

OneDrive Online



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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.

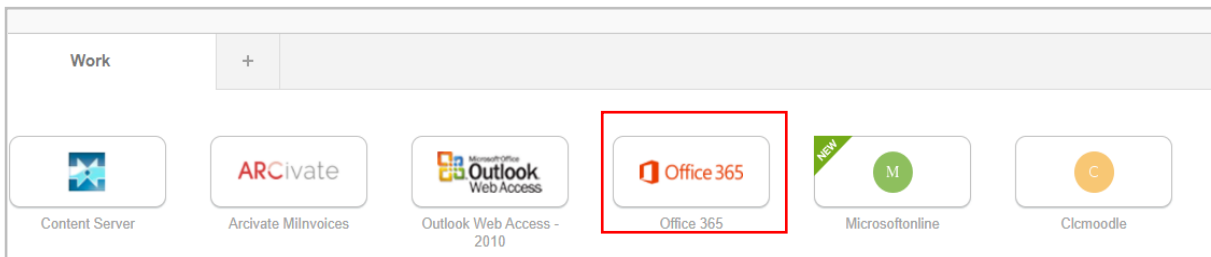
GETTING STARTED

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

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.

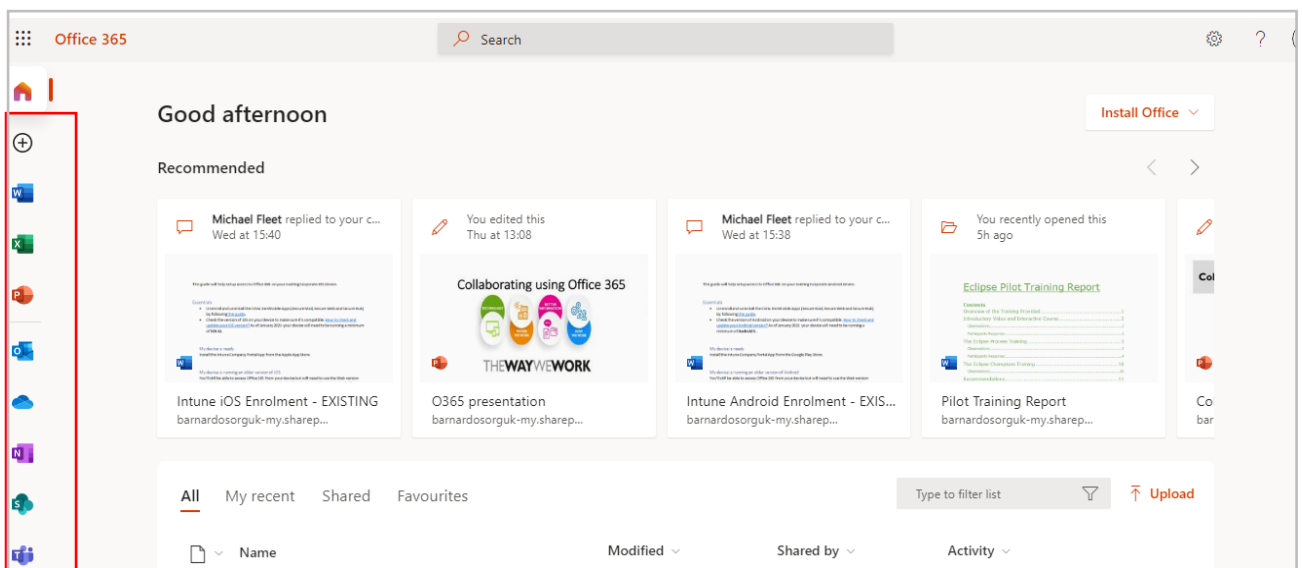
OneDrive is your storage space for your own documents and for collaboration purposes. If you want to collaborate on a document that is within Content Server (to share it and work on it at the same time) you could move it into your OneDrive, share it with your colleagues, then move the final version into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

To access Office365 applications, log onto Office.com <https://www.office.com> or choose Office365 from your Barnardo's OKTA Dashboard screen as below <https://login.barnardos.org.uk>.



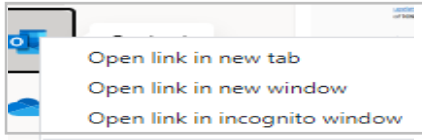
Below is your Office 365 home page, your 'landing' page.

Don't worry about how busy it may look, it's just trying to help you!

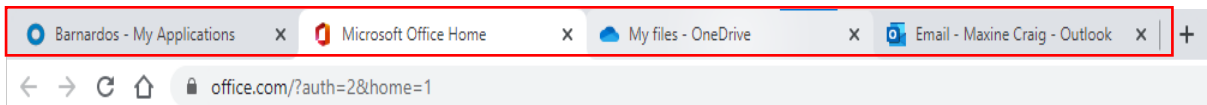


On the left, you can see all the symbols – known as icons - relating to the O365 applications you can use. If you hover over an icon, it tells you the application name (Teams, OneDrive, Word, etc)

Right click onto the icon of the app you want, and it gives three options to open:



- New tab opens as a tab along the top of your existing window. Some prefer this option as it keeps everything in a row:



(**Tip:** you can use **Ctrl + Page up/down** to move easily between open tabs on your online browser. This is useful if you have no mouse)

- New window opens in a separate window to the rest of your opened systems. This is useful if you want to be able to move them around or need to view two apps/systems at once, either via a dual screen set-up or using the 'snap' feature in Windows 10.

