# OneDrive for Business

[Your Company Name]

CustomGuide
Interactive Training

# Contents

# OneDrive for Business

OneDrive for Business makes file storage, file management, file protection, and file sharing a breeze. You can use OneDrive for Business to keep your business files tidy and centrally located. The sharing features make it possible for teams and the entire organization to collaborate on files. Or, if you don't want others making changes to a final version, you can distribute files to an audience with read-only permissions.

OneDrive for Business also makes it easy to locate files with searching, sorting, and filtering options. With OneDrive, you can edit files with ease because previous versions of a file are stored and can be resurrected using version history.

This course provides an overview of the most important and useful features available in OneDrive for Business.

## Objectives

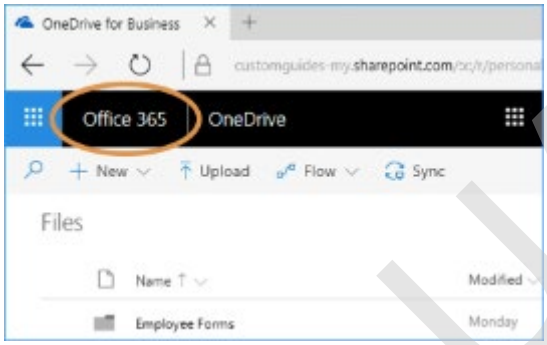
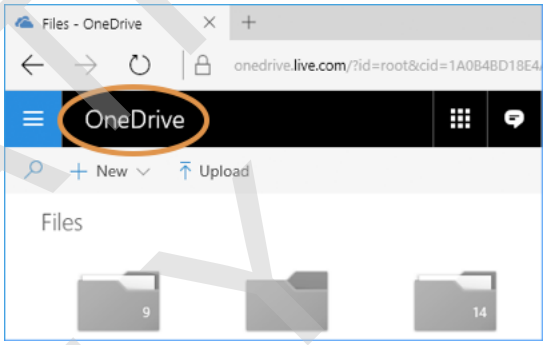
- OneDrive for Business Basics
- Create a New File
- Folders
- Open a File
- Upload Files
- Save from Office
- Delete and Restore Files
- Search
- Share Files
- Shared Libraries
- Version History
- Sort and Filter
- Sync with Your Computer
- Help

# OneDrive for Business Basics

OneDrive for Business is a cloud service that allows you to store and share your work-related documents, while still protecting files that don't belong in a public a location.

## OneDrive for Business vs. OneDrive

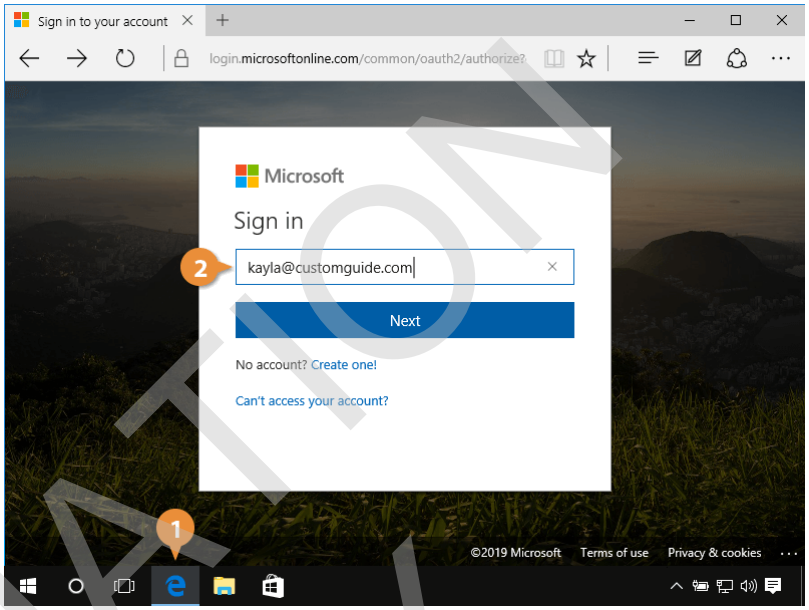
OneDrive for Business is not the same as OneDrive. The standard OneDrive is for individual users to store files online when they want to have access to them from anywhere. It is used with a personal email address and not a work email. OneDrive for Business is exactly what the name implies—a tool used for work purposes.

| OneDrive for Business | OneDrive |
|---|---|
|  |  |
| • Store work-related files in a secure 1 TB space online<br>• Advanced versioning and document history<br>• Tied to SharePoint and accessed with work email<br>• Easily share with coworkers<br>• Auditing, reporting, and advanced administration tools | • Store personal files in a secure, private 5 GB space online<br>• Simple versioning and document history<br>• Accessed with a personal email<br>• Basic access is free, but upgrades are available for purchase |

## Sign In

OneDrive for Business can be accessed two ways. You can either log in to your Office 365 account and navigate to OneDrive for Business or navigate to it from SharePoint. Either way, you're accessing your organization's OneDrive for Business storage.

1. Open the Office 365 Sign in window on any browser and click **Sign in**.
2. Type your email address in the **Address** field and click **Next**.



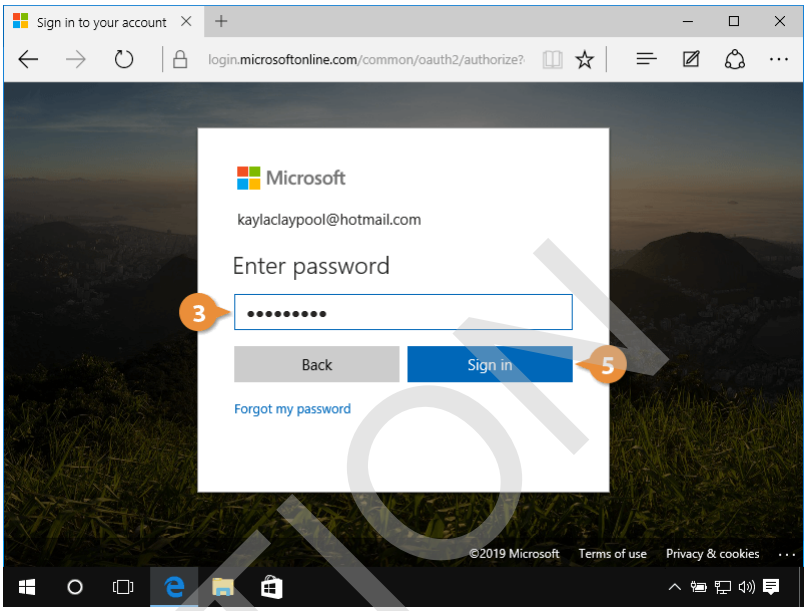
3. Type your password in the **Password** field.

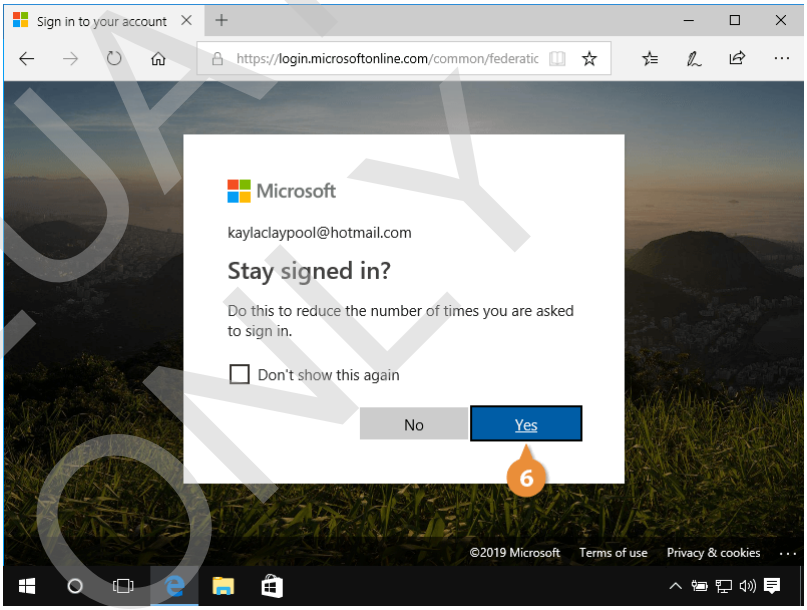
4. If you have multiple Office 365 accounts, select the account you want to use.

5. Click **Sign in**.

   A dialog box appears asking if you want to stay signed into OneDrive for Business.

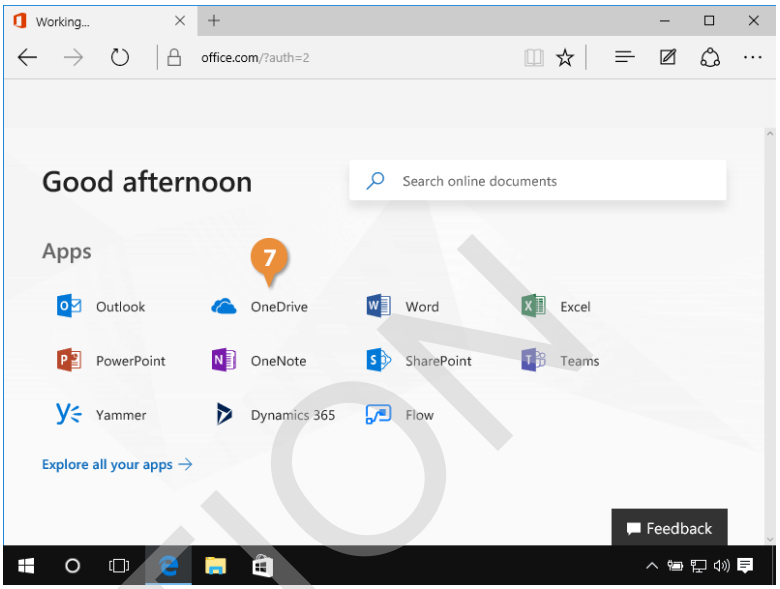
6. Click **Yes**.



7 On the Office 365 home page, click **OneDrive**.

OneDrive for Business opens and you see all of the documents that are currently stored here.



## The Toolbar

Some commands you'll use for working with your documents appear on the toolbar. You can create new files and folders, or upload files from your computer. These commands will change when you have a file or folder selected.

1. Select a file by clicking anywhere in its row.

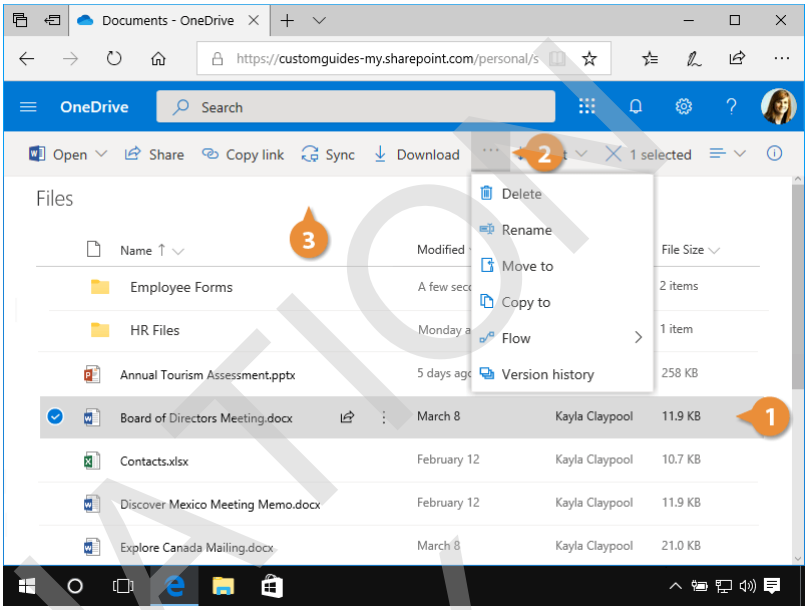
   And it's selected. New commands will appear on the toolbar to open the file, share it, or download it.

   Additional commands will be available in the menus on the toolbar and on a selected file, indicated by the three dots called an ellipsis.

2. Click the **ellipsis** button for the selected file or folder.

   A menu with actions you can perform with the folder or file appear.

