Office 365: OneDrive Workshop

Nassau BOCES Model Schools
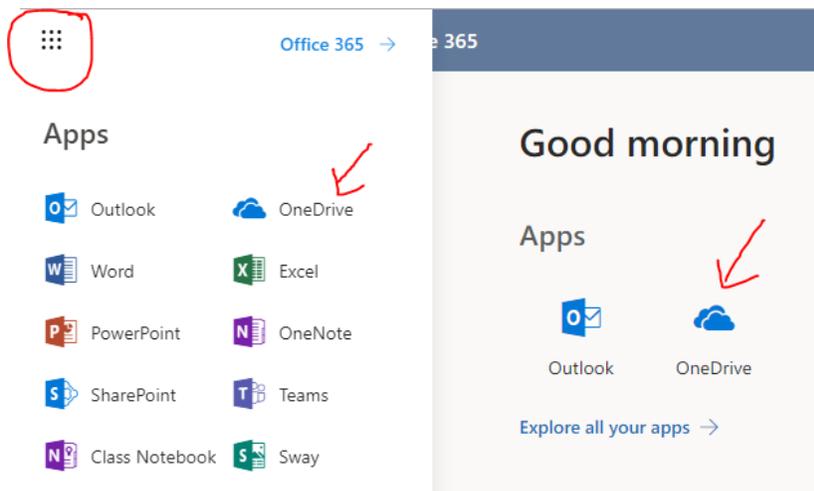
Adapted information from:
https://www.windowscentral.com/how-get-started-onedrive-windows-10
Additional Support from Office: https://tinyurl.com/yczh296y

OneDrive Online

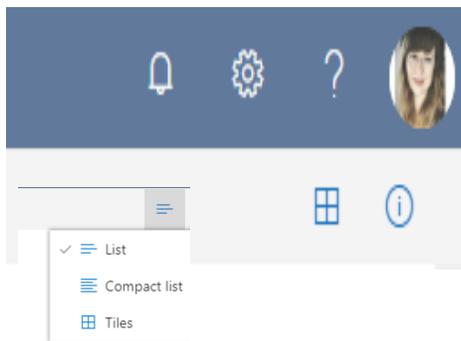Sign in: Go to office.com and in the top right corner click Sign In

Click on the Waffle on the top left corner to open your Office 365 Apps, or see your apps listed on your landing page of Office365

  "Waffle" to choose Office apps

Navigating OneDrive Landing Page

Top Right Icons

Bell icon: Notifications- will alert you to any new activity within Office- emails, shared documents etc.

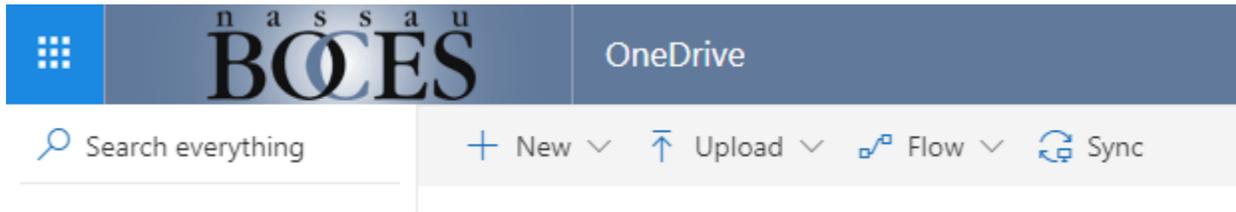Gear icon: Settings- options to customize your OneDrive

? Icon: Help- you can type in your issue and articles related to your search will appear.
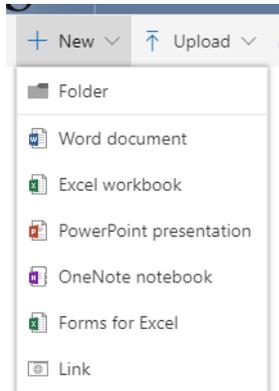
You: Access your profile and account/sign out

Window/Lines: View of your files (List, Compact, Tiles)

i: Lists your activity and activity of your files

Top Left Icons

Search everything: search your documents and folders

+New: Create a new document using Office Apps

Upload: Upload files and folders from your desktop/external USB locations

Flow: used for more advanced tech integrations and syncing

Sync: Select this icon to sync your OneDrive files to your computer

← groups

Side Left Icons

Files: All of your documents/files in your OneDrive

Recent: Chronological listing of when you accessed items

Shared: Access all files that were shared with you from someone else
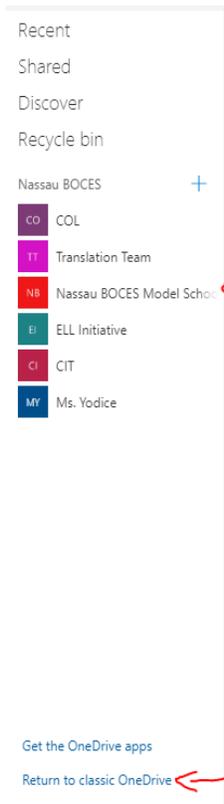
Discover: Curated files from your team members- files in this section are files you already have access to within group folders/files that have been shared directly with you. Personal files/files not shared will not be featured in this section.

Recycle Bin: Items you have deleted. Items in this section can be restored or permanently deleted.

Organization and Plus Sign (colored icons below): These are groups you can create and manage. Files in groups are accessible to everyone invited. You can create a new group, and/or be invited to and belong to other groups.

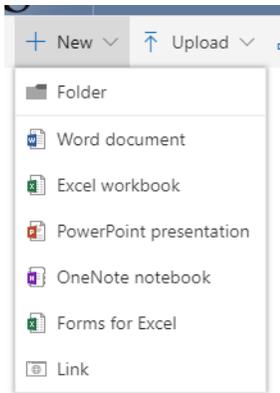**Get the OneDrive apps:** to purchase apps (not needed for you)

Return to Classic OneDrive: select if you are having problems viewing groups/as a troubleshooting solution for minor OneDrive issues

Creating in OneDrive

Choose new from within your personal file section to create something

Choose "New" to Create new documents using Microsoft Apps. Create and edit documents right in your web browser, or open in the desktop versions of the applications to have access to all of the features and full functionality of the program. Switch between online and desktop versions seamlessly dependent on your needs.

