

# OneDrive Desktop Guide

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## GLOSSARY

**Web browser:** this is just what you use to get onto the internet, such as Google Chrome, Internet Explorer or Microsoft Edge.

**Device:** whatever you are using to access your work on – desktop PC, laptop or smartphone.

**Cloud:** in simple terms, the cloud is the internet. It's all of the things you can access remotely over the Internet, such as data and programmes. When something is in the cloud, it means it's stored on special internet computers ('servers') instead of just on your device.

**Online/offline:** whether you are connected to the internet or not.

**Application:** the different programmes within O365 are called applications, e.g. Outlook, Word, PowerPoint, Teams. Often these are called Apps for short.

**Icon:** the 'logos' of the different applications (e.g. Word is a blue W, Excel is a green E, OneDrive is a blue cloud) or web browsers (e.g. Chrome is a coloured circle)

**Desktop apps:** applications that are available on your laptop/computer by clicking onto the icon. They may be on your bottom taskbar, or in your Start menu. You don't have to be online to see and access them.

**Window:** In computer terms, a window is an area on the screen that displays information about a programme. You can have multiple windows open, displaying different websites, documents and applications.

**File Explorer:** the 'folder' icon that displays along your bottom taskbar; the one you have been using to find your documents, downloads, pictures and desktop.

**GDPR:** the General Data Protection Regulations. It was introduced to standardise data protection law and give people in a digital world greater control over how their personal information is used.

**Ellipsis:** the 3 dots you will find next to various names and commands. An ellipsis tends to be used when there is not enough room to display all options.

**Microsoft 365 and Office 365:** this is essentially the same thing and both names are used for the applications in this guide.

**Uploading:** means data is being sent from your computer **to** the Internet. For example, when you move a document from your desktop into your OneDrive, that is uploading because you are moving it to the Cloud.

**Downloading:** means your computer is receiving data **from** the Internet. For example, if you want a document from a website, you can download it to your desktop.

**Windows Key:** this is a bottom-left key on your keyboard with the Windows icon on it.

**SharePoint:** this is the platform for storing and saving files in Office 365. You do not have to do anything currently as SharePoint is not 'active' at Barnardo's, other than behind OneDrive.

## GETTING STARTED

The screenshots in this guide are for Word documents, but the principles and options are the same for Excel workbooks too.

OneDrive is your personal and private storage based in the Cloud. Unless you deliberately share a document with others, nobody can see any of your documents on OneDrive.

It's important to remember that OneDrive and Content Server are not the same thing and OneDrive does not replace Content Server. You should continue to use Content Server as your SUR and for non-SUR documents that are linked to case files.

OneDrive is your storage space for your own documents and for collaboration purposes. If you want to collaborate on a document that is within Content Server (to share it and work on it at the same time) you could move it into your OneDrive, share it with your colleagues, then move the final version into Content Server once completed.

As with all Microsoft 365 applications, there are two versions of OneDrive: Online (also known as Web or 'on the web') and Desktop. **This guide is for using OneDrive Desktop app.**

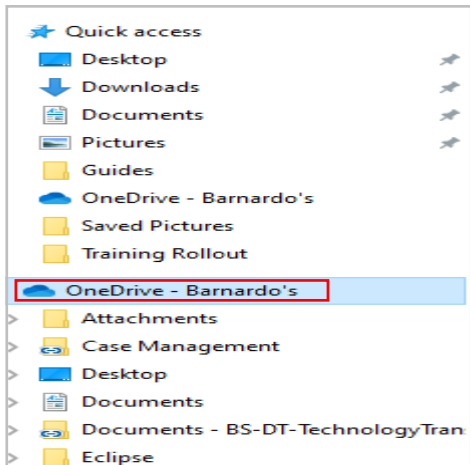
**OneDrive Online** has its functionality and commands presented in a kind of 'one-stop shop', which you can see in the separate OneDrive Online guide on the Inside Barnardo's Microsoft Training and Guidance page. You need to be signed into [www.office.com](http://www.office.com) to access the online versions of your O365 apps.