3. Click outside of a menu to close it.



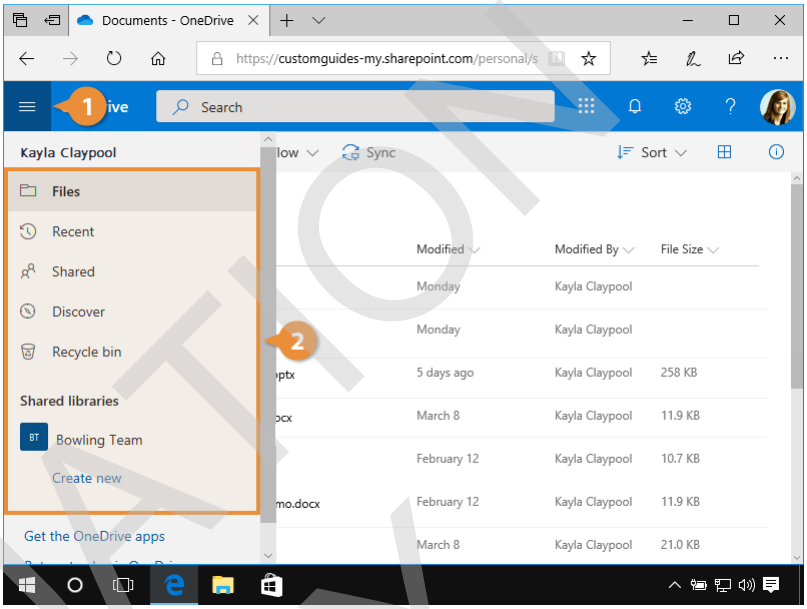
## The Navigation Pane

Finally, let's look at the Navigation Pane. If your browser window is big enough, it will always appear on the left. When you're working with a large quantity of files, the navigation pane comes in handy to check out files you've recently used, see just the items that are shared with you, view the files you're following, check out the site folders, and see what's in the recycle bin.

1. If necessary, show the Navigation Pane by clicking the button in the upper-left that appears as three bars.
2. Select a folder in the Navigation Pane.

   You can now view all of the files in the folder you selected.

Now that we've covered the basics, you're ready to jump into everything else OneDrive for Business has to offer!

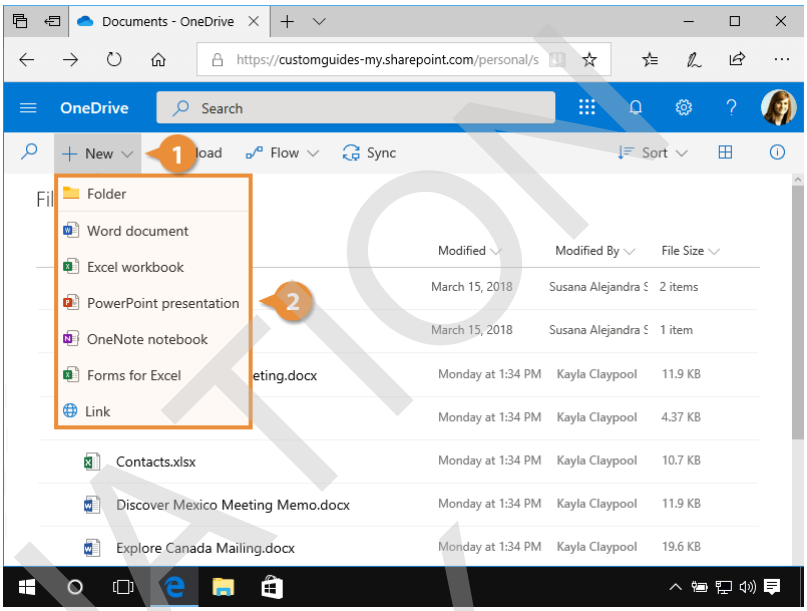


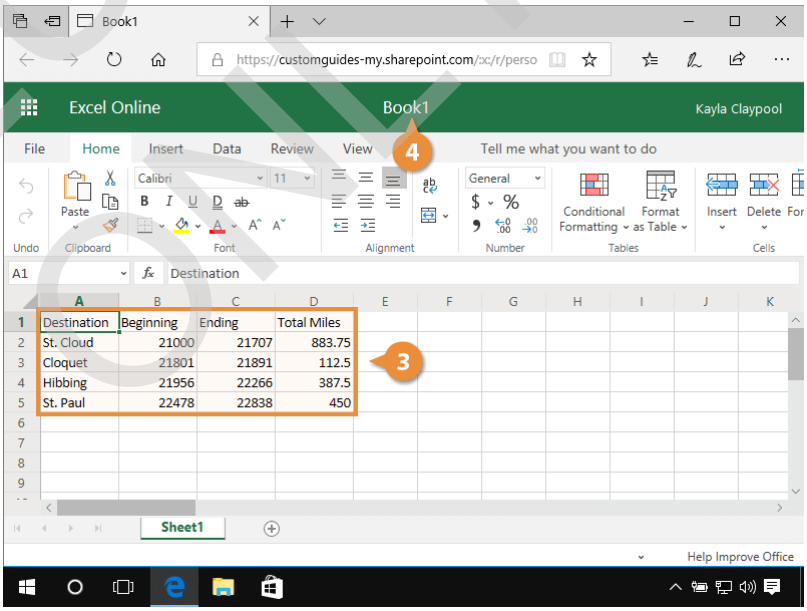
# Create a New File

If you need to create a new file from scratch, you can do it from right within OneDrive for Business.

1. Click the **New** button.
2. Select a file type.

   A new file appears and is ready to populate.
3. Add content to the new file.
4. Click the **Name** in the title bar.



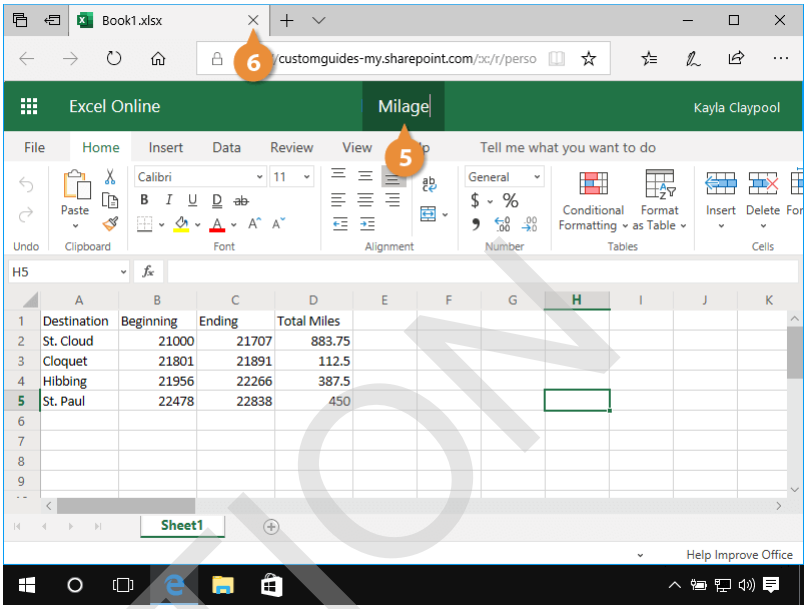



5. Type a file name.

   The changes you make in any of the Office Online apps are automatically saved.

6. Close the file.

The new file is added to the library, and you know it's new because of the little green icon next to the name.



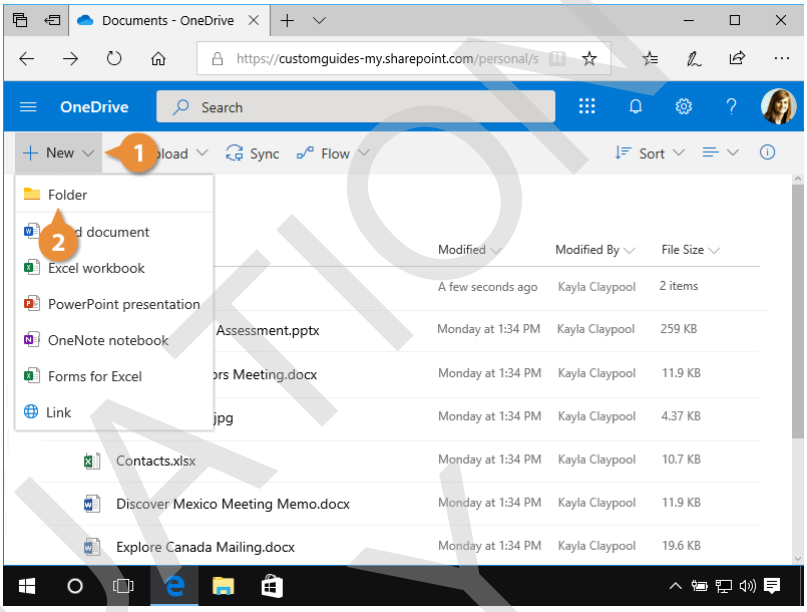
# Folders

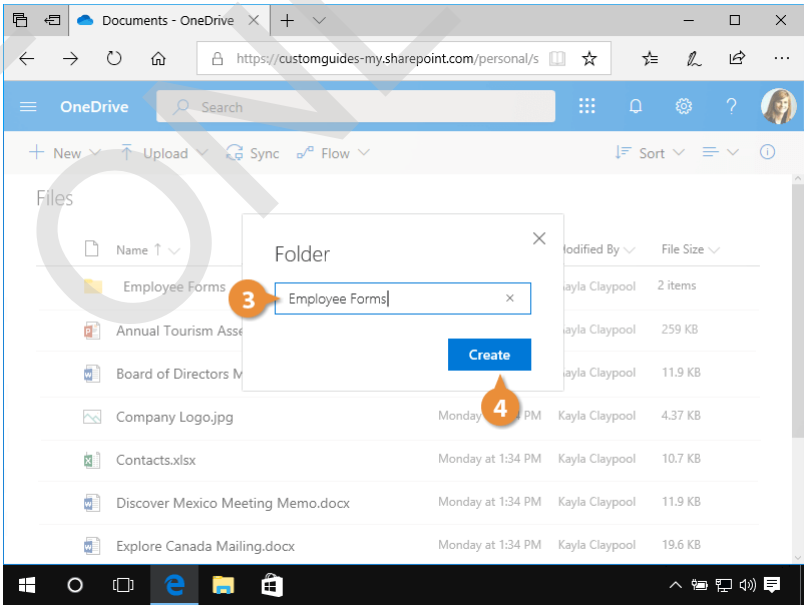
Folders are an easy way to organize your documents and keep similar items together in one location.

## Create a Folder

1. Click the **New** button.
2. Select **Folder**.
3. Type a unique name for the folder.
4. Click **Create**.

The new folder is created and shows up with all your other files in the Documents library.



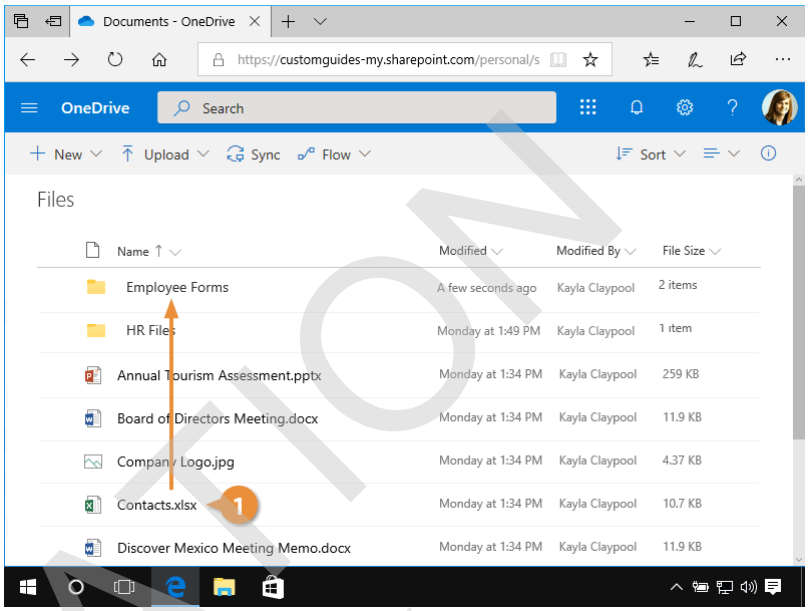



## Add Files to a Folder

Now you can begin to add files to your new folder.

1. Click and drag a file onto a folder.

The file is added to the folder.