To Snap, select the window you want to snap and press the Windows Logo Key + left arrow or right arrow to move the window to the side of the screen where you want it to be. You can also move it to a corner manually using a snapping motion)

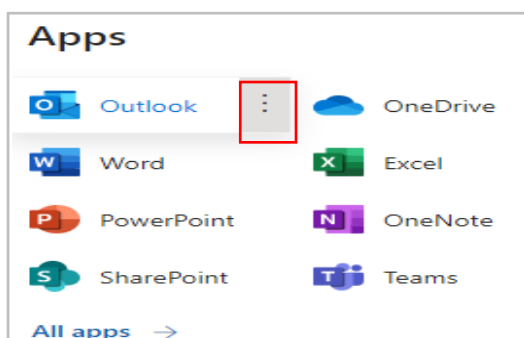
(**Tip:** you can use **Alt + Tab** to move easily and quickly between the open windows. Keep Alt pressed down and click on Tab each time you wish to move to the next window)

- You will rarely, if ever, use 'incognito window.' It is to do with hiding browsing history.

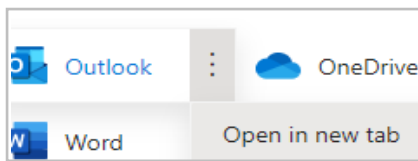
Navigation tip: When you are in any Office 365 application, you can open another application by using the O365 App Launcher. This box of 'dots' appears in the top left corner of all O365 applications:



Clicking onto this will bring up your list of apps

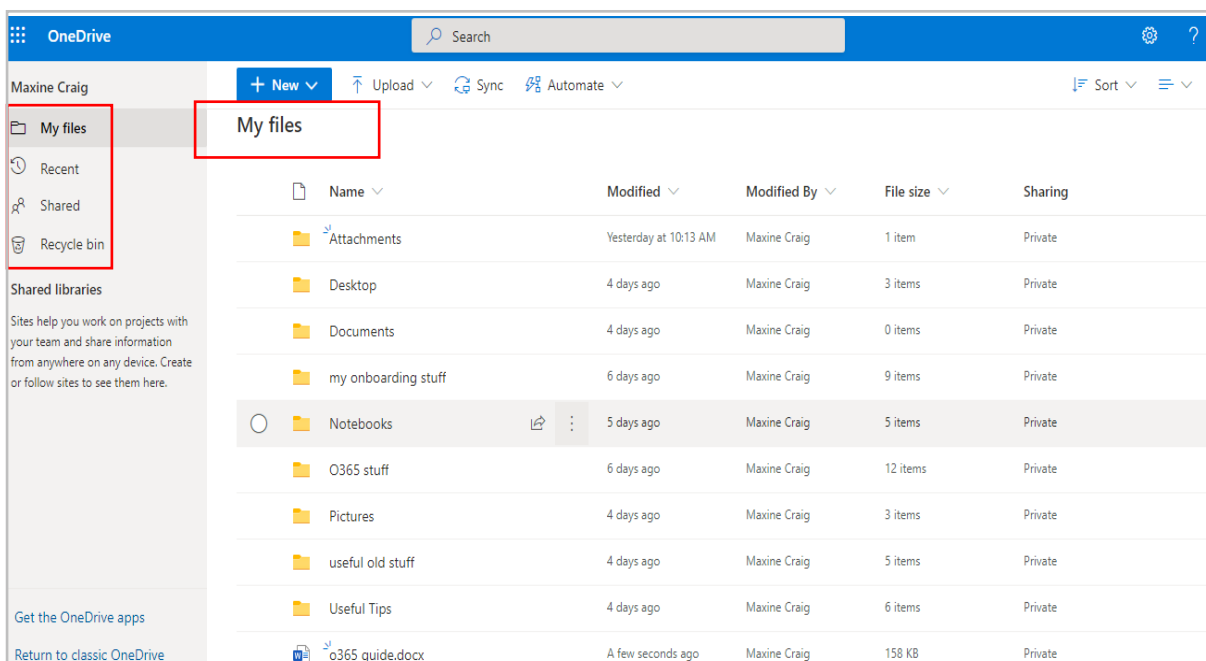


Note: If you click straight onto one of these app icons, it will open the new app in place of the browser tab you are in. However, if you click onto the 3 dots next to the app name, you can choose to open the new app in a new tab.



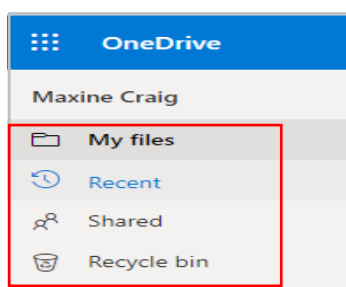
ONEDRIVE

OneDrive is your personal storage base. It's important to know that, unless you deliberately share a document with others, nobody can see any of your documents on OneDrive. **It is private to you.**

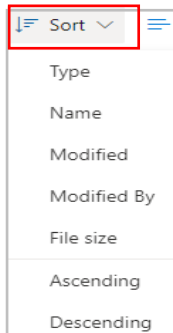


Your OneDrive home page shows you all the documents and folders you currently have in your OneDrive.

There are 4 'sites' on the left within OneDrive to choose: My Files, Recent, Shared and Recycle Bin

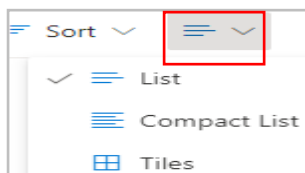


You can sort the files in your OneDrive in different ways. Click onto Sort in the top right corner of OneDrive and choose your preferred display.