**OneDrive via your desktop** has mainly the same functionality but in a different way as it is all done via File Explorer and right clicking to see commands. It still allows you to:

- quickly access your saved documents
- open, work on and save a document
- share a document/folder straight from OneDrive desktop site
- manage access and sharing permissions for documents
- choose settings which give you access to a document offline
- as with any document in File Explorer, you can also drag and drop a file into a different or new OneDrive folder should you wish to move it.

**(Tip:** For a shortcut to your File Explorer, press Windows Key + E)

You can find your OneDrive site in the list on the left of your File Explorer window. Any folders you have in your OneDrive will display underneath the OneDrive site listing – there will be some automatically there, such as Pictures, Documents and Desktop.





Once you click on ‘OneDrive – Barnardo’s’, your documents and folders will appear to the right for you to choose which you want to view.


## Icons


On the desktop version of OneDrive, there are icons against each of the files/folders. For example, you can see below that there are five types of icons showing against these folders and files.





### What do the icons mean?


- 
 A blue cloud icon next to your OneDrive files or folders indicates that the file is only available online. Online-only files don't take up space on your computer. You can open online-only files when your device is connected to the Internet but not when you are offline.
  
- 
 A green tick means when you open an online-only file, it downloads to your device and becomes a *locally available* file. You can open a locally available file anytime, even without internet access. If you need more space, you can change the file back to online only; just right-click the file and select “free up space.” A cloud icon will appear instead of the green tick.


 If you see a 'person' icon next to your files or folders, this indicates the file/folder has been shared with other people.


 A white tick indicates files that you have marked as "Always keep on this device". These 'always available' files download to your device and take up space, but they're always there for you even when you're offline. For example, your Desktop is always available.

 If you see a chain icon next to your OneDrive folder or files, this means they are on a shared SharePoint site. These folders/files will only appear in OneDrive if you have chosen to create a OneDrive shortcut to the site.

 The circular arrows over the OneDrive icons signify that sync is in progress. This includes when you are uploading files, or OneDrive is syncing new files from the cloud to your PC.

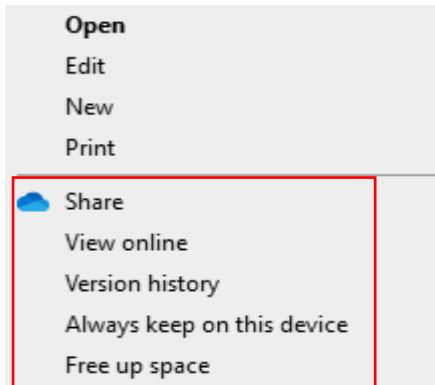
 A red circle with a white cross means that a file or folder cannot be synced. If this does not resolve itself – please visit <https://support.microsoft.com/en-us/office/fix-onedrive-sync-problems> for some help. It could be that someone has worked on the document in desktop app but has not been on Autosave.

 A greyed-out OneDrive icon in the taskbar means you're not signed in, or OneDrive setup hasn't completed. On a PC, press the Windows key, search for OneDrive on the left-hand list and then open the OneDrive desktop app.

 OneDrive will show a padlock icon next to the sync status if the file or folder has settings which prevent it from syncing.

## OneDrive Desktop use

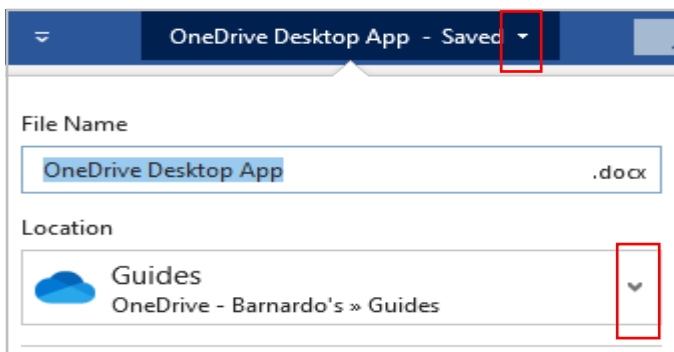
Once in File Explorer, to open a file on OneDrive using desktop you can either double click as with any document, or right click on the document you want and a box will appear with some OneDrive functions to choose. These are open, edit, new, print, share, view online, version history, always keep on this device, and free up space.



