

Faculty & Staff

OneDrive for Business: Basics

Quick Reference Guide





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Faculty & Staff

OneDrive for Business: Basics

Quick Reference Guide

REVISION CONTROL

Document Title: O365 OneDrive for Business Basics - QRG.docx

Author: Campus Training

File Reference:

Revision History

Revision Date	Revised By	Summary of Revisions	Section(s) Revised
9/21/2015	T. Sherman	Created document	Click here to enter Revision Date

Review / Approval History

Review Date	Reviewed By	Action (Reviewed, Recommended or Approved)

OneDrive for Business: Basics

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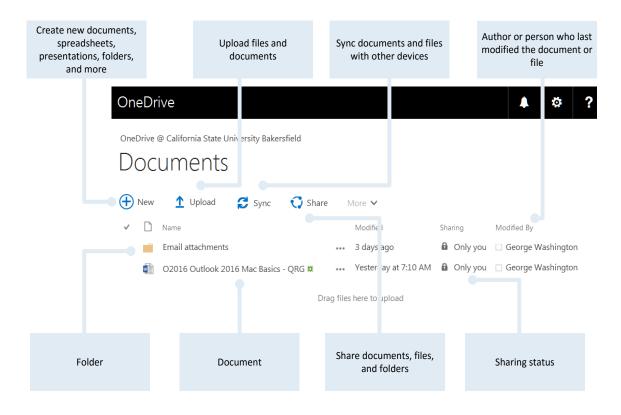
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1.0 OneDrive for Business Overview

OneDrive for Business is part of the Office 365 suite of applications. It allows you to store, sync, and share your work documents, photos, videos, documents and other files virtually. Essentially, your documents and files are in a secure cloud; thus providing you access wherever you have Internet connectivity. More importantly, you can access your OneDrive from any device – phone, tablet, and computer.

With OneDrive, you have the ability to:

- Access and update your files from any device connected to the Internet.
- Instantly view pictures you take with your mobile phone on your Windows PC, iOS, or Android device.
- Work on a document you create at work on a laptop or computer at home.
- Share your documents and files with others
- Work on documents with others at the same time.



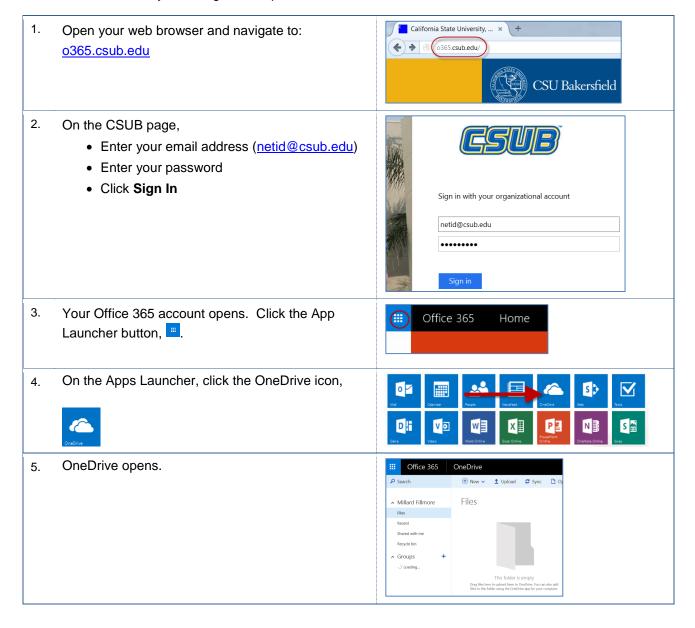
OneDrive and OneDrive for Business are different products. OneDrive is used for home or personal accounts through Office 365 Home. OneDrive for Business is an enterprise solution for organizations, like CSU Bakersfield. The use of OneDrive in the document refers to OneDrive for Business.

2.0 Accessing your Office 365 Account

You can access OneDrive for Business from your web browser, the OneDrive for Business application, and from your Office applications, such as Word, Excel, and PowerPoint. The first time you access OneDrive for business you will need to initialize it.

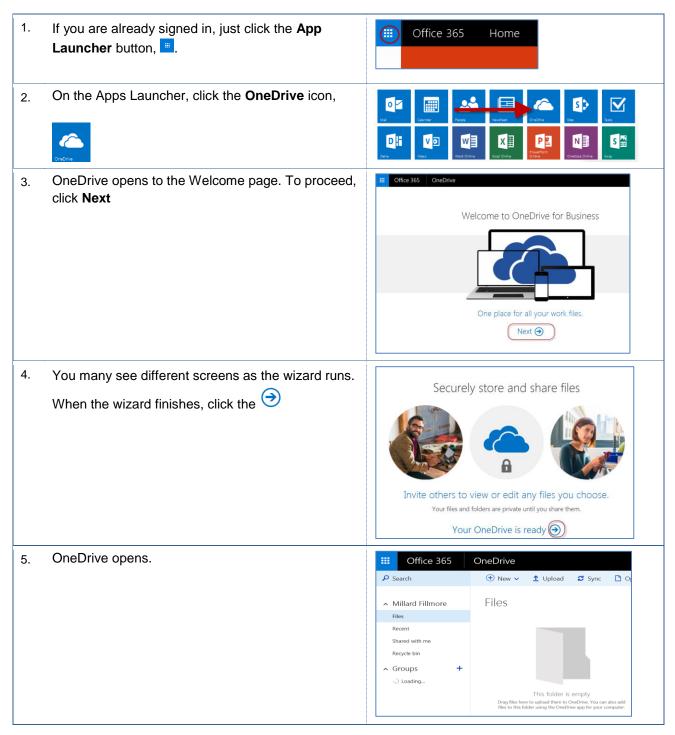
2.1 Accessing OneDrive from a web browser

You can access OneDrive for Business from a web browser by accessing your Office 365 account. These instructions will walk you through the steps.



