CITY OF **MADISON**

Microsoft Training: **OneDrive**

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OneDrive Orientation

What is OneDrive

Most simply put, OneDrive is Microsoft's online file storage solution. OneDrive permits you to access files from multiple devices, and allows file sharing and easy collaboration. OneDrive allows users access from anywhere, anytime, and comes with increased security.

Access files from any device

- Store all files privately in the cloud
- Securely access files from any location, any time

Share work product in real time

- Collaborate and co-author in real time
- Share file links with co-workers – no more sending files via email
- Apply access controls and expiration dates to files and folders

Keep files compliant, secure and protected

- Set sharing permissions (access controls) per files or folders
- All security, compliance and governance managed within OneDrive

? **QUESTION**: ***What is the difference between OneDrive and SharePoint?***
Great question! They are not quite the same. SharePoint is a web-based platform created for managing and sharing content, knowledge, and internal communications. Think of it this way... OneDrive is your personal SharePoint site. SharePoint is the preferred location for shared files.

? **QUESTION**: ***Will OneDrive replace my U (User) Drive?***
Currently there is not an identified retirement date for U (User) drive. OneDrive sites are individual sites and will eventually replace U drives. A OneDrive site is given to new employees as part of the M365 suite of MS Office applications (Outlook, Word, Excel, PowerPoint).

? **QUESTION**: ***What happens if an employee leaves City employment?***
When an employee leaves City employment, OneDrive access is given to the employee's supervisor for a limited time, and then it is deleted.

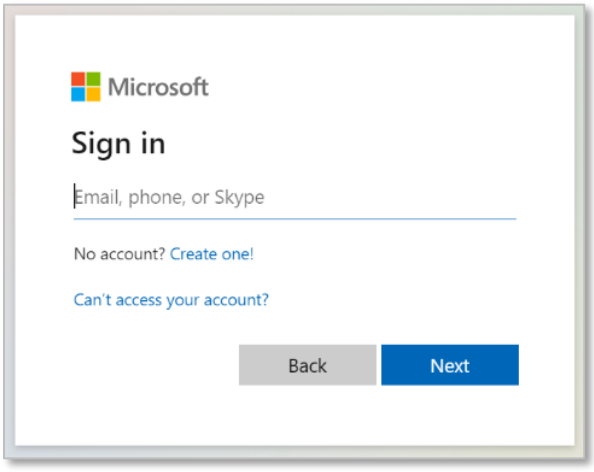
OneDrive Use Cases

OneDrive serves as individual storage space. Use cases at the City of Madison include:

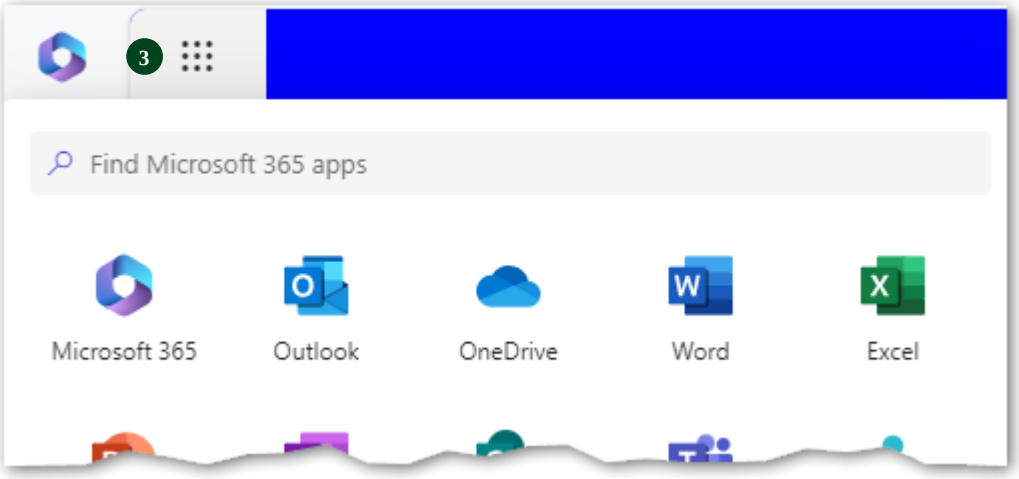
- Documents you create and are collaborating on before sharing to a group/team space.
- Reference documents and items sent to you for review.
- Business-related personal records such as benefits documentation, position description, etc.
- Alternative to personal drives, flash/thumb drives, or other removable drives.
- Refer to Where to Store Your Stuff in the IT Service Center.

Access OneDrive

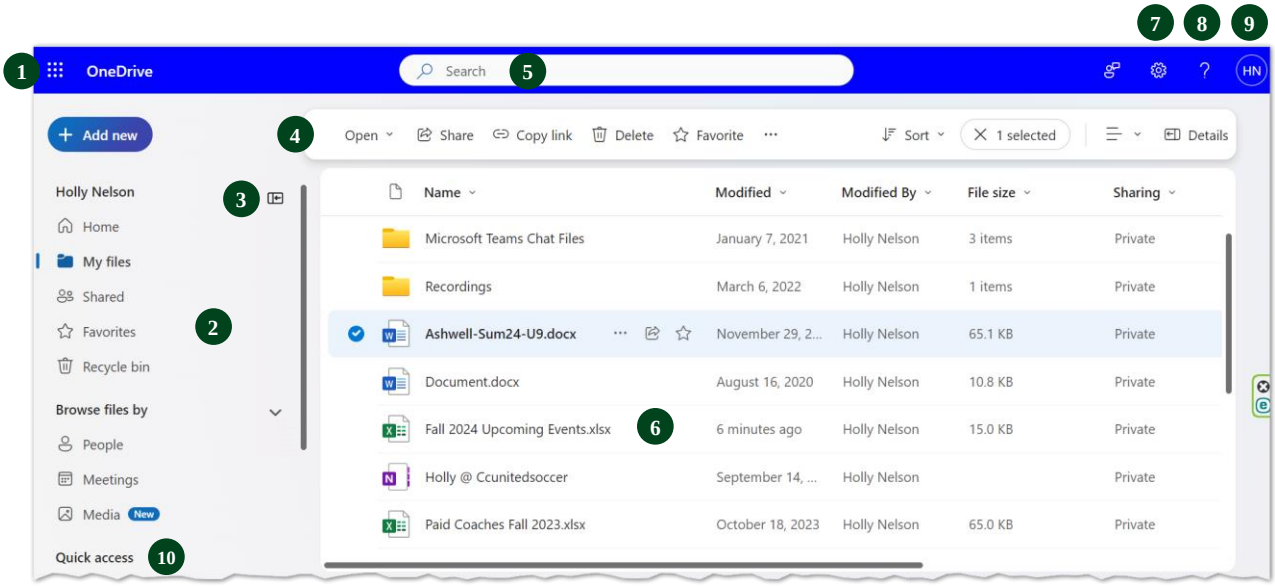
1. Open your web browser (i.e. Chrome or Edge) and go to **office.com**.
2. Use your company login credentials to login.



3. Once logged in, select the **Apps Launcher** button and choose **OneDrive**.



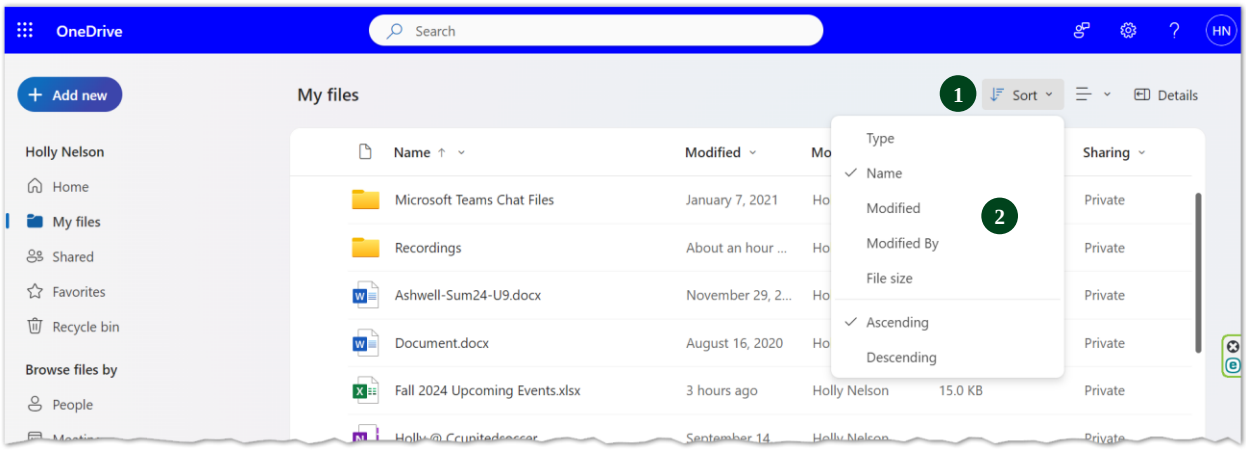
OneDrive Orientation



1. **Apps Launcher** – Used to access Microsoft Office 365 applications (i.e. Word, Excel, PowerPoint, OneDrive).
2. **Navigation Pane** – Contains a tree view of the contents and quick links to content on your OneDrive.
   - **Home** – Landing page in OneDrive.
   - **My files** – Displays your files and folders in OneDrive.
   - **Shared** – Displays files that have been shared with you or by you.
   - **Favorites** – Quick access files/folders.
   - **Recycle bin** – Displays deleted files and folders.
3. **Hide/Show Navigation Pane** – Use the Collapse/Expand button to hide or show the Navigation Pane.
4. **Toolbar** – Displays file options for selected files / folders.
5. **Search bar** – Search for files and folders within your OneDrive.
6. **File List** – Displays files and folders for the option that you have selected in the navigation pane.
7. **Settings** – Use the gear icon to change settings, theme, contact preferences, etc.
8. **Help** – Use the question mark icon to search for help on a certain OneDrive topic.
9. **Account Manager** – Select the name or picture icon to view and change account settings, or to logout of your account.
10. **Quick Access** – Frequently used storage locations, including recently used shared libraries, channels, and folders in SharePoint and Teams.