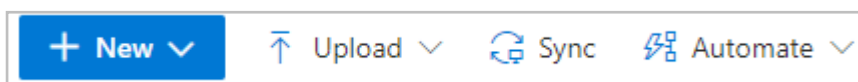
MY FILES - OVERVIEW

All your stored documents and folders on OneDrive will appear in My Files. When viewing these, you can change the way your documents are shown by using the drop-down box on the far-right top of the page.



You can choose List, Compact List or Tiles. Tiles displays the documents as actual document icons, which some people like to see. Give this a go and see what you prefer.

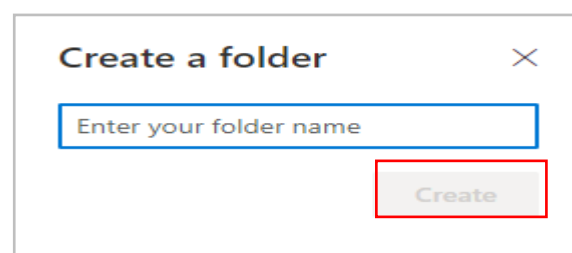
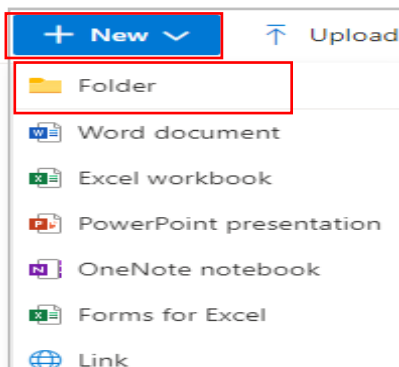
Along the top of the My Files page are 4 commands: New, Upload, Sync and Automate.



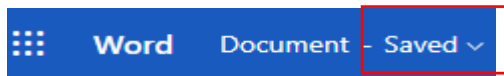
New:

You can click on 'New' and create a Word, Excel, PowerPoint, OneNote notebook or even a Forms survey straight from this screen. The document you select opens in an online web browser (so you can even use it if the O365 tools are not installed on your device).

This is how you also create a new folder: select Folder, enter folder name and press Create.

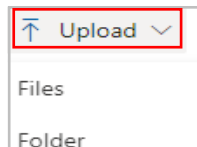


When you are working in O365 on a document, notice that for each change you make it shows at top left as 'saved' automatically. Using the drop-down box there, you can name or rename your document before saving, if needed.

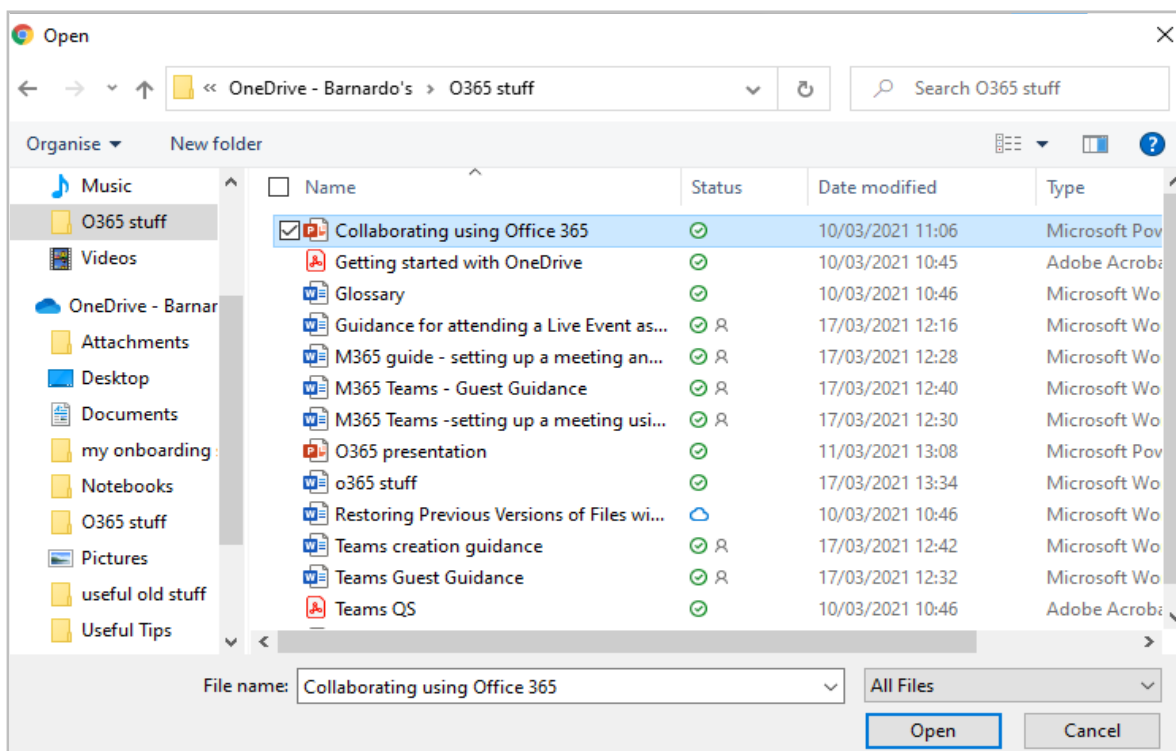


Upload:

You can upload a document from your computer to your OneDrive. Click 'Upload' at the top:

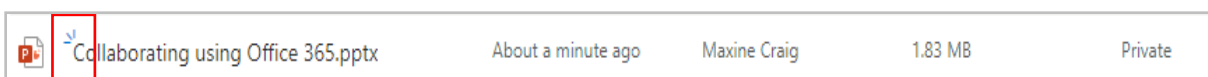


Choose which you need - File or Folder - and it will take you to File Explorer to select your file/folder to upload. Find the one you need and click onto it. You can upload multiple files/folders at the same time by keeping the CTRL key pressed down as you select.