<u>Word document:</u> A new document will open in Word online. You will have the option to edit the document in Word online, or to open the document in the desktop version of Word.

<u>Excel Workbook:</u> A new excel workbook will open in Excel online. You will have the option to edit in Excel online, or to open in the desktop version of Excel.

<u>PowerPoint Presentation:</u> A new presentation will open in PowerPoint online. You will have the option to edit in PowerPoint online, or to open in the desktop version of PowerPoint.

<u>New Folder:</u> A new folder will appear in your OneDrive. Name it and it will appear listed in your OneDrive.

## Creating in Desktop and Saving to OneDrive

When you create a new document in the desktop version, you can save the document to your OneDrive. First, make sure you are signed into office, by signing in at the top right of the document. Then, when you choose to save, you can save to your OneDrive as the destination.
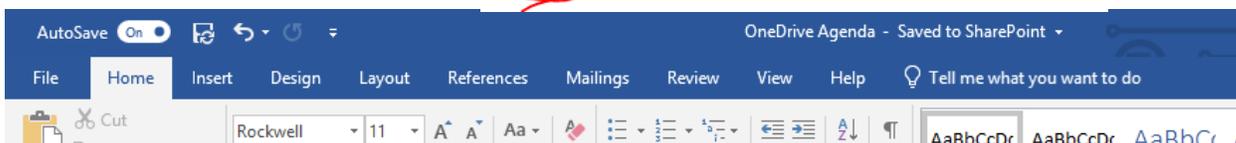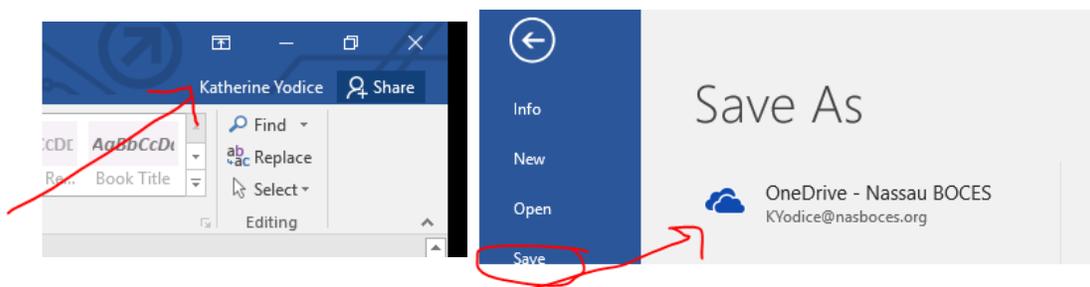
Once your document is saved to OneDrive, "Autosave" is activated, which eliminates the need to choose "File-Save", and all changes are saved and synced automatically with OneDrive
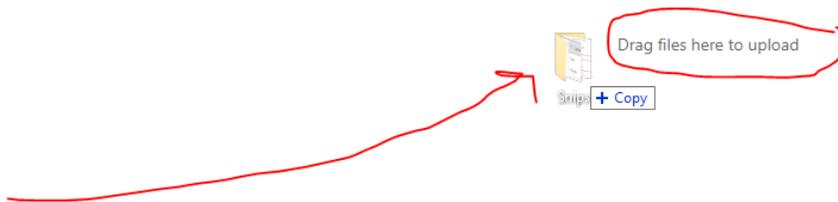
Uploading files and folders

On the top toolbar, choose "Upload". You then can choose to upload a file or a folder.
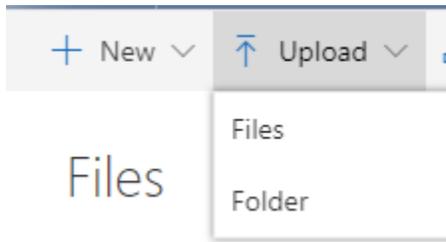
Another option, and a quick way to select multiple items is to drag items directly to OneDrive from your desktop. This creates a copy of the items on your desktop. If you edit the items on your desktop, they will not make changes to the versions in your OneDrive. However, once you copy the files from your desktop, you can delete them from your Desktop, and work with the new copies in your OneDrive that are now share-able and fully editable.

Invalid characters

Applies to:

Certain characters have special meanings when used in file names in OneDrive, SharePoint, Windows and macOS, such as "*" for wildcards, and "\" in file name paths. If a file or folder you're trying to upload to OneDrive contains any of the characters listed below, it may prevent files and folders from syncing. Rename the file or folder to remove these characters before you upload it.

Characters that aren't allowed in file and folder names in OneDrive, OneDrive for Business on Office 365, and SharePoint Online	Characters that aren't allowed in file and folder names in OneDrive for Business on SharePoint Server 2013
" * : < > ? / \		~ " # % & * : < > ? / \ {	}.

You can move files from your desktop or other computer locations into your OneDrive folder by dragging and dropping them

 Note the invalid characters for files names in OneDrive. If you are moving existing documents into OneDrive that contain any of those characters, you will need to rename them before moving them.

Notes:

- To rename a file or folder in Windows, select it and press F2. To rename a file or folder on a Mac, select it and press the 'return' key.

- Some organizations don't yet support # and % in names. If you're a global admin or SharePoint admin in Office 365, see Enabling # and % Support on the SharePoint blog to learn how to allow these characters.

- If you're using Office 2010, you can't use "&" in file and folder names.