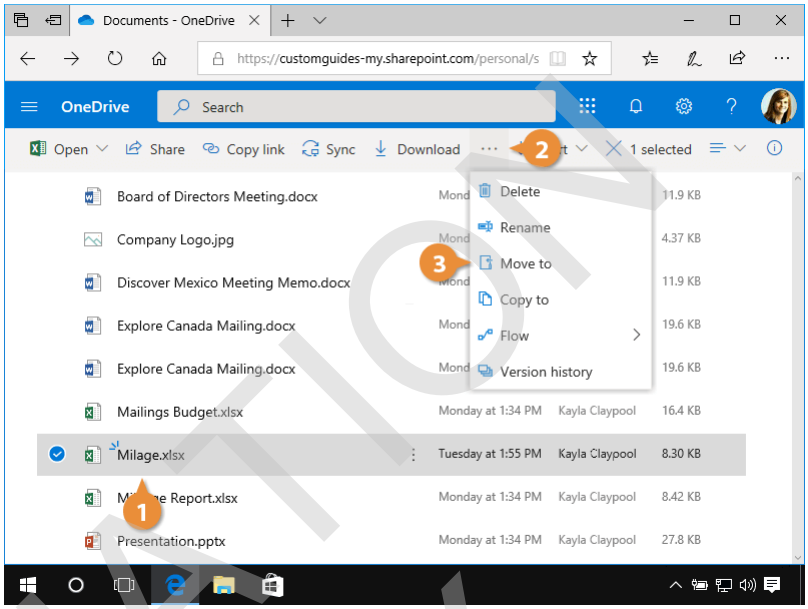
## Move a File to Another Folder

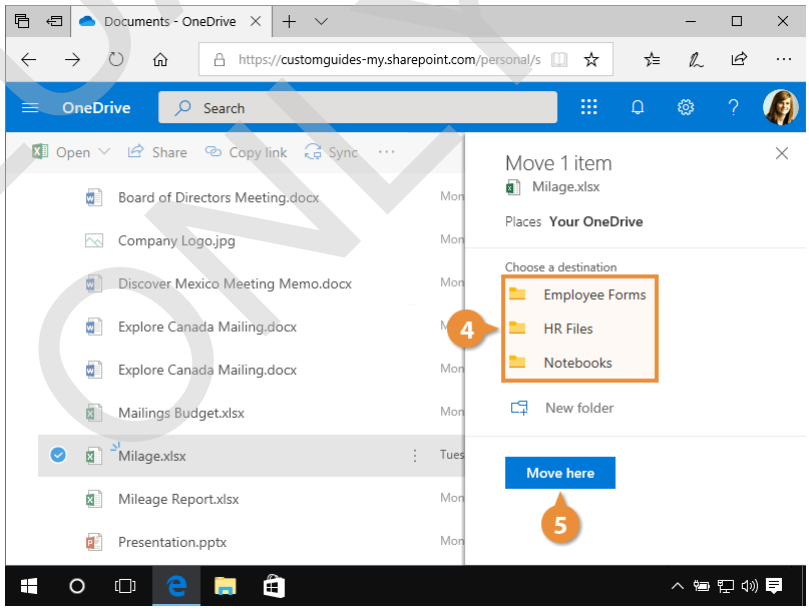
You can also move a file from one folder to another, even if you can't see both the file and the folder at the same time.

1. Select a file.
2. Click the file's **ellipsis** button.
3. Select **Move to**.

   The Move Pane opens on the right, listing the folders on your OneDrive.
4. Select a folder.
5. Click **Move here**.

The file is moved to the selected folder.



# Open a File

When you're ready to view the files you've saved in OneDrive for Business, you can either open them in the browser or use the full program installed on your computer.

## Preview a File

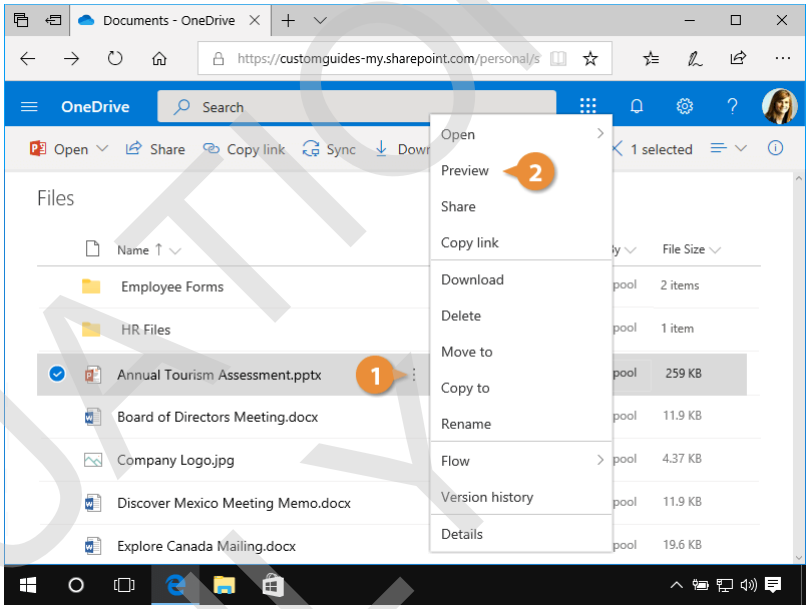
Before opening a file, you may want to preview it to make sure it's the correct one.

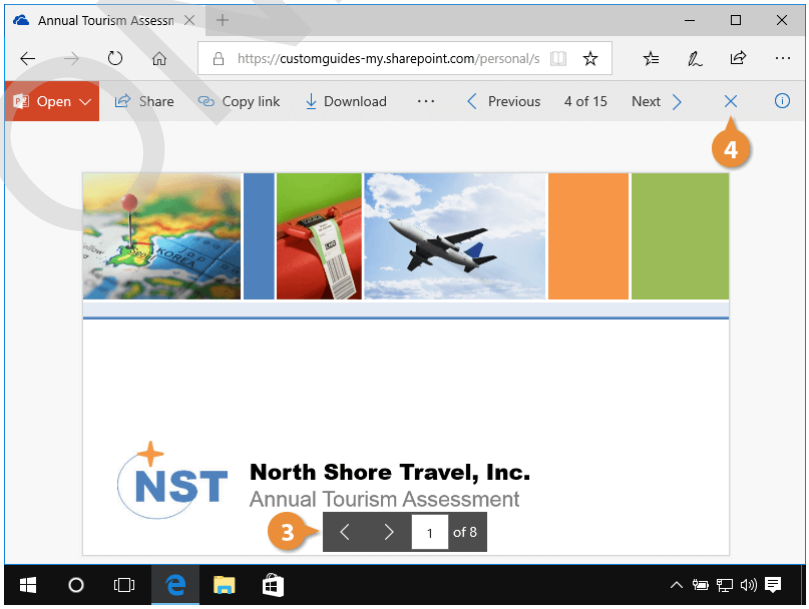
1. Click a file's **ellipsis** button.
2. Select **Preview**.

   A preview of the file opens as it takes over the window.

   You can use the navigation arrows to move through the file.
3. Click a **navigation arrow** to preview other pages.

   Once you're finished viewing the preview, you can close it.
4. Click the **Close** button.



## Open in Office Online

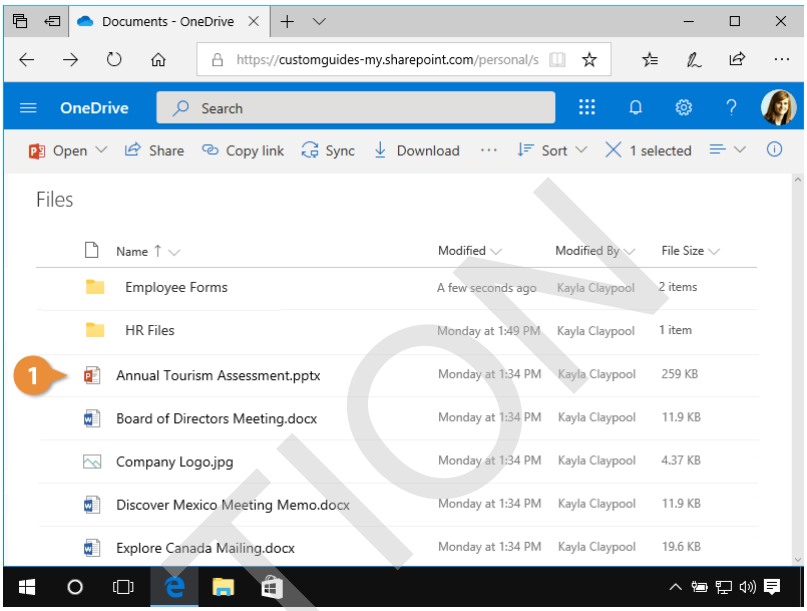
1. Double-click a file name.

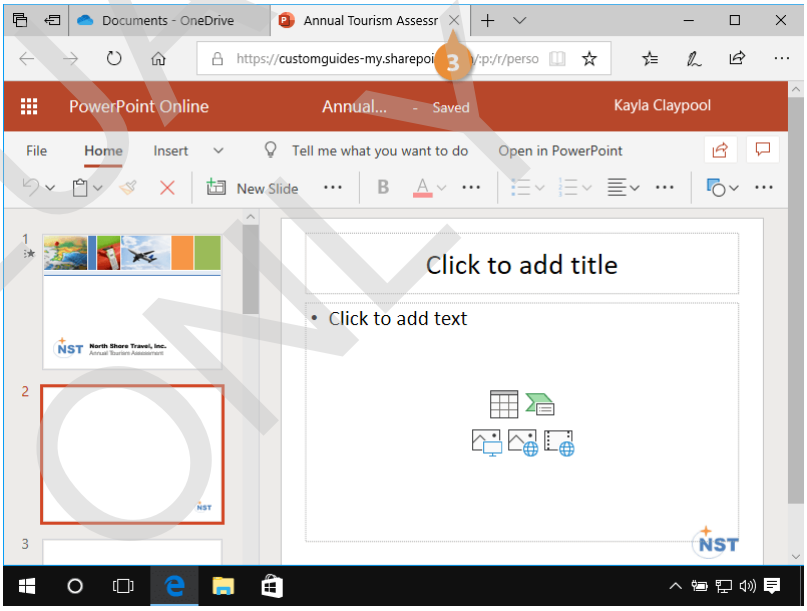
   The file opens in a new browser tab and you can edit it.

2. Edit the file as needed.

   The changes you make in the Office Online files save automatically, so there's no need to save it manually.

3. Click the **Close** button.



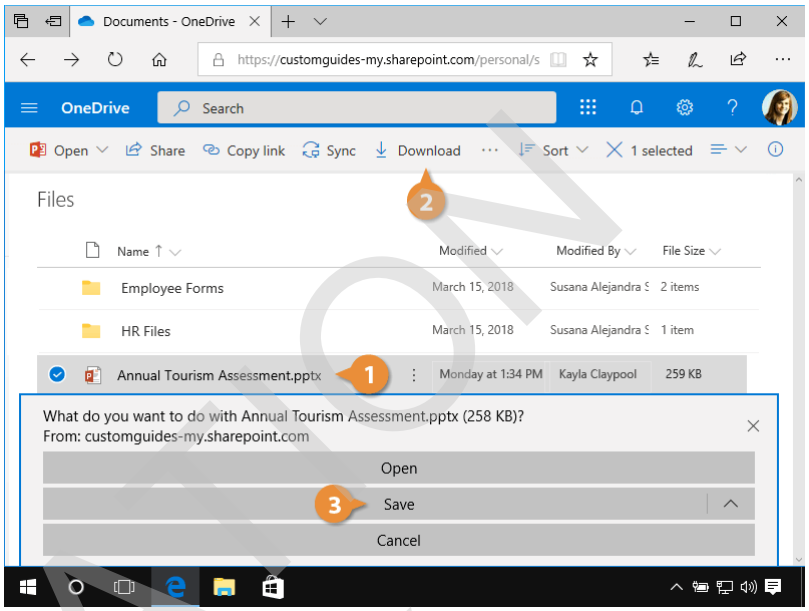
## Download a Copy

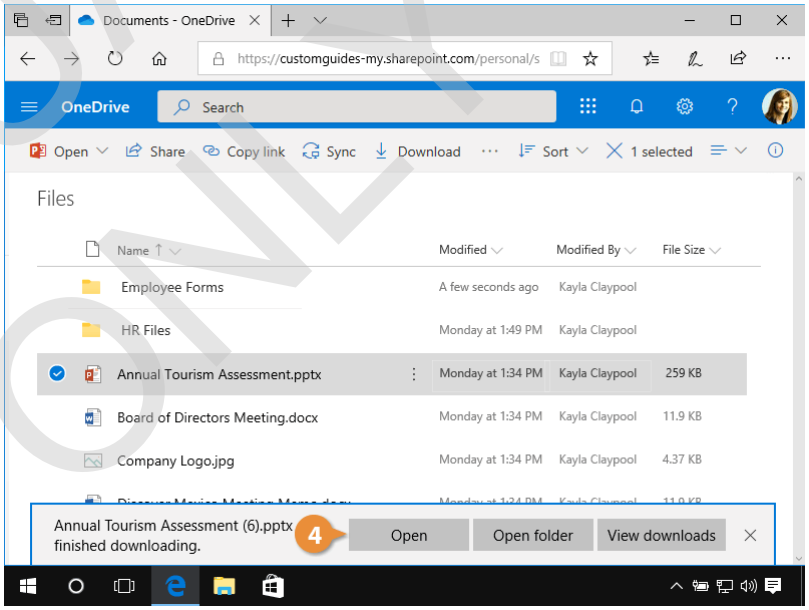
If you want a separate copy of the file to save locally on your computer, just download it.