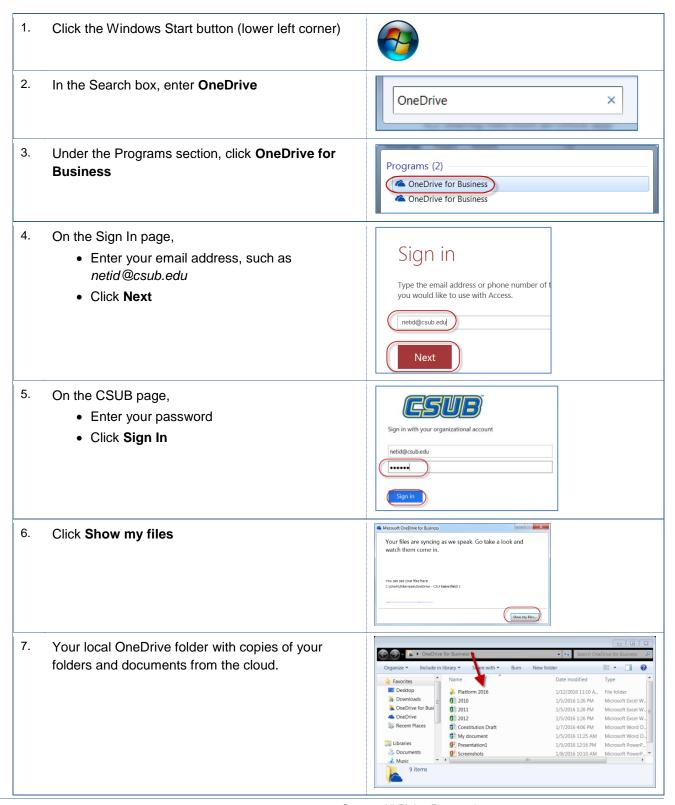
2.1.1 Initializing OneDrive

Before you begin using OneDrive, you will need to initialize it. The initialization process allows you to activate OneDrive for uploading, retrieving, and sharing documents and folders. These instructions will walk you through the process.



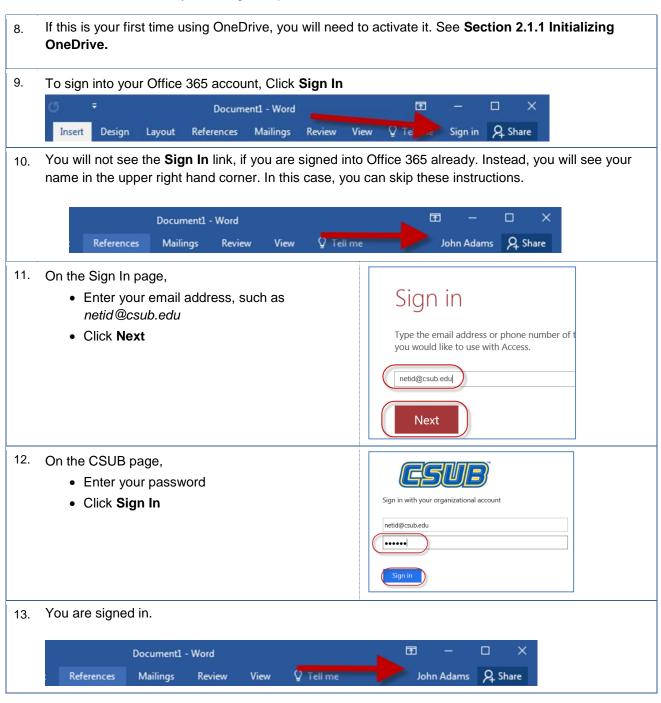
2.2 Accessing OneDrive from the OneDrive App

You can access OneDrive for Business from the OneDrive for Business application. These instructions will walk you through the process.



2.3 Accessing OneDrive from an Office Application

You can access OneDrive for Business from your Office applications, such as Word, Excel, and PowerPoint. These instructions will walk you through the process.

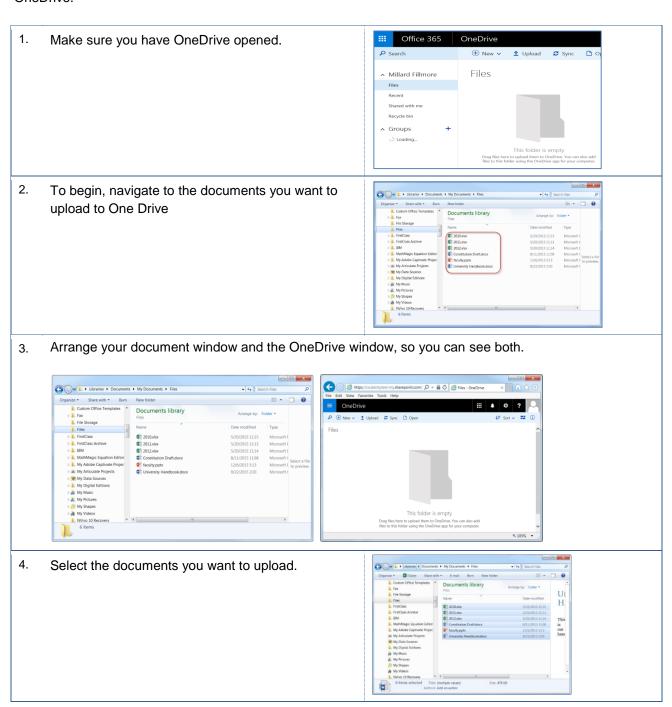


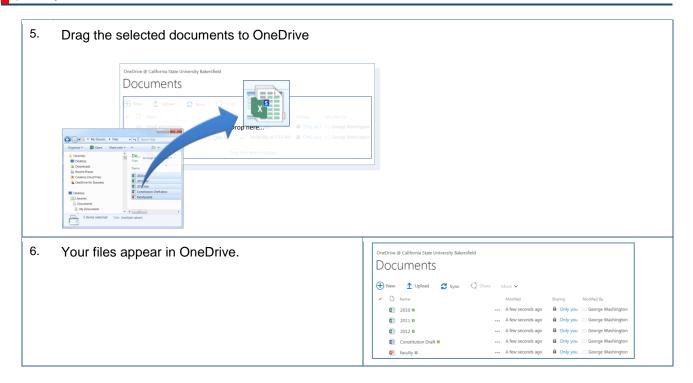
3.0 Storing Files in OneDrive

You have three ways to store your documents and files to OneDrive. First, you can drag and drop files and documents from your computer or portable device. Second, you can upload your files and documents to OneDrive. Lastly, you can save your documents to OneDrive directly.