Moving Files and Folders

You have a few options on how to move a file. From the OneDrive homepage, select the item you'd like to move. At the top, a new menu bar appears. Choose "Move to" and choose your destination.
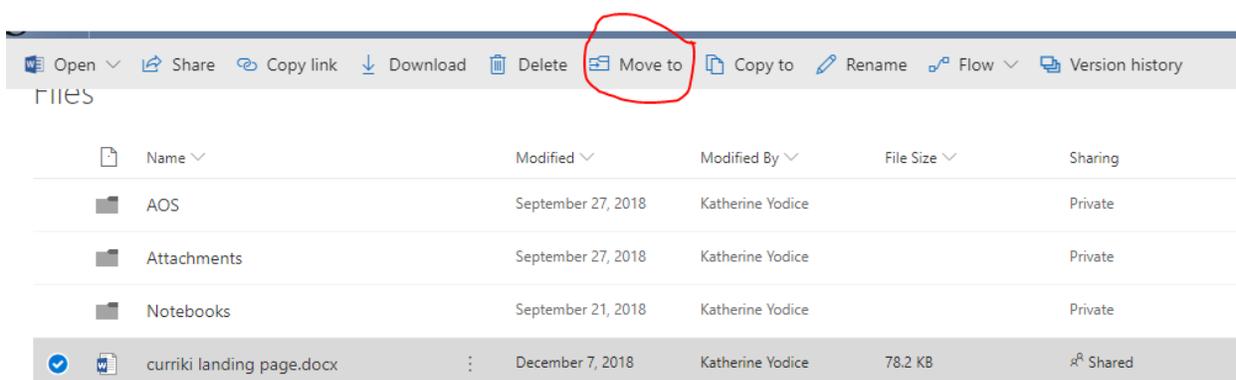
Another way to move an item is to choose the three dots to the right of the document, a tool bar appears to the right, and you have the option to move from there.
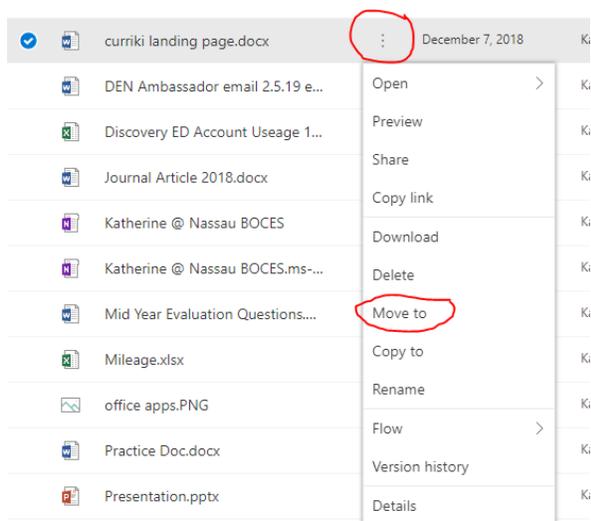
Yet another way is to select the document and drag it into the folder you would like it to go.
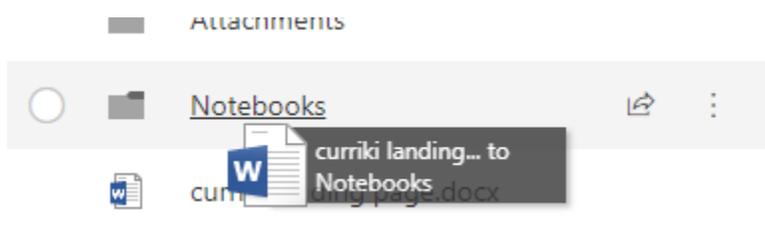
Collaborating and Sharing

After you create or upload a file, you can share it with others and collaborate.

<u>Shared with Me</u>

If someone has shared something with you, you will receive an email notification and the files/folders will appear in your "Shared" files section on the left of the homepage.
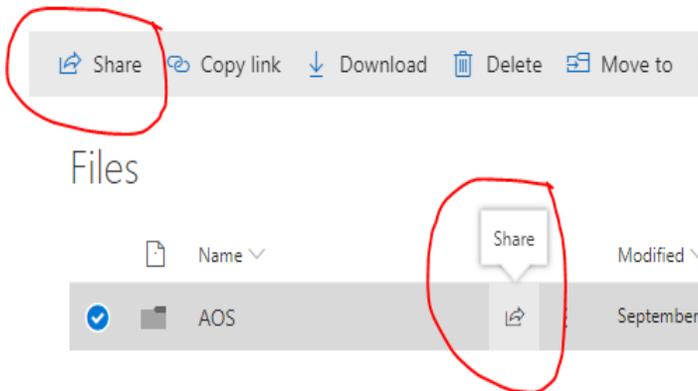
**Find items shared with you:**
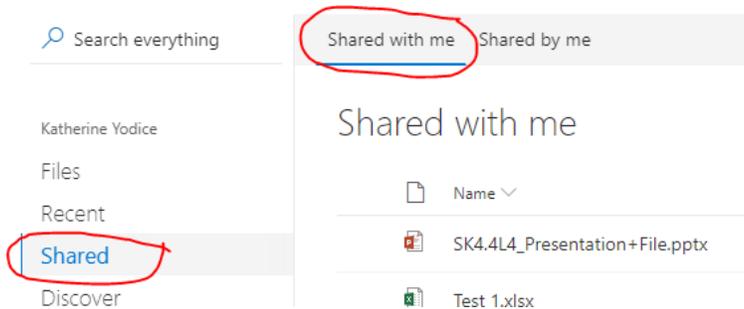
Email notification:
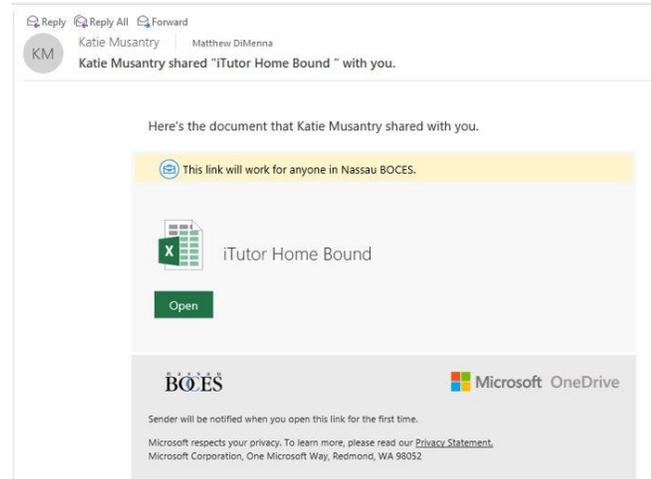
<u>Sharing with Others</u>