1. Select a file.
2. Click the **Download** button on the toolbar.
3. Click **Save**.

   Once it's done downloading, you can open it.
4. Click **Open**.

A new copy of the file opens on your desktop and can be modified and saved in whichever location you need it.



# Upload Files

In addition to creating new files in OneDrive for business, you can also upload existing ones.

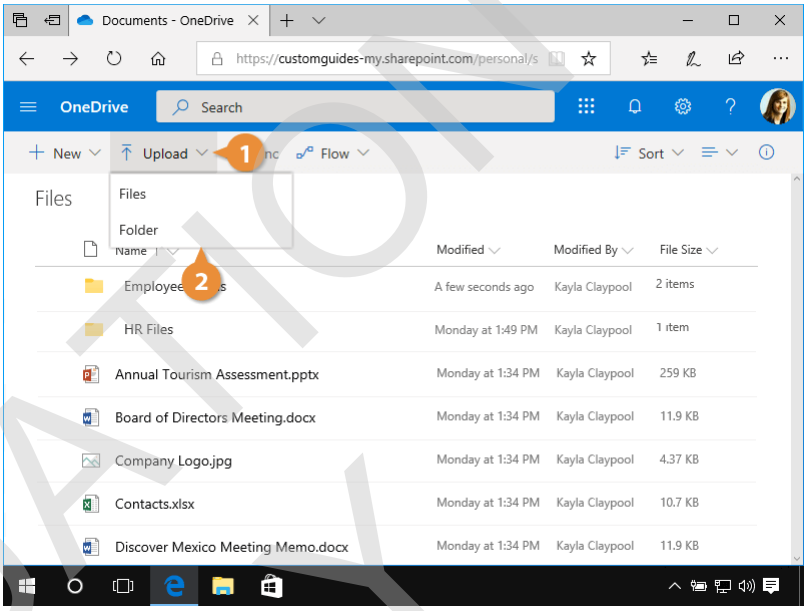
## Upload a Single File

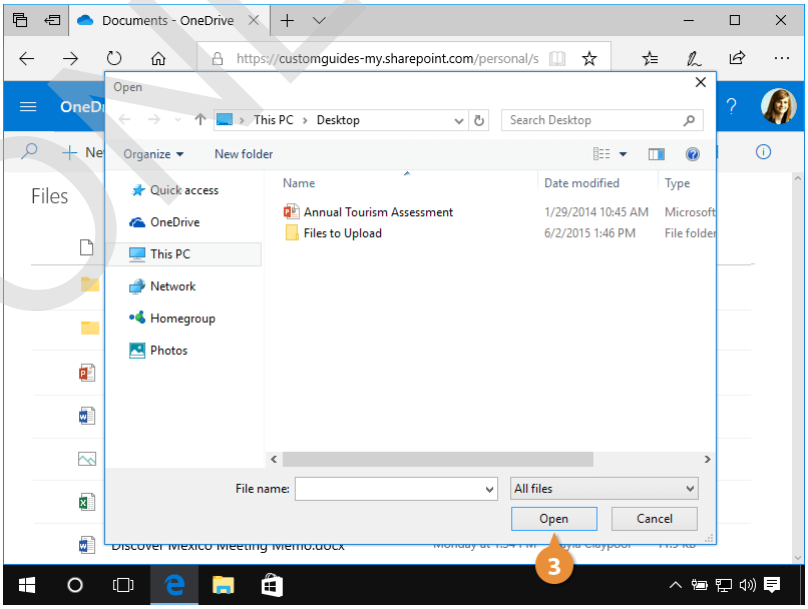
1. Click the **Upload** button.

   A menu appears that lets you choose whether you want to upload specific files or upload an entire folder.

2. Select **Files** or **Folder**.
3. Navigate to and select a file, then Click **Open**.

The file is uploaded to the Documents library.



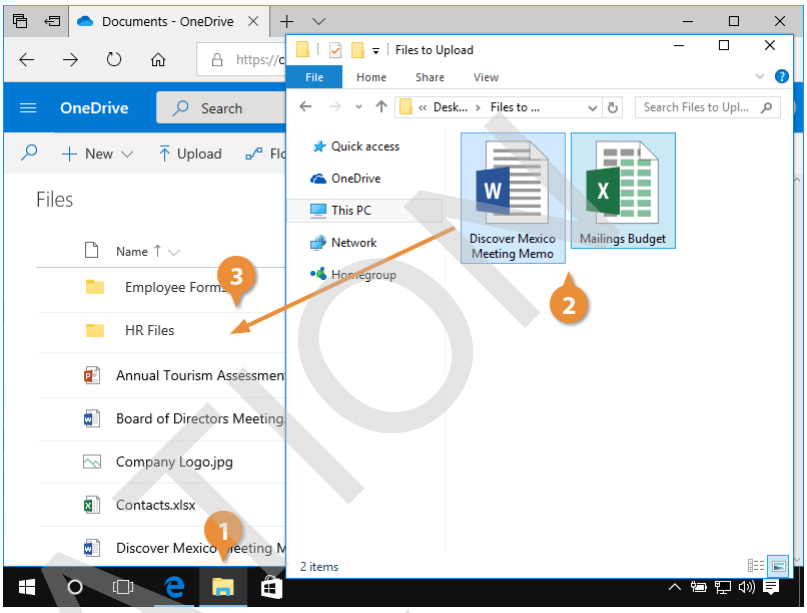



## Upload Files with Drag and Drop

If you have multiple files to upload at once, it's easier to drag and drop them into OneDrive for Business.

1. Open **File Explorer** from the Windows taskbar.
2. Select the desired files.
3. Drag the files into the Documents library.

Your files are all uploaded at the same time.



# Save from Office

## Save an Office File to OneDrive

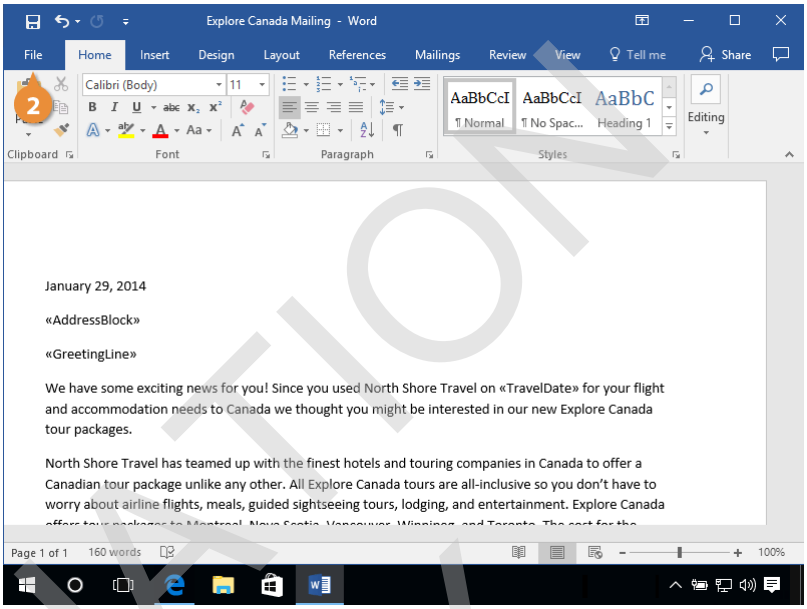
1. Open a file in any Office application.
2. Click the **File** tab.
3. Click **Save As**.

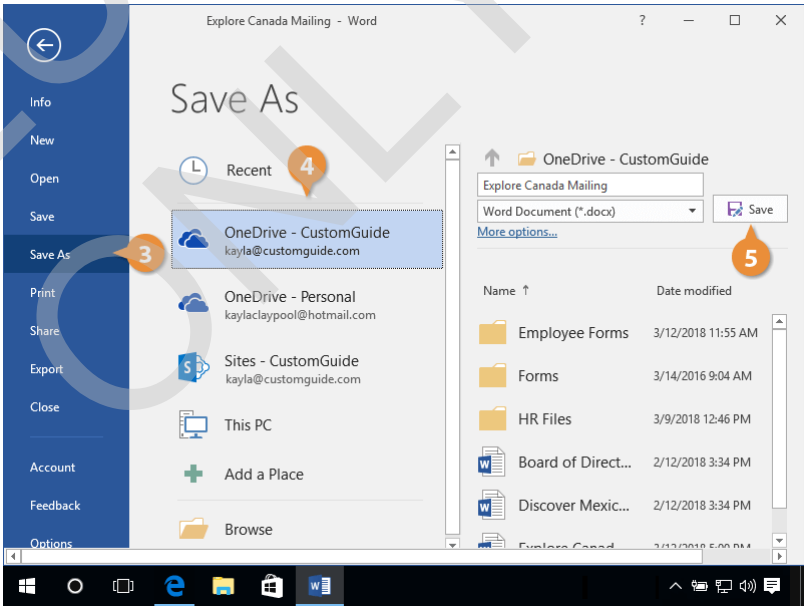
   **Tip:** Remember, OneDrive personal is something different. If you haven't saved to OneDrive for Business from Office before, you find it in **Other Web Locations**.
4. Select your **OneDrive for Business** location.

   Here you see all the files and folders from your OneDrive for Business account.

   If needed, you could change your file name here.
5. Click **Save**.

You see an upload notification while the file is saving, and once it's done, the file is saved in OneDrive for Business.



# Delete and Restore Files

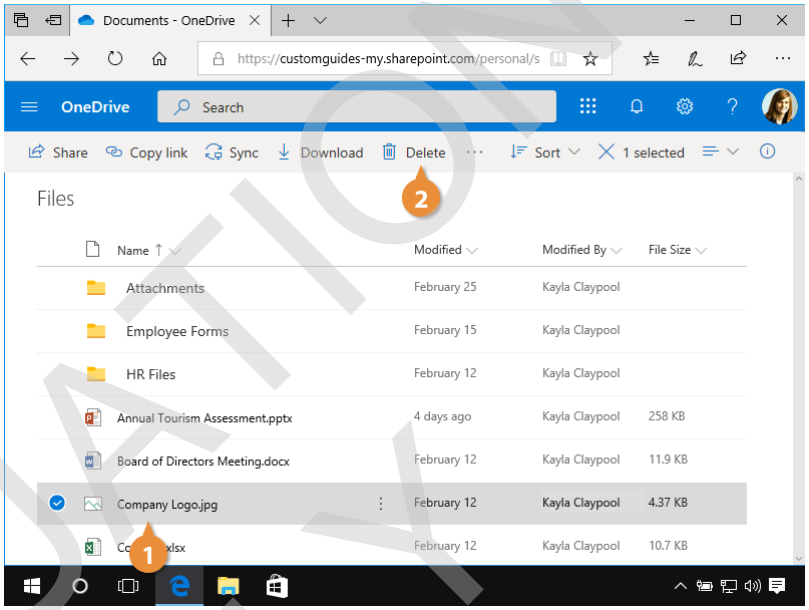
If you have an item you no longer need in OneDrive for Business, delete it. Deleted files can be restored if you change your mind later.