Sort Files

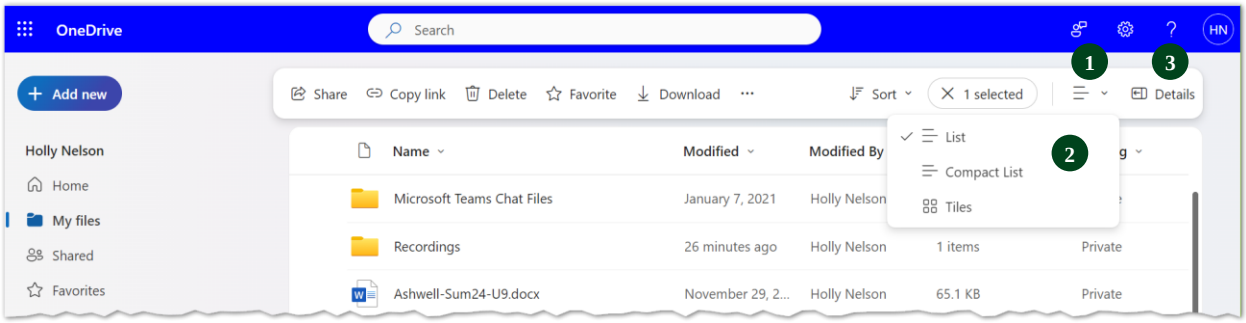
1. Select the **Sort** button from the toolbar.



2. Choose the **field** to sort on from the top half of the dropdown menu. Choose **Ascending** or **Descending** from the bottom half of the dropdown menu.

View Options

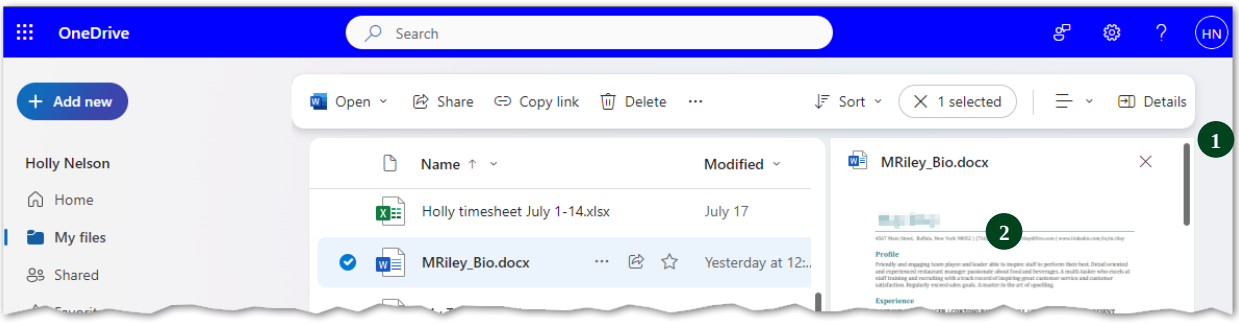
1. Select the **Switch View Options** button from the toolbar.



2. Choose one of the three view options:
    a. **List**: display contents as a list.
    b. **Compact List**: display contents as a list with compacted row height.
    c. **Tiles**: display files as image thumbnails.

Details

1. Choose the **Details** button from the toolbar.

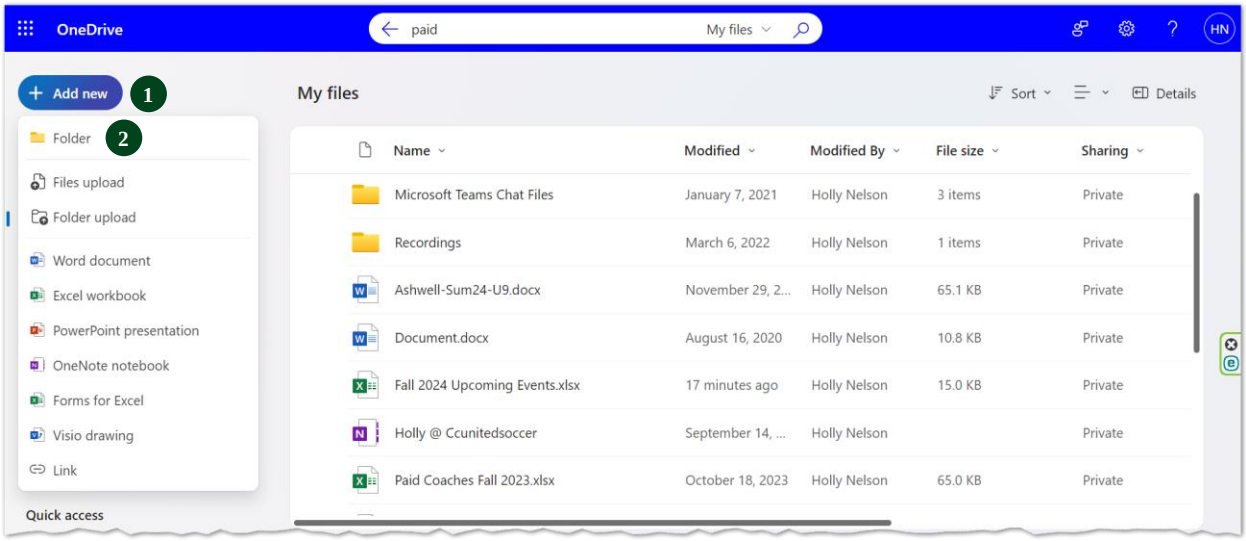


2. This shows a preview of the document along with the ability to manage access.

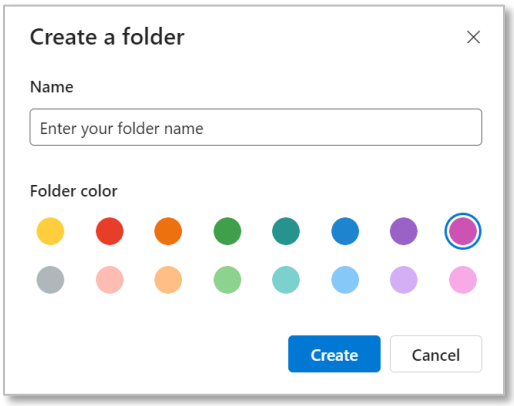
Basic File Activities in OneDrive

Create New Folder

1. Select the **Add New** button from the Navigation Pane.



2. Choose **Folder**.

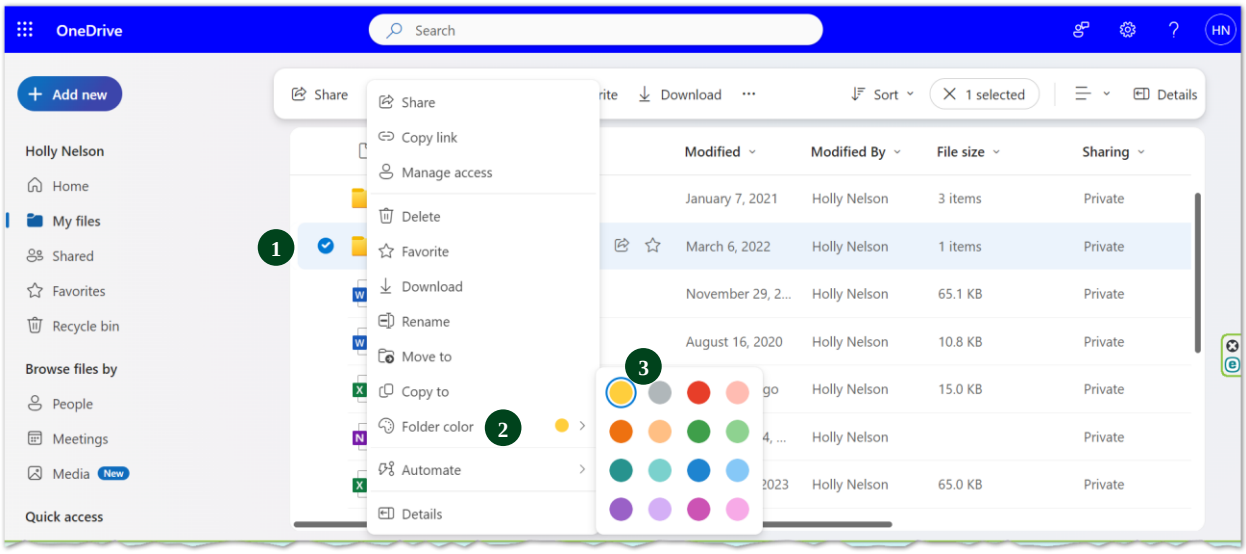


3. Name the folder and choose a color.
4. Select **Create**.

TIP: The new folder color coding options help create a visual distinction that makes content more accessible to find and organize. Try to use colors consistently across your folder structure.

Recolor an Existing Folder

1. Right-click an existing folder.
2. Choose **Folder Color**.

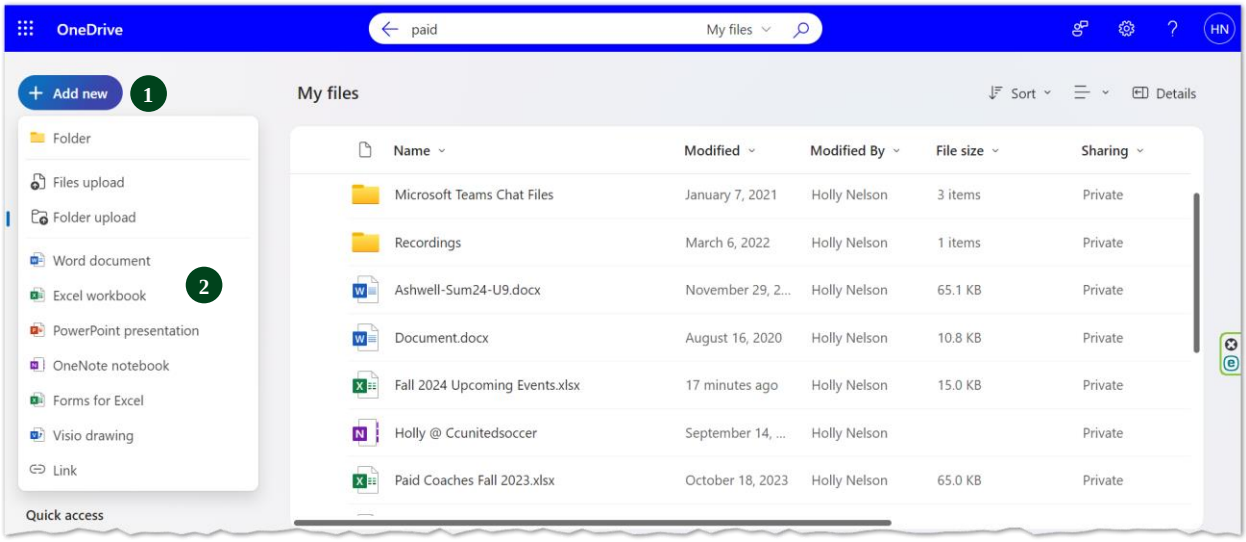


3. Select a color.

NOTE: There may be older folders (from 2019 and before) that may not have the re-color option available.

