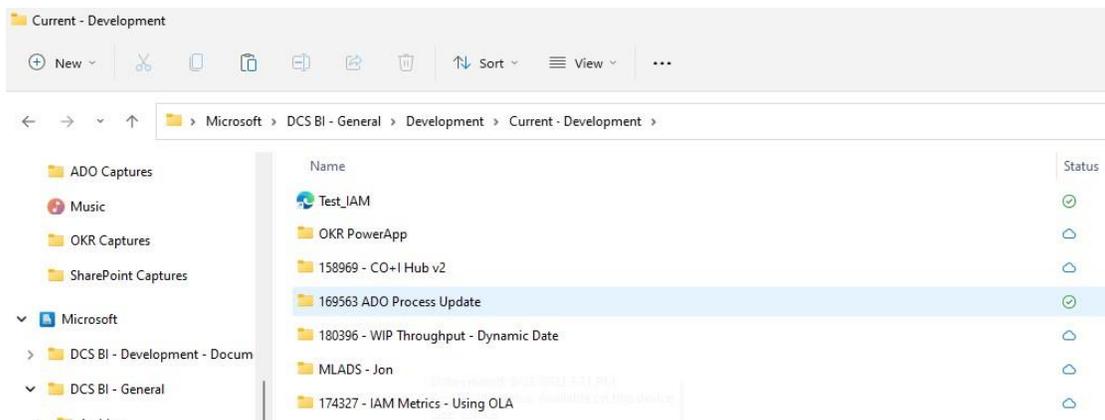


FIGURE 5.2.4. THE FOLDER TO BE PINNED HIGHLIGHTED IN THE DCS BI > GENERAL > DEVELOPMENT > CURRENT DEVELOPMENT ON THE LOCAL PC.

### 5.2.5 Right click the folder to be pinned to Quick Access.

#### 5.2.5.1 A dropdown menu appears after the folder is right clicked.

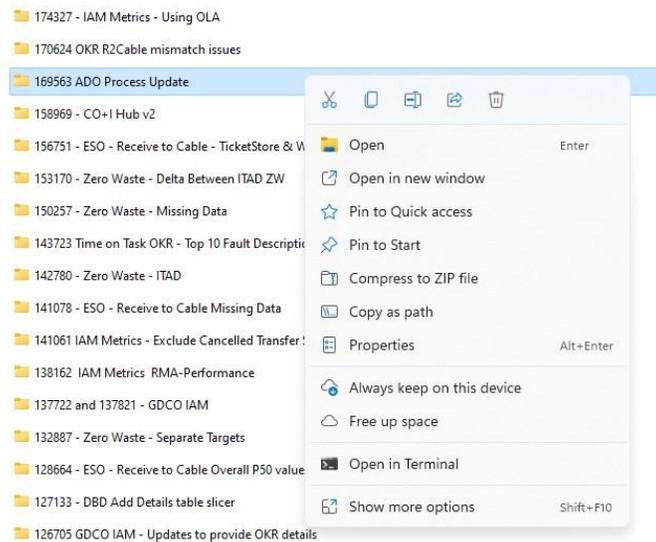


FIGURE 5.2.5.1 THE DROPDOWN MENU THAT APPEARS WHEN THE FOLDER TO BE PINNED IS RIGHT CLICKED.

