Faculty & Staff

OneDrive for Business: Basics

Quick Reference Guide
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CSU Bakersfield
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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.

1. Open your web browser and navigate to:
   o365.csуб.edu

2. On the CSUB page,
   - Enter your email address (netid@csуб.edu)
   - Enter your password
   - Click Sign In

3. Your Office 365 account opens. Click the App Launcher button, 📱.

4. On the Apps Launcher, click the OneDrive icon,

5. OneDrive opens.
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.

1. If you are already signed in, just click the **App Launcher** button.

2. On the Apps Launcher, click the **OneDrive** icon.

3. OneDrive opens to the Welcome page. To proceed, click **Next**

4. You may see different screens as the wizard runs. When the wizard finishes, click the **Next** button.

5. OneDrive opens.
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.

1. Click the Windows Start button (lower left corner)

2. In the Search box, enter OneDrive

3. Under the Programs section, click OneDrive for Business

4. On the Sign In page,
   - Enter your email address, such as netid@csub.edu
   - Click Next

5. On the CSUB page,
   - Enter your password
   - Click Sign In

6. Click Show my files

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

8. If this is your first time using OneDrive, you will need to activate it. See Section 2.1.1 Initializing OneDrive.

9. To sign into your Office 365 account, Click Sign In

10. You will not see the Sign In link, if you are signed into Office 365 already. Instead, you will see your name in the upper right hand corner. In this case, you can skip these instructions.

11. On the Sign In page,
   - Enter your email address, such as netid@csub.edu
   - Click Next

12. On the CSUB page,
   - Enter your password
   - Click Sign In

13. You are signed in.
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.

1. Make sure you have OneDrive opened.

2. To begin, navigate to the documents you want to upload to OneDrive.

3. Arrange your document window and the OneDrive window, so you can see both.

4. Select the documents you want to upload.
5. Drag the selected documents 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.

1. From OneDrive, click **Upload**

2. On your computer,
   - Find and select the documents you want to upload
   - Click **Open**

3. Your files appear in 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.

14. If this is your first time using OneDrive, you will need to activate it. See Section 2.1.1 Initializing OneDrive.

15. To begin make sure you are signed into your Office 365 account. If you see your name in the upper right hand corner, then you are signed. If you are not signed in, see 2.3 Accessing OneDrive from an Office Application.

16. From your Office application, such as Word 2016, click the File tab.

17. On the Info screen, click Save As.

18. On the Save As page, click OneDrive – CSU Bakersfield.

You should see your email address below it.

19. In the center pane, click the folder called OneDrive – CSU Bakersfield.
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.

1. From OneDrive,
   - Locate the file you want to download
   - Click the *** button

2. From the pop-up menu, click Download
3. On the Opening … window,
   • Click Save File
   • Click OK

4. Most web browsers will save your file to your computer’s Downloads folder.
   • Navigate to your Downloads folder
   • Double-click the downloaded file

5. The file opens in the appropriate application, in this case, PowerPoint

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,
   • Locate the file you want to open
   • Click the document, such as Constitution Draft
2. The document opens in the appropriate Online application, in this case, Word Online.

3. To print the document, click the Print icon.

4. The Print option creates a PDF document. To view the PDF, click the link.

5. Depending on your browser, the file opens in a new browser window. To print the PDF, click the Printer icon.

6. Return to OneDrive by clicking the appropriate tab.

7. On the PDF screen, click Close.

8. To edit the document, click Edit Document.
9. Select **Edit in Word Online**

10. Make your changes. The Online applications will save your changes automatically. The document status appears at the bottom of the screen.

### 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 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.

1. From OneDrive,  
   - Locate the file you want to download  
   - Click the document, such as Constitution Draft

2. The document opens in the appropriate Online application, in this case, Word Online.

3. To print the document, click the **Print** icon
4. The Print option creates a PDF document. To view the PDF, click the link.

5. Depending on your browser, the file opens in a new browser window. To print the PDF, click the Printer icon.

6. Return to OneDrive by clicking the appropriate tab.

7. On the PDF screen, click Close.

8. To edit the document online, click Edit Document.

9. Select Edit in Word Online.

10. Make your changes. The Online applications will save your changes automatically. The document status appears at the bottom of the screen.

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**

4. 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.

6. 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.

1. From the OneDrive, click **New**

2. From menu, click **Folder**

3. On the Folder screen,
   - Give the folder a name
   - Click **Create**

4. Your folder appears in OneDrive

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.

1. From OneDrive,
   - Locate the file you want to copy
   - Click the "..." button
2. From the pop-up menu, click **Copy to**

3. On the Copy Item to:
   - Select the desired folder
   - Click **Copy**

4. Your file or document appears in the selected folder

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.

