

# OneDrive for Business



# Table of Contents

<b>WELCOME TO ONEDRIVE FOR BUSINESS.....</b>	<b>3</b>
<b>OBJECTIVES .....</b>	<b>3</b>
<b>STORING UNIVERSITY INFORMATION IN THE CLOUD.....</b>	<b>3</b>
<b>SIGN IN TO ONEDRIVE .....</b>	<b>4</b>
<b>THE OFFICE 365 INTERFACE.....</b>	<b>4</b>
<b>BASIC FILE MANAGEMENT .....</b>	<b>5</b>
Create, upload, and preview documents.....	5
Working with Files.....	6
Deleting and Restoring Documents .....	7
<b>USING VERSION HISTORY .....</b>	<b>8</b>
<b>USING ONEDRIVE TO SHARE DOCUMENTS .....</b>	<b>9</b>
How to share files.....	10
<b>GET A LINK TO SHARE A DOCUMENT .....</b>	<b>11</b>
<b>SHARE A FOLDER.....</b>	<b>11</b>
<b>CHANGE/REMOVE SHARE PERMISSIONS.....</b>	<b>11</b>
<b>VIEW DOCUMENTS SHARED WITH YOU.....</b>	<b>12</b>
<b>SYNCING ONEDRIVE.....</b>	<b>13</b>
<b>LIMITS ON SYNCING ONEDRIVE FOR BUSINESS .....</b>	<b>13</b>
<b>SIGNING OUT .....</b>	<b>14</b>

---

**Copyright © 2021 WSSU Office of Information Technology**

This document may be downloaded, printed, or copied for educational use without further permission of the Office of Information Technology (OIT), provided the content is not modified and this statement is not removed. Any use not stated above requires the written consent of **OIT**. The distribution of a copy of this document via the Internet or other electronic medium without the written permission of the **WSSU - OIT** is expressly prohibited.

**Published by Technology Learning Center – 2021**

The publisher makes no warranties as to the accuracy of the material contained in this document and therefore is not responsible for any damages or liabilities incurred from **OIT** use.

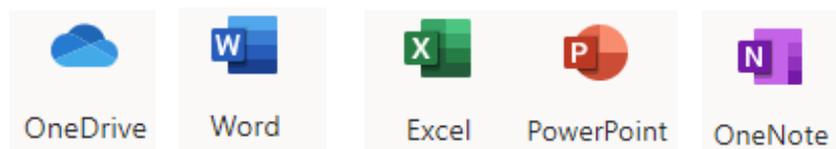
---

## Welcome to OneDrive for Business

OneDrive for Business is a cloud-based file storage system with online editing and collaboration tools for Microsoft Office documents and is part of Office 365. Winston-Salem State University provides staff access to Office 365 with their university accounts while you are an employee of WSSU.

This includes:

- OneDrive for Business - Cloud based storage (1 TB) with the ability to share documents with anyone.
- Office Online – Edit your Office documents online without need to have Microsoft Office installed on your computer (See Figure 1).



*Figure 1-OneDrive Home Page Listing*

OneDrive for Business can be utilized in many different ways. It can be used as a simple store for documents, as a way to access files from any location on any device, or as a collaboration tool to share and jointly work on documents. Access to files can be in a web browser, directly from Office desktop programs, in Windows File Explorer, in the Office apps for IOS & Android devices, or synchronized with a local folder on your computer.

The University recommends the use of either our central file servers or OneDrive for Business as the preferred location for storing files that are actively being worked upon. Due to its large storage capacity, OneDrive for Business can house many more documents than is currently available on our servers.

## Objectives

At the completion of training, the users will be able to perform:

- Basic file management
- Sharing Files

## Storing University Information in the Cloud

**NOTE: CONFIDENTIAL** documents should not be downloaded to non-University owned devices. For more information and guidance see the following web site for more information:

[OIT Security Guidelines and Standards](#)

## Sign In to OneDrive

To access OneDrive for Business sign in by opening a web browser and going to [Microsoft Account Page](#). *Google Chrome* or *Mozilla Firefox* are recommended browsers to use.

Click in the first field to enter your Winston-Salem State University account, using the fully qualified username: (See Figure 1) username@wssu.edu.