### Open/Edit

These will allow you to access the file and work on it.

In the drop-down arrow next to the document title, you can change the document name or the location of where the document is saved (using the drop-down arrow on location).



## Saving your changes

If you make amendments, there are 4 ways to save your document and the changes.

### A) Autosave button

When working on a Microsoft document within the desktop app, there is the option to 'autosave'. In the top left corner of your document is a toggle button called Autosave.



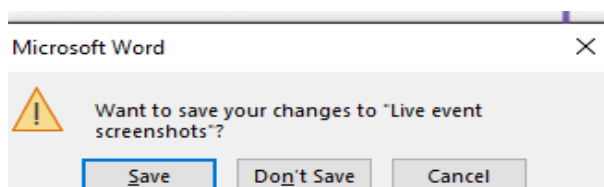
Switching this on will ensure your document's updates are saved automatically. You will be able to see 'saving' next to the document name when you are making changes, which changes to Saved when you stop.



Autosave is an optional feature but should be your default because it prevents loss of data caused through forgetting to save or problems with your device. It also means you do not have to think about saving any other way, just close your document and it is all done.

### B) Clicking on the 'X to close' in top right of the document

If you choose to close the document and have not selected Autosave, you will be asked if you wish to save your changes.



Click Save and the document will be updated with your amendments saved on OneDrive.

### C) Using the Save command

At the top left of your document, there is a Save option.



This will save the changes you have made but keep the document open. You will notice that the document title now has 'saved' next to it.



## D) Using File and Save

Click on File in top left of your document and choose Save from the list. Again, this saves your changes but does not close the document.



When Save is clicked, it returns you to your open document, but you will notice that the document title now has 'saved' next to it.



## Share a document

This has the same controls as OneDrive Online sharing.

### Protocols

#### Points to remember for sharing if you are new to OneDrive:

When you **share** within OneDrive, you are sharing the **LIVE** document, which is why there are various controls as shown in this section. Don't worry though - the system will only do what you ask it to, you are in control of sharing! If you are nervous, why not share a few test documents with colleagues between yourselves?

- Do you want to share a whole folder OR just a document in it? If it is just a single or couple of documents within a folder, make sure you go into the relevant folder and select the document(s) individually.
- Are you sure of who you want to see the document/folder? Use the following sharing options wisely to control access to your document. Where relevant, use the most restrictive/secure links to prevent giving more access than the recipient needs.
- If collaborating or you need input from colleagues, use 'Share' or 'Copy Link' instead of sending attachments. When you send email attachments, you end up with duplicates you'll need to collate if people make changes. With Share and Copy link, everyone works off the same copy; Version History will track all the changes for you.

**GDPR:** If you are sharing documents that include the **personal data** of others, please bear in mind the GDPR regulations. Personal data is information or a collection of data that could lead to the identification of a living person. This includes name, address, date of birth, but also genetic, biometric, health, racial, ethnic data or around religious or political beliefs.

The GDPR requires you to have consent from an individual to share their personal data, that it is collected and shared for a specific and valid purpose, that it is collected lawfully and transparently, kept no longer than necessary, is accurate/up to date, and is kept securely.



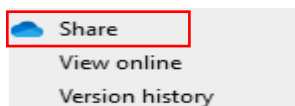
## Ways to share

There are a few ways of selecting Share.

- 1) If you are **still in** your document, you can select Share from the top right corner. This button appears in Word, Excel and PowerPoint.