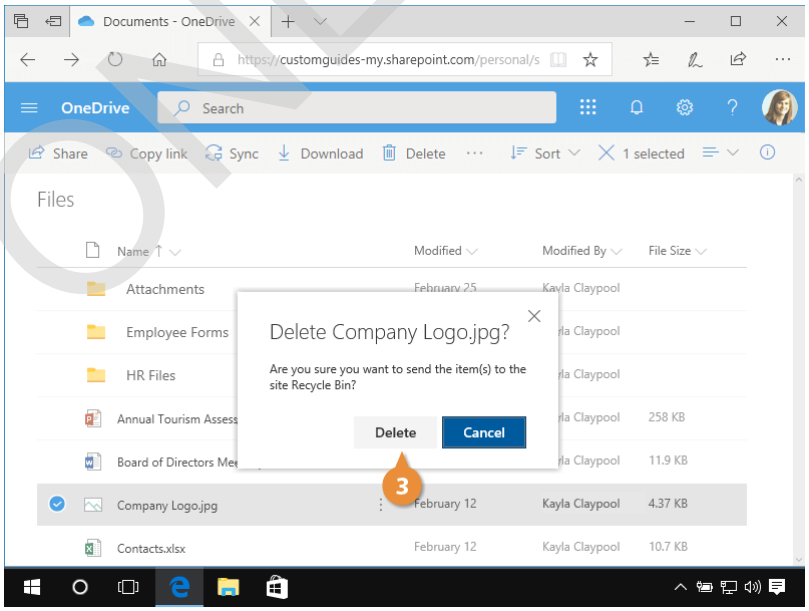
## Delete an Item

1. Select the file you want to delete.
2. Click the **Delete** button on the toolbar.

   A dialog box appears asking you if you're sure you want to delete the item.
3. Click **Delete** in the confirmation dialog box.

It may take a few seconds, but the file is transferred to the Recycle bin.

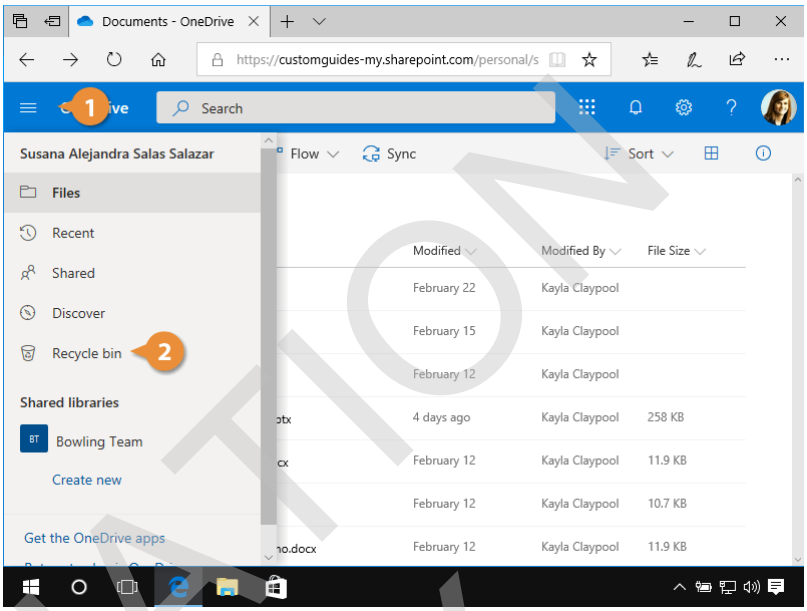


## Restore an Item

If you have deleted an item and later realize that deleting that item was a mistake, you can retrieve it from the Recycle bin.

1. If necessary, click the button in the upper-left to display the Navigation Pane.
2. Click **Recycle bin**.
3. Select the file you want to restore and click the **Restore** button.




The file is restored to the Documents library.

# Search

If you have a lot of files saved in OneDrive for Business, you can search through all your content to find just what you need.

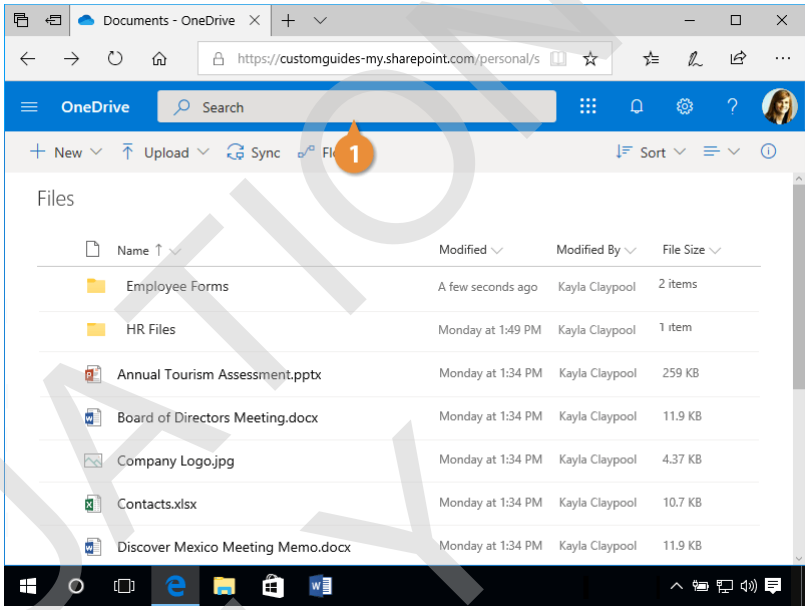
## Search OneDrive

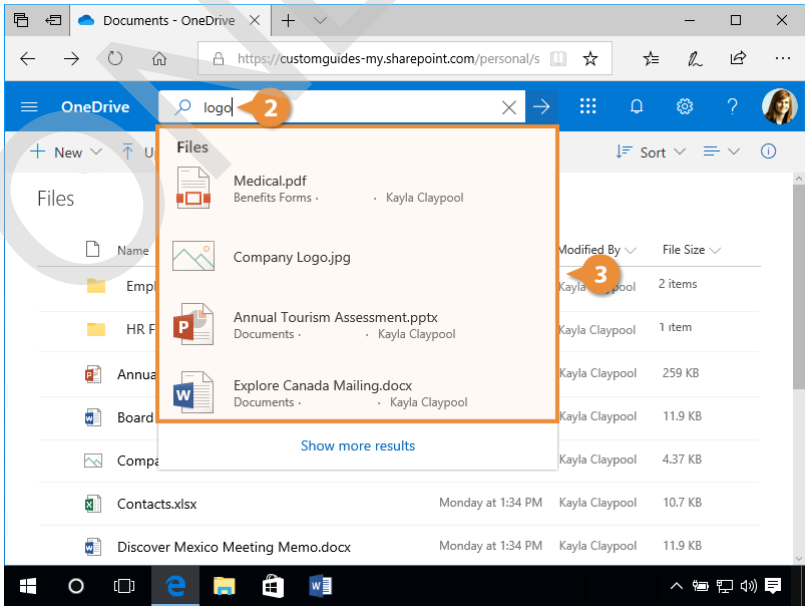
1. Click in the **Search** field.
2. Type a search term and press **Enter**.

   Any matches appear in a list of results.

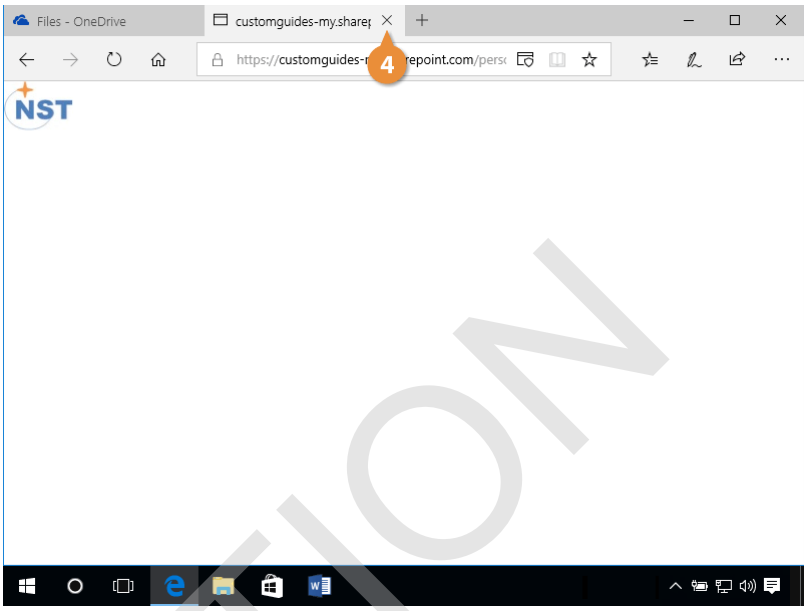
   If you don't see what you need, click **Show more results**.
3. Select an item from the list.

   The file opens in a new tab in the browser.



4 Once you are finished with the file, close the tab.



# Share Files

When you have a file or folder stored in OneDrive for Business that you need other people to have access to, share it.

## Share a File

Sharing files with OneDrive prevents the need to email attachments back and forth while trying to keep track of the current version.

1. Select a file.
2. Click **Share**.

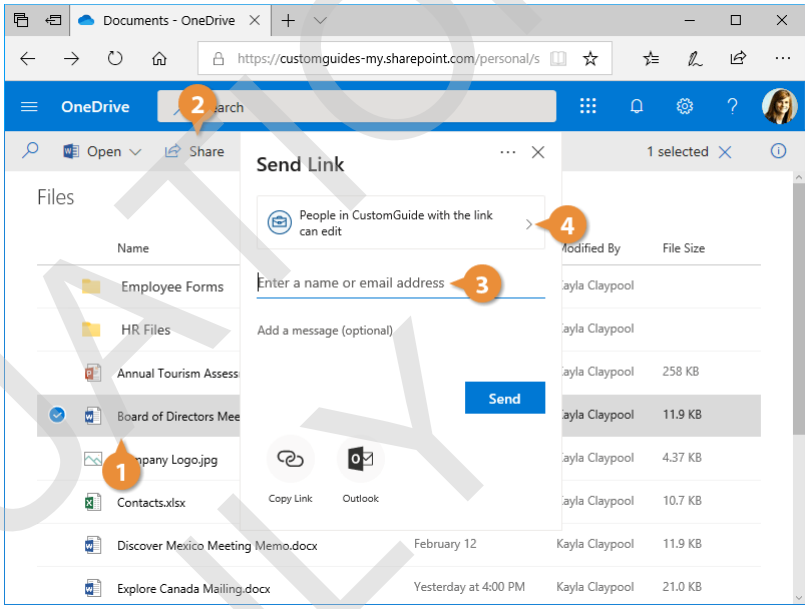
   The Share menu lets you send a link to this document that you can send to other people through email, while changing the file's sharing settings to give them access.
3. Enter the names of the users who need access to the document.
4. Click the **Link Settings** list arrow.

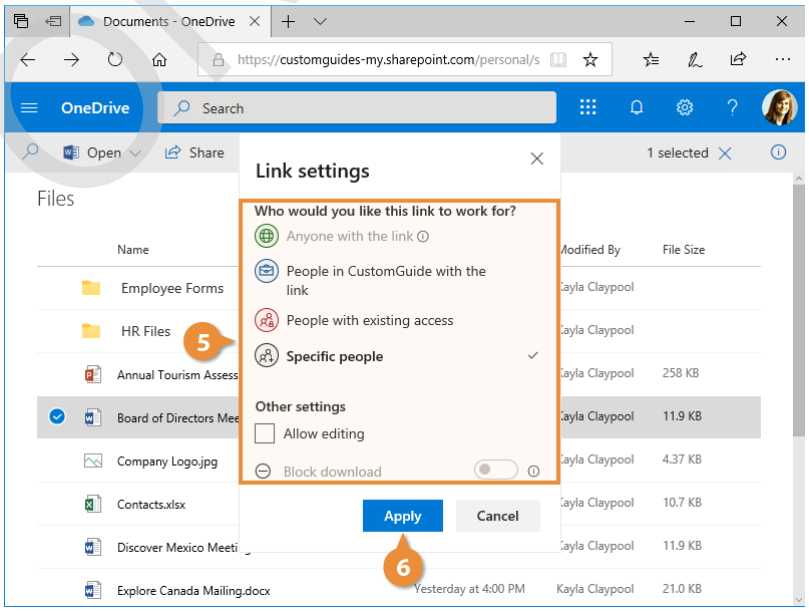
   Customize the link permissions settings.