**Note: All logins for all Office 365 products should be entered using the “username@wssu.edu” format.**

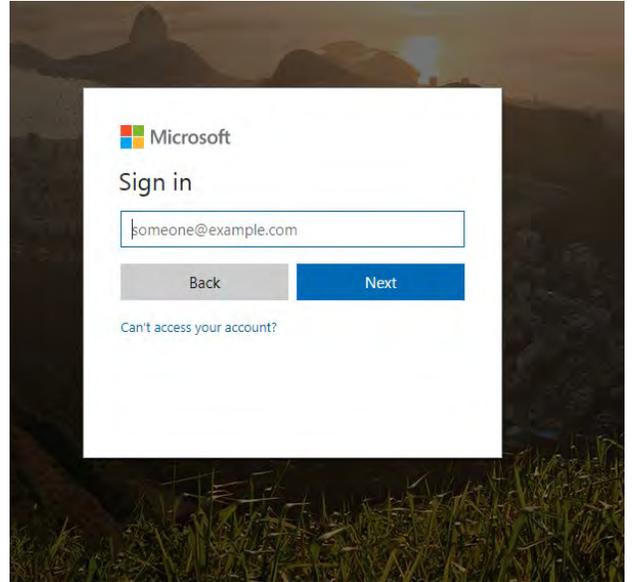


Figure 2 -OneDrive Login

When users click **Next**, they will be re-directed to the Winston-Salem State University's Office 365 sign-in page. Enter your University password and click **Sign in**. (See Figure 2)

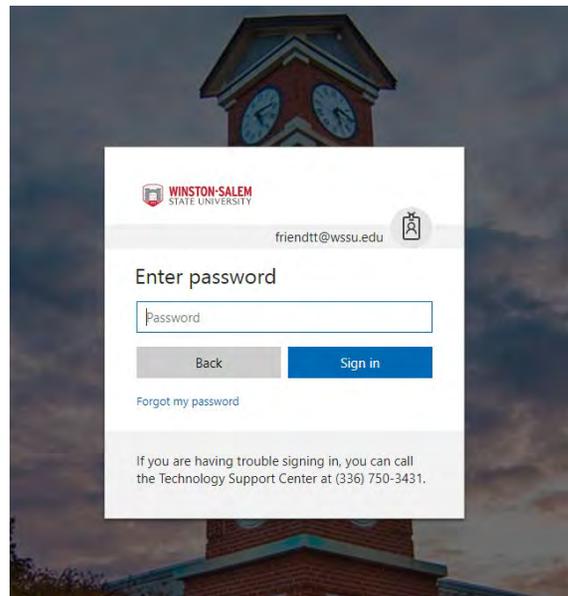


Figure 3 -OneDrive Password Entry

## The Office 365 Interface

Initial login is directed to the main apps landing page. (See *Figure 3*) From the landing page users can access the following features:

- The **application tiles** for opening the range of available Office 365 apps
- The **Start New**, **All Apps**, and **Install Office** options allow users to maneuver through the landing page.

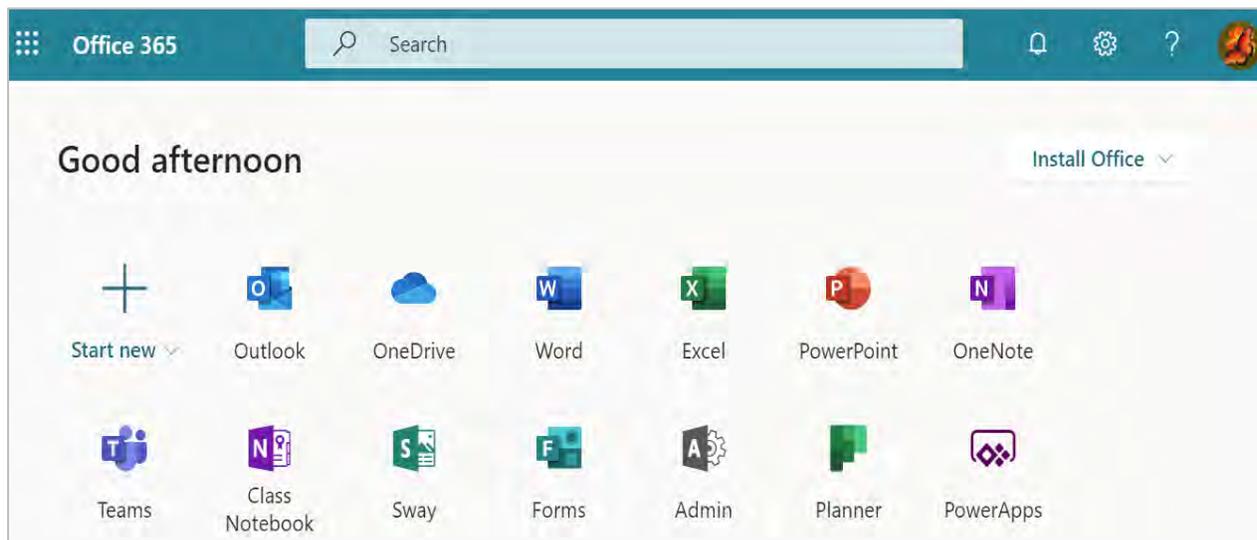


Figure 4 – Office 365 Interface

## Basic File Management

### Create, upload, and preview documents

The main Files window in OneDrive displays the contents of your OneDrive library arranged as a standard file display. The Navigation Pane to the left contains links to other parts of your OneDrive site such as the Recycle Bin for deleted files and Shared with me, for accessing documents others have shared with you.