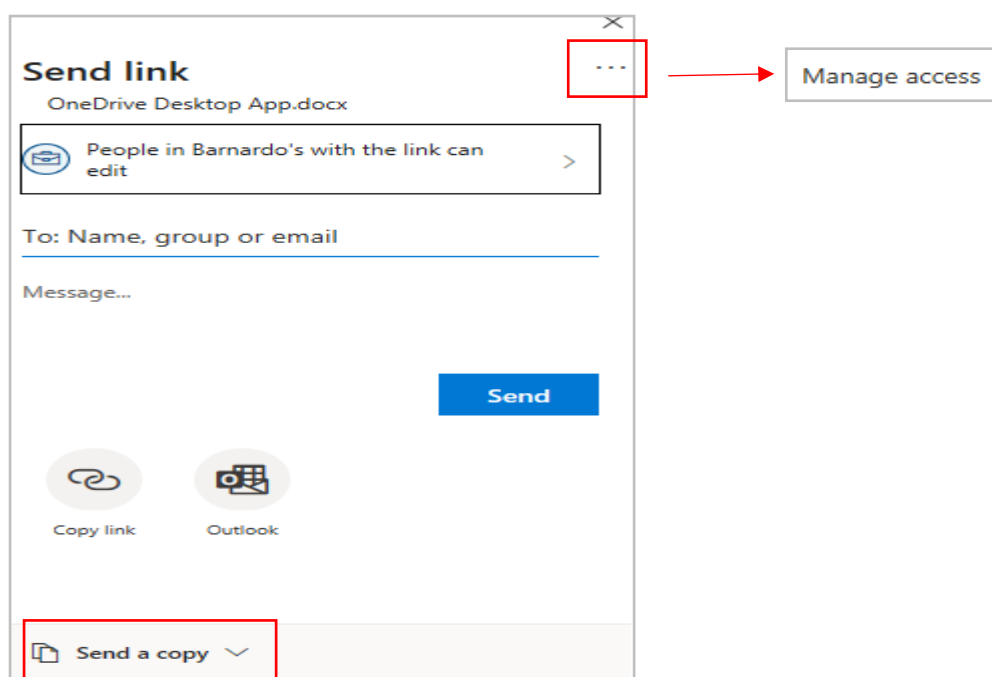
- 2) If you are **not** in the document, you can right click on it in the File Explorer list and choose Share.



- 3) You can choose File and then Share.

When you select Share using **from within the document** (method 1 above) or **using File and Share** (method 3 above), a Send Link box will appear for you to set your sharing controls and choices.

(See page 16 for the Copy Link and Outlook choices, and there is an ellipsis for Manage Access which we will look at on page 14)



### Send a copy

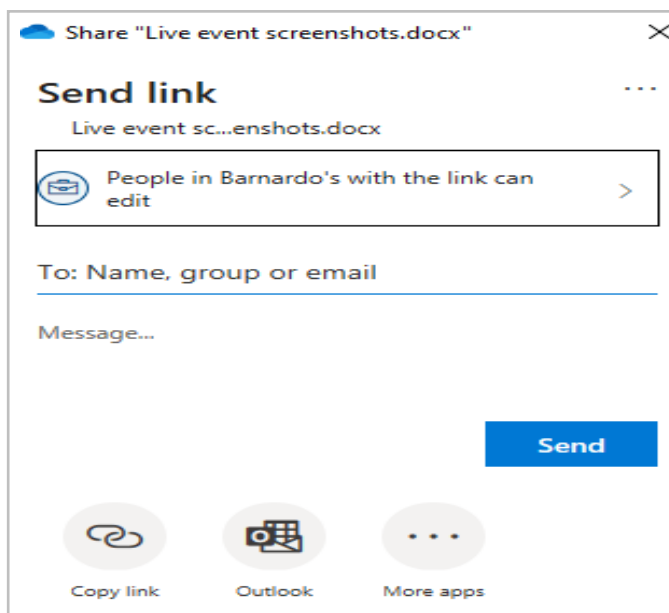
This gives you the option of sending the document as an email attachment instead of using OneDrive collaboratively in the cloud. This could be used if you are sending something like an agenda or a document that is for information only and needs no input from others.

When you use the drop-down arrow, you can choose between sending it as a Word document or as a PDF.



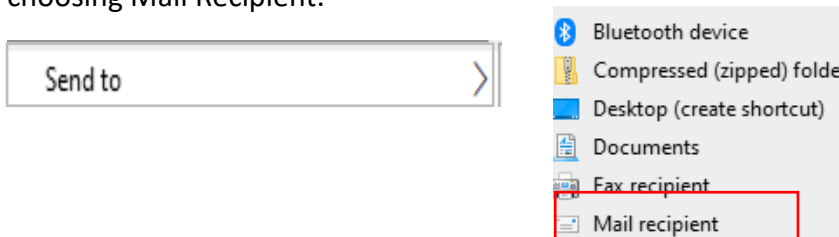
Click on the format you want and an Outlook email will open with the document already attached. Type in your recipient(s) and any message you want to include, and press Send.