1. From OneDrive,
   - Locate the file you want to copy
   - Click the *** button

2. From the pop-up menu, click **Move To**
3. When the Move item to screen appears,
   - Navigate to the desired folder
   - Click Move

4. Your file or document appears in the selected folder

5.4 Rename File

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

1. From OneDrive,
   - Locate the file you want to rename
   - Click the "..." button

2. From the pop-up menu, click Rename

3. When the Rename box appears,
   - Enter the new name
   - Click Save

4. Your file or document has a new name.
5.5 Delete File

You can delete files from OneDrive.

1. From OneDrive,
   - Locate the file you want to delete
   - Click the *** button

2. From the pop-up menu, click Delete

3. When the Delete Confirmation appears,
   - Click Delete

4. Your file or document disappears from the selected folder

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.

1. From the folder pane, click Recycle bin

2. The recycle bin opens.
3. To restore a selection,
   - Check the desired document
   - Click Restore Selection

4. At the confirmation message, click OK

5. The item is moved to your Files folder

6. To delete one or more items,
   - Click the desired document(s)
   - Click Delete Selection

7. At the confirmation message, click OK

8. The item(s) are removed from your Recycle bin folder

9. To empty your Recycle bin, click Empty Recycle Bin
10. At the confirmation message, click **OK**

11. All items are removed from your **Recycle bin**

### 5.7 Details

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

1. From OneDrive,
   - Locate the file you want to copy
   - Click the *** button

2. From the pop-up menu, click **Details**

3. The details shows a preview, link, sharing status, recent activity, and file information
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.

1. For the sync to work, you will need to be signed into your Office 365 account and the OneDrive for Business app

2. From the OneDrive, Sync

3. At the prompt, click Sync now

4. If this is your first time syncing, you may see this message. To continue, click Sync Now

5. Click Show my files
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.

1. From OneDrive,
   - Locate the file you want to share
   - Click the *** button

2. From the pop-up menu, click Share

3. The Share window opens.
   Type the names or email addresses of each person you want to share the document with

   As you type, suggestions will appear. When you see the name you desire, click it to add it to your list.

4. Select the permission that you want to grant the people. Your choices are:
   - Can Edit – read and make changes
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 OneDrive

2. To share the document, click Share

3. In Share pane,
   - In the Invite People, enter the names of the people you want to share the document with. You can also click the Address Book, to search for names.
   - Select a permission, such as Can Edit
   - Enter a message
   - 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.

1. From the folder pane, click **Shared with me**

2. The folder opens. If you were granted edit permission, you can edit this document like any other document.

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.

1. To begin, you will need to share the document. For instructions on sharing a document, see sections 6.1 or 6.2

2. From OneDrive,
   - Locate the file you want to open
   - Click the document, such as Constitution Draft

3. The document opens in the appropriate Online application, in this case, Word Online.

4. To edit the document, click **Edit Document**
5. Select **Edit in Word Online**

6. Once the document opens, you can begin editing.

7. When other are sharing the document, a notification box will appear.
   
   - Click the box to see the participants.

8. As others edit the document, flags will appear in the document representing their contributions.

### 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.

1. From OneDrive,
   
   - Locate the file you want to work with
   - Click the button

2. From the pop-up menu, click **Version History**
3. The Version History opens. It shows it version of the document, person who modified the document, and more.

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<th>Modified By</th>
<th>Size</th>
<th>Comments</th>
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<td>20.9 KB</td>
<td></td>
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<td>5.0</td>
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<td>John Adams</td>
<td>20.4 KB</td>
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<td>John Adams</td>
<td>20.7 KB</td>
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<td>11/12/2015 10:17 AM</td>
<td>John Adams</td>
<td>14.9 KB</td>
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</tr>
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</table>

4. To open a version, click the date

5. When the Launch Application opens,
   - Click Microsoft Office 2016
   - Click OK

6. Click OK

8. 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.

9. From the menu, click **Restore**

10. Click **OK**

11. To delete a version, click the down arrow by the date

12. Click **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.

14. To delete all versions, **Delete All Versions**
6.6 Viewing files Shared with You

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

3. When you open OneDrive, your folder pane is located on the left.

4. To access the files shared with you, click Shared with me.

5. The folder opens to show files shared with you. You can work with files, just like any other OneDrive file or document.
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](https://www.csub.edu/training/pgms/onedrv/index.html)

- For Office 365 questions or issues
  
  Email [office365@csub.edu](mailto:office365@csub.edu)

- For general training questions or information
  
  Tammara Sherman, Ed.D.
  
  Campus Training
  
  661-654-6919
  
  [tsherman@csub.edu](mailto:tsherman@csub.edu)
  
  [www.csub.edu/training/index.html](http://www.csub.edu/training/index.html)

- For help with computer-related Issues
  
  Help Desk
  
  661-654-2307
  
  [helpdesk@csub.edu](mailto:helpdesk@csub.edu)