   There are four options for who you can share the file with:

   - Anyone
   - People in your organization
   - People with existing access
   - Specific people

   You can also choose whether the people you are sharing the file with can edit it by checking or unchecking the **Allow editing** check box.
6. Click **Apply**.



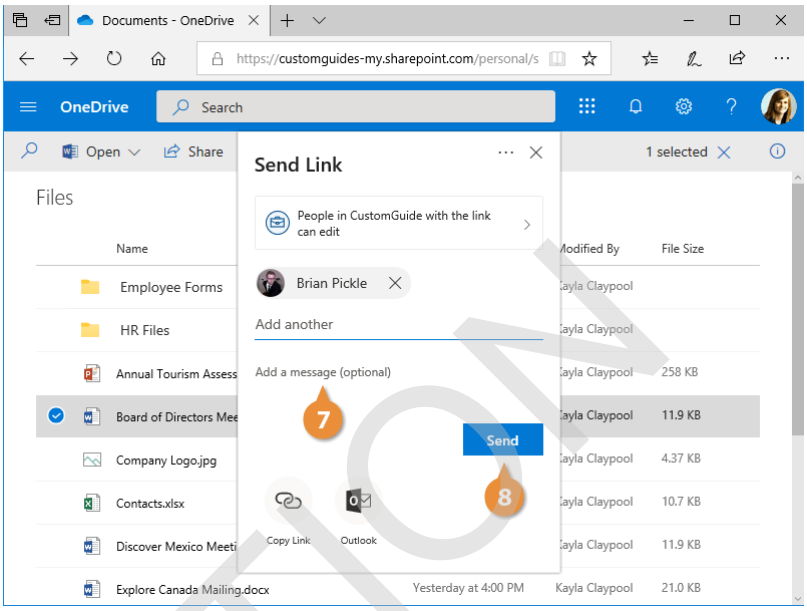



7. (Optional) Add a message.

   If you just want to copy the link, click the **Copy Link** button. If you'd rather compose the email in Outlook, click the **Outlook** button.

8. Click **Send**.

A notification appears, letting you know the document is shared, and the recipients are sent an email with a direct link to the item.




## Manage Access to Shared Files

After you've started sharing things with others, it may be tricky to remember who has access to what.

1. Select a shared document.
2. Click the **Details** button.

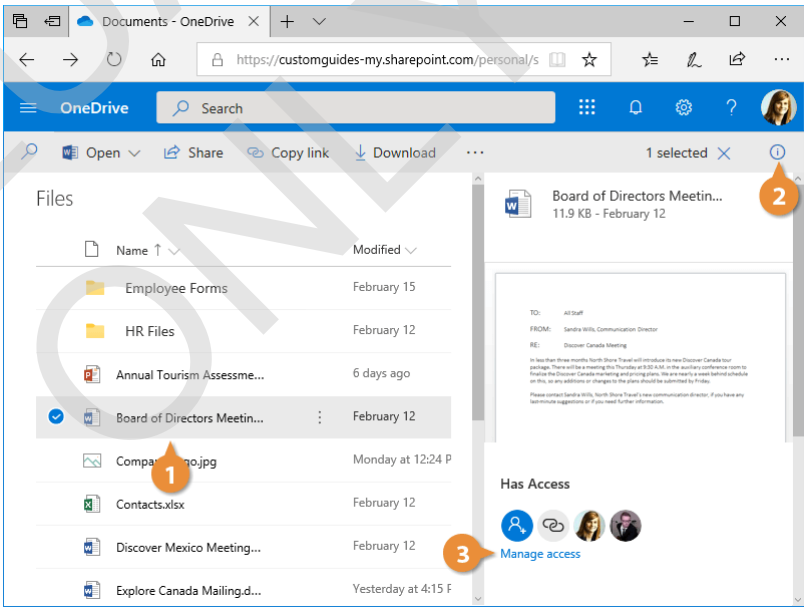
   The Details Pane opens, showing information about the selected file.

   Under the Has Access header, you can see a summary of who this file has been shared with.

3. Click **Manage access**.

Now you can see everyone who has access to the document, and whether they have editing or view only permissions.

From here, you can copy a link to the document or stop sharing the document. You could also click **Grant Access** to invite additional people to view the file.



# Shared Libraries

When you're collaborating on multiple files with a team, use shared libraries to keep everything in one central location.

## View a Shared Library's Files

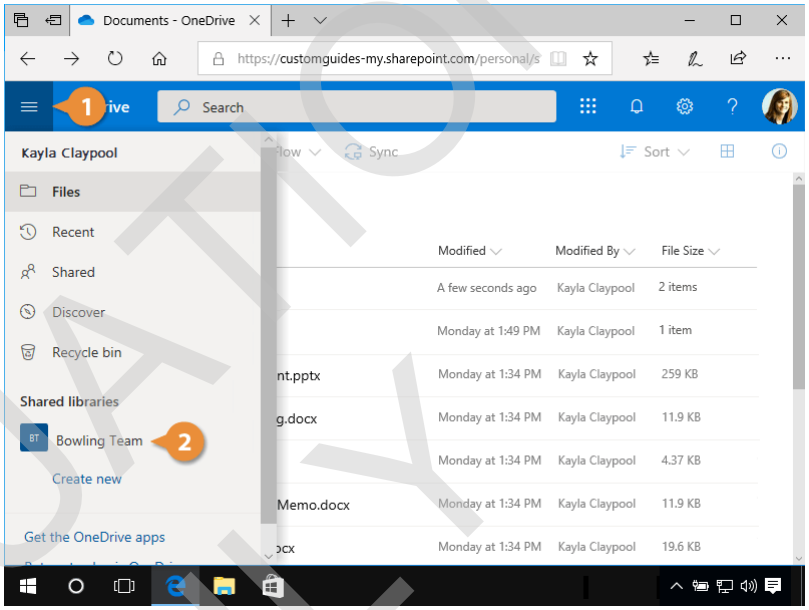
A shared library includes other features, such as a group calendar, task list, and discussion board.

1. If necessary, expand the Navigation Pane.

   Below your files and locations, underneath the name of your organization, is a list of the shared libraries that you're a part of.

2. Select a shared library.

That shared library opens, displaying its files.



## Create a Shared Library

You can also create a new shared library.

1. Expand the Navigation Pane.

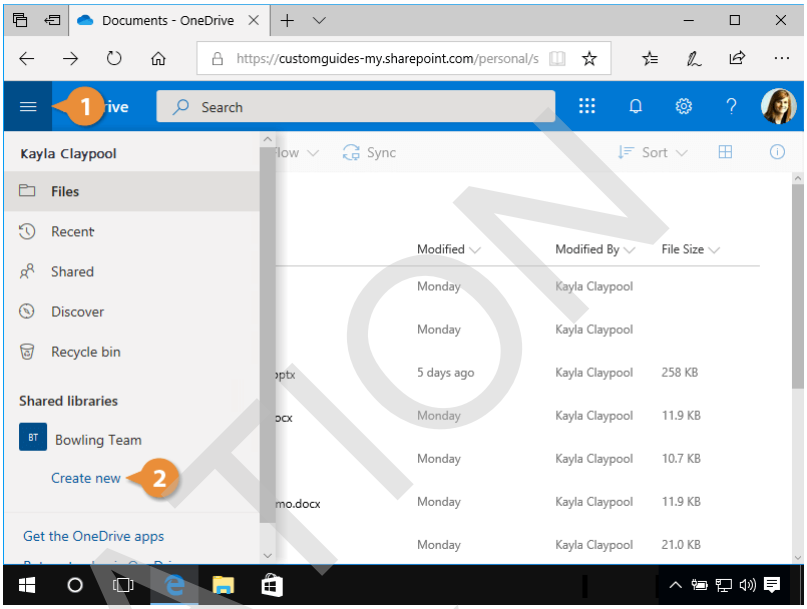
   Click **Create new** below the shared libraries.

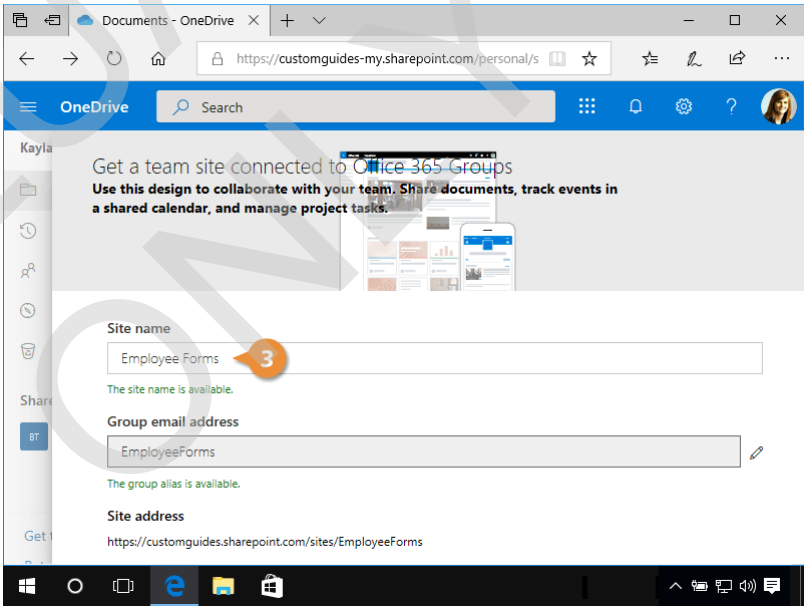
2. A new window appears where you can begin setting up the shared library site.

3. Click in the **Site name** field and type a name.

   Each shared library needs to have a unique name, so it's checked as you type.

   If the name is available, you're ready to move on.

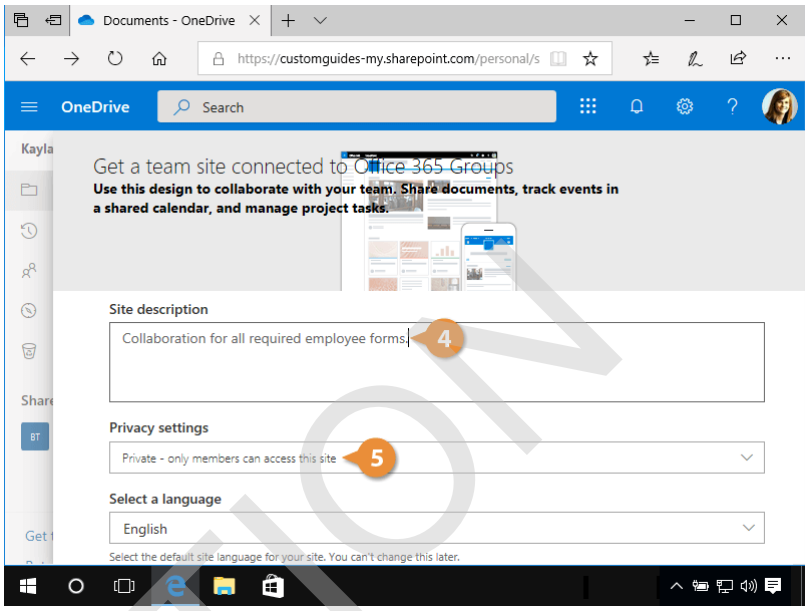


4. Click in the **Site description** field and type a description.

5. (Optional) Select a privacy option.

   - **Public:** This is the default option in which everyone in the organization can see what's in the folder. However, members of the shared library can make edits.
   - **Private:** By setting the privacy level to private, only members of the shared library can see the folder.

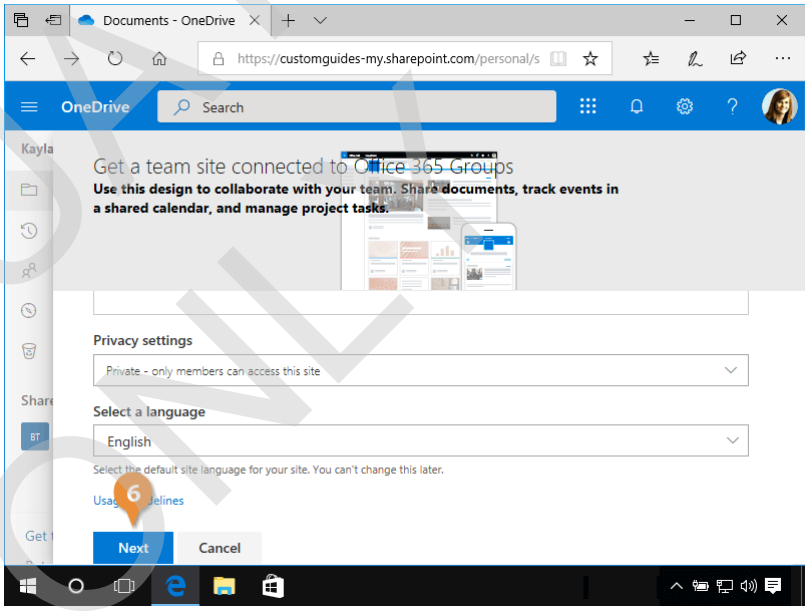



6. Click **Next**.

Now it's time to add additional group owners and members.

