

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 coauthor in real time
- Share file links with coworkers – 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 <u>not</u> an identified retirement date for U (User) drive. OneDrive sites are individual sites and will <u>eventually</u> 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).

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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.

Access OneDrive

- 1. Open your web browser (i.e. Chrome or Edge) and go to office.com.
- 2. Use your organization login credentials to log in.

Microsoft		
Sign in		
Email, phone, or Skyp	e	
No account? Create one		
Can't access your accour	nt?	
	Back	Next

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

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₽ Find Microso	oft 365 apps			
0			w	x
Microsoft 365	Outlook	OneDrive	Word	Excel
	_		-	

OneDrive Orientation

							
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My files			Recordings	March 6, 2022	Holly Nelson	1 items	Private
☆ Favorites		 • 	Ashwell-Sum24-U9.docx … 🖻 ビ	ን November 29, 2	Holly Nelson	65.1 KB	Private
ເມີ Recycle bin			Document.docx 7	August 16, 2020	Holly Nelson	10.8 KB	Private
Browse files by	×.		Fall 2024 Upcoming Events.xlsx	6 minutes ago	Holly Nelson	15.0 KB	Private
III Meetings			Holly @ Ccunitedsoccer	September 14,	Holly Nelson		Private
🛛 Media 📭			Paid Coaches Fall 2023 xlsx	October 18, 2023	Holly Nelson	65.0 KB	Private

- Apps Launcher Used to access Microsoft Office 365 applications (i.e. Word, Excel, PowerPoint, OneDrive).
- 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.
- Quick Access Frequently used storage locations, including recently used shared libraries, channels, and folders in SharePoint and Teams.

4. **Hide/Show Navigation Pane** – Use the Collapse/Expand button to hide or show the Navigation Pane.

- 5. **Toolbar** Displays file options for selected files / folders.
- 6. **Search bar** Search for files and folders within your OneDrive.
- File List Displays files and folders for the option that you have selected in the navigation pane.
- Settings Use the gear icon to change settings, theme, contact preferences, etc.
- Help Use the question mark icon to search for help on a certain OneDrive topic.
- Account Manager Select the name or picture icon to view and change account settings, or to logout of your account.



NOTE: In order for the **Toolbar** to appear in your display, a file or folder must be selected.

Sort Files

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

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+ Add new	My files		1 ↓ ≓ Sort ~	Ξ ~ 🗉 Details
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G Home	Microsoft Teams Chat Files	January 7, 2021	Ho Modified	Private
Shared	Recordings	About an hour	Ho Modified By	Private
☆ Favorites	Ashwell-Sum24-U9.docx	November 29, 2	File size Ho	Private
觉 Recycle bin	Document.docx	August 16, 2020	 ✓ Ascending Ho Descending 	Private
Browse files by	Fall 2024 Upcoming Events.xlsx	3 hours ago	Holly Nelson 15.0 KB	Private
- Martin	Holly @ Capitadeocear	Sentember 14	Hally Nalcon	Drivate

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.

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+ Add new	ⓒ Share ⁽ Ə Copy link 道 Delete ☆ Favorite	⊥ Download …	J≓ Sort	 X 1 selected 		E (3 Details)
Holly Nelson	🗅 Name ~	Modified ~	Modified By	✓ Ξ List Ξ Compact List	2	g ~		
 G Home My files 	Microsoft Teams Chat Files	January 7, 2021	Holly Nelson	88 Tiles		2		
Shared	Recordings	26 minutes ago	Holly Nelson	1 items	Priva	ite		
☆ Favorites	Ashwell-Sum24-U9.docx	November 29, 2	Holly Nelson	65.1 KB	Priva	ite		

- 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.

::: OneDrive	,		e e	ø?	HN
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- Caucait			Experience	SINT	_

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.