When you select Share using method 2- **from File Explorer** - a Send Link box will appear for you to set your sharing controls and choices.



(See page 16 for the Copy Link and Outlook choices, and there is an ellipsis for Manage Access which we will look at on page 14)

This box is slightly different from the other two sharing methods as it gives you no option for 'send a copy'. This is because you would use the normal way to attach a copy from File Explorer, using the Send To option when you right click on a document's name, then choosing Mail Recipient.



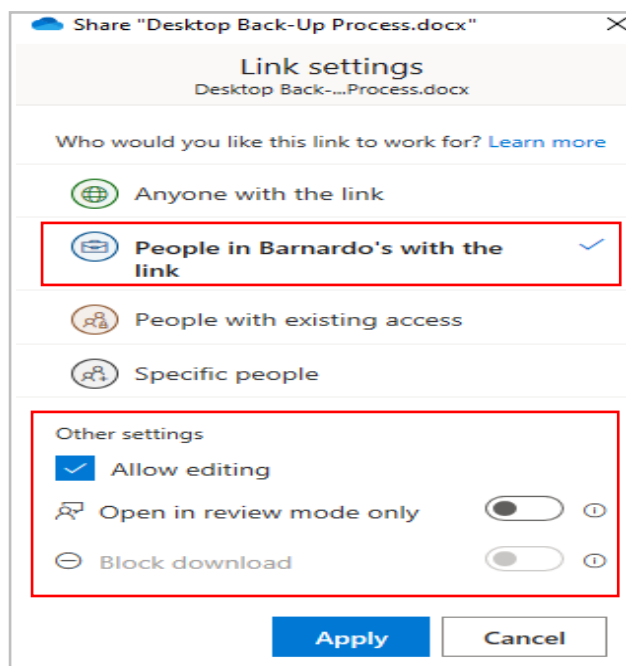
## Sharing a link

If sharing a link instead of attaching a copy, you will need to set your controls and permissions.

At Barnardo's, the default option is **'People in Barnardo's with the link can edit'**, so if this is okay you can go ahead and input your recipient's name, email or a group name and write a message to accompany the email.

This option means the link only goes to Barnardo's colleagues with whom you share BUT can be accessed and edited by anyone within the organisation if the link is forwarded to them by someone other than you.

If you click onto **'People in Barnardo's with the link'**, it will bring up a link settings box where you can see some controls for this option:



As you can see, there is a setting to **allow or not allow editing** for Read Only purposes.

You can also block people from downloading the document by switching the **Block Download** button across. This is another good way of controlling your document's confidentiality and future use. You cannot select 'block download' unless the 'allow editing' is unticked.

When sharing a Word document, there is also an option to set the document to **Review Mode Only** – recipients can comment but cannot make changes to the document content.

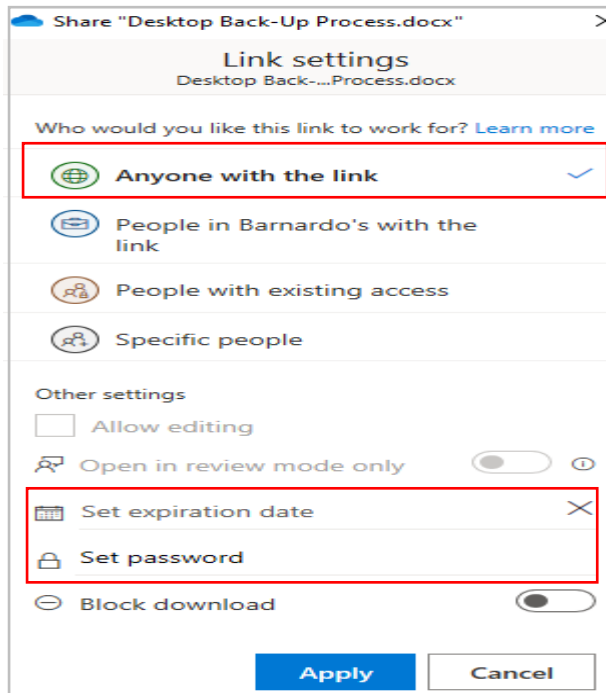
Once you have made your choices, click Apply and the original Send Link box will re-appear to allow you to input a name(s) and optional message.