From Online OneDrive:

There a few ways to initiate sharing. You can choose an item from your OneDrive, and choose to share from the top menu bar, or from the "Share" arrow that appears to the right.
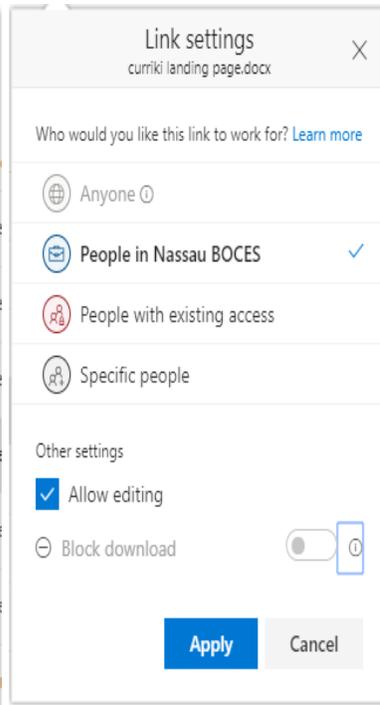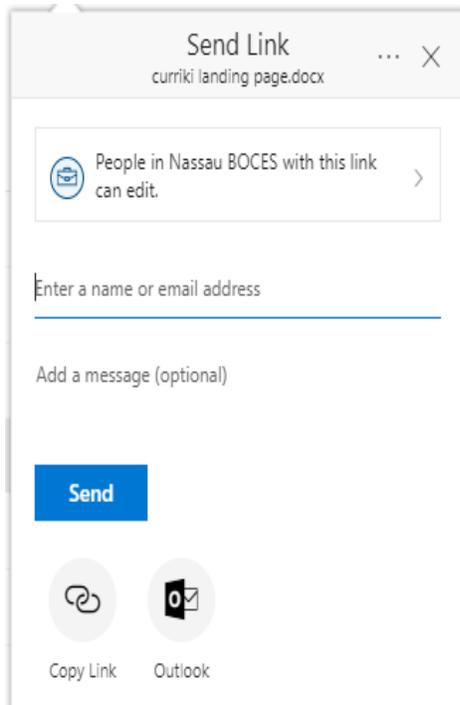
From within a document, in the top right corner, the "Share" button appears. It looks slightly different in the online version and the desktop version.
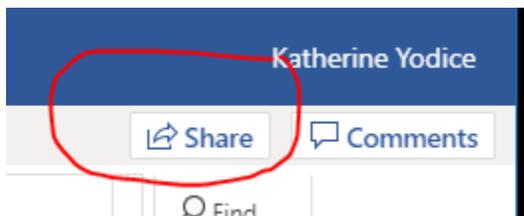

Online App
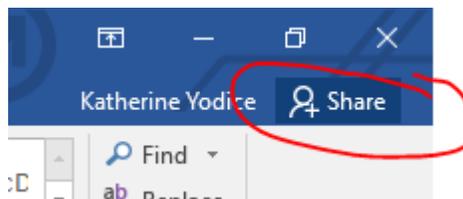
Desktop App

When selecting **share** from within OneDrive or online documents, you have options. Choose the link you prefer, copy Link, and send the link through email, to multiple people. You can decide whether you want people to be able to view or edit the document. You can invite individual people to view/edit the document by writing their name into the bar. Then choose "Send" to send it to those people.
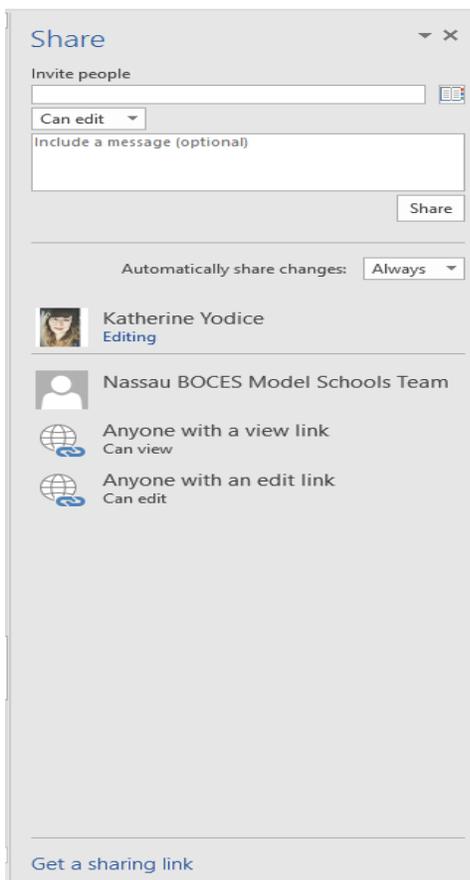
In the desktop version of sharing, you have the same options, but the view is slightly different. You can invite certain people and decide whether they can edit or view the document. You can also choose "Get a sharing link" to send to multiple people, and can choose from editing or viewing rights for the link.
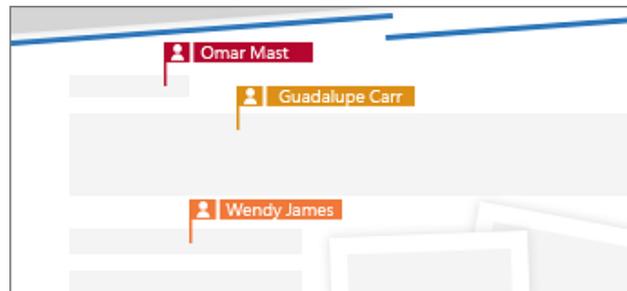

When you collaborate in real time, you can see who is in the document with you, and where they are in the document as well.