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+ Add new 1	My files		JF Sort × Ξ × 🖽 Details
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Files upload	Microsoft Teams Chat Files	January 7, 2021 Holly Nelson	3 items Private
Word document	Recordings	March 6, 2022 Holly Nelson	1 items Private
Excel workbook	Ashwell-Sum24-U9.docx	November 29, 2 Holly Nelson	65.1 KB Private
PowerPoint presentation	Document.docx	August 16, 2020 Holly Nelson	10.8 KB Private
OneNote notebook Forms for Excel	Fall 2024 Upcoming Events.xlsx	17 minutes ago Holly Nelson	15.0 KB Private
Visio drawing	Holly @ Ccunitedsoccer	September 14, Holly Nelson	Private
€∋ Link	Paid Coaches Fall 2023.xlsx	October 18, 2023 Holly Nelson	65.0 KB Private
Quick access			

2. Choose Folder.

Crea	te a fo	older				×
Name						
Enter	your fol	der nam	e			
Folder	color					
					_	
				Create	Ca	ncel

- 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.

::: OneDrive	🔎 Search						e 🕸	?	HN
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왕 Shared	· · · · · · · · · · · · · · · · · · ·	Ē	☆	March 6, 2022	Holly Nelson	1 items	Private		
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Browse files by	Copy to		3	go go	Holly Nelson	15.0 KB	Private		e
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🗷 Media ᠢ	ू 🕫 Automate	>		2023	Holly Nelson	65.0 KB	Private		
Quick access	E Details								

3. Select a color.

<u>الا</u>

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

Create a New File

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

	OneDrive	•	🗧 paid	My files 🗸 🖌			8 ⁻ 10	?	HN
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	E Folder	D	Name ~	Modified ~	Modified By ${\scriptstyle \!$	File size 🗸	Sharing	~	
	Files upload	-	Microsoft Teams Chat Files	January 7, 2021	Holly Nelson	3 items	Private		
'	Word document	-	Recordings	March 6, 2022	Holly Nelson	1 items	Private		
	Excel workbook		Ashwell-Sum24-U9.docx	November 29, 2	Holly Nelson	65.1 KB	Private		
	PowerPoint presentation		Document.docx	August 16, 2020	Holly Nelson	10.8 KB	Private		0
	OneNote notebook Forms for Excel	× ==	Fall 2024 Upcoming Events.xlsx	17 minutes ago	Holly Nelson	15.0 KB	Private		e
	🕺 Visio drawing	N	Holly @ Ccunitedsoccer	September 14,	Holly Nelson		Private		
	👄 Link	X	Paid Coaches Fall 2023.xlsx	October 18, 2023	Holly Nelson	65.0 KB	Private		
	Quick access					_			

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.

III 🔯 Document1 🍲 🗸 3	,∕⊃ Se	earch for tools, help, a	nd more (Alt +	Q)				ŝ	HN
File Name	View	Help			Comments	• ^ • Catch up	🖉 Editing 🗸	🗗 Sh	nare ∨
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🕚 Version History		Shared 8	-	Apps 0 items	June 13	Holly Nelson			
		☆ Favorites	-	Attachments 4 items	August 3, 2023	Holly Nelson			
vne a name for the file		Quick access		Fall 2020 4 items	August 16, 2020	Holly Nelson			1
ype a name for the file.		More places	-	Microsoft Teams Chat Files 3 items	January 7, 2021	Holly Nelson			
elect the Location arrow	Ν.			Recordings	July 7	Holly Nelson			
Choose a location to stor ile.	re the			1 item Ashwell-Sum24-U9.docx	November 29. 2023	Holly Nelson	7		

7. Select Move Here.



4. 5. 6.

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.

::: OneDrive							8 🕸	?	HN
+ Add new 2	📲 Open Y 🖄 Share 👄 Copy link	🛈 Delete	☆ I	Favorite …	J≓ Sort ~	X 1 selected	<u> </u>	Details	
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 G Home My files 	A [№] Open in Immersive Reader			August 16, 2020	Holly Nelson	4 items	Private		
용 Shared	Microsoft Teams Chat Files			January 7, 2021	Holly Nelson	3 items	Private		
☆ Favorites	Recordings			2 hours ago	Holly Nelson	1 items	Private		
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Browse files by	1 📀 🕎 Document.docx	e	3 ☆	August 16, 2020	Holly Nelson	10.8 KB	Private		e
I Meetings	Fall 2024 Upcoming Events.	xlsx		3 hours ago	Holly Nelson	15.0 KB	Private		

- 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.