3.1 Dragging Files

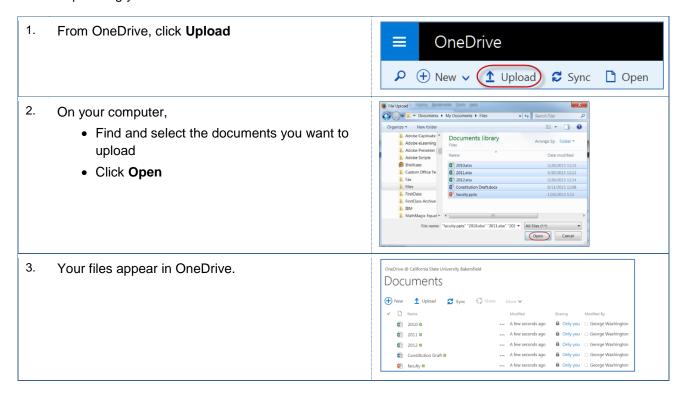
One way to store your files to OneDrive is to drag them. These instructions cover dragging your files to OneDrive.





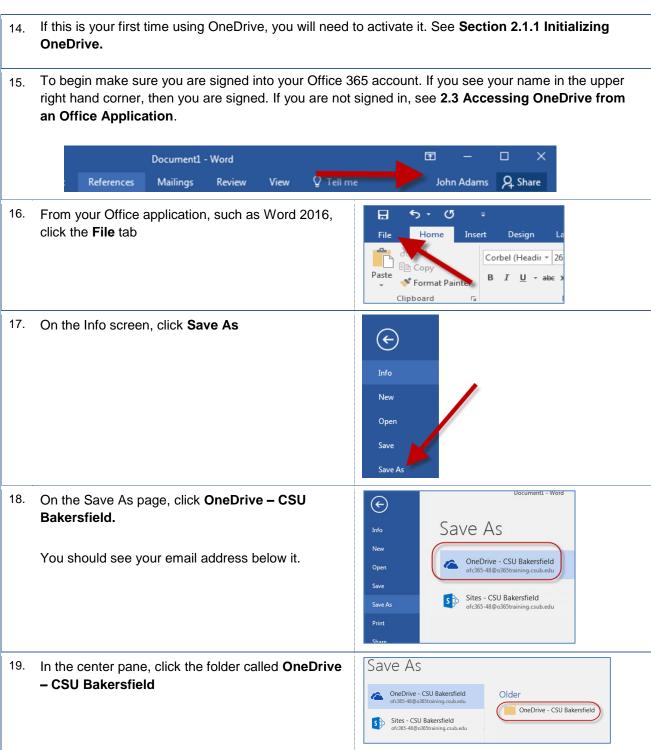
3.2 Uploading Files

A second method for storing your files and documents in OneDrive is to upload them. These instructions cover uploading your files to OneDrive.



3.3 Saving files to OneDrive

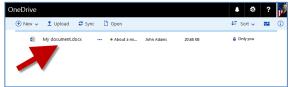
A third way for storing documents to OneDrive is to save them using the Save As menu from your Office products. You must be signed in to your Office 365 account for this function to work. These instructions cover saving documents to OneDrive using Word 2016 for PC.



- 20. On the Save As screen,
 - · Give the file a name
 - Click Save



21. Your document appears in OneDrive.



22. After your document is saved to OneDrive, your Save button 🗔 changes to a Sync button 🔂.

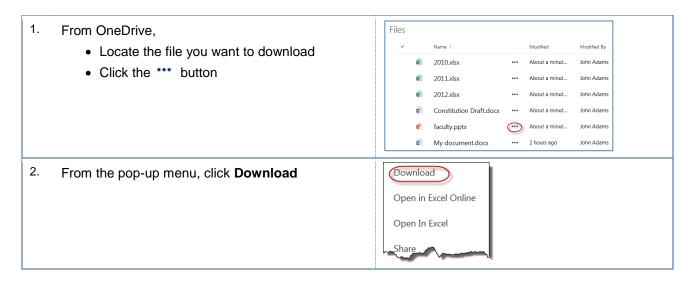
You can use the Sync button to save any changes to your document and synchronize your changes with the document copy in OneDrive.

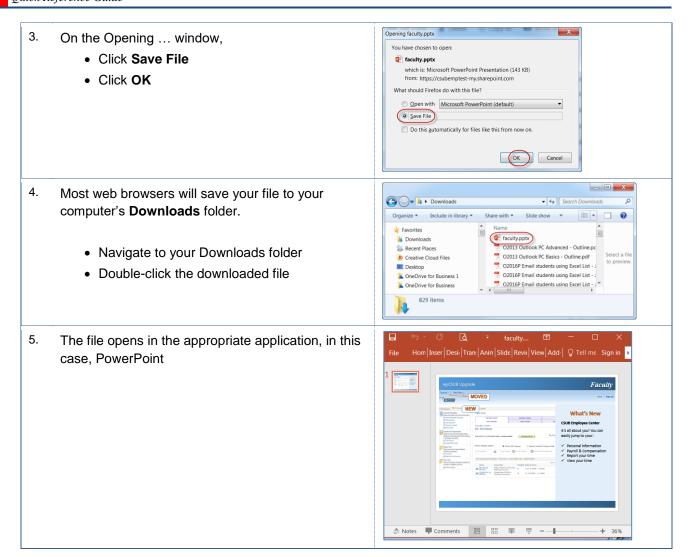
4.0 Working with Files

You can perform several tasks with your files in OneDrive. For example, you can download and open your files. Additionally, you can create new files using the online applications, such as Excel, Word, and PowerPoint.

4.1 Download a File

You can download your files to your local computer. Downloading a file involves copying the file from OneDrive to your local computer's hard drive. Any changes you make to the local copy will not appear in the file on OneDrive. These instructions will guide you in downloading a file.