Additional Capabilities

<u>Version History</u>

When multiple people have access to edit and collaborate on files, it is helpful to be able to return to see who has edited the document, and to revert to previous versions of the document. In OneDrive, you can select the document, choose the three dots to the right, and select version history. This will show you who edited the document, and give you the option to open different versions. You can access version history from the desktop as well, by choosing File-History.
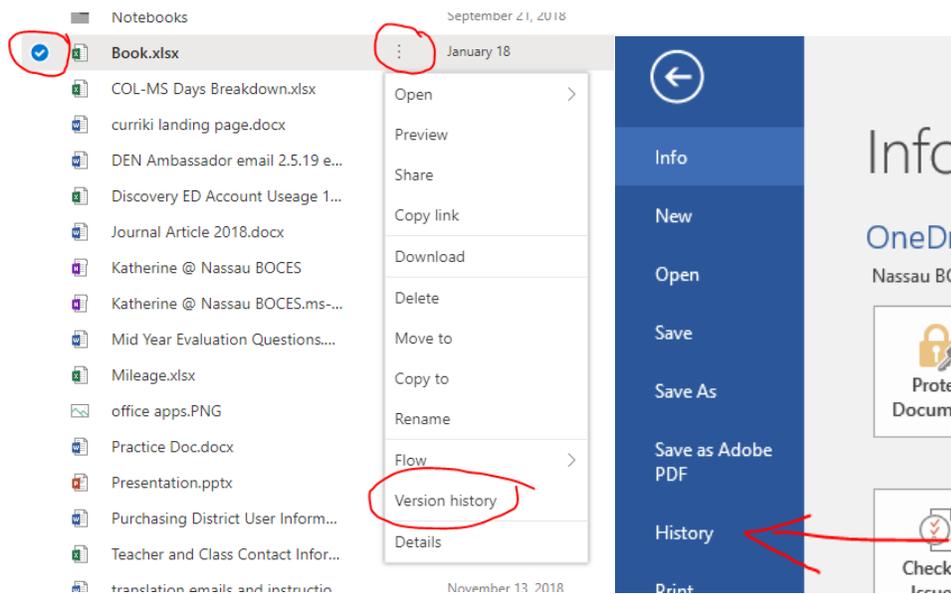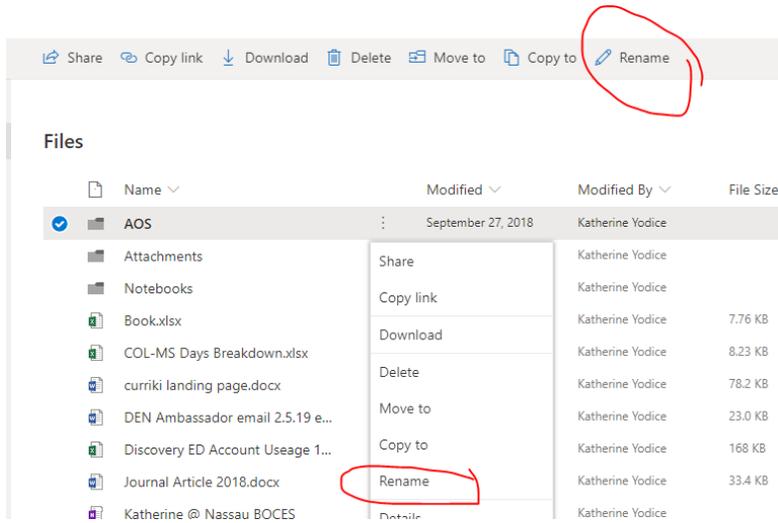

<u>Restoring from Recycle Bin</u>

You can restore items you may have accidentally deleted, by choosing "Recycle Bin" on the side bar, select the item to restore, and then choose "restore". This item will now go back into your OneDrive.
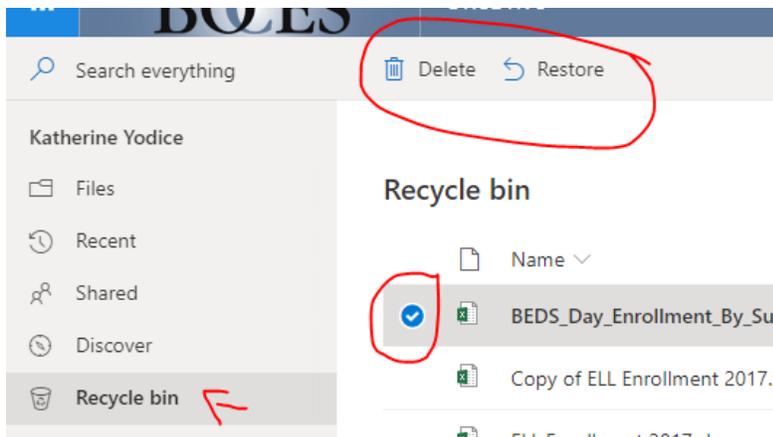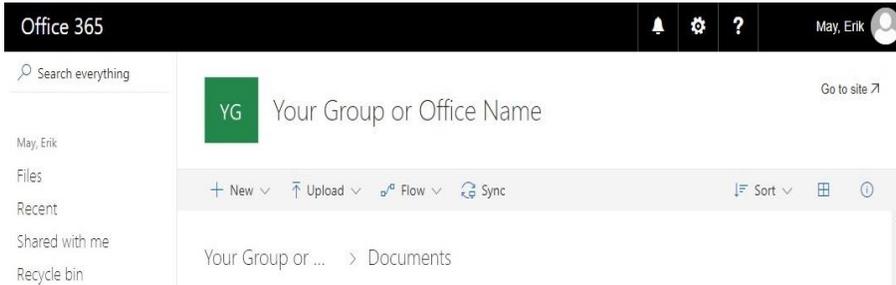
Renaming files and folders

To rename a file or folder, select the item, and choose the three dots to the right. Choose "rename" to rename your item.
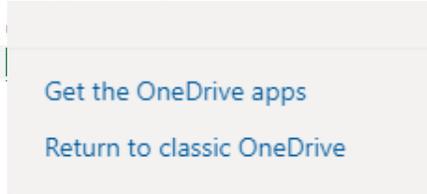
Groups:

Groups create a space for colleagues to collaborate, and they create a separate OneDrive storage space that can be used as a "Shared Drive".
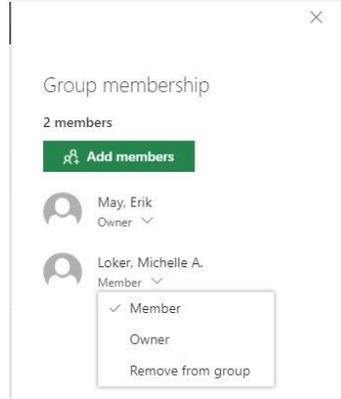
To see if you have been invited to a group

- choose "Return to Classic OneDrive", select the new group
- then choose "Follow" on the top right.