The **Command Bar** will allow you to carry out a range of basic file management tasks. The options listed on the command bar are context driven and will change depending on what you have selected. The default listings are **New**, **Upload** and **Sync** as described below:



Figure 5-OneDrive Menu Options

1. Click **+New** to create a new document or folder. You can then add and edit content with the online Office apps. Newly created document can be saved by changing the default filename.
2. Click **Upload** and navigate to the files or folders on your computer to upload them to OneDrive. Alternatively, in some browsers you can just drag and drop files or folders onto the OneDrive window. NOTE: For large numbers of files, it is better to use the sync client for uploading into OneDrive (see the next bullet point).
3. Click **Sync** to sync OneDrive with a folder on your local computer. Use of the sync button activates sync client software to download and keep all files from OneDrive up to date. (For more information

on syncing files see the section **Syncing**).

- To preview a document, click on its name to open a view-only version in a separate tab.
- You can use standard drag and drop techniques to move and manage files and folders. Additional file actions (download, rename, copy, etc) are available by clicking the *more ellipses* (•••) beside each filename. Copy file cannot be done from web to local drive.
- You can change the view for any folder from list to preview tiles. Click the icon to toggle between the Tile  and the List (stack) .
- The Information pane can toggle on and off using the  icon. It displays a quick access pane to see a file preview, recent file activity and file sharing status.

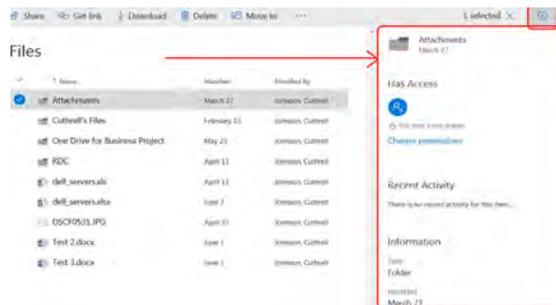


Figure 6-OneDrive File Information Summary

## Working with Files

When you select  a file or folder in the Files document library, the command bar will change to reflect a different range of options for managing the file. These options are also listed in a fly-out menu from the file ellipses or by right-clicking the filename. Hover the mouse over the filename and click in the circle to select the document.

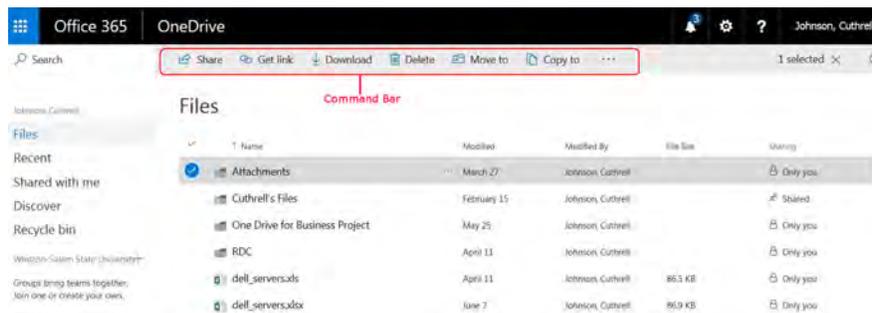


Figure 7 -OneDrive Menu

## To edit the document:

1. Click on **Open**
2. From the drop-down select either (the choice will be for whichever application, *Word* in this case):
  - **Open in Word Online** to use the online version (this has auto save)
  - **Open in Word** to use the full-featured desktop version of the program (you may have to login for the first time)