4.2 Open Online

You can open Word, Excel, and PowerPoint documents from OneDrive. The documents will open in their Online equivalent, such as Word Online, etc. The advantage of this option is your changes are available on any device that you use with OneDrive, as well as anyone that you have shared the document with. These instructions will assist you.

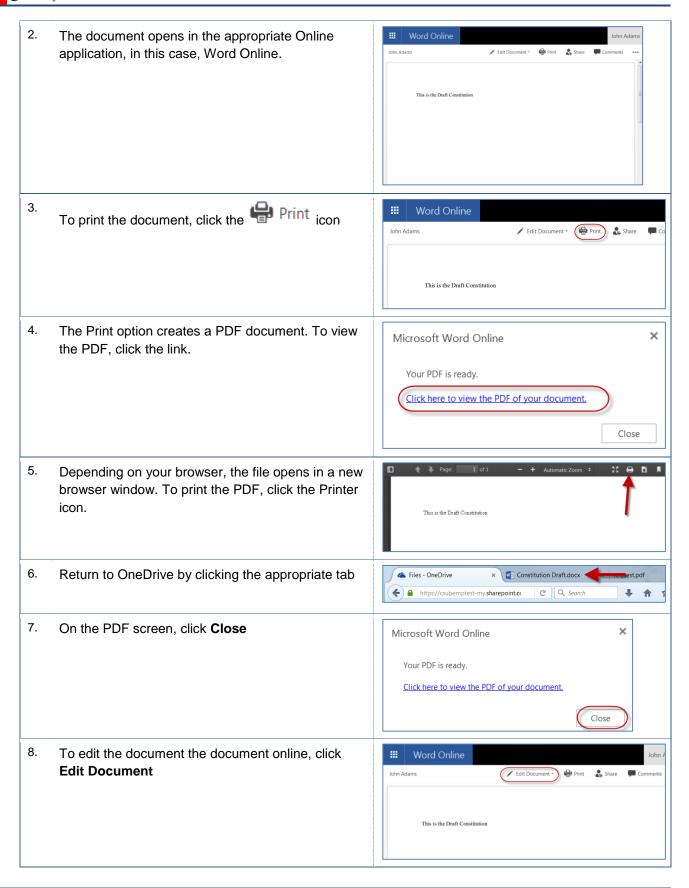
1. From OneDrive, Files · Locate the file you want to open 2010.xlsx • Click the document, such as Constitution 2011.xlsx John Adams Draft About a minut... 2012 ylsy About a minut... John Adams Constitution Draft.docx About a minut... faculty.pptx About a minut... John Adams

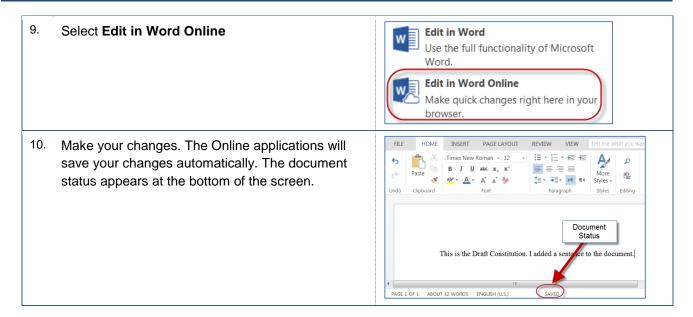
My document.docx

•••

2 hours ago

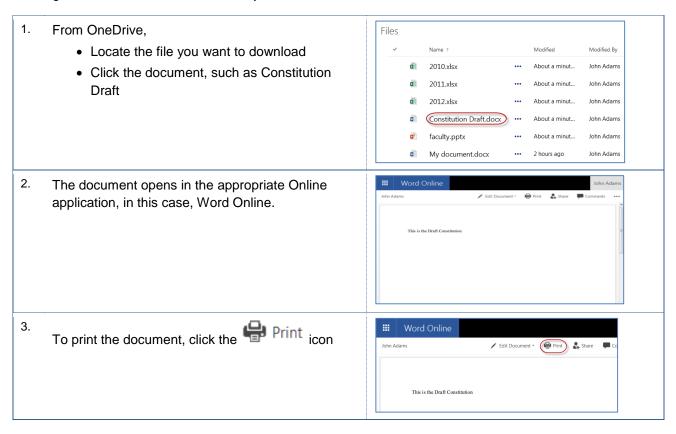
John Adams

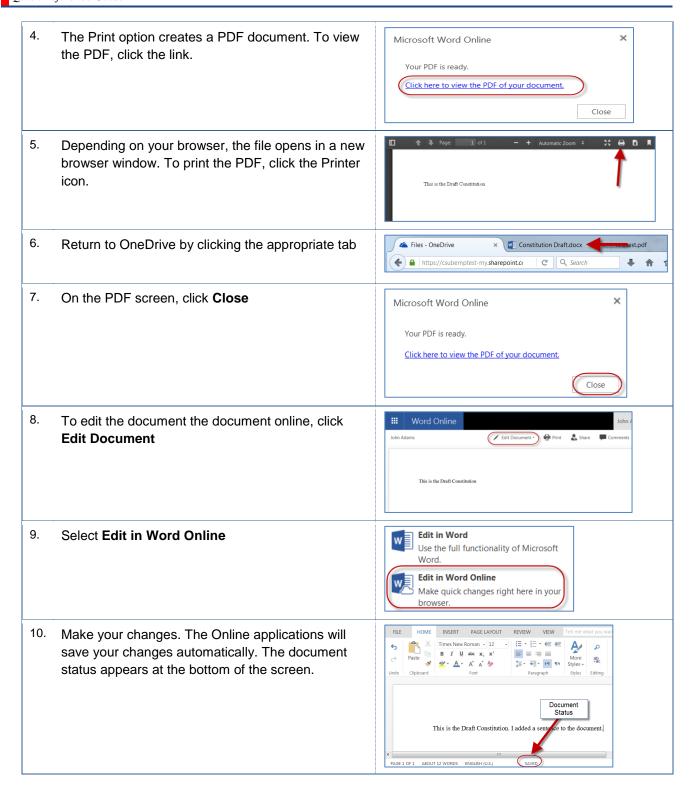




4.3 Open in Application

You can open your documents in native Office applications. This process downloads a copy of the document and then launches the appropriate application. When you choose to this option, your changes are not stored in the OneDrive copy of your document. If you shared this document with others, they will not see your changes. These instructions will assist you.