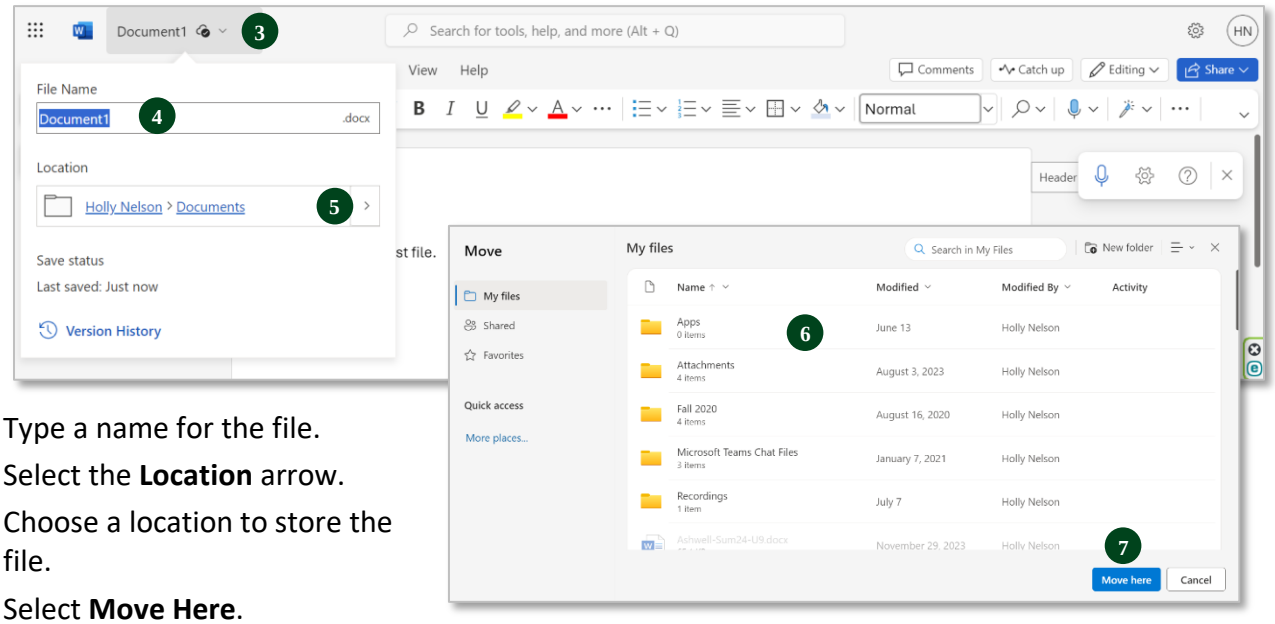
Create a New File

1. Select the **Add New** button from the **Navigation Pane**.



2. Choose an application by which to create the new file.

3. Save the file by selecting the dropdown arrow next to the temporary file name in the upper left corner of the window.



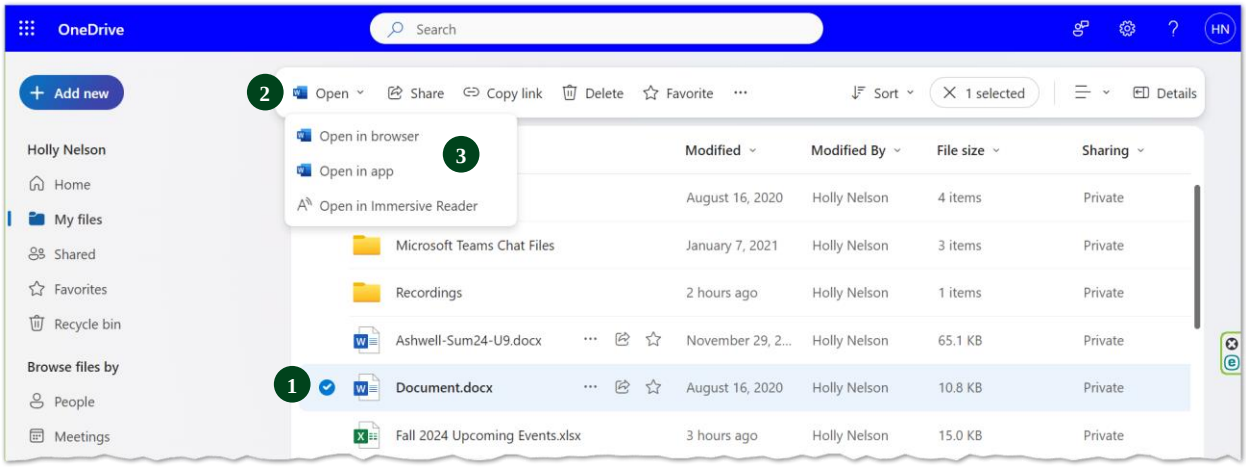
4. Type a name for the file.
5. Select the **Location** arrow.
6. Choose a location to store the file.
7. Select **Move Here**.

NOTE: File changes are automatically saved by default using the web version of a Microsoft Office application. The Microsoft Office desktop version of applications have an on/off toggle for AutoSave as well, found as the first button on the Quick Access toolbar.

TIP: You may need to select the **Refresh** button in your web browser to display a newly created file in your OneDrive window.

Open a File

1. Select a file from **My Files** using the file selection option.



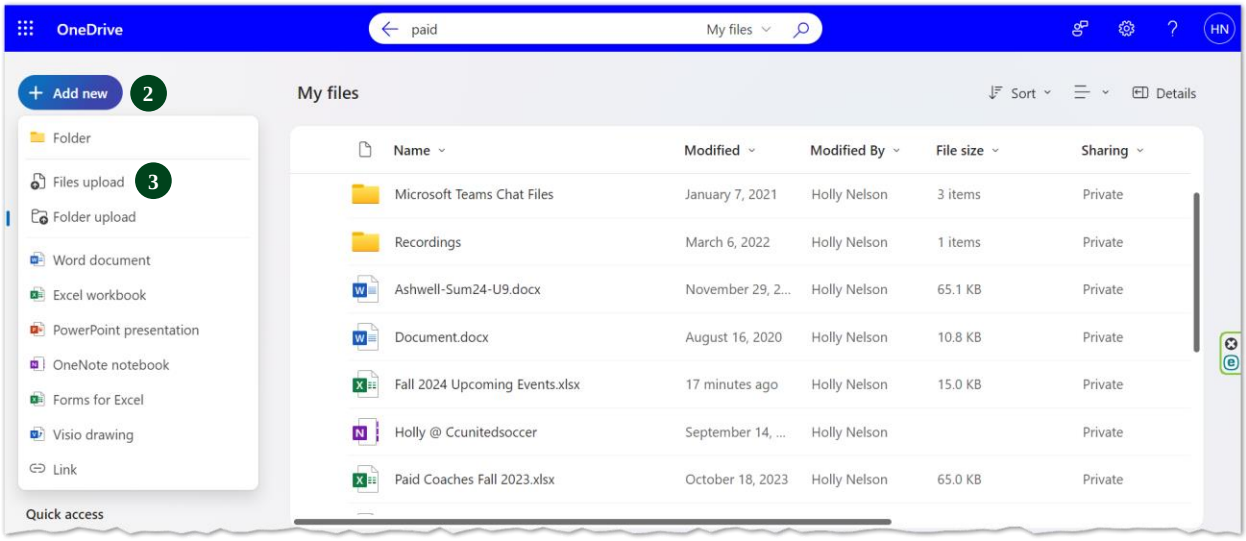
2. Select the **Open** button from the toolbar.
3. Choose to either **Open in browser** or **Open in app**.

TIP: You can also use the **More** (...) button to the right of the filename, choose **Open** and select to **Open in browser** or **Open in app**. *Review the **Using Office Applications Online** section in this guide for more details on working in your browser*.

Upload a File or Folder

Upload from within OneDrive

1. Navigate to the OneDrive folder where you wish to upload a file or a folder.
2. Select the **Add New** button from the Navigation Pane.



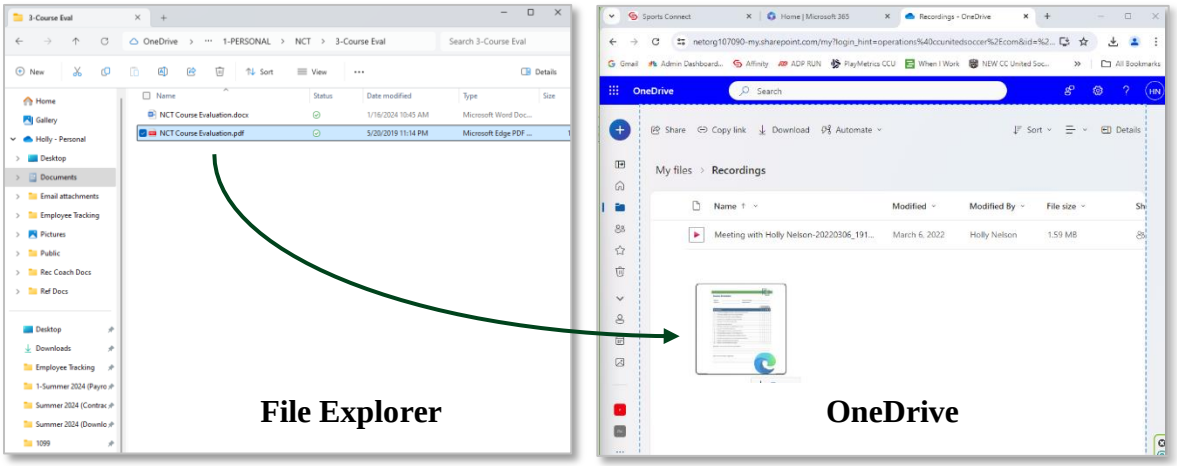
3. Choose **Files upload**.
4. Navigate to and select the file you wish to upload.
5. Select **Open**.

TIP: You can also choose to upload a folder and its files as well. Select **Add New** and choose **Folder upload**. Navigate to and select the folder you wish to upload and select the **Upload** button.

NOTE: Depending on the web browser, upload files up to 250GB in size. (This limit is per file, not total.) Recommended web browsers are Chrome or Edge.

Upload a File to OneDrive using File Explorer

1. Navigate in File Explorer to the location where your file (to upload) is located.
2. Navigate to the OneDrive folder where you wish to upload a file or a folder.