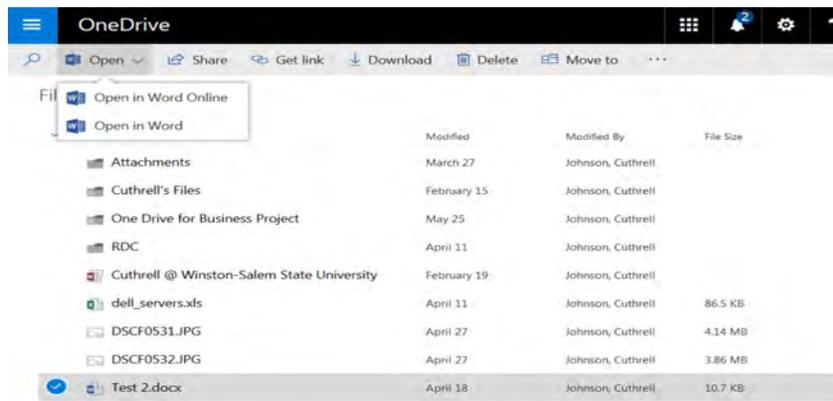


Figure 8 -OneDrive File Open Menu

When editing a document using Word Online, Excel Online, etc, the changes are **saved automatically**. When you are finished editing, click on your username link on the command bar to return to your file library, or merely close the browser tab in which the document is displayed. When editing in the full desktop version of the program, any changes made **must be saved** in order to be synced back to the One Drive cloud.

## Deleting and Restoring Documents

### To delete a document:

1. Click under the “Check mark” next to the file to select the file in the library window.
2. Select the **Delete** option on the command bar *or* right-click on the file or folder name.
3. Select **Delete**.

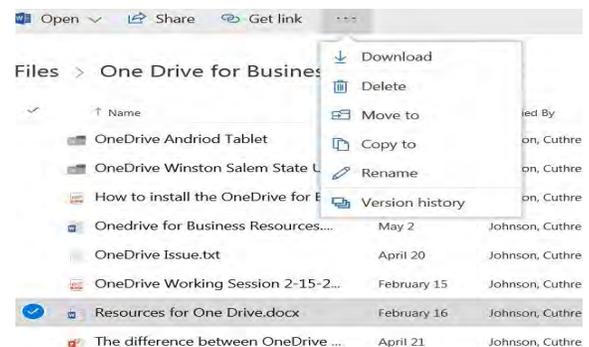


Figure 9 -OneDrive File Selection

The file will be moved to the account **Recycle Bin**. If you delete a file from your OneDrive for Business library, it will be stored in the Recycle bin for **90 days**, allowing you to recover a deleted file.

### To recover a deleted file:

1. Click the **Recycle Bin link** in the navigation pane to open the Recycle Bin.
2. Click to select the required file(s) and click **Restore** on the command bar. The file will restore to the *location from which it was originally deleted from in your library* (for instance, within a particular folder or if the folder from which a file was deleted, was *itself* deleted, this too will be restored).

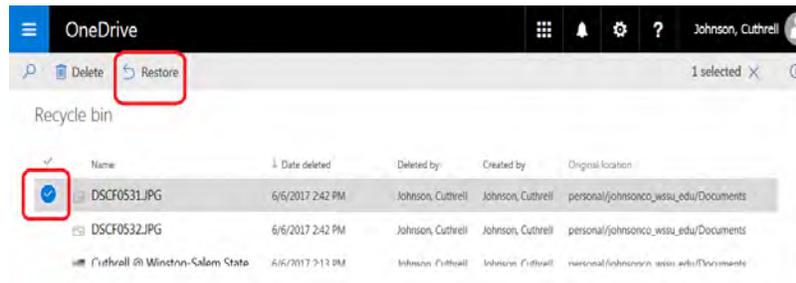


Figure 10 -OneDrive File Restore

NOTE: You may have to refresh your screen to see the changes.

## Using Version History

Documents stored and edited in OneDrive have a full version history available. Each editing session is saved as a new version. Previous versions can be viewed and a document can be restored to any historical state from the point of the file's initiation in OneDrive.

1. Click to select the document in the library window.
2. From the command bar, select **Version History** (or right-click on the filename and select it from the context menu).

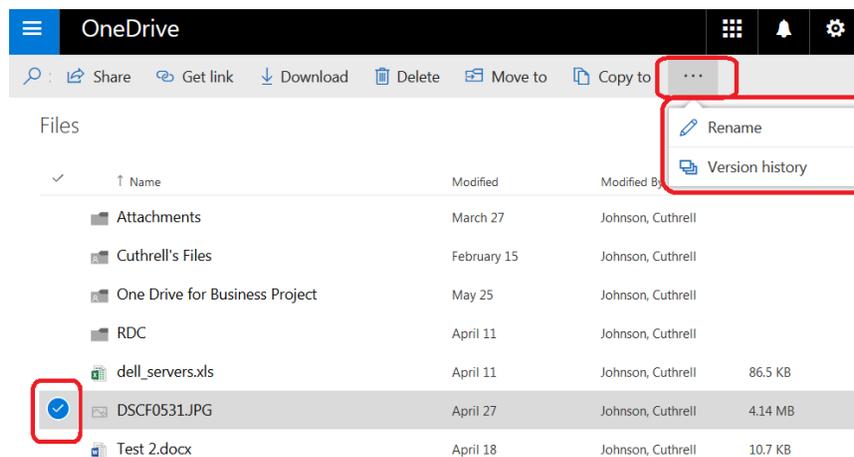


Figure 11 OneDrive File Versions

Any previous versions will be listed for review. If you wish to restore one of the versions, use the ellipses menu next to the date.