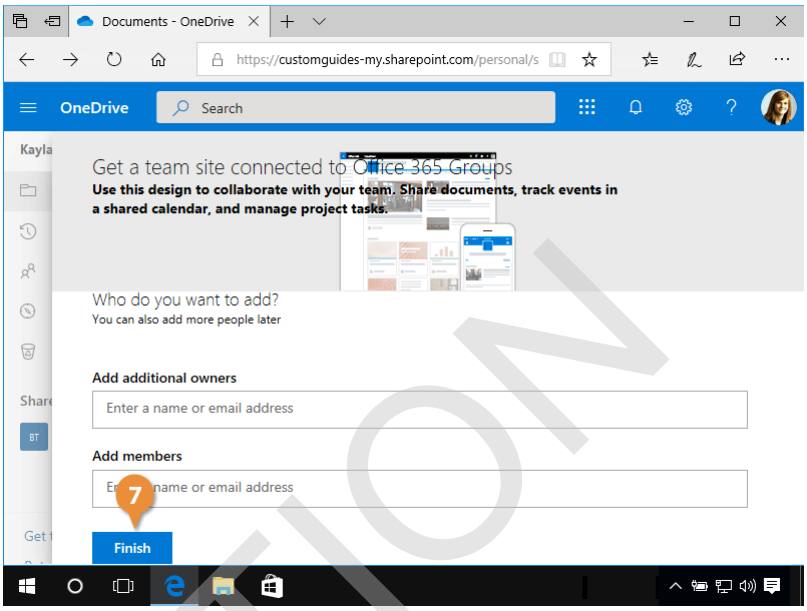
Invite owners and members by entering their email addresses.

Owners of a group have special permissions to edit a group's settings, as well as invite and remove members of private groups.



7 Click **Finish**.

The new shared library is created and now serves as a central repository for group members to hold conversations and store files.



# Version History

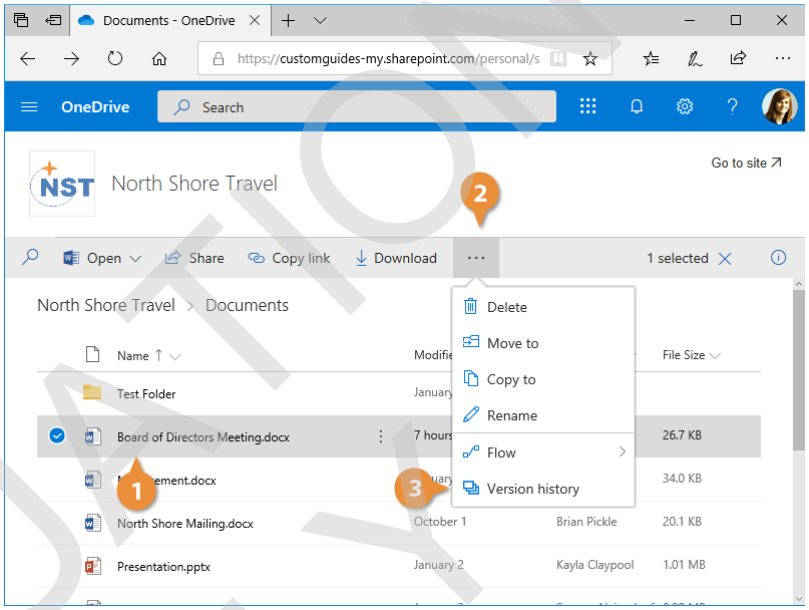
When working with files in an Office 365 site's shared document library, you can see not only the current version of a file, but all the previous versions as well.

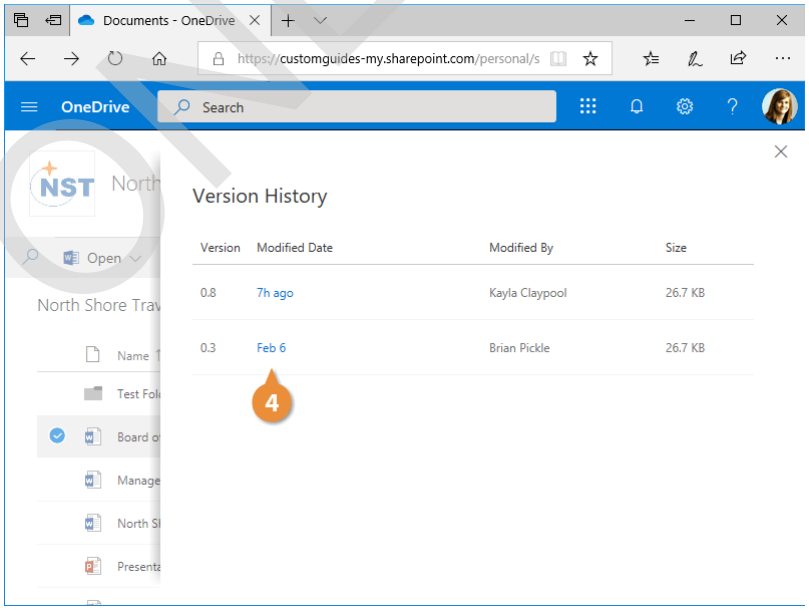
## View Version History

1. Select a file.
2. Click file's **ellipsis** button.
3. Select **Version history**.

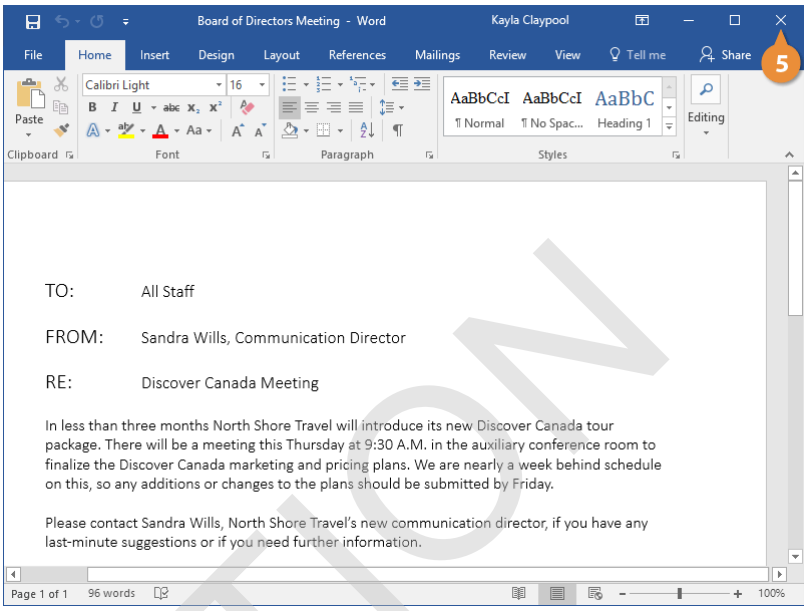
   The dialog box shows all major and minor versions of the file, when they were created, and who created them. These files aren't overwritten, so you can quickly see older versions.
4. Click the date/time for a version.

   That version of the file opens in the program that it was created in. You can't make changes to this version, but you can see how it looks and compare it to the current version.



5 Close the file when you're finished viewing it.

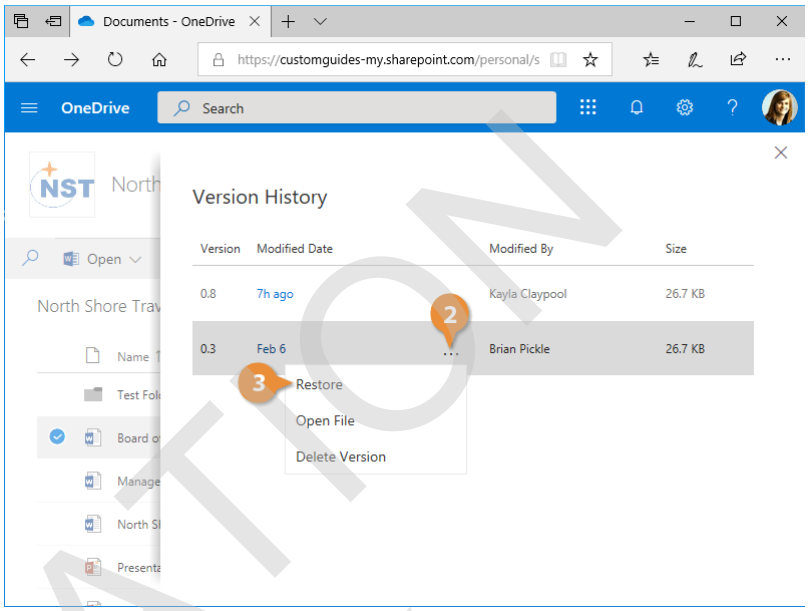


## Restore a Previous Version

If the most recent version of a file isn't working out, you can restore a previous version to use instead.

1. View a file's version history.
2. Click the **ellipsis** button next to a version's date and time.
3. Select **Restore**.

A copy of the selected version is created with a newer version number.



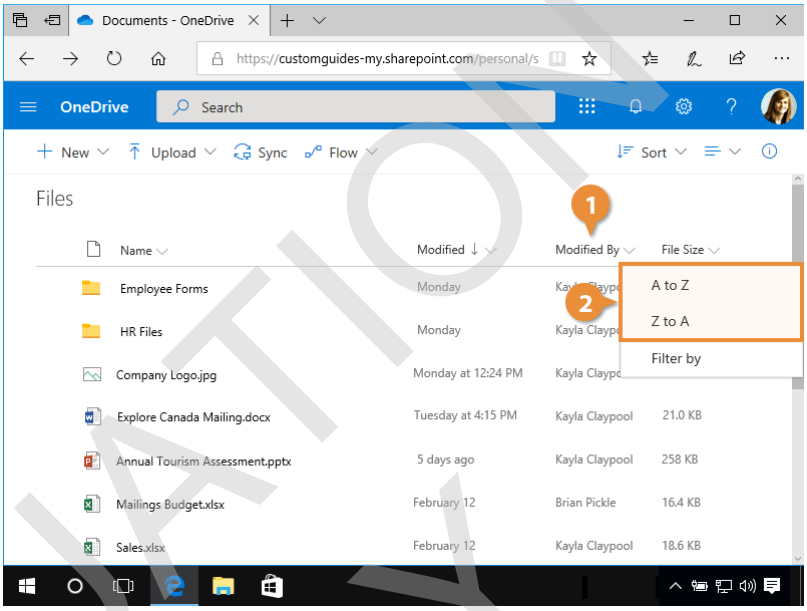
# Sort and Filter

## Sort

Using the Sort feature makes it easier to locate information and keep related information together.

1. Click the column header for the column you want to sort.
2. Select a sort option.

The files are now sorted as you specified. An arrow icon also appears by the column header showing that the column is being used to sort the view.