Anytime you are in this Link Settings box, you can change your choice for 'who would you like this link to work for'. You don't have to go back a step and re-select, and when you change your selection the box will change appearance depending on the sharing option you choose.

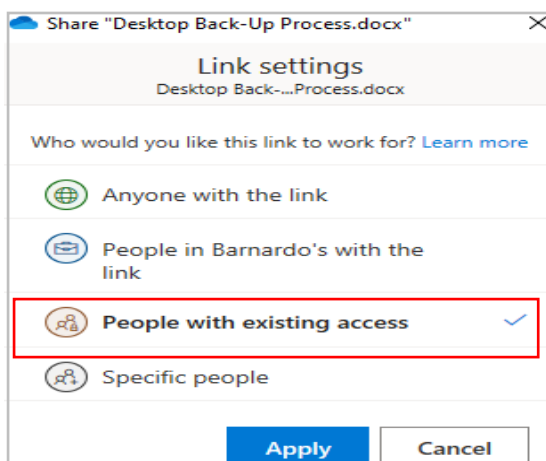
But instead of the default option, you can choose who to share with:

**Anyone with the link:** this is far less secure than other sharing options because a link could be forwarded publicly without your permission to both internal and external users.

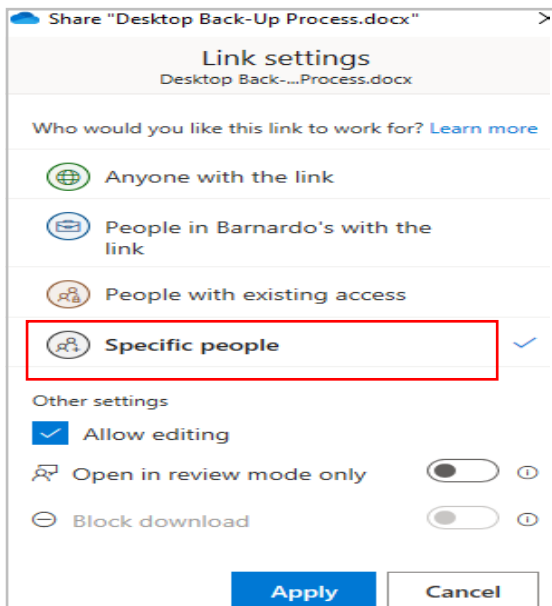
For this reason, you can set an expiration date (e.g. for work with a deadline) and/or password to control access. Obviously with a password, remember to provide it to chosen recipients.



**People with existing access** (those with whom you shared it before). This is a more secure link than the one above. Essentially this link does not generate any extra privileges for the content but maintains the security/permissions it already had.

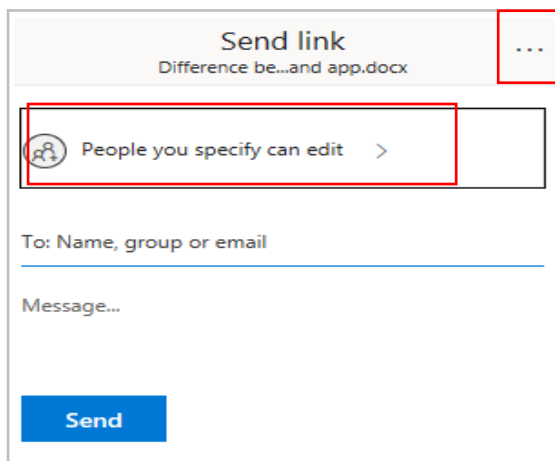


**Specific people** (goes to only those named in your Send Link box). This is the most secure option and should be your default for sharing documents externally of Barnardo's.



For this, you tick this option, click Apply, and it takes you back to the Send Link box for you to type in the email addresses of those you wish to share the document with.