4.4 Open files from Native Applications

You can open a document stored in OneDrive, from most Office applications, such as Word, Excel, or PowerPoint. The advantage of this option is your changes are sync'ed with OneDrive, as well as anyone that you have shared the document with.

- 1. Before you begin, you should:
 - Activate OneDrive, see Section 2.1 Initializing OneDrive.
 - Access OneDrive from your Application, see Section 2.3 Accessing OneDrive from Office
- 2. From your Office application, such as Word 2016, click the **File** tab



3. On the Info screen, click Open

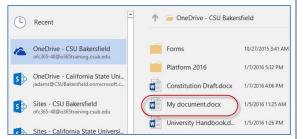


 On the Open page, click OneDrive – CSU Bakersfield.

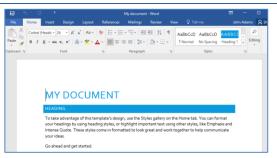
You should see your email address below it.



5. If necessary navigate to the desired folder, then click the desired document.



Your document opens in your application. You can make any changes are additions.



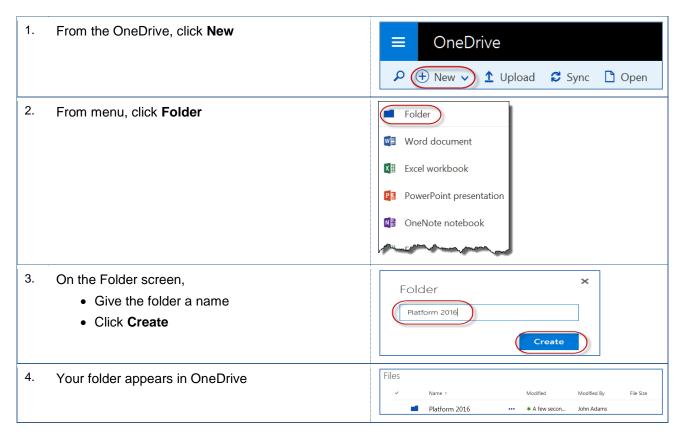
7. After your OneDrive document is opened, your Save button 🖫 changes to a Sync button 🐱.

You can use the Sync button to save any changes to your document and synchronize your changes with the document copy in OneDrive.

5.0 Managing Files

5.1 Create a Folder

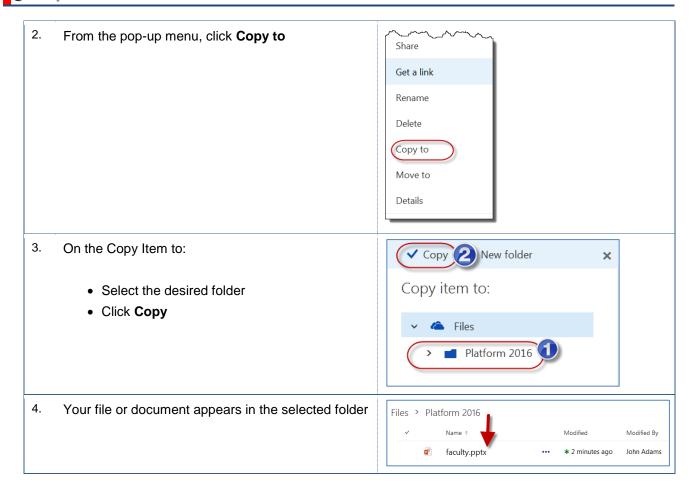
You can create folders to keep your files and documents organized.



5.2 Copy File to Folder

You can copy files to a folder. This is helpful, if you want to retain the original version of a file or document.

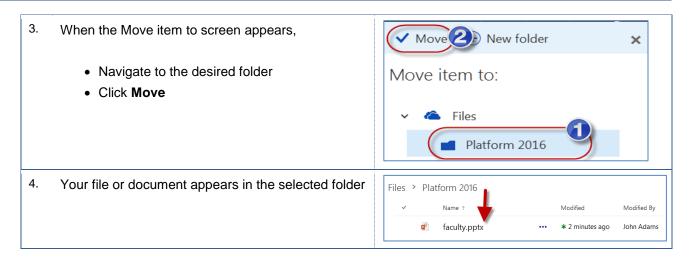




5.3 Move File to Folder

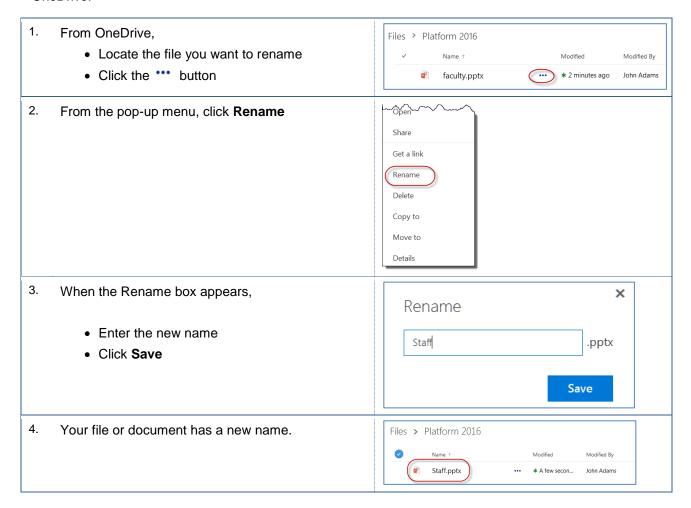
You can move your documents or files to a folder. This is helpful, if you want to organize related items together.