3. Drag and drop the file from the File Explorer window to the OneDrive window.

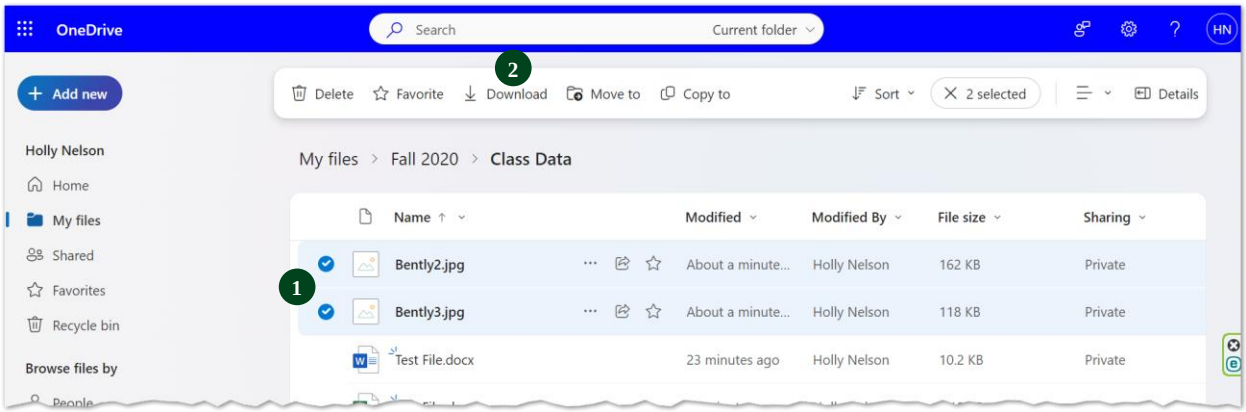
Download Files

NOTES: You will most likely only use the Download feature on rare occasions, such as making the file available offline when online access isn't available or stable.

Please be aware! Downloading multiple copies of files (as well as emailing copies of files) is not a best practice. Duplicated files take up more cloud space and contribute to our digital carbon footprint.

You can't download files directly from the Shared view. You will need to open the file and save a copy in the location of your choice.

1. Select a file (or files) from **My Files** using the file circle check box selection option.



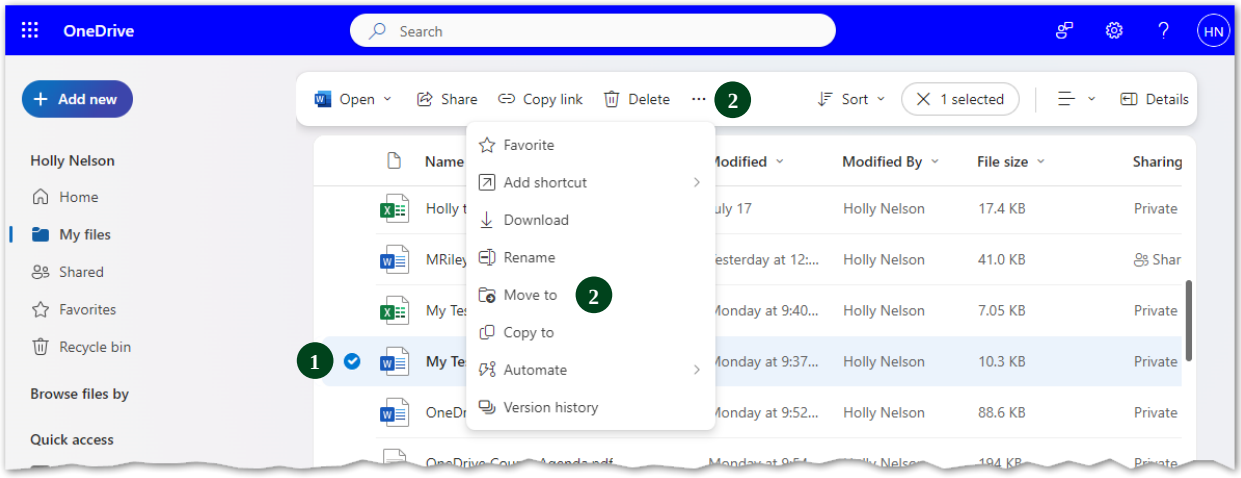
2. Select the **Download** button from the toolbar.
3. Files will download to the computer hard drive into the Downloads folder. If you selected more than one file, all files download into one .zip file.

Move a File or Folder

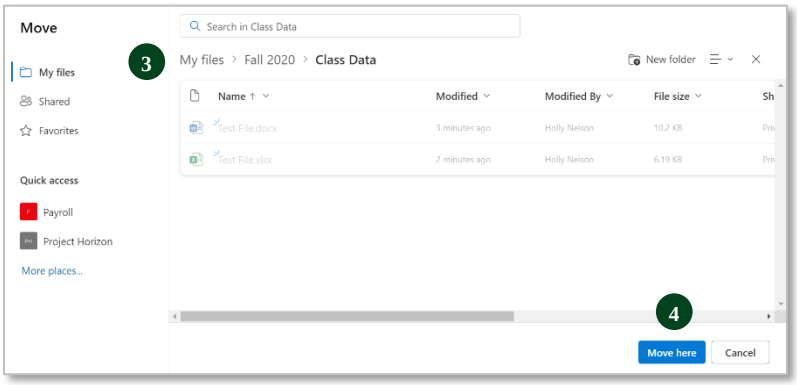
NOTE: Move files/folders to OneDrive from your U drive or other location rather than syncing. The City of Madison's guidance: First, clean up your U drive! Second, move applicable files to OneDrive. The City of Madison will NOT be syncing the U drive with OneDrive.

- *OneDrive at office.com*
  - Depending on the web browser, upload files up to 250GB in size. (This limit is per file, not total.) Recommended web browsers are Chrome or Edge.
- *File Explorer*
  - Copy or move files between folders within OneDrive, or from other folders on your computer. (When files from other folders on your computer are moved to a OneDrive folder, the files are removed from your computer and added to OneDrive.)
- *Desktop App*
  - Recommended for transferring large files or many files to OneDrive rather than using the Upload button on office.com.

1. Select a file (or files) from **My Files** using the file circle check box selection option.



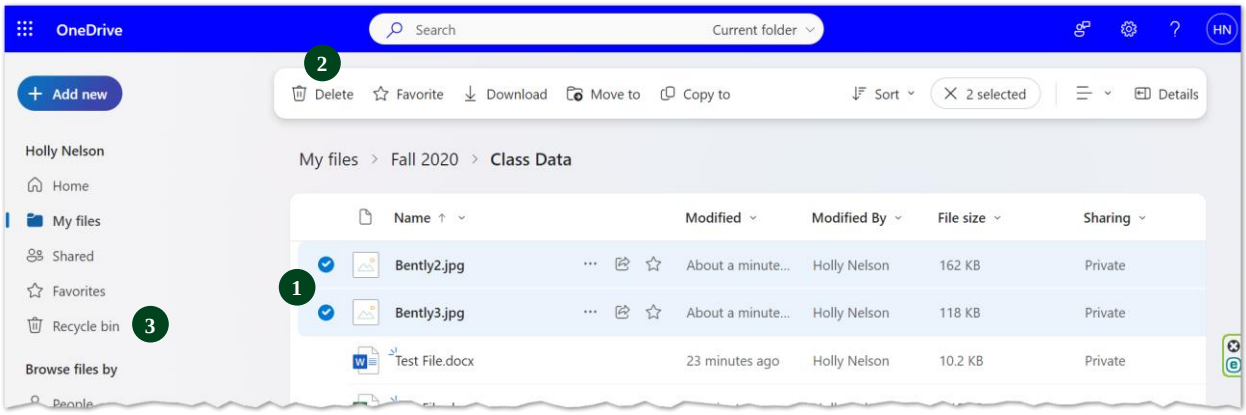
2. Choose the **Move to** button from the toolbar. Depending on your window size you may need to choose the **More** (…) button from the toolbar first, then choose **Move to**.
3. Navigate the folder structure to choose a location to store the file.



4. Select **Move Here**.

Delete a File

1. Select a file (or files) from **My Files** using the file circle check box selection option.

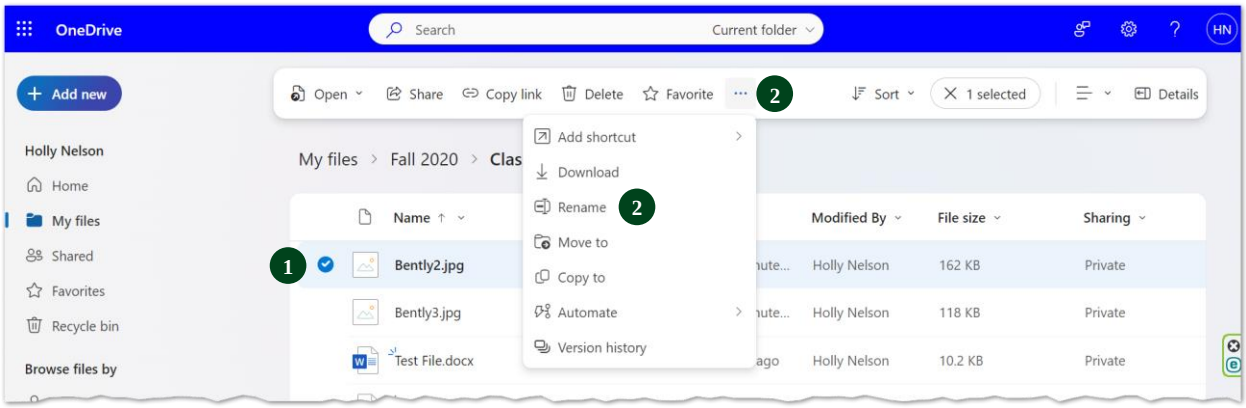


2. Select the **Delete** button from the toolbar. You will be asked to confirm deletion.
3. The deleted file moves to the **Recycle bin**. You can restore the file if desired.

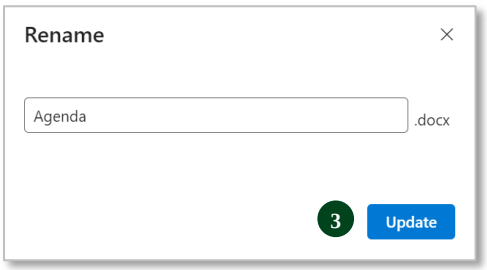
NOTE: When a file or folder is deleted on OneDrive within one device, it is deleted off **all** other devices as well.

Rename a File

1. Select a file (or files) from **My Files** using the file circle check box selection option.



2. Choose **Rename**. Depending on your window size you may need to choose the **More** (…) button from the toolbar first, then choose **Rename**.
3. Rename the file and select **Update**.