## 5.2.6 From the dropdown menu select Pin to Quick access.

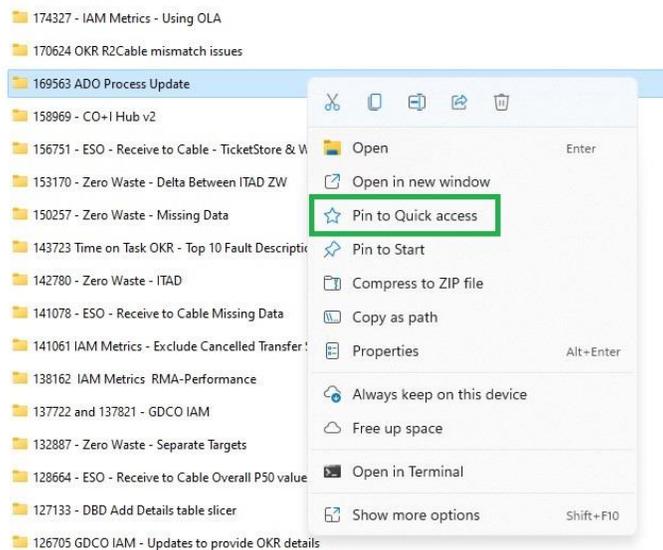


FIGURE 5.2.6. PIN TO QUICK ACCESS HIGHLIGHTED IN THE DROPDOWN MENU.

### 5.2.6.1 The folder is now pinned to the Quick Access section of File Explorer.

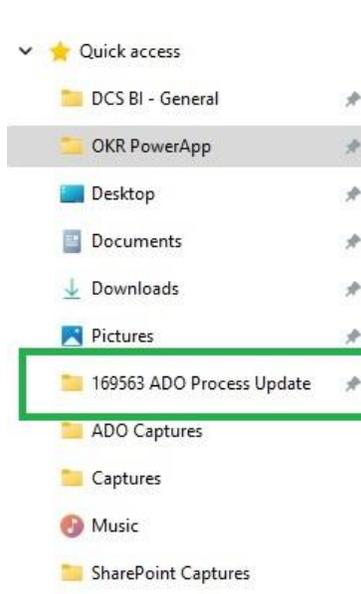


FIGURE 5.2.6.1. THE PINNED FOLDER IN THE LOCAL PC QUICK ACCESS SECTION OF FILE EXPLORER.

5.2.7 Click and hold the folder just pinned to Quick Access.

5.2.8 Drag the folder to the desired location in Quick Access.

5.2.9 When the folder is moved to the desired location release the mouse button to finalize the move.

*NOTE: Do not drag and drop files from the DCS BI – General folder in SharePoint to File Explorer on the local PC. The pinning procedure described above is the only safe method of adding SharePoint file accessibility to the to the local PC.*

*NOTE: Use care when dragging the newly pinned folder. Ensure the folder is only moved to a new location and not unintentionally dropped into another folder. When dragging the folder in File Explorer the folder caption will indicate the expected result of the action. Pin to Quick access is the desired outcome. This will move the folder but not drop it into another folder in Quick Access.*