Click Open at the bottom of the open dialogue box and the chosen document will be uploaded to your OneDrive.

Your newly loaded document/folder will now display in **My Files** with 3 small lines on the name to indicate it is new.



Sync:

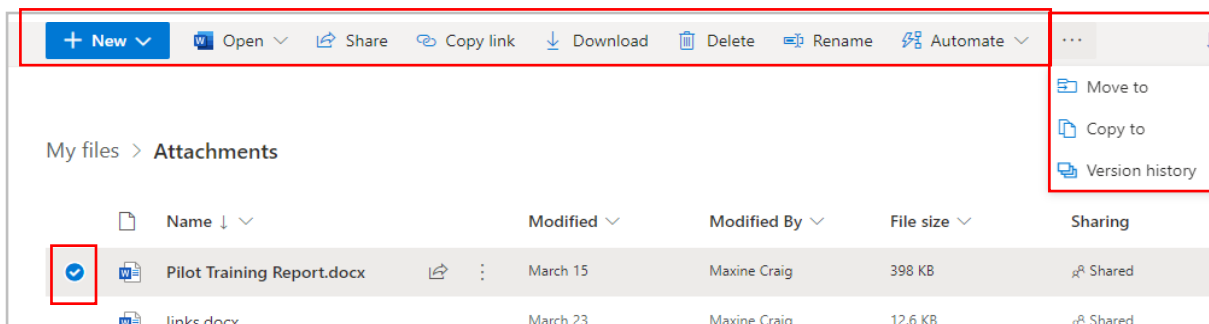
Sync allows you to keep documents on your Barnardo's Windows device synchronised with OneDrive; by default, your Desktop, Documents and Pictures folders are automatically synchronised.

Automate:

This is Microsoft's automated workflow service and will not be needed by majority of O365 users.

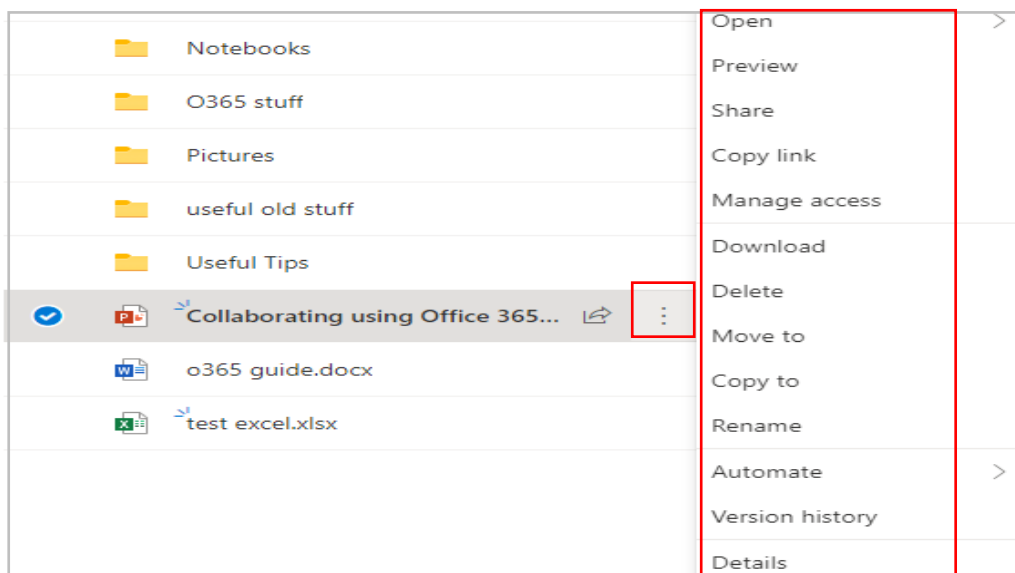
MY FILES - DEALING WITH DOCUMENTS

Once you have clicked on the button against the document you want, the choice of commands along the top changes:



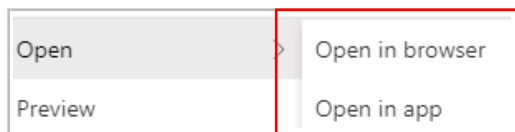
You have New, Open, Share, Copy Link, Download, Delete, Rename, Automate, Move to, Copy To and Version History.

If you prefer, you can also click onto the ellipsis next to the document's name to get the same set of actions but with a couple of extra ones, Manage Access and Details.



Open:

Click on the drop-down box and you get a choice to 'open in browser' or 'open in app'.



Browser means using the online version, 'app' means via your desktop applications on your laptop/desktop. For apps like Word and Excel if you have a lot of work to do, opening in desktop app gives more functionality and is a better view as it opens the document as if you had clicked onto the Word icon on your computer's taskbar.

However, this guide is focused on web browser usage, which is the online version.

Share:

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?