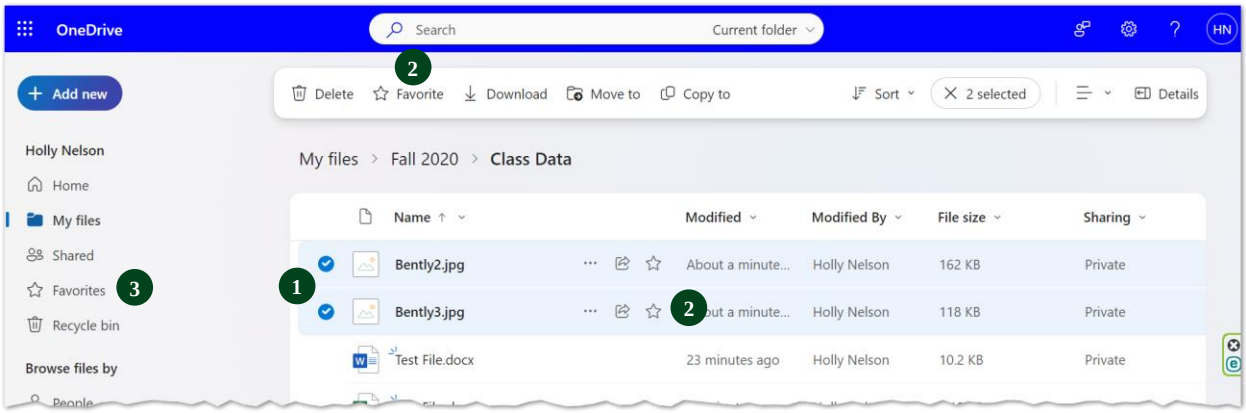


Additional File Activities

Add a File to Favorites

Adding files and folders to your Favorites allows you to quickly and easily access frequently used files, items that are difficult to locate, and files that are buried multiple folders deep.

1. Select a file or folder (or multiple files of folders) from **My Files** using the file circle check box selection option.



2. Select the **Favorite** button from the toolbar. You can also choose the star button to the right of the filename.
3. Choose **Favorites** from the Navigation Pane to find files and folders you have pinned here.

Share Files and Folders

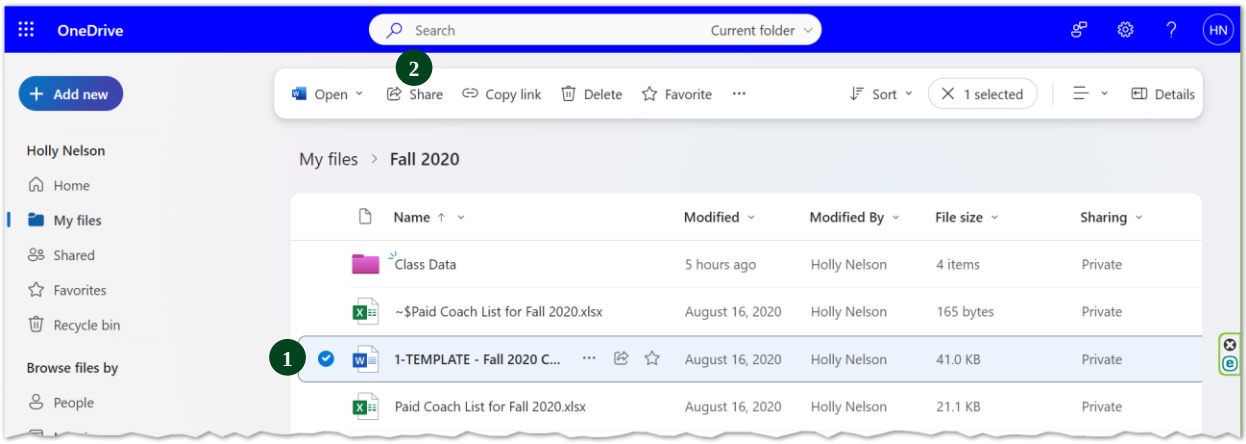
NOTE: End-users are able to grant access to their OneDrive files/folders to members of our City of Madison tenant, and current or new guest users.

City of Madison's expectation on file sharing:

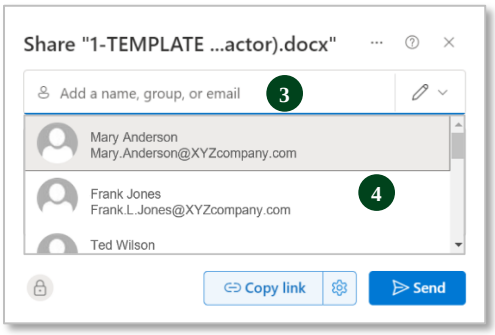
- *You can easily share and collaborate internally on files / folders from anywhere with an Internet connection.*
- *You cannot share a file on OneDrive outside of your organization or with people external to the City of Madison workforce.*

Share from OneDrive

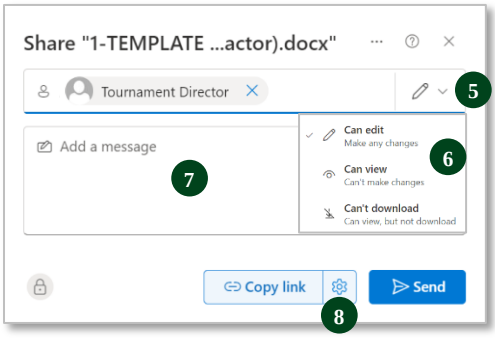
1. Select a file or folder from **My Files** using the file circle check box selection option.



2. Select the **Share** button from the toolbar.
3. Enter the name, group or email of the person(s) you wish to share the file with.

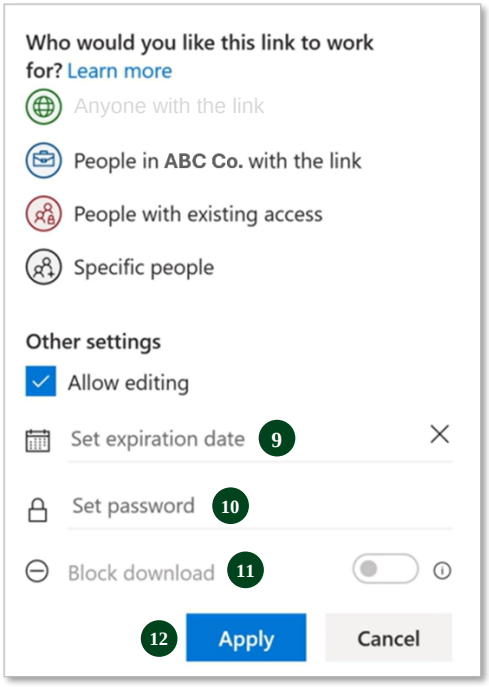


4. Select the appropriately matched name from the selections provided. If the appropriately matched name doesn't appear, type the entire email address.
5. Select the **Edit options** dropdown arrow.

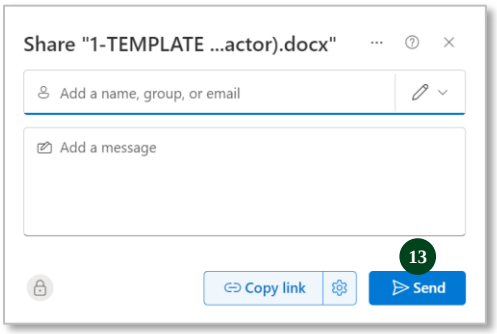


6. Select one of the following options: "Can edit", "Can view" or "Can't Download".
7. Add a message about the context of the file share.
8. Choose the **Link Settings** (gear) button.

9. Choose an expiration date, if desired.

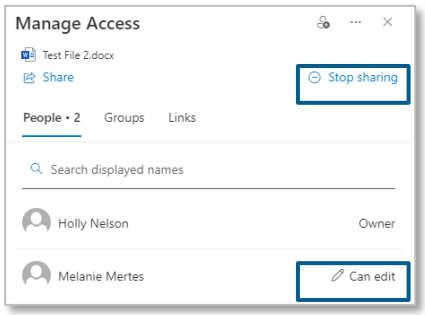


10. Set a password, if necessary.
11. If you wish to block shared users from downloading the file, you must uncheck **Allow editing** to activate the **Block download** option.
12. Select **Apply**.
13. Select the **Send** button.