From here you can **Restore, Open or Delete** version. Restoring a version makes that selection the current state of the document; it does not over-write previous versions.

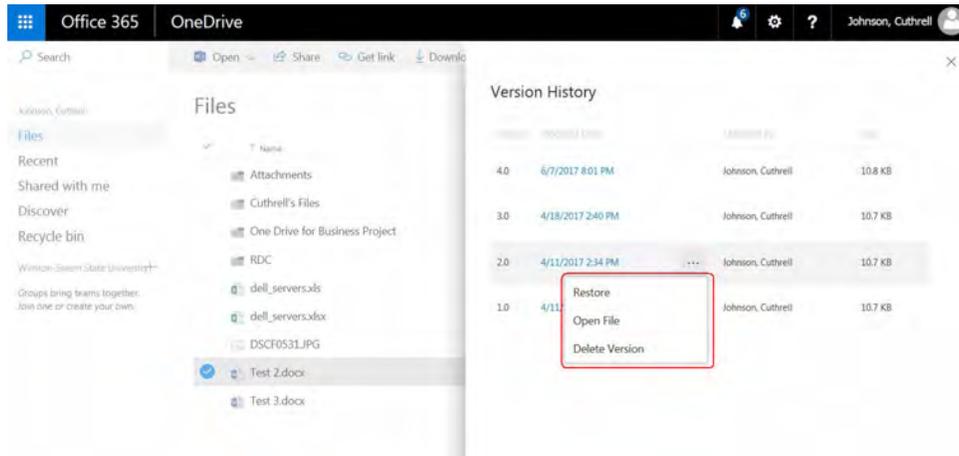


Figure 12 OneDrive File Restore, Delete and Open

## Using OneDrive to Share Documents

Sharing a document allows you not only to give permissions to others to view files but also to edit them collaboratively. In OneDrive, multiple users can edit a document simultaneously. No more being locked out of an Excel file until someone has closed it.

## How to share files

To share a file:

1. Select the file (place check mark beside file).
2. Click **Share** on the command bar.
3. The share information window will appear.
4. Enter the name of the person you want to share the file with. Click in the top field and type the names (last name and first name or username or email address) of people with whom you want to share the document.
  - a. Typing a few letters will bring up a matched list of users.
5. Select the person to add them to the field. Continue to add all required users.
  - a. For people external to the University, enter their full email address.
6. If you want, type a message to be included with an email that's sent to all shared users.
7. When you are finished adding shared users, click **Share**.
  - a. This will generate two emails, one to each person with whom you are sharing and one to yourself as a notification of sharing.
  - b. The email includes a link to the shared document.