## 5.3 Embedding Links to SharePoint Files

5.3.1 Navigate to the file to be linked.

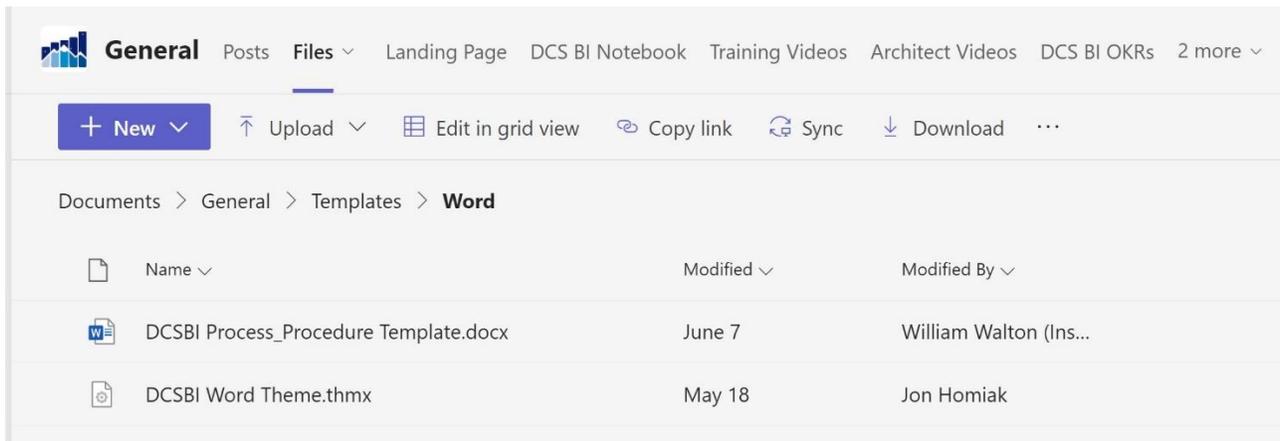


FIGURE 5.3.1.1. FILES AS DISPLAYED IN THE SHAREPOINT (VIA TEAMS).

### 5.3.2 Open the file in SharePoint.

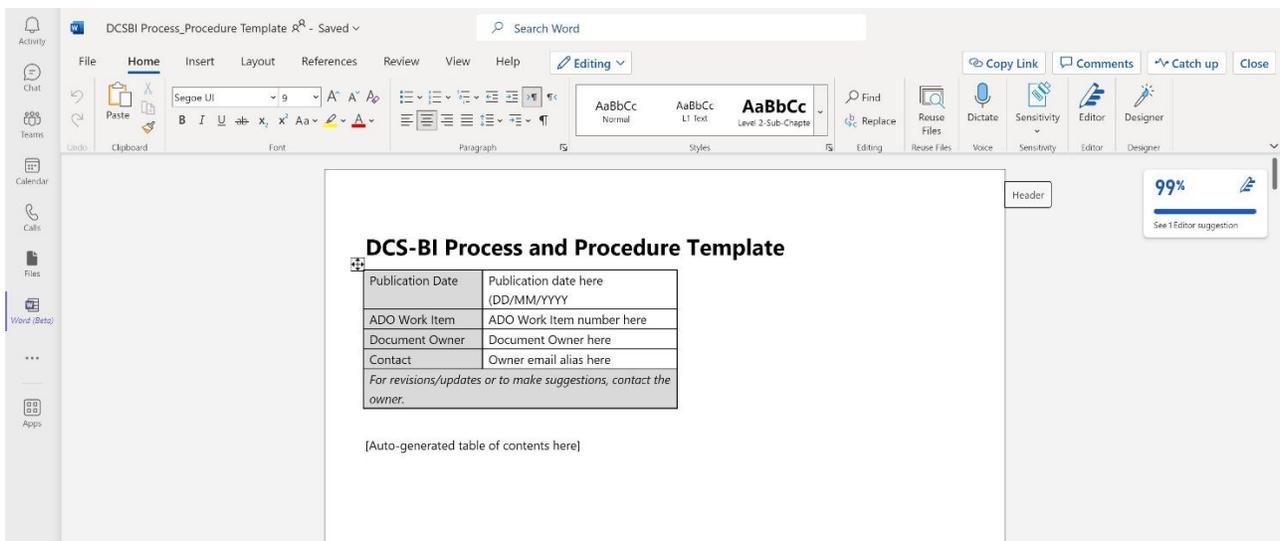


FIGURE 5.3.2.1. FILE OPENED ON THE LOCAL PC DECKTOP.