::: OneDrive	← paid	My files 🗸 🔎		୫ 🌣 ? 🕀
+ Add new 2	My files		JF Sort ×	🚍 ~ 🖽 Details
E Folder	🗅 Name ~	Modified V Modified By V	File size 🗸	Sharing ~
Files upload	Microsoft Teams Chat Files	January 7, 2021 Holly Nelson	3 items	Private
Word document	Recordings	March 6, 2022 Holly Nelson	1 items	Private
Excel workbook	Ashwell-Sum24-U9.docx	November 29, 2 Holly Nelson	65.1 KB	Private
PowerPoint presentation	Document.docx	August 16, 2020 Holly Nelson	10.8 KB	Private
OneNote notebook Forms for Excel	Fall 2024 Upcoming Events.xlsx	17 minutes ago Holly Nelson	15.0 KB	Private
Visio drawing	Holly @ Ccunitedsoccer	September 14, Holly Nelson		Private
⇔ Link	Paid Coaches Fall 2023.xlsx	October 18, 2023 Holly Nelson	65.0 KB	Private
Quick access				

- 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.



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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 <u>not</u> 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.

::: OneDrive	✓ Search	Current folder	\sim	ଞ ଛ ? 🕀
+ Add new	2 ⊕ Delete ☆ Favorite ↓ Download	i 🔓 Move to 🗘 Copy to	↓₹ Sort ~ X 2 selected	Ξ · E Details
Holly Nelson	My files > Fall 2020 > Class D	Pata		
My files	🗅 Name 🕆 🗸	Modified ~	Modified By ${}^{\scriptstyle \vee}$ File size ${}^{\scriptstyle \vee}$	Sharing ~
옹 Shared	Sently2.jpg	··· 🖻 ☆ About a minute	Holly Nelson 162 KB	Private
☆ Favorites ⑩ Recycle bin	Bently3.jpg	… ビ ☆ About a minute	Holly Nelson 118 KB	Private
Browse files by	Test File.docx	23 minutes ago	Holly Nelson 10.2 KB	Private @
O People				

- 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 <u>rather than</u> <u>syncing</u>. 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.

Move	Q Search in Class Data				
🗂 My files	My files > Fall 2020 > Class D	Data	t	New folder	×
Shared	🖺 Name † 🗸	Modified ${}^{\checkmark}$	Modified By ${}^{\vee}$	File size $$	SI
습 Favorites	Test File.docx	3 minutes ago	Holly Nelson	10.2 KB	P
	Test File.xlsx	2 minutes ago	Holly Nelson	6.19 KB	P
Quick access					
Payroll					
Project Horizon					
More places					
	4			4	

4. Select Move Here.

Delete a File

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

::: OneDrive		✓ Search		Current folder	\sim		8 ⁻ - 1	₿?	HN
+ Add new	2 Delete 5	☆ Favorite 🛓 Download	d 🕞 Move to (🖵 Copy to	JF Sort ~	X 2 selected	≡ .	🗊 Detail	s
Holly Nelson	My files >	Fall 2020 > Class E	Data						
My files	C	Name ↑ ✓		Modified ~	Modified By ~	File size ~	Sharin	g ~	
<mark>은</mark> Shared	0 🖂	Bently2.jpg	… 匠 ☆	About a minute	Holly Nelson	162 KB	Private	,	
☆ Favorites ⑰ Recycle bin 3	1	Bently3.jpg	… 臣 ☆	About a minute	Holly Nelson	118 KB	Private		
Browse files by	w	Test File.docx		23 minutes ago	Holly Nelson	10.2 KB	Private	1	
0		N							

- 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 <u>all</u> other devices as well.

Rename a File

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

	::: OneDrive	s م	earch		Currer	nt folder	\checkmark		å	¢3	?	HN
	+ Add new	බ් Open ~ 🖻 Sh	nare 🖙 Copy lir	nk 🔟 Delete ☆ Favorit	te …	2	↓F Sort ~	X 1 selected	≡ •	E	Details	
	Holly Nelson	My files > Fall :	2020 > Clas	 Add shortcut 	>							
1	My files	🗋 Nam	ie ↑ ∽	E) Rename 2			Modified By 🗸	File size 🗸	Shari	ing ~		
	양 Shared	1 🛛 🖂 Bent	ily2.jpg	Contraction Move to		nute	Holly Nelson	162 KB	Priva	te		
	었 Favorites ⑪ Recycle bin	Bent	ly3.jpg	ମ୍ପି Automate	>	nute	Holly Nelson	118 KB	Priva	te		
	Browse files by	Test	File.docx	D Version history		ago	Holly Nelson	10.2 KB	Priva	te		0

- 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**.