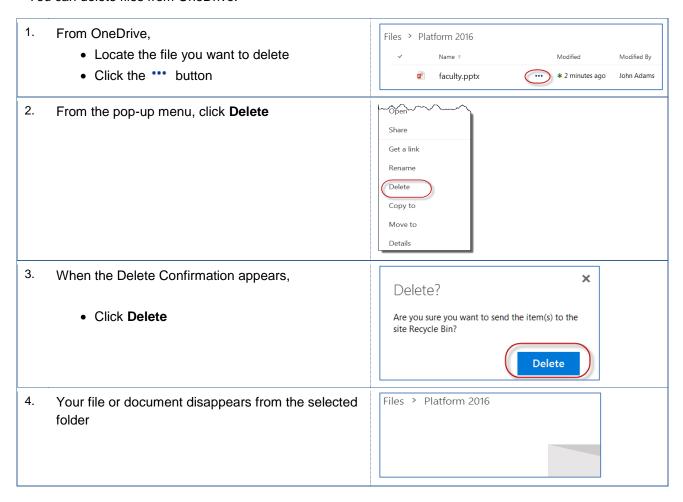
5.4 Rename File

On occasion, you may need to rename a file or document. You can easily perform this operation in OneDrive.



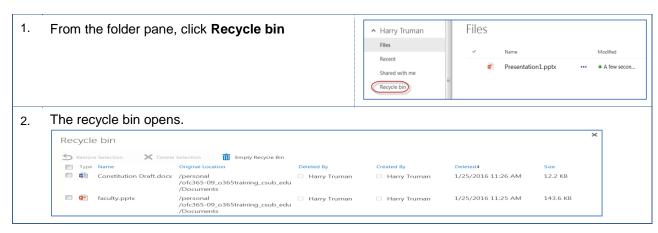
5.5 Delete File

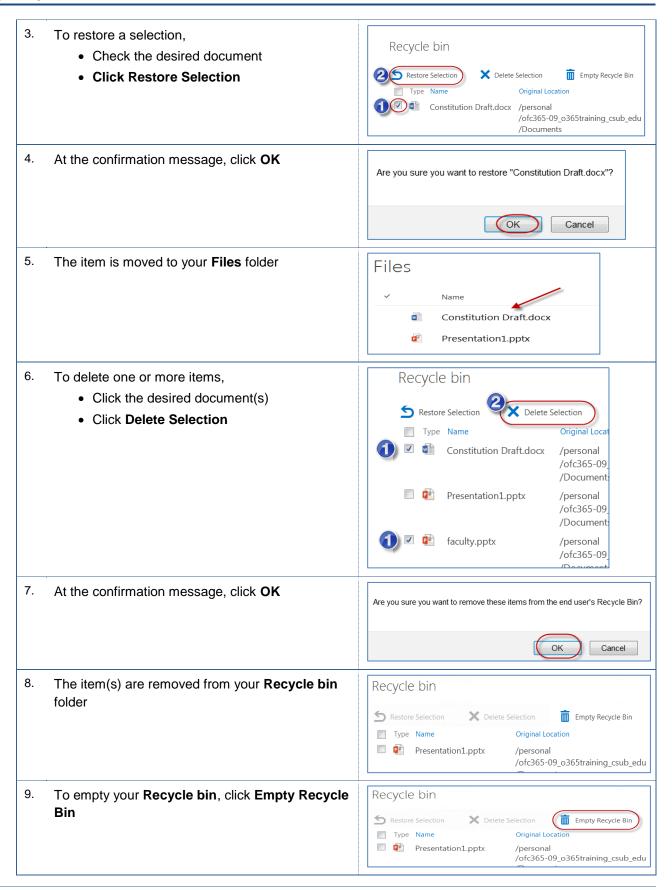
You can delete files from OneDrive.



5.6 Restore Deleted Items

When you delete documents, files, or document versions, the items are placed in the OneDrive Recycle Bin. The OneDrive Recycle Bin allows you to restore selected items, delete selections, and empty the Recycle Bin. These instructions will assist you with this tasks.

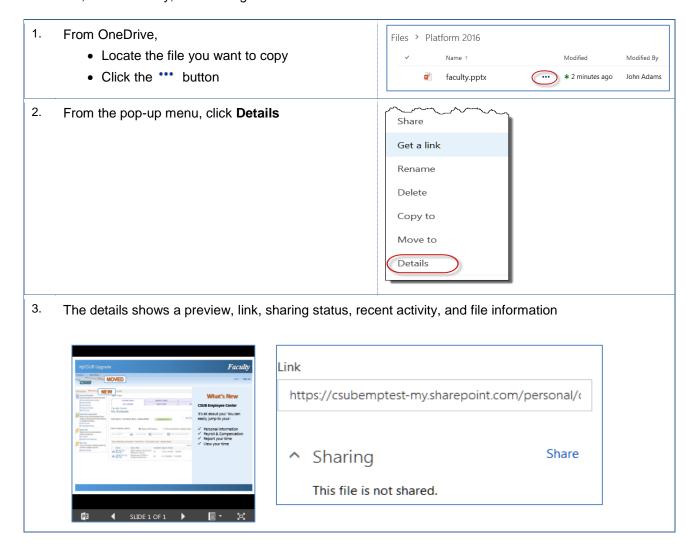




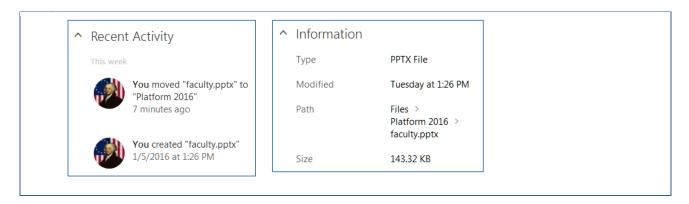


5.7 Details

With Details, you view information about your files and documents. This information includes general information, recent activity, and sharing status.