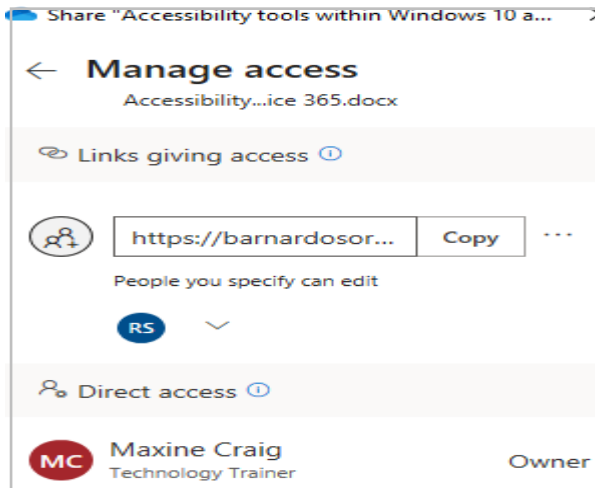
Notice now that the link box now shows 'people you specify can edit' rather than 'people with the link'.



## Manage Access

The Send Link box also has an ellipsis (see page 10). This gives you your 'Manage Access' box.

Manage access is just that, your way of managing permissions and access to your document. It shows you who has access because you have already shared it, the level of permission (can edit, etc), who has direct access, and allows you to amend this access.



There are two parts - 'links giving access' and 'direct access', which refer to how you have shared the document.

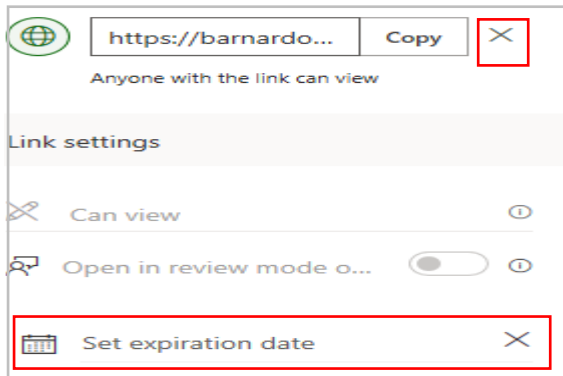
Links giving access – shows all links that people may use to access your item.

For example, the box below shows that the link has been shared via OneDrive with a setting of 'anyone can edit', but also emailed out with settings of 'people in Barnardos with the link can edit'. The second link was for colleagues to check it before it was shared to a wider audience and could be deleted now.

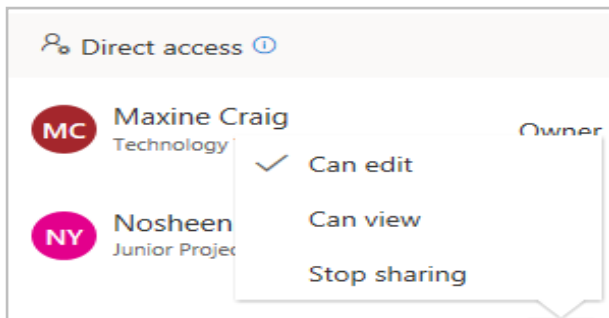


If you click into the ellipsis, you can set an expiration date if the link was share as 'anyone with the link can view'. You even can do this after it was sent to people if you decide to remove access after a certain period of time.

Or you can click on the X next to the link next to 'copy' and remove the link, which stops the access.



Direct access – shows the people and groups that have been given direct access to your item. If you click onto a name in the Direct Access section (apart from yourself as Owner), you can change editing rights and even stop sharing.

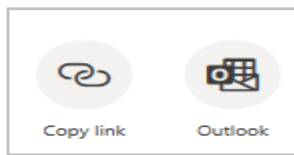


If you select 'stop sharing' you do get a box checking if you are sure, which you can cancel if it was an error.

Remember to click **Apply** to save your any of your changes to the link settings for all of these sharing options

When shared, the document opens for a recipient in their web browser. Any changes made by other people are shown in real time.

The other options in your original Send Link box (from page 10) are Copy Link and Outlook.