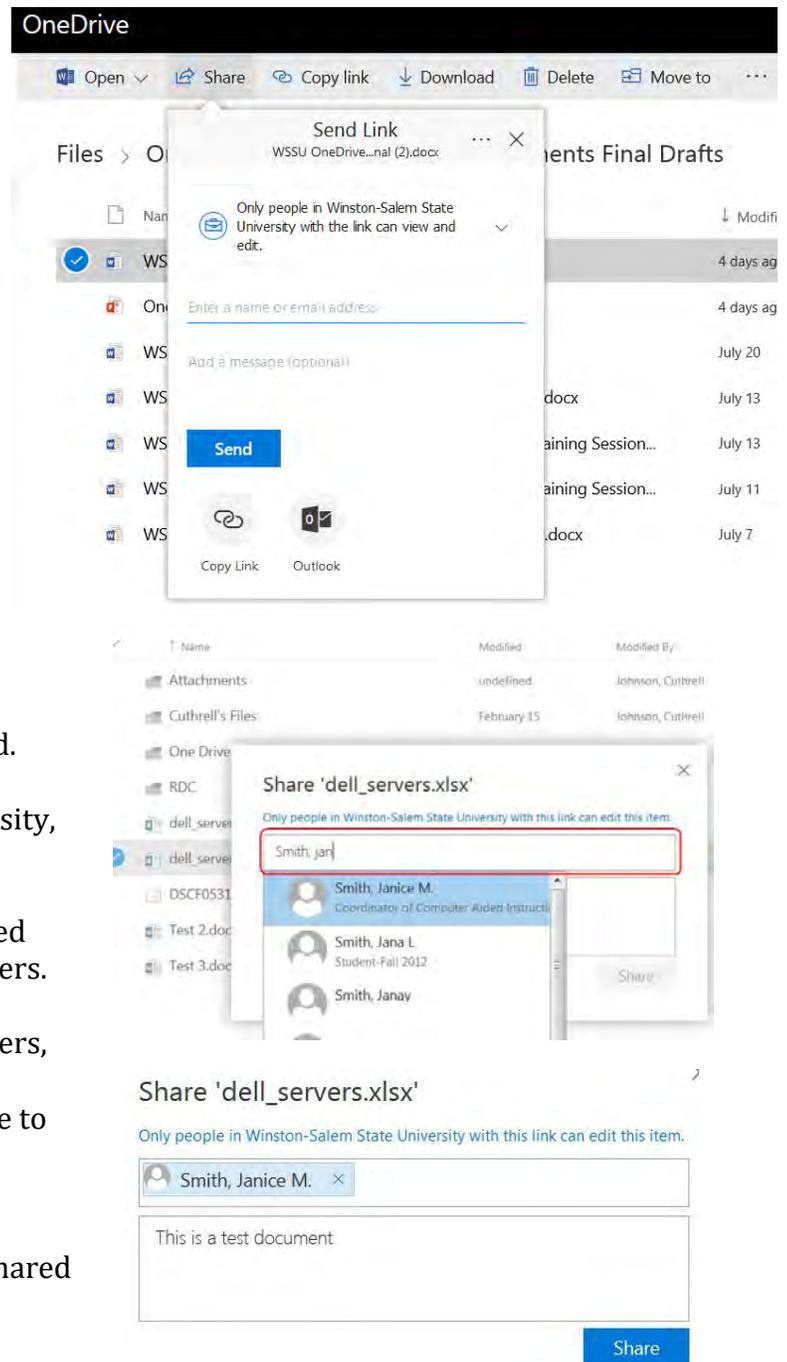


Figure 13-OneDrive Share Process

Once a document is shared it should not be moved to a different location. Moving a shared document will break the share links and those with whom it was shared will no longer have access to it. If this is necessary, it is better to share a folder instead of individual documents as the share permissions are attached at folder level. See the section on folder sharing.

## Get a Link to Share a Document

Sometimes you may want to send the link of a shared file to another user. Use these steps if you wish to embed a link to a shared document in a separate email that can then be sent to multiple people.

1. Select the file by placing a check mark next to the filename.
2. From the command bar, click the “Copy link” option. This will open a dialogue box.
3. In the dialog box, click the link (list of characters) and the message will change to show that the link has been copied.
4. Now, click on the  icon and the options will change to allow you to send the link to specific people and whether to allow file editing.
5. Select the users you want to allow access to the file and then click apply. This will setup a shared link to the file for the user.
6. Make sure you copy the link into the copy buffer.
7. Now open your email and paste the link into the email message.