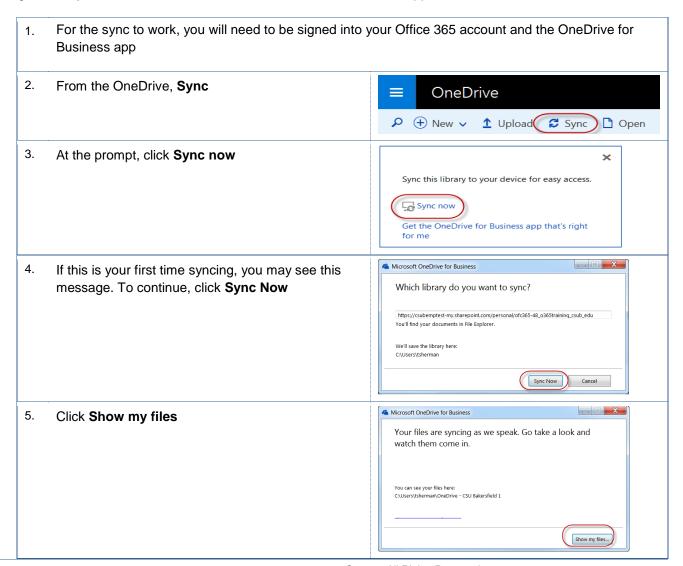


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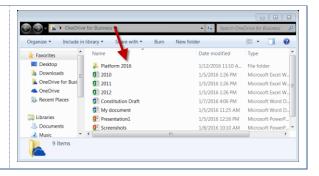
5.8 Syncing files

You can view your OneDrive files from your computer without using a web browser. All your changes will sync to OneDrive in the cloud, whenever you have an Internet connection. For the sync to work, you will need to be signed into your Office 365 account and the OneDrive for Business app.



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6. Your local OneDrive folder with copies of your folders and documents from the cloud.



6.0 Sharing and Collaborating

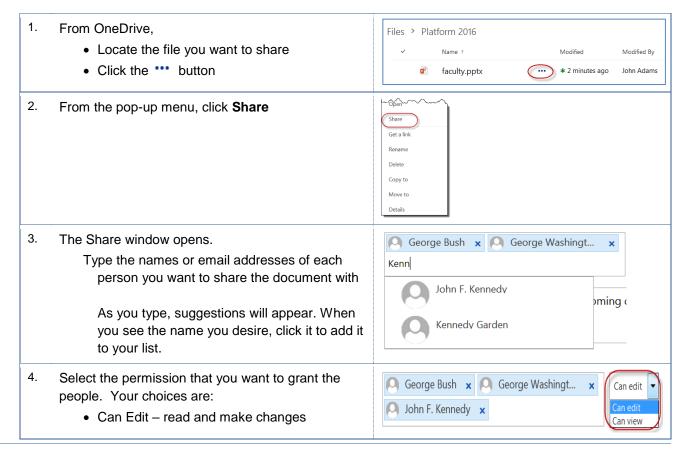
You can share your documents with OneDrive for Business or from your Office application. Additionally, more than one person can work on a document at the same time.

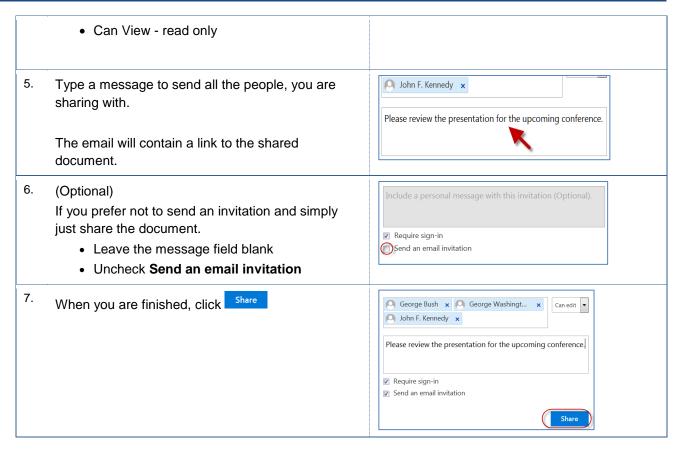


Documents and files stored in OneDrive for Business are tied to an individual. If the individual leaves the university, their documents and files leave with them. As such, you will lose access to these files and documents.

6.1 Sharing files from a web browser

When working with OneDrive using your web browser, you can quickly share a document or file with others.





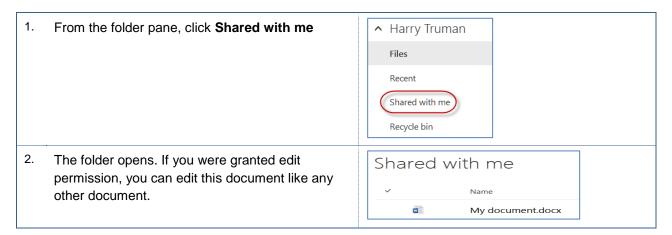
6.2 Sharing files from an Office app

While working in an Office application (Word, Excel, or PowerPoint), you can share your document with others.

- 1. Before you share a document, you should:
- Activate OneDrive, see Section 2.1 Initializing OneDrive. Access OneDrive from your Application, see Section 2.3 Accessing OneDrive from Office • Save the document to OneDrive, see Section 3.3 Saving files to One Drive 2. To share the document, click Share ▼ X In Share pane, Share Invite people In the Invite People, enter the names of the people you want to share the document Can edit with. You can also click the Address Book, to search for names. Select a permission, such as Can Edit Automatically share changes: Ask me Enter a message George Washington Editing Click Share