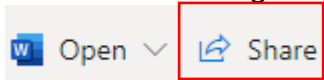
- Do you want to share a whole folder OR just a document in it? If it is just a single or couple of documents within a folder, make sure you go into the relevant folder and select the document(s) individually.
- Are you sure of who you want to see the document/folder? Use the following sharing options 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 email attachments. When you send attachments in an email, you end up with duplicates you need to collate if the recipient makes a change. 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 the obvious such as name, address, date of birth, but also genetic, biometric, health, racial, ethnic data or around religious or political beliefs.*

The GDPR requires that you have consent from the 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 for that purpose, is accurate/up to date, and is kept securely.

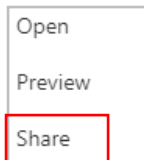
Ways to Share

Click on Share along the top command bar

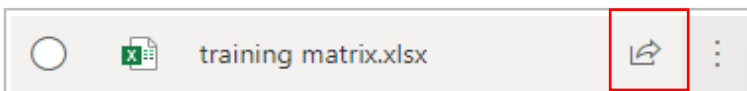


Or

Click on Share within the ellipsis next to the document name

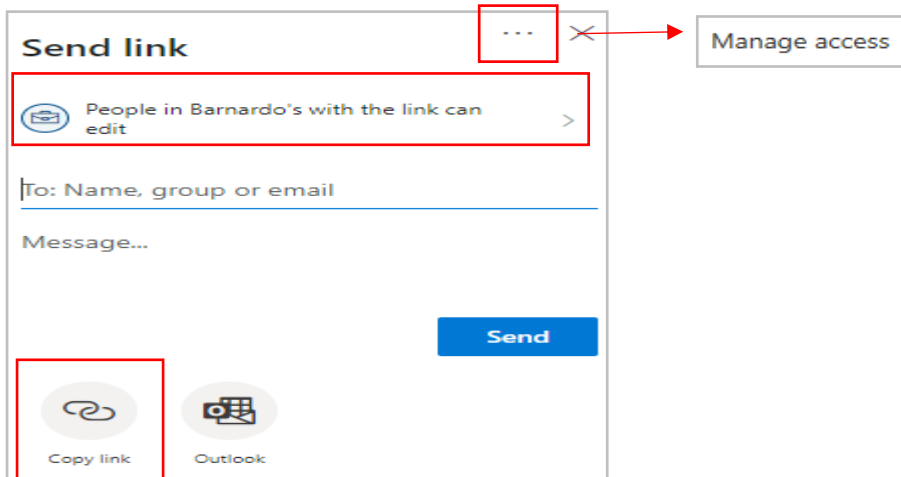


You can also use the small arrow icon after a document's name to get the same result for Sharing:



Click Share using any method and you will see a box called Send Link.

(See page 15 for the Copy Link and Outlook choices, and there is an ellipsis for Manage Access which we will look at on page 16)

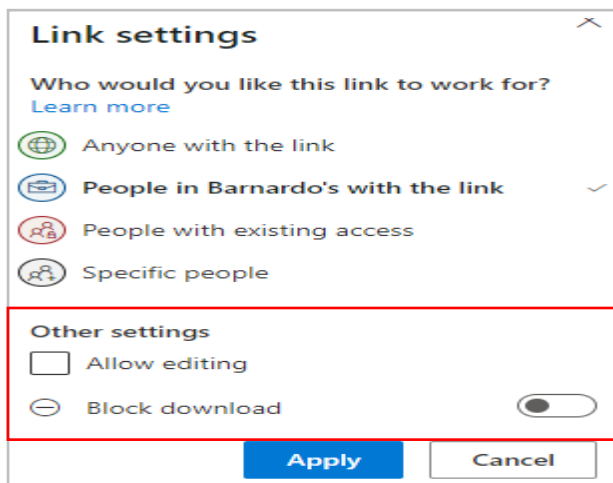


At Barnardo's, the default option in your Send Link box is 'People in Barnardo's with the link', so if this is okay you can go ahead and input your recipient's name, email or a group name and write a message to accompany the email.

This option means the link only goes to Barnardo's colleagues with whom you share BUT remember it could be accessed by anyone within the organisation if the link is forwarded to them.

However, if you click onto the small arrow next to 'People in Barnardo's with the link' it will bring up the box below where you can see some link settings for this option

Link Settings are just how you control access and permissions to your document.



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.

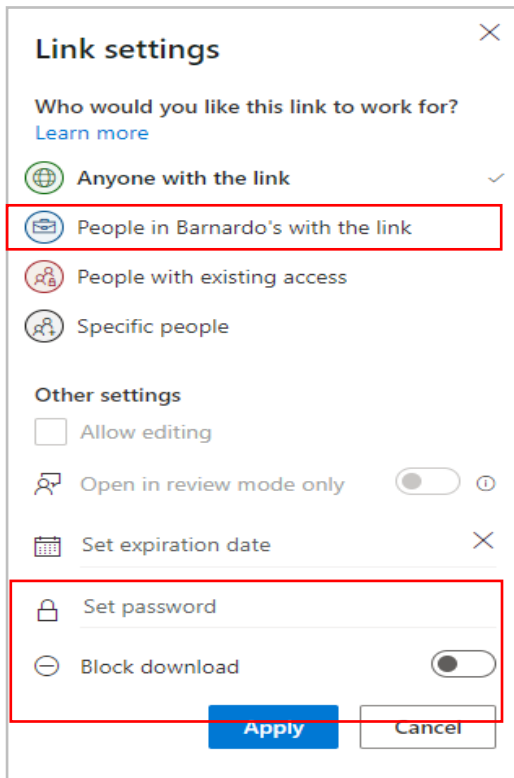
Once you have made your choices, click Apply and the Send Link box will re-appear to allow you to input a name and message.