5.3.2.1 The file is opened.

5.3.3 From the Menu Bar at the top of the application click **Copy Link**.

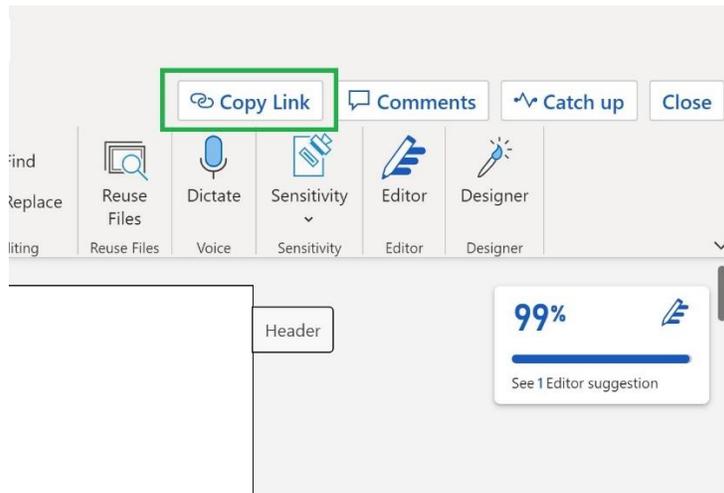


FIGURE 5.2.3.1. THE COPY LINK BUTTON HIGHLIGHTED IN THE MENU BAR.

5.3.3.1 A Copy Link dialog box is displayed.

5.3.4 Click the **Copy** button.



FIGURE 5.3.4.1. THE COPY BUTTON HIGHLIGHTED IN THE COPY LINK DIALOG BOX.

5.3.4.1 A Dialog box is displayed with the URL for the document to be linked.

5.3.5 Click **Copy** in the Link to [file name] copied dialog box.

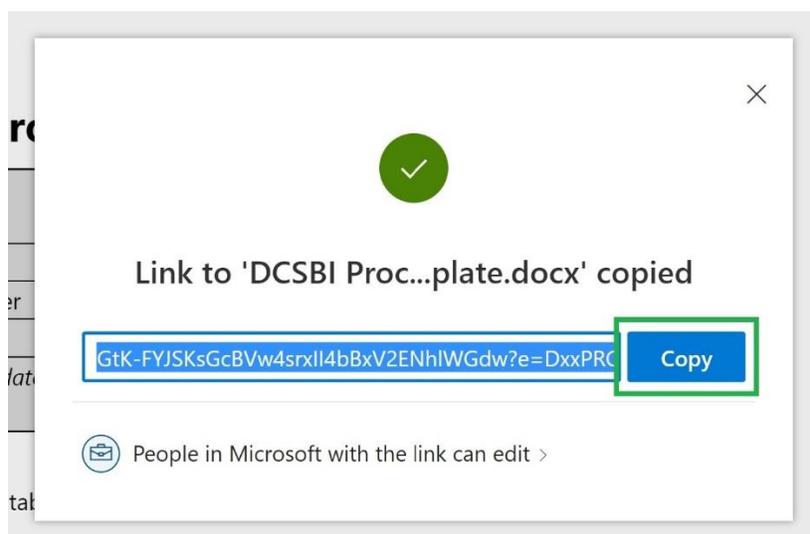


FIGURE 5.3.5.1. THE COPY BUTTON HIGHLIGHTED IN THE LINK COPIED DIALOG BOX.

5.3.6 Navigate to the location the link is to be shared.

5.3.7 Enter **CTRL V** to copy the link to the location from which the link is to be shared.

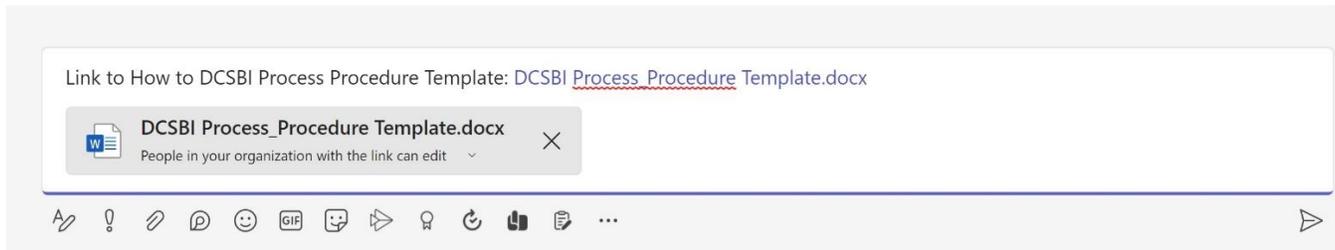


FIGURE 5.3.7.1. THE LINKED DOCUMENT EMBEDDED IN A MESSAGE.