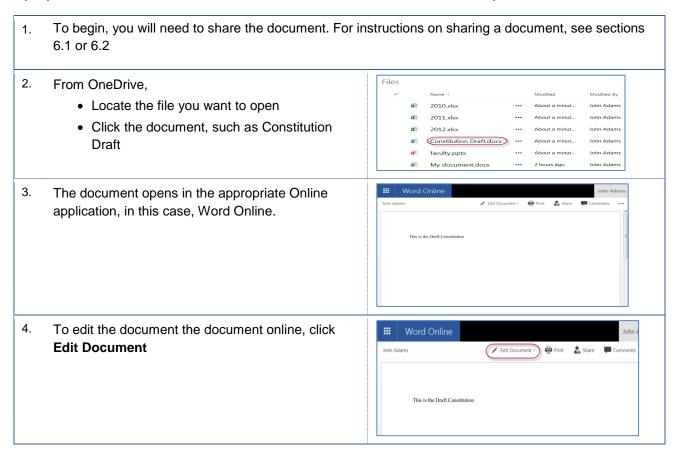
6.3 Opening a Shared Document

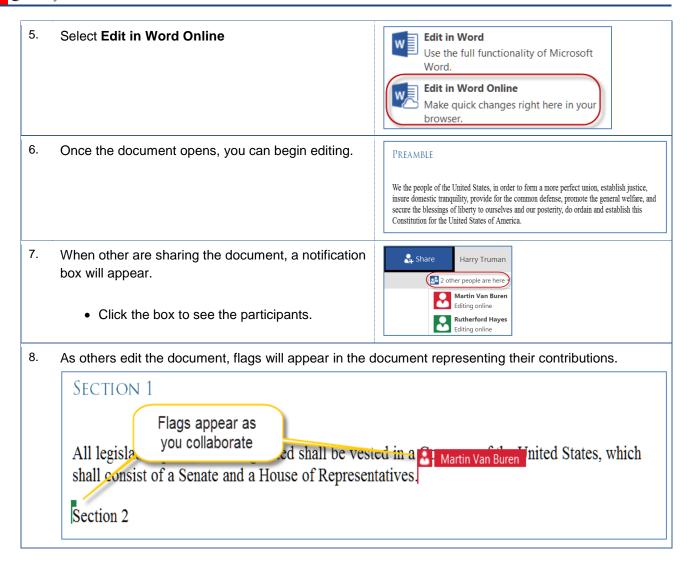
When a document is shared with you, you can open it from OneDrive or from the sharing invitation. These instructions will guide you.



6.4 Working on the same document together

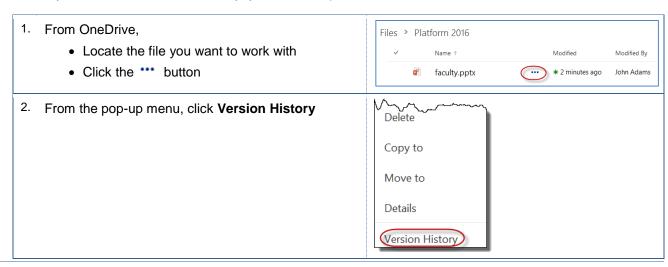
One advantage of using OneDrive is the ability to collaborate on documents. Essentially, one or more people can edit a document at the same time. These instructions will cover this process.





6.5 Version History

Whether you are revising a document or collaborating on a document with others, you can view the version history of the document. Additionally, you can view prior versions.

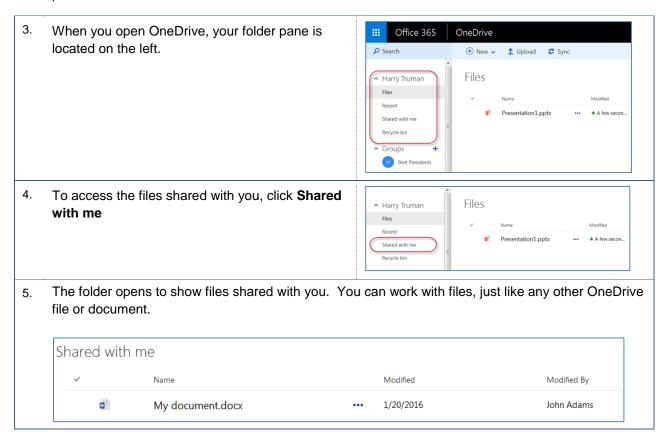


The Version History opens. It shows it version of the document, person who modified the document, and more. Version History No. ↓ Modified Modified By Size Comments 6.0 20.9 KB ☐ Harry Truman 1/20/2016 4:52 PM 5.0 1/20/2016 4:39 PM ☐ John Adams 20.4 KB 1/5/2016 11:25 AM ☐ John Adams 20.7 KB 11.4 KB 3.0 ☐ John Adams 11/12/2015 10:21 AM 14.4 KB 2.0 11/12/2015 10:18 AM ☐ John Adams 14.9 KB 1.0 11/12/2015 10:17 AM ☐ John Adams Version History 4. To open a version, click the date No. ↓ Modified 6.0 1/20/2016 4:52 PM 5.0 (1/20/2016 4:39 PM) 4.0 1/5/2016 11:25 AM 3.0 11/12/2015 10:21 AM 2.0 11/12/2015 10:18 AM 1.0 11/12/2015 10:17 AM 5. When the Launch Application opens, Click Microsoft Office 2016 Click OK Bemember my choice for ms-word links. Cancel 6. Click OK Do you want to open this file? Program: Microsoft Word 7. The document version you selected opens in **MY DOCUMENT** Microsoft Office 2016. To take advantage of this template's design, use the Styles gallery on the Home tab. You can format your headings by using heading styles, or highlight important text using other styles, like Emphasis and Intense Quote. These styles come in formattee to look great and work together to help communicate your ideas. Go ahead and get started.

To restore a version, click the down arrow beside the desired version date Restore replaces the current version. It is added as another version, which allows you to revert back.	Version History Delete All Versions No. ↓ Modified 6.0 1/20/2016 4:52 PM 5.0 1/20/2016 4:39 PM
9. From the menu, click Restore	View Restore Delete
10. Click OK	You are about to replace the current version with the selected version.
11. To delete a version, click the down arrow by the date	Version History Delete All Versions No. ↓ Modified 6.0 1/20/2016 4:52 PM 5.0 1/20/2016 4:39 PM ▼
12. Click Delete	View Restore Delete
13. Click OK Delete moves the document to your OneDrive Recycle Bin. If you need to recover the deleted version, you can restore it from the OneDrive Recycle Bin.	Are you sure you want to send this version to the site Recycle Bin?
14. To delete all versions, Delete All Versions	Version History Delete All Versions No. ↓ Modified 6.0 1/20/2016 4:52 PM

6.6 Viewing files Shared with You

You can easily view files that are shared with you in OneDrive for Business. These instruction will guide you in this process.



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7.0 Getting Help

If you are unsure or need assistance, please refer to the resources below:

Resources on the Web

OneDrive Business

https://www.csub.edu/training/pgms/onedrv/index.html

For Office 365 questions or issues

Email office365@csub.edu

• For general training questions or information

Tammara Sherman, Ed.D.
Campus Training
661-654-6919
tsherman@csub.edu
www.csub.edu/training/index.html

For help with computer-related Issues

Help Desk 661-654-2307 helpdesk@csub.edu