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.

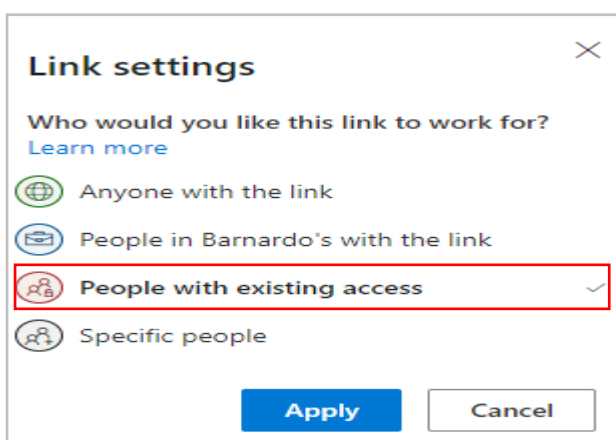
But instead of the default option, you can choose who to share with:

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.

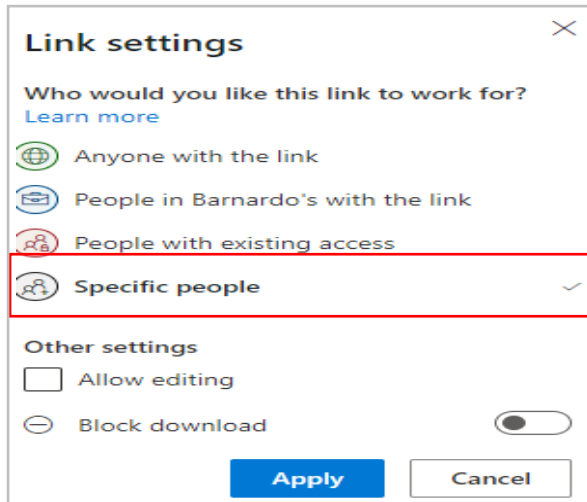
For this reason, you can set an expiration date (e.g. for work with a deadline) and/or password to control access. Obviously with a password, remember to provide it to recipients.



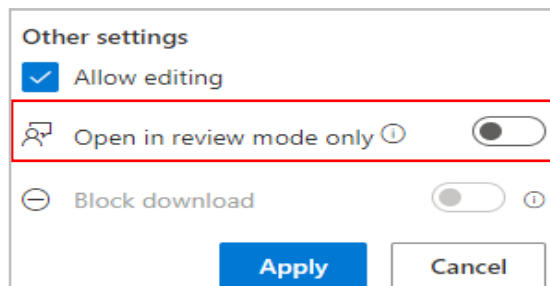
People with existing access (those with whom you shared it before). This is a more secure link than the one above. Essentially this link does not generate any extra privileges for the content but maintains the permissions it already had.



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



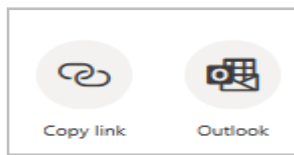
For all of these sharing options, if you are sharing a Word document there is also an option to set the document to Review Mode only – recipients can write comments but cannot make editing changes to the document.



Remember to click Apply to save your changes to the link settings!

When shared, the document opens for a recipient in 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:

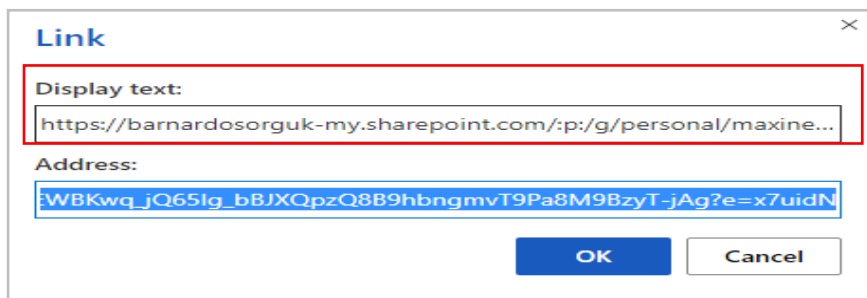
You can copy the link if you prefer to put it in an email yourself or need to paste it into, say, a Word document or PowerPoint.

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


 [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.

A box will appear for you to type in what you want the link to be called.



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](#).”

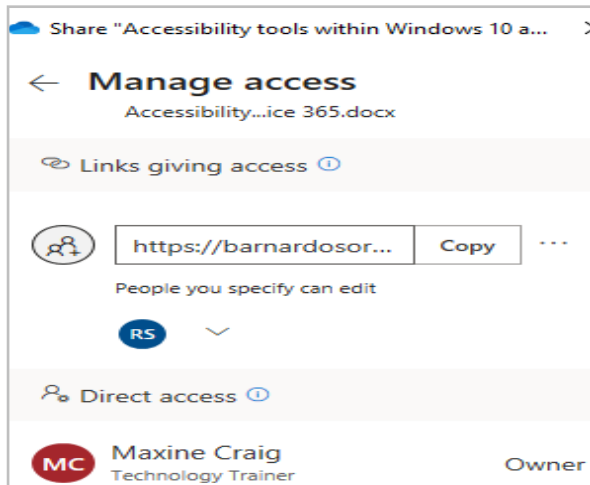
You can click onto the link once created to set the sharing controls – it displays the same choices as the Share method.