From here you can also see who the members of your group are, and if you are the owner, you can add new members. This group will now appear to your left in your OneDrive.

Groups also create an Outlook conversation space that you can see on the bottom left of your Outlook Mailbox. If you create a group and want to delete it, you will do so through Outlook
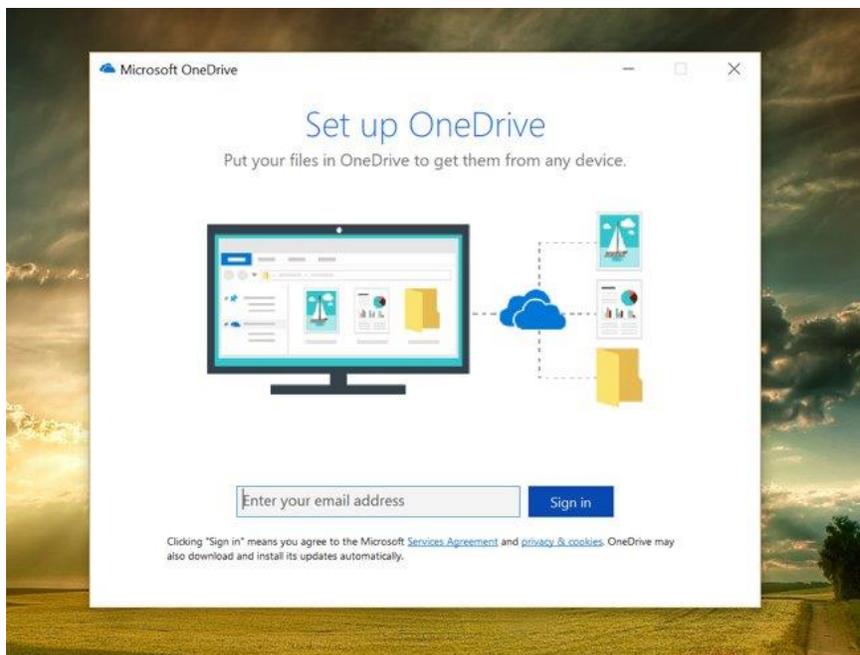

.
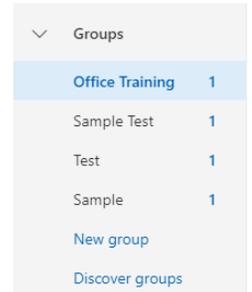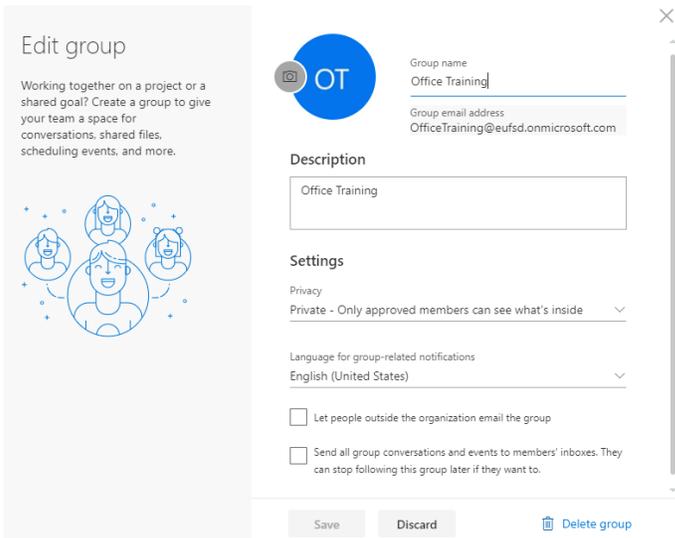
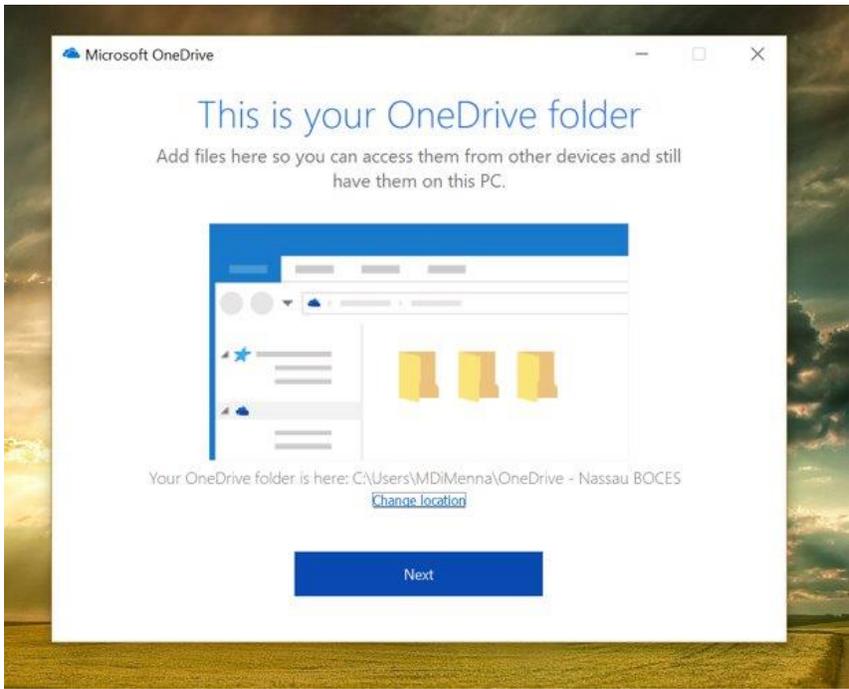# Guide for Setting up OneDrive Desktop Application on your computer
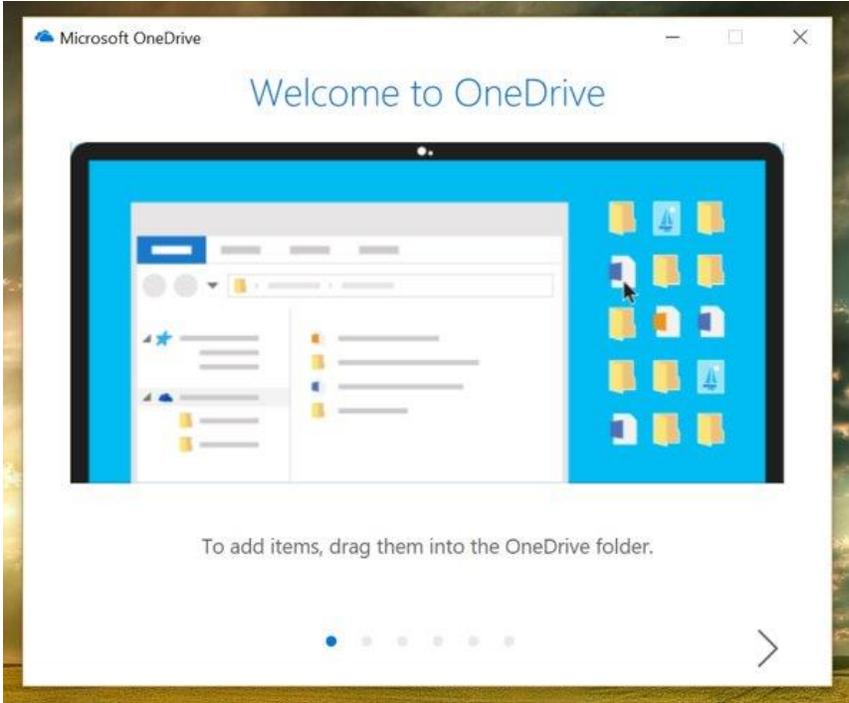