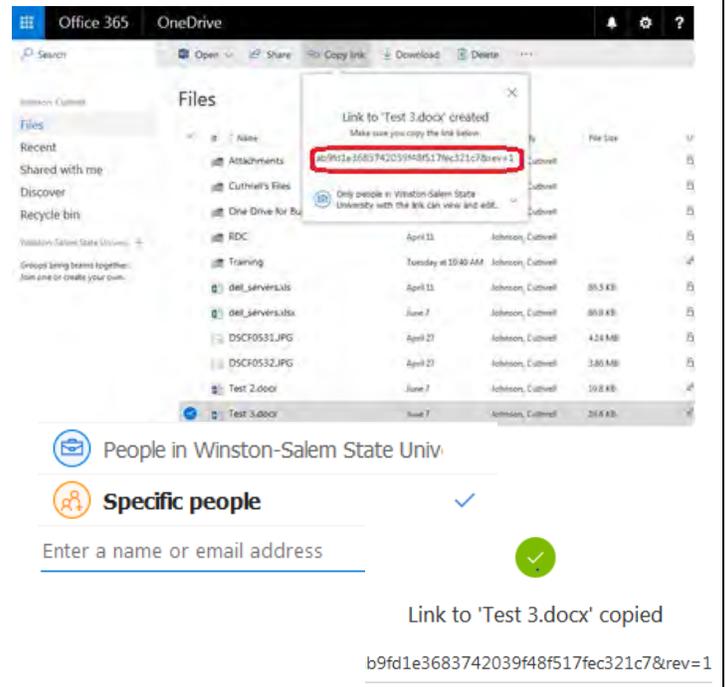


Figure 14 OneDrive Share Link Process

## Share a Folder

When you share a folder, you automatically share all items in that folder. Any document moved into a shared folder will inherit the folder share permissions. Sharing a folder provides a quick way to share many documents with other people at once and makes it easier to manage a set of shared documents. Folders are shared using the same procedure as for sharing a document by sending or creating an invitation link to selected people. Individual files within a folder may be given different sharing permissions if, for instance, you wanted to restrict access to certain files.

## Change/Remove Share Permissions

To change share permissions, call up the Share dialog box for the given file/folder.

1. Click the check mark beside the filename (see 1) to select the item.
2. Click the information icon (see 2) to open share information).

- Then, go to the **Info** panel on the right which displays a list of everyone with whom the file has been shared and their permissions.

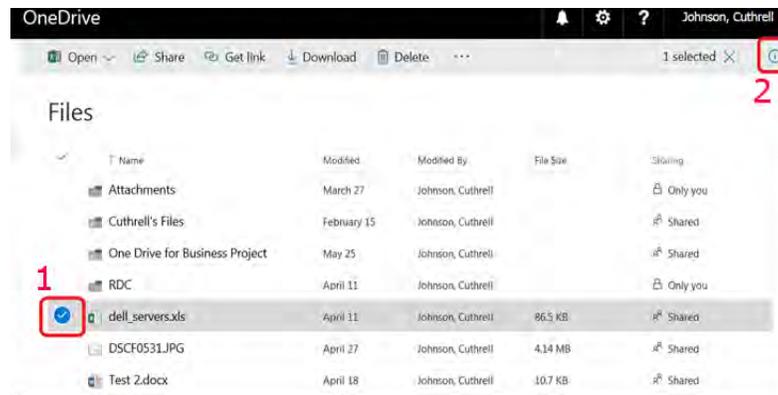


Figure 15 - OneDrive File Permissions

- Click the Change permissions link
- This will open the Change permissions panel. Here you can select the user(s) and change their permission to the file.
- To stop sharing the file with all users, click the Stop sharing option near the top of the window under the filename.
- To stop sharing the file with individual users, click the “Can Edit” option below the user’s name. This will open a panel with two options (change to view only and stop sharing).

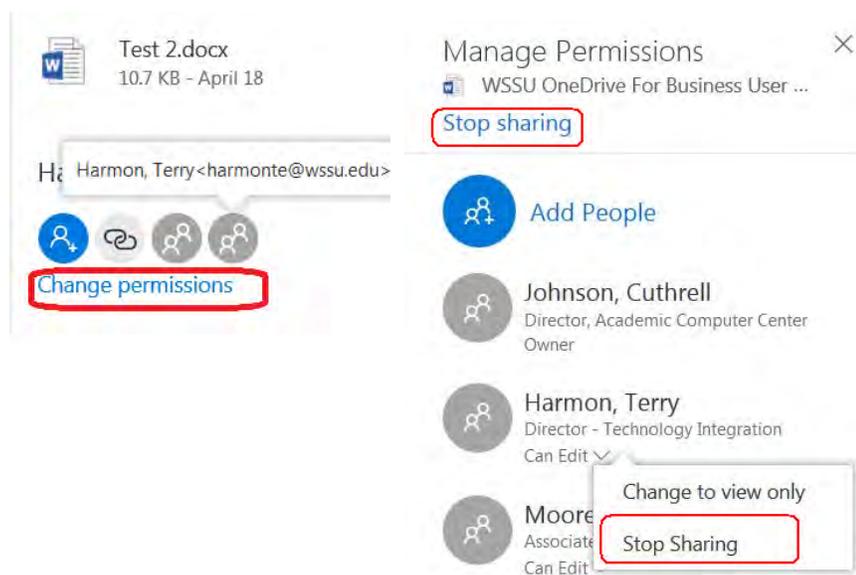


Figure 16 OneDrive File Permissions and Stop Sharing

## [View Documents Shared with You](#)

To view and access documents and folders which other users have shared with you, go to the Navigation Pane in your library window and choose ‘Shared with me’. This will display a window listing all documents and folders that have been shared with you from which you can then open and edit them.

You can sort this list by the various columns. However, as this is a virtual folder (that is, it is in reality just a list of links to other people's files), you will not be able to use standard file management to organize it (create folders, move files, etc).