## 6 Appendix

### 6.1 DCS BI > General File Folder Descriptions

*NOTE: The folder structure described below is subject to change.*

*NOTE: When adding files and folders to SharePoint use the appropriate folder naming conventions as described below.*

*NOTE: Place files in the appropriate folders, whether the folder was previously present or added.*

#### Folder Structure

##### DCS BI > General

- **Archive**
  - Contains general archived files
- **Data Tools**
  - Contains folders for data tools- place files pertaining to the use of data tools in these folders
    - Azure
    - Data Galaxy
    - Kusto
- **Development**
  - Use the Development folder to store any files (or) documents that are in development or draft phase.
  - The Development folder contains sub-folders for current and archive development files
    - Current – Development
      - Contains files for current development
        - Folders are organized by ADO Work Item number and Work Item description
          - Example: 186156 – Zero Waste – ITAD Data
    - Archive – Development

- Contains files for completed projects
    - Folders are organized by ADO Work Item number and Work Item description
      - Example: 13203 Update All Dashboards to include GRDS
- **Fixes**
  - Contains files pertaining to fixed issues
    - Folders are organized by ADO Work Item number and Work Item description
      - Example: 173053\_WUE PowerApps\_Lost Water Data Fix
- **Images**
  - Contains image files such as logos
- **OKRs**
  - Contains OKR planning documentation
    - Folders are organized by Fiscal Year
- **PowerBI**
  - The PowerBI folder contains all PBIX files for reports published to the DCS BI workspaces.
  - Each sub-folder represents a PowerBI workspace and contains the current version of the report in that workspace.
    - PowerBI – Leadership
      - Contains current and archived source files and documentation pertaining to Leadership
    - PowerBI – PPE
      - Contains current and archived source files and documentation pertaining to PPE
    - PowerBI – Prod
      - Contains current and archived source files and documentation pertaining to Prod
- **Processes**
  - Contains files associated with Processes, Procedures, Process diagrams, and Process overview
- **Report Tables**
  - Contains source files/data used in production reporting.
  - Treat these files as official data sources used in reporting.
  - **WARNING: Do not edit the files in this folder without understanding the potential impact.**
    - **Any changes made to the files could cause PowerBI report refreshes to fail.**
- **Templates**
  - Contains DCS-BI templates for Word, Visio, and PowerPoint

## 6.2 Glossary

Term/Acronym	Definition
ADO	Azure Development Operations
Alias	Microsoft email address

Ally.io	OKR Management software package
API	Application Program Interface
CO+I	Cloud Operations + Innovation
DCS-BI	Data Center Services- Business Intelligence. AKA DCSBI
FY	Fiscal Year
High Pri	High Priority
MAC	Move Add Change
Max Hours	This is the estimated maximum (Max) hours it would take to complete a Work Item end to end. The dedicated time could span multiple business days. This is the time spent on the Work Item itself.
Min Hours	This is the estimated minimum (Min) hours it would take to complete a Work Item end to end. The dedicated time could span multiple business days. This is the time spent on the Work Item itself.
OKR	Objective [and] Key Result
PM Hours	Project Management Hours- The number of hours that a Project Manager will be dedicated to managing a single Work Item. This work consists of gathering requirements, scheduling meetings, removing blocking items, and organizing deployment. The dedicated time could span multiple business days. This is the time spent on the Work Item itself. Overhead Ratio has been locked at 28% of the Development Time in line with common industry standards. See Min Hours [and] Max Hours
POC	Point Of Contact
PPE	Pre-Production Engineering
Prod	Production
QSG	QuickStart Guide
SLA	Service Level Agreement
UAT	User Acceptance Testing
UG	User Guide