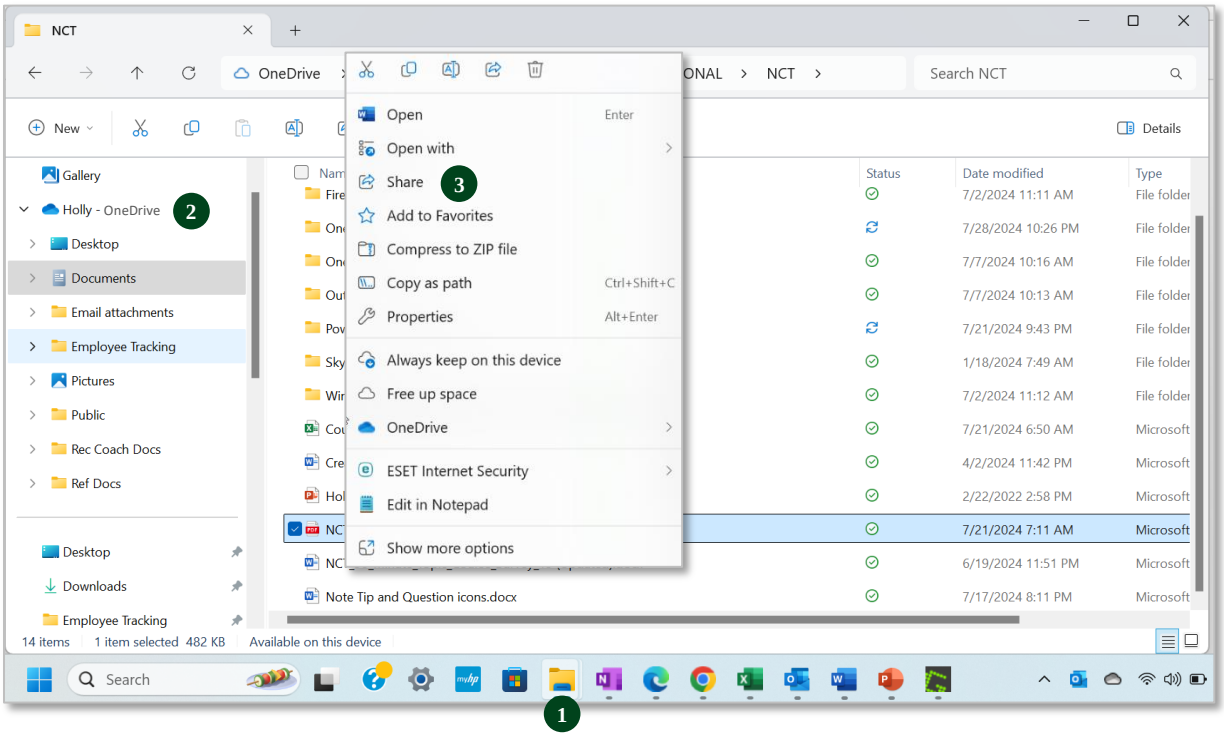
Unshare Files or Folders

1. Select **Shared** in the Sharing column of your **My Files** file list. You can change permissions or Stop Sharing.

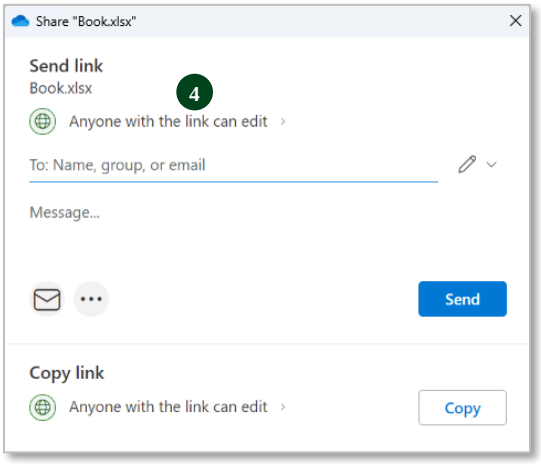


Share from File Explorer

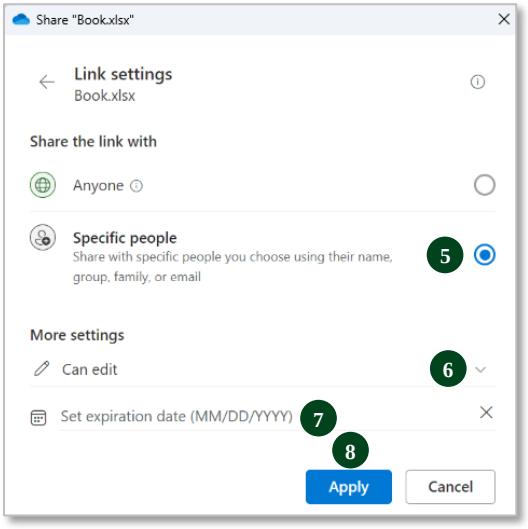
1. Open File Explorer by selecting the yellow file folder in the Windows Taskbar.



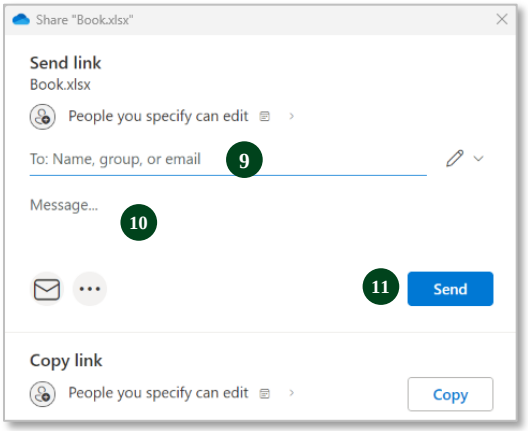
2. OneDrive is integrated with Windows File Explorer and is listed as a drive in the navigation pane tree view in File Explorer.
3. Right-click a file and choose **Share**.
4. Select the **Anyone with the link can edit** option.



5. Select **Specific people**. Leaving the **Share the link with** setting at **Anyone** will allow recipients the ability to forward the link to others, and anyone who receives the link will be able to view and access the content. If you opt to leave the **Share the link with** option at **Anyone**, you have the option to set a password in **More settings**.



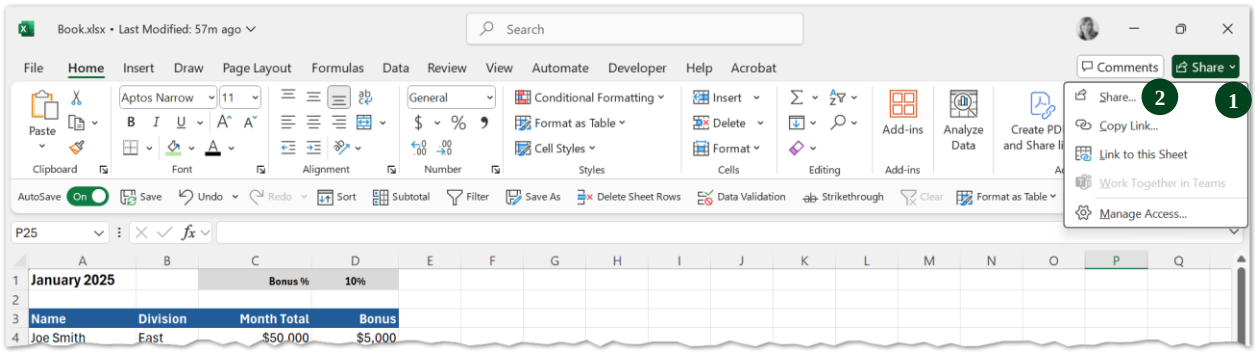
6. Select the **Edit options** dropdown arrow. Select one of the following options: “Can edit” or “Can view”.
7. Choose an expiration date, if desired. **Note**:.
8. Click **Apply**.
9. Enter the name, group or email of the person(s) you wish to share the file with. Select the appropriately matched name from the selections provided. If the appropriately matched name doesn’t appear, type the entire email address.



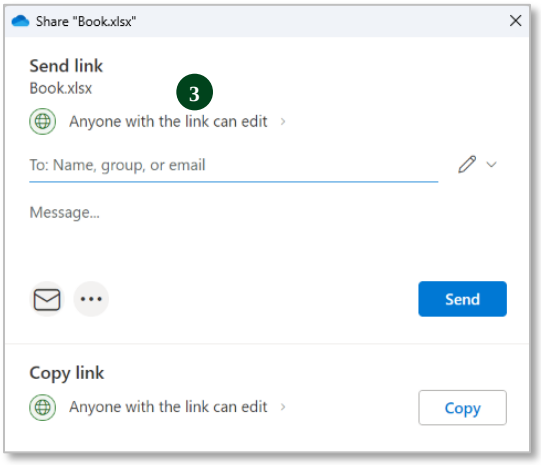
10. Add a message about the context of the file share.
11. Select the **Send** button.

Share from within Microsoft Applications

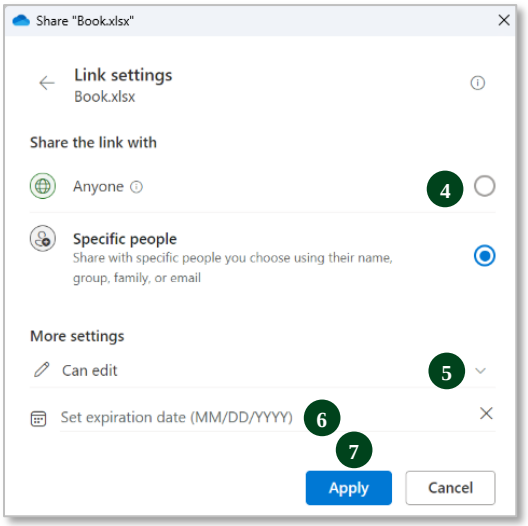
1. From within a Microsoft application, select the **Share** drop-down button from the upper right corner of the application window.



2. Choose **Share**.
3. Select the **Anyone with the link can edit** option.

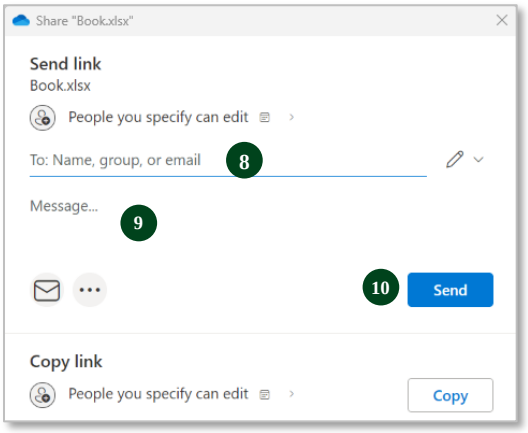


4. Select **Specific people**. **Note**: Leaving the **Share the link with** setting at **Anyone** will allow recipients the ability to forward the link to others, and anyone who receives the link will be able to view and access the content. If you opt to leave the **Share the link with** option at **Anyone**, you have the option to set a password in **More settings**.



5. Select the **Edit options** dropdown arrow. Select one of the following options: “Can edit” or “Can view”.
6. Choose an expiration date, if desired.

7. Click **Apply**.
8. Enter the name, group or email of the person(s) you wish to share the file with. Select the appropriately matched name from the selections provided. If the appropriately matched name doesn't appear, type the entire email address.