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

Manage Access

The Send Link box also has an ellipsis. 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.

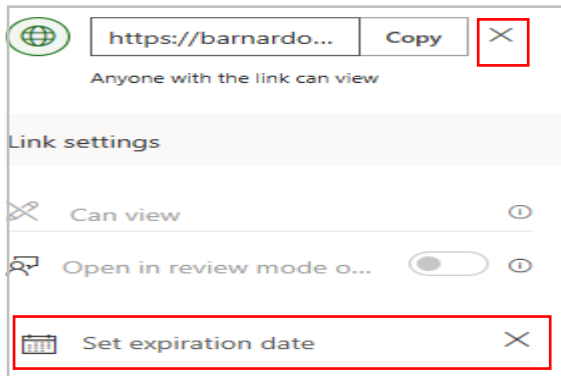
Links giving access – shows all links that people may use to access your item.

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.

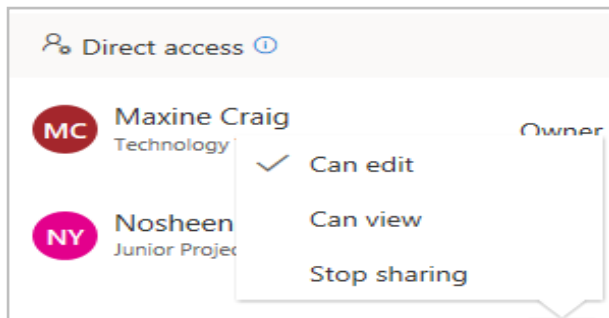


If you click into the ellipsis, you can set an expiration date if the link was share as 'anyone with the link can view'. You even can do this after it was sent to people if you decide to remove access after a certain period of time.

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.

Download:

Clicking this will download a copy of the document into your device's Download folder.

Delete:

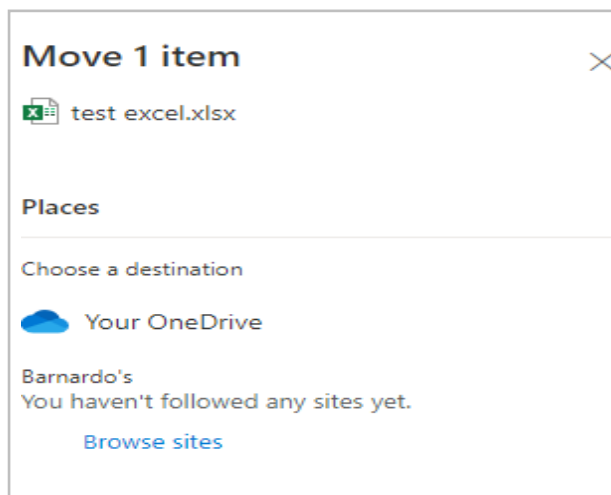
It does ask 'are you sure' to check you do wish to send the document to the recycling bin (in case you have pressed Delete by mistake)

Rename:

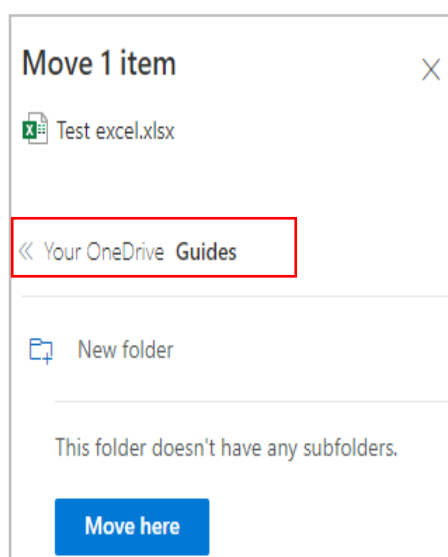
This brings up a simple box for you to type in the new name you want.

Move to:

Allows you to move a document or folder around either your OneDrive or to other SharePoint sites you have access to. The default option is OneDrive, so if you want to move the document to another Barnardo's SharePoint site, choose Browse sites, find your chosen location to save and use the same process as the following:



If you click on the OneDrive box, it brings up all your folders and documents there. Click on the folder into which you want the document to move. If the folder has no sub-folders, it will tell you as below. All you do is click Move Here and the document changes its location.



Copy to:

Allows you to copy a document to elsewhere in OneDrive or on a Barnardo's SharePoint site you have access to.

The process is the same as the Move To process as above, except the relevant buttons say Copy Here.

Version History:

A handy feature in OneDrive is that you can see previous versions in case of errors or accidental over-typing, etc.

Go to the ellipsis either at the top of the My Files page or next to the document name and choose Version History.

You can now see the versions, modified by, and modified date.

Click onto the ellipsis next to the version you want and you get three choices: restore, open and delete.

Version History				
Vers...	Modified Date	Modified By	Size	
26.0	Just now	Maxine Craig	570 KB	
25.0	51m ago	⋮	Maxine Craig	567 KB
24.0	57m ago	Restore	Maxine Craig	567 KB
23.0	1h ago	Open File	Maxine Craig	552 KB
22.0	1h ago	Delete Version	Maxine Craig	506 KB



Choose Restore and it creates a **new** version which replicates how the document was prior to whichever version you have chosen. Note that it does NOT delete the 'wrong' version unless you tell it to by using the Delete Version option.