Rename	×
Agenda	.docx
	3 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.

::: OneDrive			Current folder	~		8 ⁰	֎ ?	HN
+ Add new	2 ⊕ Delete ☆ Favorite ⊥ Download	Co Move to	D Copy to	JF Sort ×	X 2 selected	≡ •	🖽 Detai	ils
Holly Nelson	My files > Fall 2020 > Class D	ata						
My files	🗋 Name ↑ 🗸		Modified ~	Modified By $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	File size $$	Shari	ng ~	
옹 Shared	🕑 🖂 Bently2.jpg	… 匠 ☆	About a minute	Holly Nelson	162 KB	Privat	te	
☆ Favorites 3 前 Recycle bin	Bently3.jpg	··· 🖻 🕁	2 but a minute	Holly Nelson	118 KB	Privat	te	
Browse files by	Test File.docx		23 minutes ago	Holly Nelson	10.2 KB	Privat	te	0
0 People								

- 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.

···· OneDrive		𝒫 Search	Current folder	\sim		8 ⁻ \$?	HN
+ Add new	💶 Open 👻	2 È Share ⇔ Copy link 🛈 Delete ☆ I	avorite ····	JF Sort ~	X 1 selected	≡ ~ e	D Details	3
Holly Nelson	My files >	Fall 2020						
G Home	Ľ	Name ↑ ∨	Modified ~	Modified By ~	File size 🗸	Sharing	,	
용 Shared		اد Class Data	5 hours ago	Holly Nelson	4 items	Private		-
岔 Favorites ⑩ Recycle bin	×	~\$Paid Coach List for Fall 2020.xlsx	August 16, 2020	Holly Nelson	165 bytes	Private		
Browse files by	1 🔹 🖬	1-TEMPLATE - Fall 2020 C 🖻 ☆	August 16, 2020	Holly Nelson	41.0 KB	Private		0
O People	×	Paid Coach List for Fall 2020.xlsx	August 16, 2020	Holly Nelson	21.1 KB	Private		

- 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.

Share	"1-TEMPLATEactor).docx"		(?) ×
8 Ad	d a name, group, or email 3		Ø ~
0	Mary Anderson Mary.Anderson@XYZcompany.com		^
	Frank Jones Frank.L.Jones@XYZcompany.com	4	
0	Ted Wilson		-
ð	ා Copy link හි		⊳ Send

- 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.

Who would you like this link to work for? Learn more Anyone with the link	
People in ABC Co. with the link	
People with existing access	
R Specific people	
Other settings	
Set expiration date 9	
A Set password 10	
⊖ Block download 11 ● 0	
12 Apply Cancel	

- 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.

Share "1-TEMPI	LATEactor).docx"	
S Add a name, gro	oup, or email	Ø v
🖄 Add a message		
		13
Ð	ා Copy link හි	⇒ Send

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.

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- 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.
- 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.

Share "Book.xlsx"	×
Send link Book.xlsx Anyone with the link can edit	
To: Name, group, or email	0 v
Message	
	Send
Copy link ⊕ Anyone with the link can edit →	Сору

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.

Share "Bookxlsx"	×
Send link Book.xlsx	
People you specify can edit	
To: Name, group, or email	$O \sim$
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- 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.

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+ Add new	■ Open × 啓 Share ⇔ Copy link 前 Delete 兌	7 Favorite 😶	↓ F Sort ~	X 1 selected	≡ .	🗊 Details	5
Holly Nelson	2 My files → Fall 2020						
My files	□ Name ↑ ✓	Modified ${}^{\scriptstyle\vee}$	Modified By $\ {\scriptstyle \curlyvee}$	File size 🗸	Sharing	~	
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☆ Favorites ⑩ Recycle bin	×\$Paid Coach List for Fall 2020.xlsx	August 16, 2020	Holly Nelson	165 bytes	Private		
Browse files by	1 📀 🔟 1-TEMPLATE - Fall 2020 C 🖻 🖞	ኛ August 16, 2020	Holly Nelson	41.0 KB	Private		(3) (8)
e People	Paid Coach List for Fall 2020.xlsx	August 16, 2020	Holly Nelson	21.1 KB	Private		_

- 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.