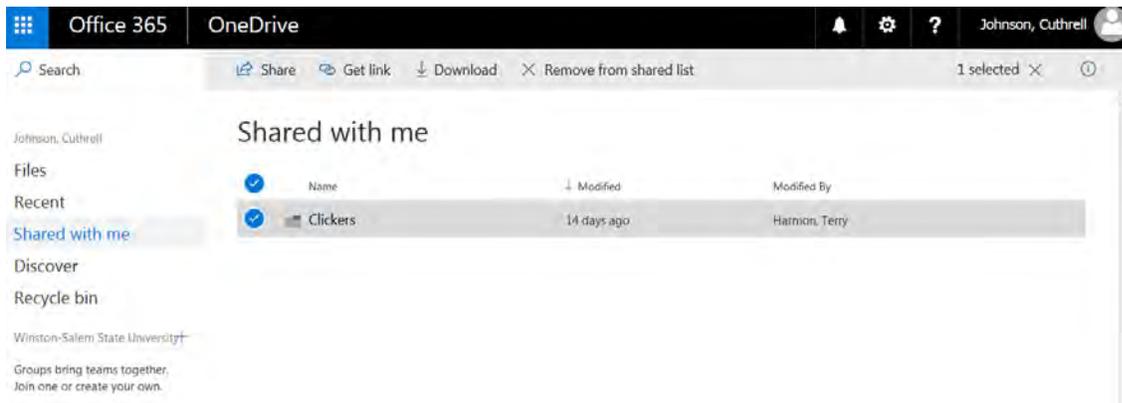


Figure 17 - OneDrive Shared with Me

## Syncing OneDrive

You can also access and manage your OneDrive library from a local folder on your computer by using the **OneDrive Sync client**, a small piece of software on your computer. Once your files are synced to your computer you can access and work on your OneDrive content in from the local folder even when you are offline. Changes made to files will be synced back to your OneDrive library in the cloud (or if you are offline, the next time you are connected to the network). Syncing may be configured to download individual folders or **all** the files in your OneDrive library, thus depending on your choice, you are only limited by the amount of free space on your computer's hard disk.

There are currently different versions of the Sync client on the web for download. The older version will **NOT** work properly with the Office 365 OneDrive application. The newest version needs to be installed and the benefit of the new version is it allows you to choose which folders to sync, rather than syncing your whole document library.

To ensure that you get the newest version Sync client, you should contact our Technology Support Services (TSS) to request the new version before you start the Sync process on your computer.

**NOTE:** If you have confidential or sensitive information stored in your OneDrive library, you should not sync it to non-university machines.

## Limits on Syncing OneDrive for Business

Please note the following limitations related to syncing OneDrive for Business to your computer

- You can sync up to a maximum of 20,000 items, including folders and files
- You can upload individual files up to a maximum of 10 GB per file
- You must have sufficient free space on your hard drive for the amount of storage you choose to sync.

- You may encounter restrictions and limitations when you sync your files and folders on your computer. (see latest information at [Microsoft OneDrive Sync Restrictions](#)) or [Microsoft Support](#)

## Signing Out

To sign out, click your user profile tile on the title bar to get the drop down menu with your account name and select 'Sign out'.

It is recommended that close your web browser to ensure your session is closed and you are fully signed out.

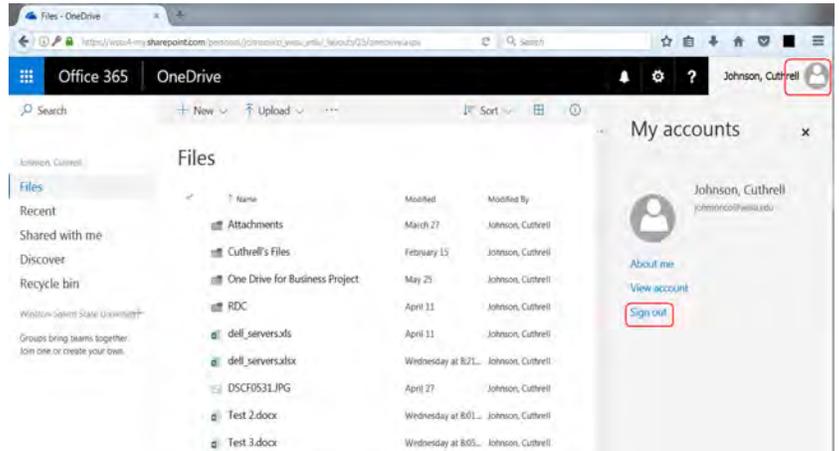


Figure 18 OneDrive Sign Out