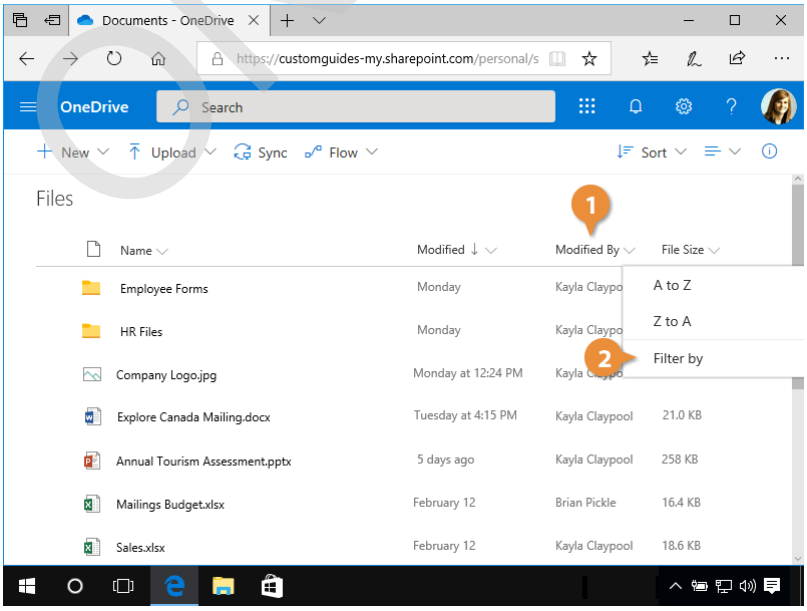

## Filter

If your library contains a lot of items, you can quickly find what you need by filtering.

1. Click a column header.
2. Select **Filter by**.

   A list appears for the possible filter options for the column.
3. Select a filter option.

The column is filtered by the option you selected.

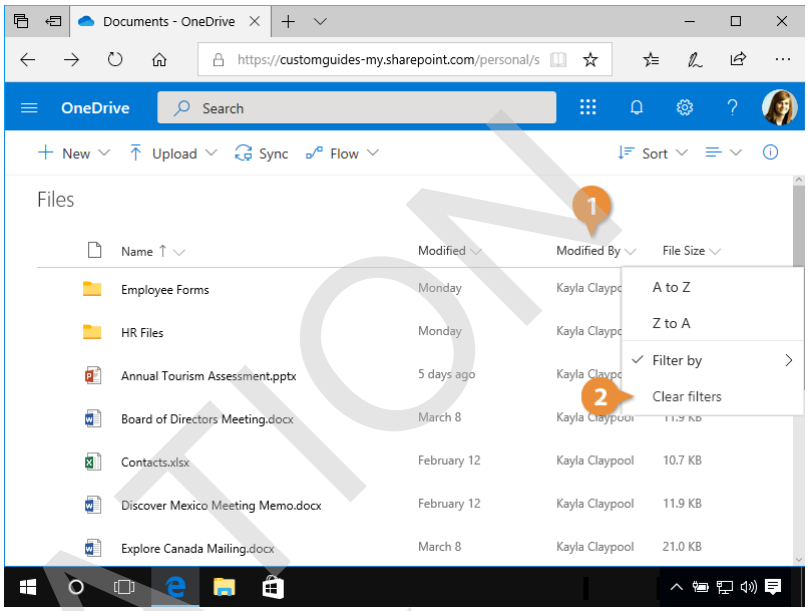


## Clear a Filter

When you're done using a filter, clear it to show all the files again.

1. Click a filtered column header.
2. Select **Clear filters**.

The filter is cleared and all the files are displayed.



# Sync with Your Computer

When you want the files saved in OneDrive for Business to be accessible from your computer without logging in with a web browser, sync the library to your computer. This requires you to install the OneDrive for Business app on your computer.

## Choose Which Folders to Sync

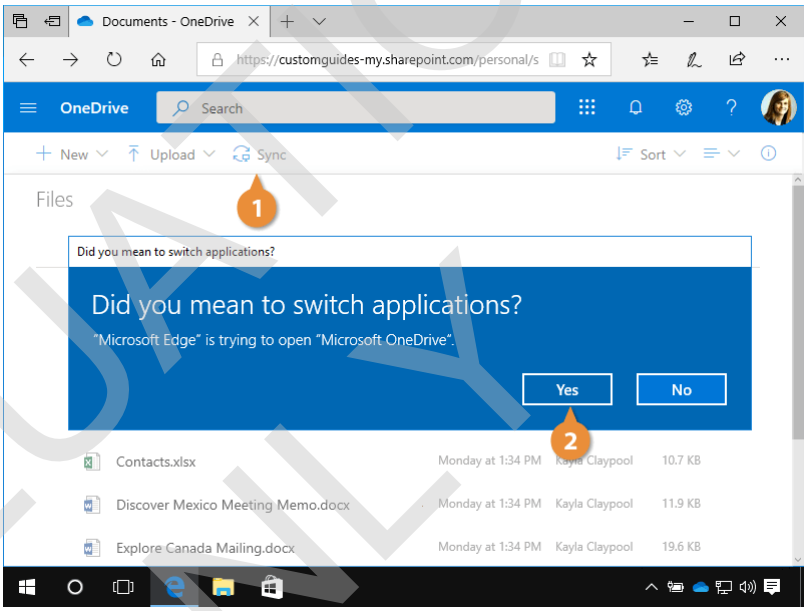
When you install the OneDrive for Business app, you will automatically sync your entire OneDrive for Business library to your computer. You can instead select certain folders to sync while leaving other folders unsynced.

1. Click the **Sync button**.
2. Click **Open OneDrive**.

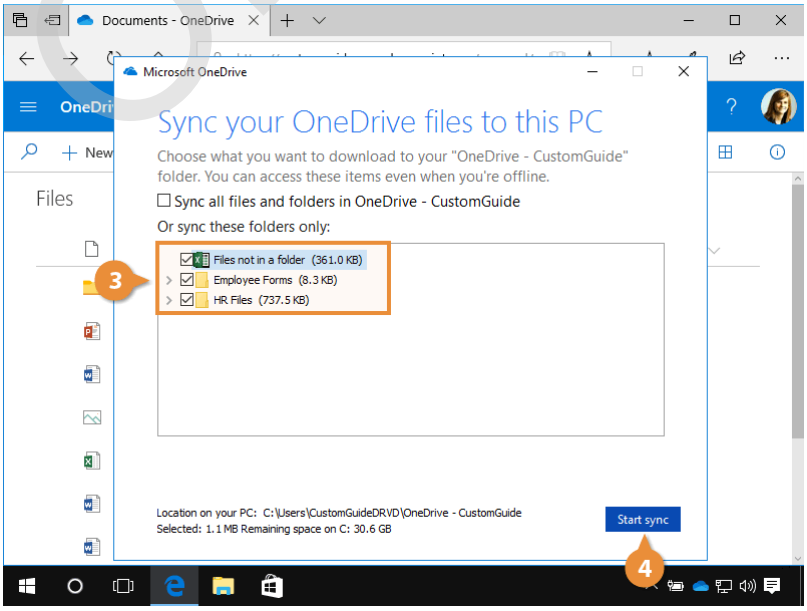
   The OneDrive for Business app opens and shows all the folders and files that are ready to sync.

   Anything that is being synced will be checked, which by default is everything.

   It also shows where the OneDrive for Business folder is found on your computer and how much storage space is available.
3. Select the folders to sync.
4. Click **Start sync**.




The folder sync settings are updated.



## Show the OneDrive for Business Folder

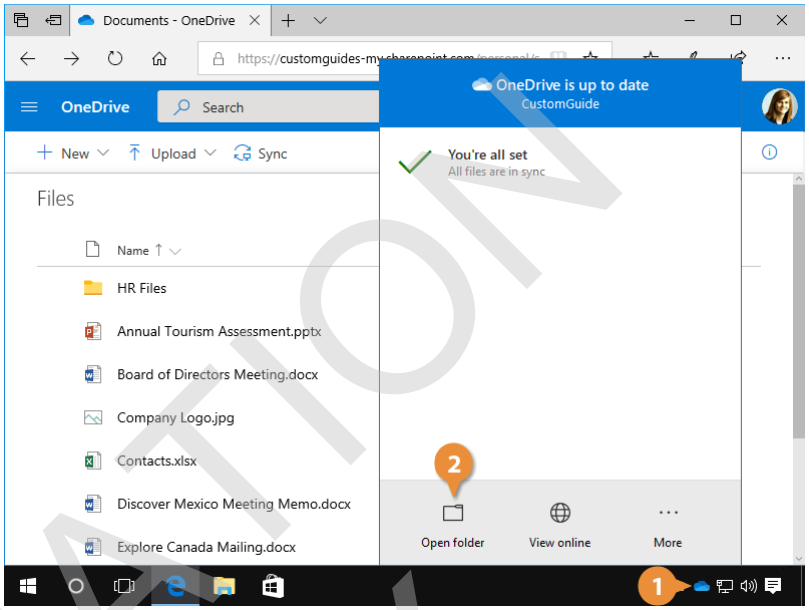
If the location of your OneDrive for Business folder on your computer is difficult to remember, or if you just want to get to it quickly, you can jump right there using the OneDrive for Business app.

1. Click the **OneDrive for Business** icon in the system tray.

   A small window opens, showing recently added and modified files.

   **Tip:** Click the **More** button to access OneDrive settings, pause syncing, or manage your storage.

2. Click **Open folder**.




OneDrive for Business opens in File Explorer. All the files from folders you have synced appear here.

The green check means the file is synced and exactly the same as in OneDrive for Business.

# Help

When you don't know how to do something in OneDrive for Business, you can use the Help feature to find answers.

## Search for Help

1. Click the **Help (?)** icon.

   The Help Pane appears on the right side of the window.

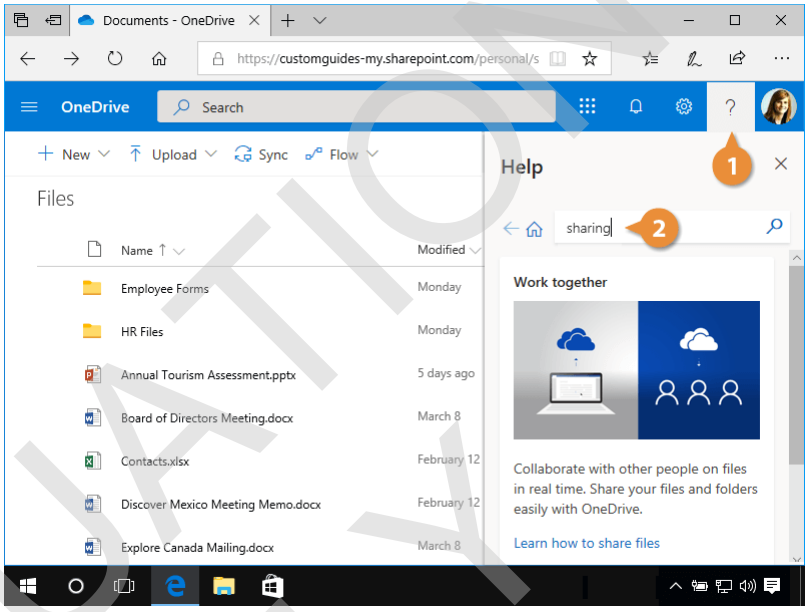
2. Click in the **Search help field and type what you're looking for**.

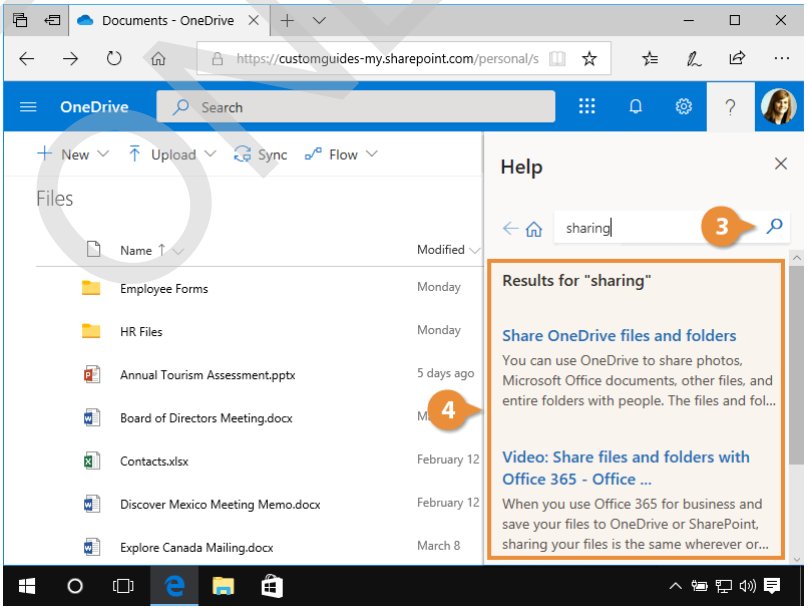
3. Click the **Search button**.

   The Help Pane shows you any items related to the search phrase, as well as relevant help files.

4. Select a help topic.

The Help Pane displays instructions on how to complete the task.



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