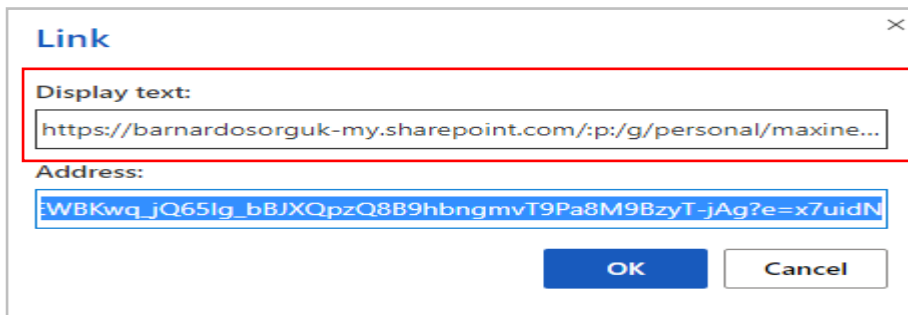
#### Copy link:

You can copy the link if you prefer to put it in an email yourself or need to paste it into, say, a Word document or PowerPoint. You can click onto the link once created to set the normal sharing controls – it displays the same choices as the Share method.


If you paste the link (Ctrl + V) into an email, it will automatically convert the lengthy link into a neat document link:

 [Collaborating using Office 365.pptx](#)

However, it does not do this when pasted into a document such as Word, but you can ‘tidy’ it yourself by right clicking on the link once pasted into the document (put a space after it to convert it to a live hyperlink) and choosing Edit link.



Change the Display Text box to the name of the document and click OK. Your link will now display as a nice clear name rather than a long file path!

 [Collaborating using Office 365.pptx](#)

#### Outlook

Choosing the Outlook option is a quick and easy way of sharing too. It opens up an email and automatically inserts the link into the email body -

**“Here's a OneDrive link to [Accessibility shortcut keys.docx](#).”**

You can click onto the link once created to set the sharing controls – it displays the same choices as the Share method.

All you have to do is type in the recipient’s email address in the To field and it is ready to send.

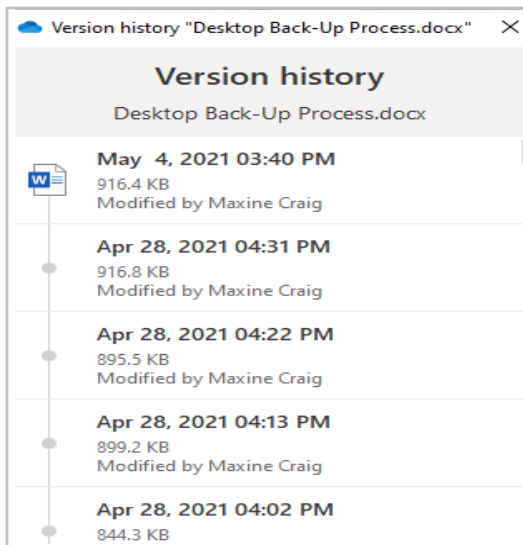


## View online

Choosing this opens the document in new browser window, the 'online' version of the document.

## Version history

This option gives you the same type of version history as OneDrive Online. You can see previous versions in case of errors or accidental over-typing, etc. You can see the versions in date order, with modified by and modified date details.



If you click onto the ellipsis, you get a choice of actions: Restore, Download or Delete.



**Restore:** choose Restore and it creates a **new** version which replicates how the document looked on whichever version you have chosen. Note that it does NOT delete the 'wrong' version unless you tell it to.

**Delete:** you may wish to delete any or all previous versions of a document – for example, an agenda, or if you have your final version of a report and have no need for the drafts leading to that final draft. You can also use this function to get rid of any incorrect versions that had errors on, such as accidental overtyping or deletion of information. If the version is wrong, why keep it?

**Download:** you can download a copy of a particular version so it appears in your computer's download folder.

### Always keep on this device

Choosing this will automatically download the file to your device and takes up space, but it will always be there even when you're offline. Choosing this option will change the icon next to the document from a green tick to a white tick (as per the icon guide on page 2).

### Free up space

When you hover over a document/folder name in your File Explorer OneDrive list, it displays a box telling you the document type (e.g. Word), size, date modified, and 'availability status'.

What this option does is switch a document's availability status from 'available on this device' to 'available when online' to free some space on your device. It consequently changes the document's icon from green tick to cloud.