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4	Tony	Giles	Sales	\$ 50,786.0	00								6
.5	Bill	Becker	Training	\$ 33,723.0	00							_	3

- 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.

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+ Add new	Open ~ 🖄 Share 🖙 Copy link 媊 Delete …	Current folder My files All files	JF Sort × X 1	selected = •	Details	
Holly Nelson	My files > Fall 2020 > Class Data	Whole organization	1			
My files	Name ↑ ∨	Modified ~	Modified By $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	File size ~	Sharing ~	
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☆ Favorites ⑩ Recycle bin	Agenda.docx	July 7	Holly Nelson	10.2 KB	Private	0

- 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.

::: OneDrive	← Bently 3	Current folder 🗸 🌖			ප ඉ	?	HN
+ Add new Open	Files Test File.xlsx Holly Nelson modified 2 minutes ago		J≓ Sort ~ ×	(1 selected	≡ •	Details)
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☆ Favorites	Show more results	5					

- 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.

::: OneDrive	÷	bently		Curre	ent folder 🖂	Q)		8	֎ ?	HN
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My files	<u>~</u>	Bently2. Holly Nel:	Open link in new window Open link in incognito window				Modified By ~	File size 👻		Sharing ~	
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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

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- 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

2

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-todate 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 <u>two-way process</u> that synchronizes files between your computer and OneDrive document libraries, which **allows for offline file access**.
- Backup is a <u>one-direction process</u>, 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.
Blue arrows icon 🛛 😂	The file or folder is being changed, such as when it's being uploaded or downloaded.

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🔄 Desktop	Book.xlsx	⊘	8/16/2020 10:46 PM	Microsoft Excel Work	8 KB			
🚽 Downloads 🖈	Paid Coach List for Fall 2020.xlsx	0	8/16/2020 11:03 PM	Microsoft Excel Work	28 KB			
Employee Tracking	M Personal Vault	3	7/7/2024 10:35 AM	Shortcut	2 KB	~~^		

Sync Folders



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

	Choose folders	
Choose avail	what you want to be available in your "OneDrive" fold- able on-demand. Unselected folders will be hidden fro	er. These files will be om File Explorer.
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r make t	hese folders visible:	
	Files not in a folder (162.4 KB)	^
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	Documents (2.9 GB)	
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> 🖂 🖿	Pictures (1.2 GB)	
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> 🔽 🖿	Rec Coach Docs (228.5 MB)	
< 🖂 🔸	Def Dece (A 6 MD)	~
() We are	unable to stop syncing some folders. Learn more.	

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.

OneDrive Settings		- 0	×
C Sync and backup	Sync and backup		
8 Account		5	
Notifications About	Back up important PC folders to OneDrive Back up your Desktop, Documents, and Pictures folders to OneDrive, so they're protected and available on other devices. Learn more	Manage backup	
	Save photos and videos from devices Save photos and videos to OneDrive when I connect a camera, phone, or any other device to my PC.	Off ●	
	Save screenshots I capture to OneDrive	Off ●	
	Preferences		
Storage	Pause syncing when this device is in battery saver mode	Off ●	
4.4 GB used of 1 TB (0%) Manage storage	Pause syncing when this device is on a metered network	On 🌑	
Get the OneDrive mobile app	p		

- 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**.

Microsoft	OneDrive			
Back u Files will if you los	up folders on be backed up, prot se this device. ore about folder bac	this PC ected, and ava	ilable anywhere	in OneDrive - Personal, even
	Documents	2.9 GB	Backed up	
	Pictures	1.2 GB	Backed up	
	Desktop	52 MB	Backed up	
2	Music	0 KB	Not backed up	۲
	Videos	1 KB	Not backed up	
4.4 GB used of 1 TB Sync more files with more storage			My premium features	
	Close			Save changes