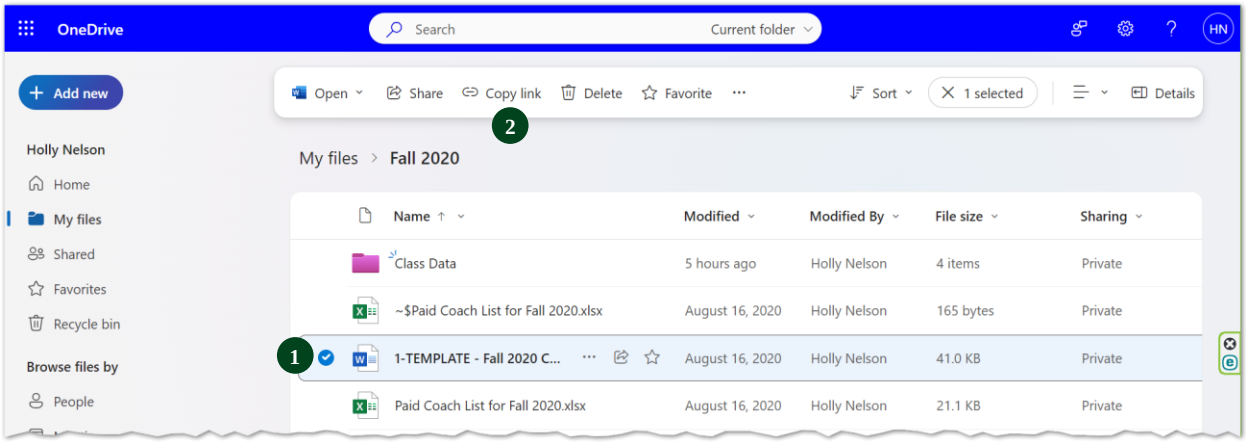


9. Add a message about the context of the file share.
10. Select the **Send** button.

Copy a Link to a File or Folder

Copy a Link from OneDrive

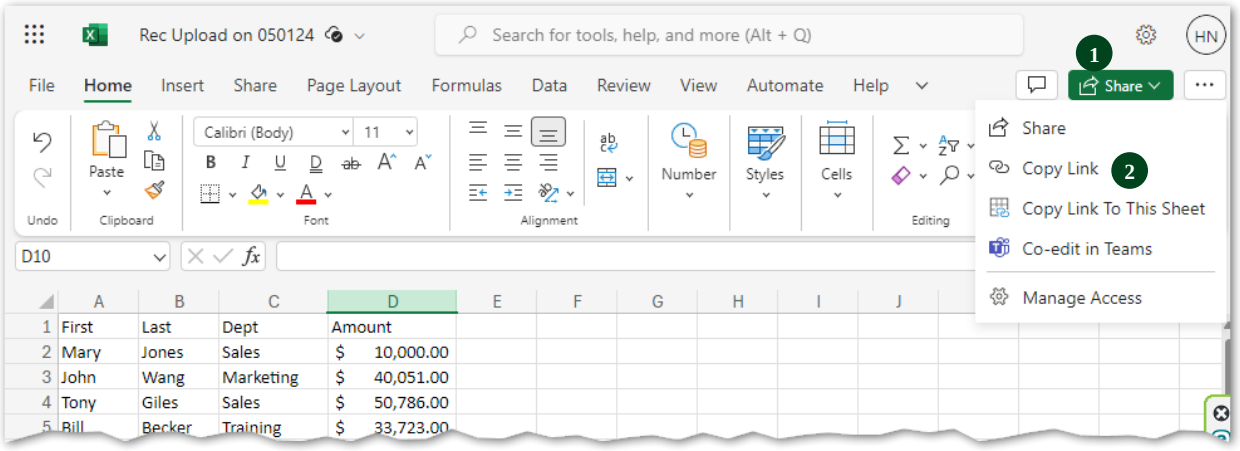
1. Select a file or folder from **My Files** using the file circle check box selection option.



2. Select the **Copy Link** button from the toolbar.
3. Move to where you wish to paste the link (for example an email or a document).
4. Press **CTRL+V** to paste the link to the file.

Copy a Link to a File from within a Microsoft Application

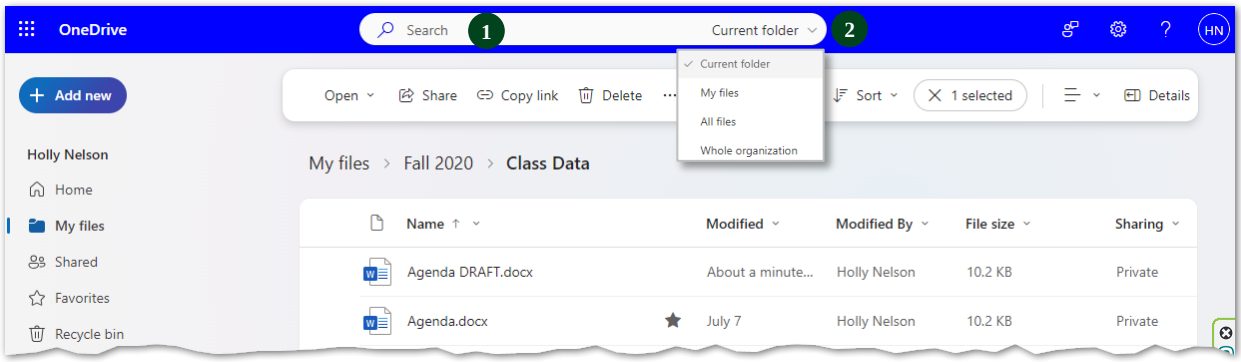
1. From within a Microsoft application, select **Share** drop-down button from the upper right corner of the application window.



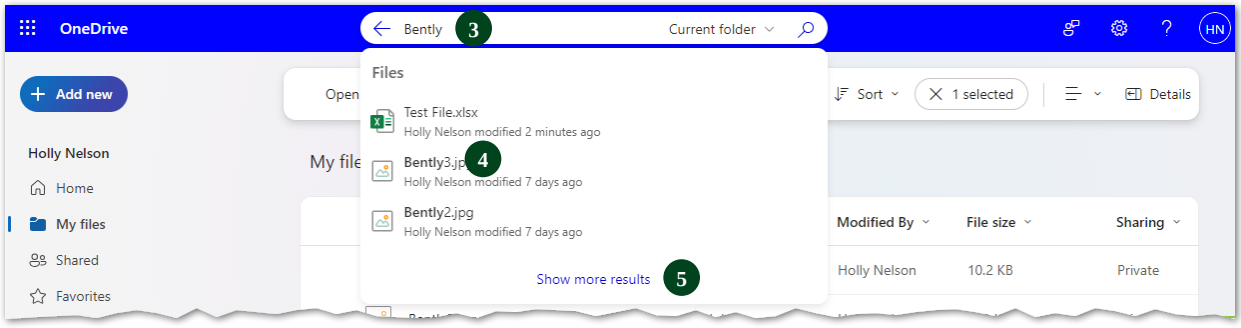
2. Choose **Copy Link**.
3. A dialog box will open. Choose **Copy**. Then close the dialog box.
4. Move to where you wish to paste the link (for example an email or a document).
5. Press **CTRL+V** to paste the link.

Search

1. Click your mouse in the **Search** box at the top of the OneDrive window.



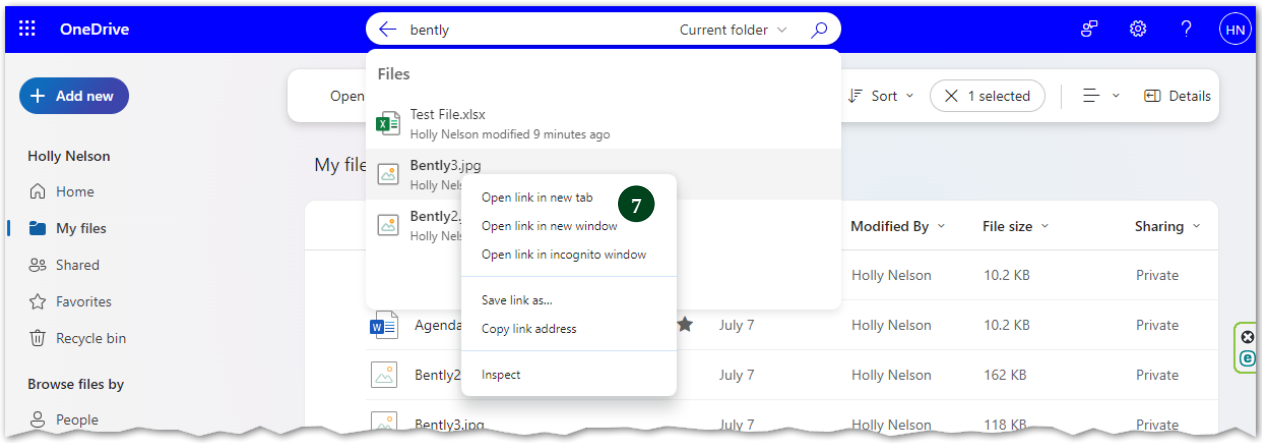
2. You can also search beyond the confines of the current folder. Select the **Current folder** dropdown arrow for other search location options. Only files you have permission to will appear in the search results.
3. Type part of the filename, folder name, or content found within a document.



4. As you are typing you will find a list appear that matches your search criteria.
5. Select **Show more results** at the bottom of the list to view all matching results.
6. If you wish to open the file, simply select the filename in the list and the file will open in a new tab.

OR

7. Right-click the filename and choose how you wish to open the file, or choose one of the link options.



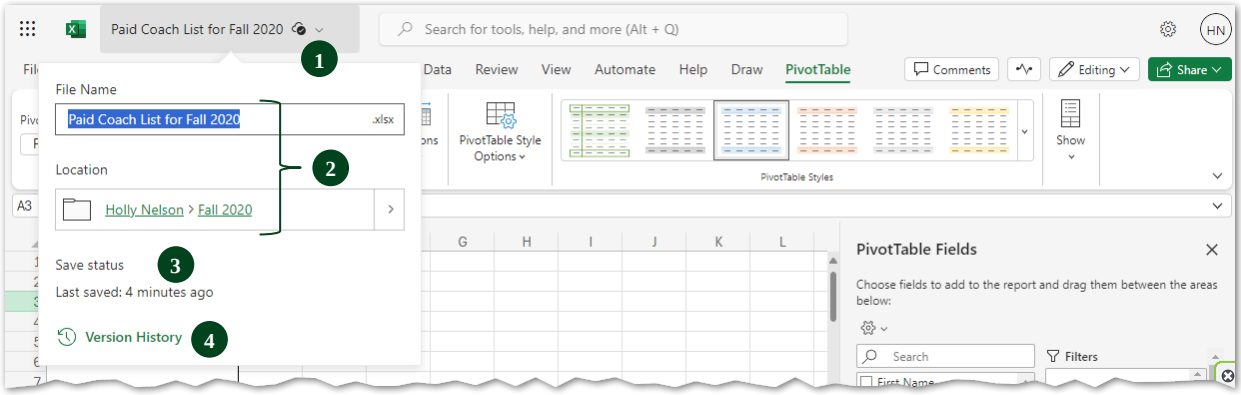
Using Office Applications Online

Collaboration

With Microsoft 365 and OneDrive (or SharePoint), multiple people can work together on a Word document, Excel spreadsheet, or PowerPoint presentation.

- When everyone is working at the same time, that's called co-authoring, or real-time collaboration.
- Microsoft Word, Excel and PowerPoint 365 all support co-authoring.
- Co-authoring is only supported on modern file formats including: Word .docx , Excel .xlsx, and PowerPoint .pptx.
- All co-authors must have permission to access and edit the documents.
- When you are editing a file, you might receive notification that others are working in the file as well. You can edit the file as you normally would.
- Locate user initials in the top right corner of the window of others working in the document at the same time as you. Microsoft Office also alerts you to their presence with a color indicator and their name, and actually shows you where in the file they're working.

Notes on Saving and Version History



1. Select the filename dropdown arrow from the upper left corner of the window.
2. You can rename the file in the top menu and/or choose a new file location.
3. When working in the browser there is no need to save the file. Your application will automatically save. View the **Save status** information. **Note**: The Microsoft Office desktop version of applications have an on/off toggle for AutoSave as well, found as the first button on the Quick Access toolbar.
4. You can easily find the file version history.

Sync and Backup Folders

QUESTION: ***What is Sync?***

- The synchronization (sync) of files between your computer and OneDrive document libraries.
- Sync means that files/folders stored in your OneDrive are automatically kept up-to-date across all your devices.
  - If you update/edit a document on your computer/laptop, the updates will automatically sync to OneDrive. This means those updates will be available to you from any other device, and to all others that have access to the file.