Locate the OneDrive application by searching for it on the bottom left corner, next to the Windows Icon
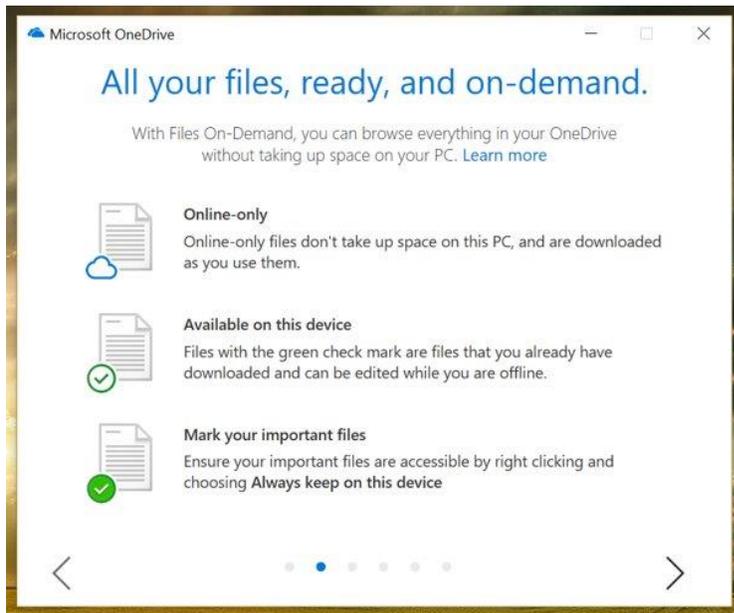

Enter your email to begin the setup process

You will be led through a series of screens sharing information about your OneDrive with you

You can drag items from your desktop/computer folders and locations into your OneDrive folder

The icons next to your files in your OneDrive will let you know whether they are online only, available on the device, or always on your device. You can right click on a file to change the status of its availability, and have access to some/all of your important files with or without internet access
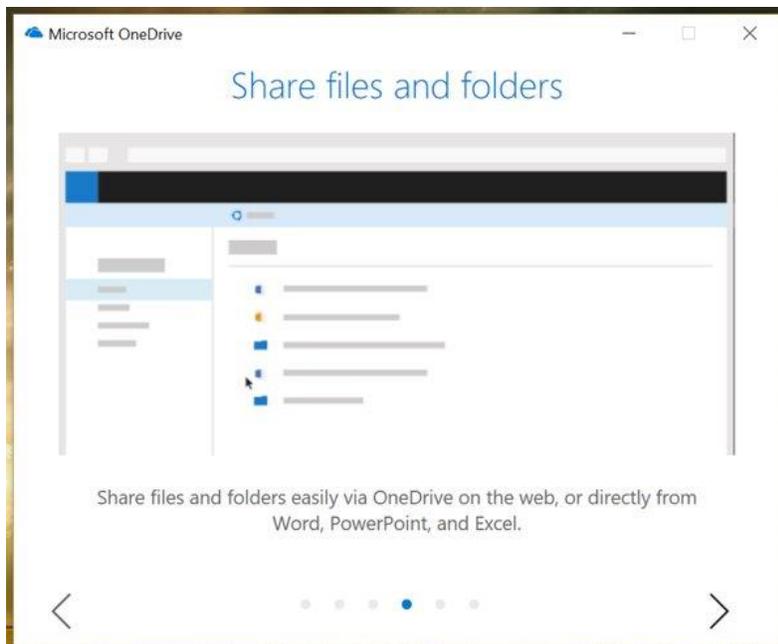
You can share directly from within the desktop Microsoft applications by right clicking on a document and selecting "share"