QUESTION: *Can I sync files from all my drives and devices with OneDrive?*

- Syncing is only possible from your computer/laptop, not from networked or peripheral devices such as a thumb/flash drive, external hard drives, F or U drives.

QUESTION: ***When does syncing take place?***

- Synced files will update continuously when the computer/laptop is connected to the internet. The computer does not need to be connected to the City of Madison network.

QUESTION: ***What is Backup?***

- Most Simply put, backup is about protecting your data against loss.
- Backup creates a separate copy of your files in the cloud, primarily used for disaster recovery and usually involves a one-time or scheduled transfer of data.
- Backup ensures that if your laptop is stolen/lost or damaged, your files will be restored.

QUESTION: ***What is the difference between Sync and Backup?***

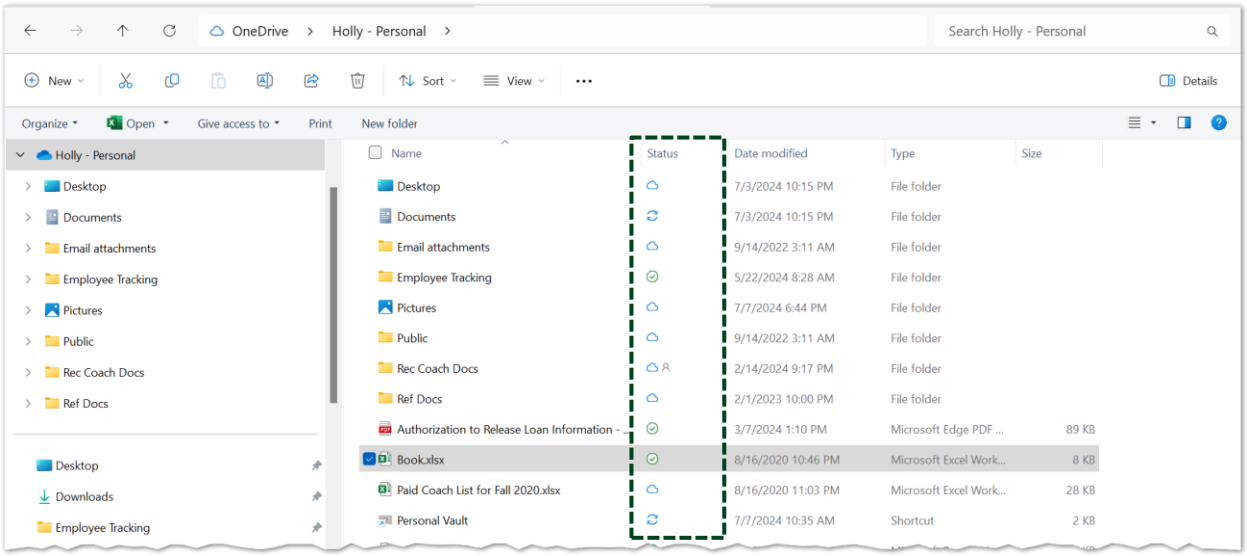
- Syncing is a two-way process that synchronizes files between your computer and OneDrive document libraries, which **allows for offline file access**.
- Backup is a one-direction process, copying files from the original location to the destination location to be **used for disaster recovery**, not continuous updates like syncing does.

Online vs Offline Access

Whenever you open a OneDrive-based file from File Explorer and then save it, your changes are automatically synchronized back to the cloud.

Offline access works by syncing your files between the web and your hard drive.

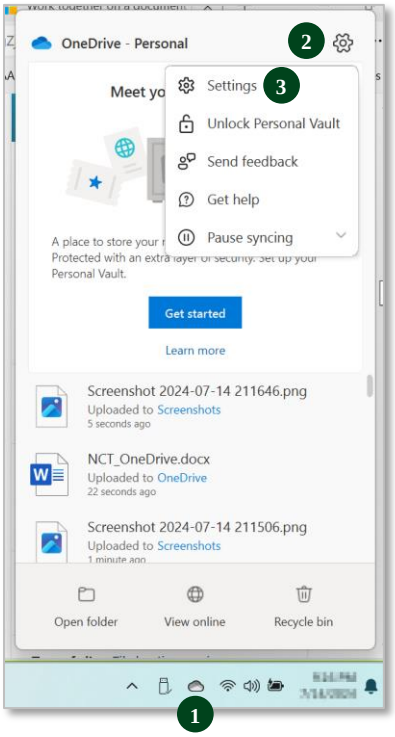
FILE STATUS ICON COLOR	MEANING
Blue cloud icon	The file is in OneDrive, but not yet on your device.
Green checkmark icon	The file is available for offline use.
Red X icon	Something went wrong with syncing. You will need to check the error message.
People icon	The file or folder is shared with others.



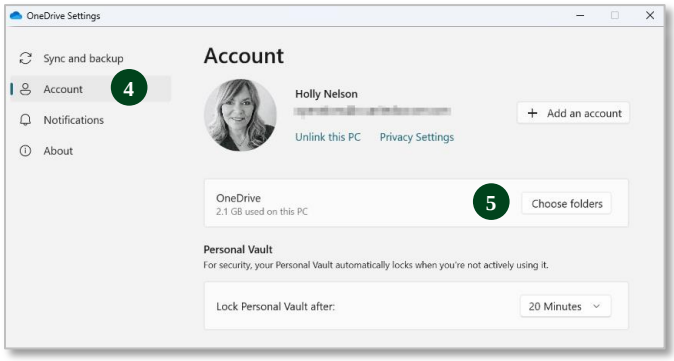
Sync Folders

NOTE: Move files/folders to OneDrive from your U drive, or other location, rather than syncing. Syncing is useful AFTER your files are in OneDrive, so that you have easy access to them on your computer. Remember, a VPN connection is required to access the U and F drives.

1. Select the OneDrive cloud icon in your Taskbar in the notification area.

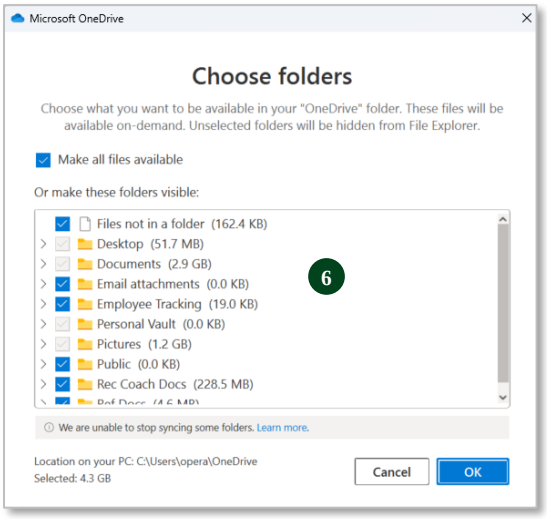


2. Choose the **Help and Settings** (gear) button.
3. Choose **Settings**.
4. Select the **Account** tab.



5. Select **Choose folders**.

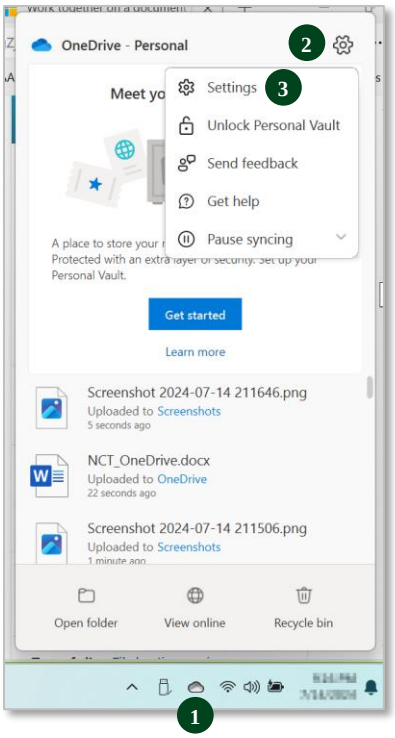
6. In the **Choose Folders** dialog box, check the folders you want to sync, and uncheck any folders you don't want to sync to your computer and select **OK**.



QUESTION: ***Should I sync my U Drive with OneDrive?***
The City of Madison's guidance: First, clean up your U drive! Second, move applicable files to OneDrive. The City of Madison will NOT be syncing the U drive with OneDrive.

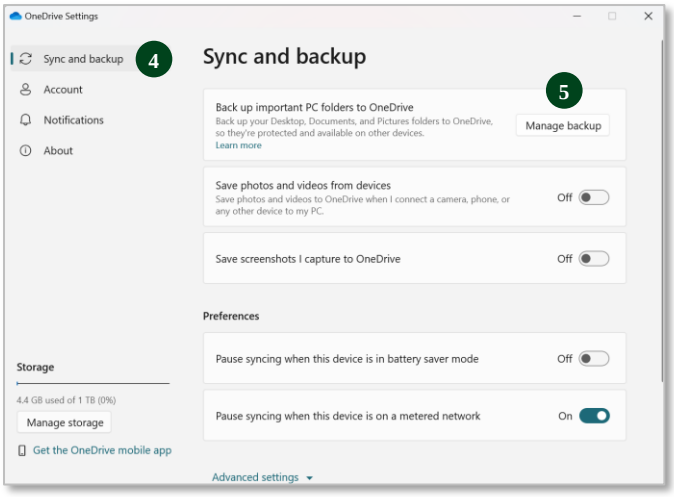
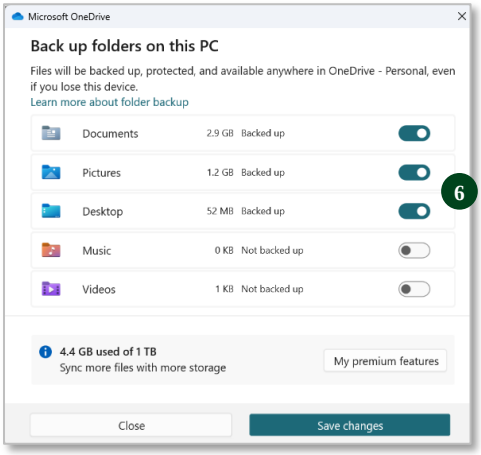
Manage Backup Folders

1. Select the OneDrive cloud icon in your Taskbar in the notification area.



2. Choose the **Help and Settings** (gear) button.
3. Choose **Settings**.

4. Select the **Sync and backup** tab.



5. Select **Manage backup**.
6. In the **Backup folders on this PC** dialog box, toggle to the "ON" position any folder that is set to not back up, and then select **Save changes**.