All of the files in your OneDrive are accesible through the OneDrive mobile application
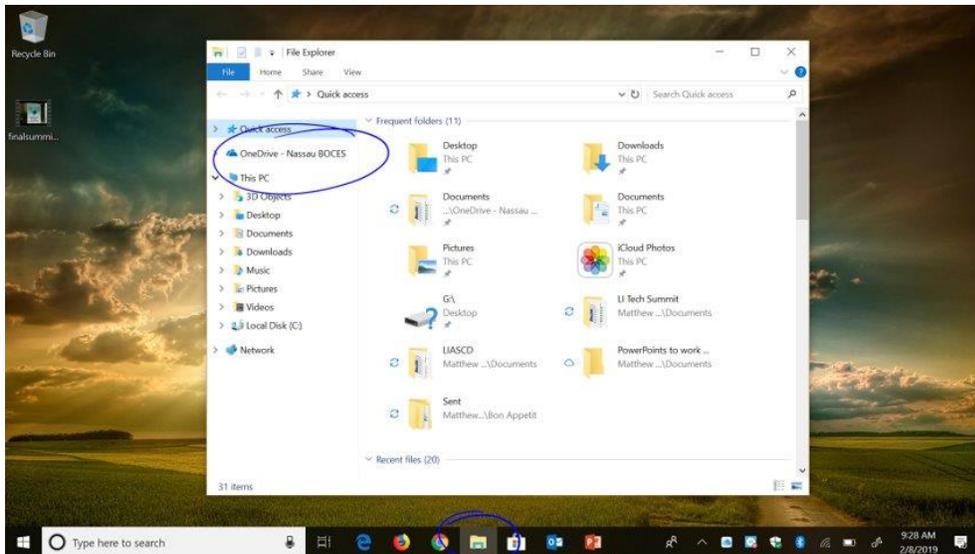
Your OneDrive folder now appears in your file explorer of your desktop computer, alongside your other folders.

Dragging Files will "Copy" the folder into the new OneDrive location. A "Copy" will remain in the previous location, which will need to be deleted
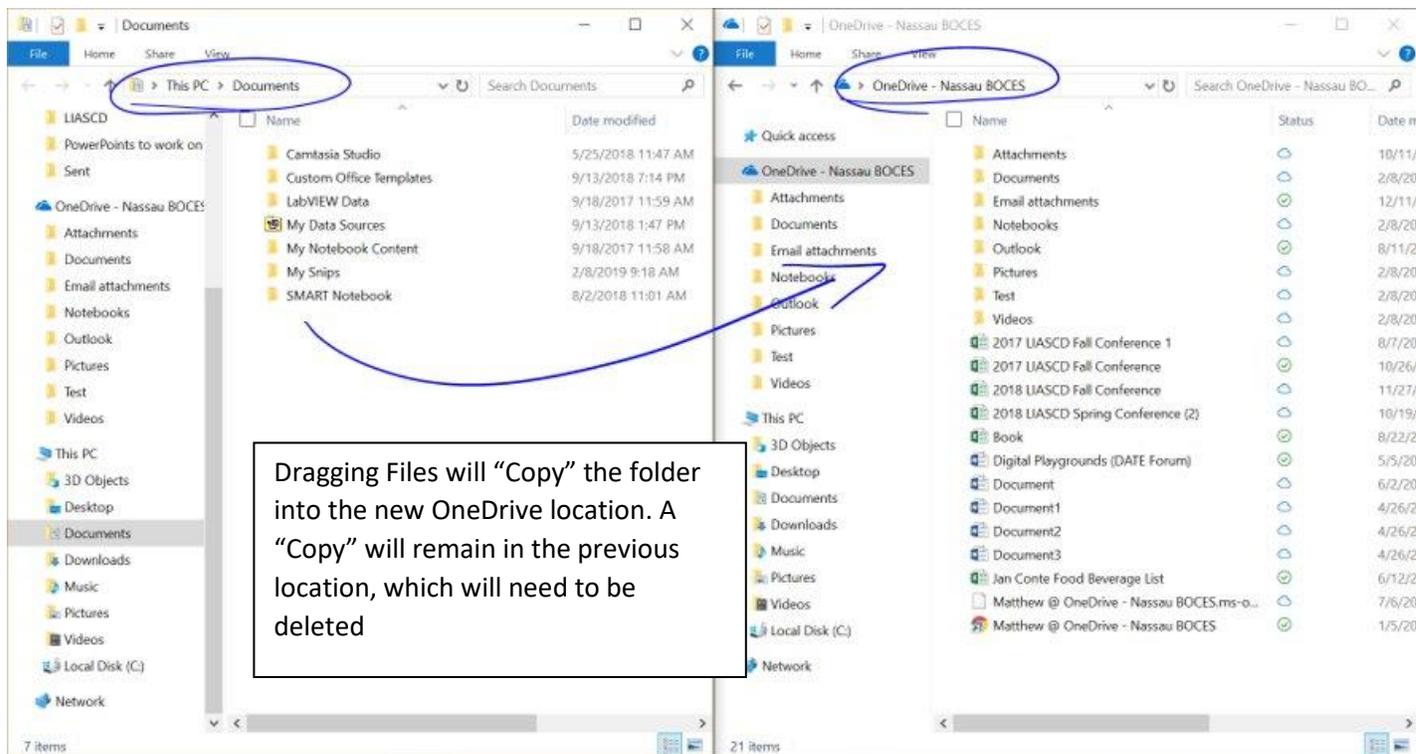
You can move files from your desktop or other computer locations into your OneDrive folder by dragging and dropping them. Open File Explorer and the OneDrive Desktop application, drag and drop the files you want to move.

Invalid characters

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Characters that aren't allowed in file and folder names in OneDrive, OneDrive for Business on Office 365, and SharePoint Online	Characters that aren't allowed in file and folder names in OneDrive for Business on SharePoint Server 2013
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