Choose Open if you are not sure which version it is that you are looking for.

Alternatively, 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 document and have no need for the drafts leading to that final draft.

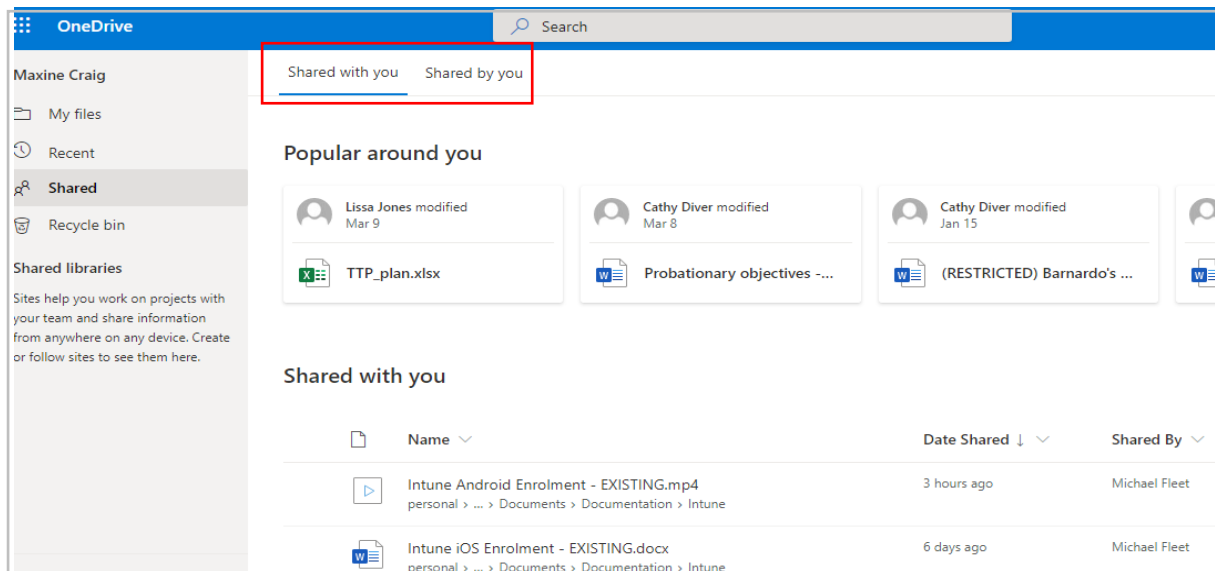
RECENT

This is a useful tool for easily accessing the documents you most recently used, or for finding a document when you can't remember its name, but you know you opened it yesterday/this week/last week.

Recent		
	Name	Last accessed
Today		
	O365 apps (office) Maxine Craig's OneDrive for Business > ... > Notebooks	2m ago
	o365 guide Maxine Craig's OneDrive for Business > ... > Documents	41m ago

SHARED

The first section within Shared is 'Popular around you', which shows you who in your team has modified which documents. But this screen also shows 'shared with you / shared by you' as you can see along the top.

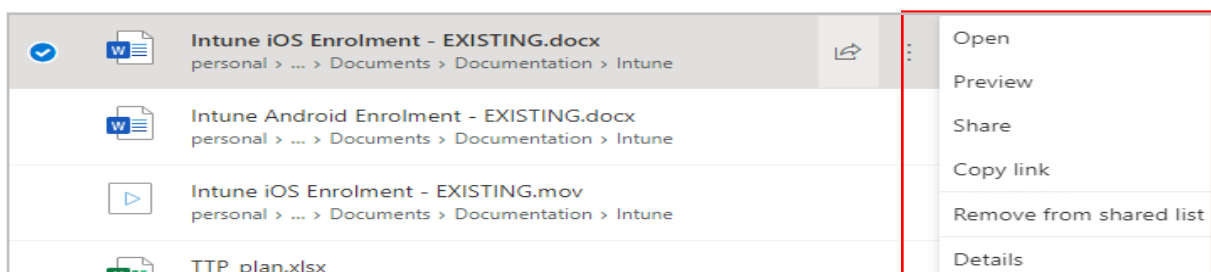


The screenshot shows the OneDrive interface with the 'Shared' section selected. At the top, there are two tabs: 'Shared with you' (highlighted with a red box) and 'Shared by you'. Below the tabs, the 'Popular around you' section displays three cards for recently modified documents: 'TTP_plan.xlsx' modified by Lissa Jones on Mar 9, 'Probationary objectives - ...' modified by Cathy Diver on Mar 8, and '(RESTRICTED) Barnardo's ...' modified by Cathy Diver on Jan 15. Below this, the 'Shared with you' section shows a table of documents shared with the user.

Name	Date Shared	Shared By
Intune Android Enrolment - EXISTING.mp4 personal > ... > Documents > Documentation > Intune	3 hours ago	Michael Fleet
Intune iOS Enrolment - EXISTING.docx personal > ... > Documents > Documentation > Intune	6 days ago	Michael Fleet

Shared with you:

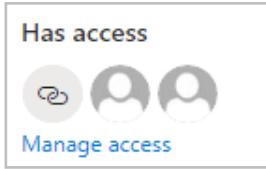
This is useful if you want to see a document you know was recently sent to you. Using the ellipsis you can click on 'Remove from shared list' if you no longer need access to the document. You can also share it with others.



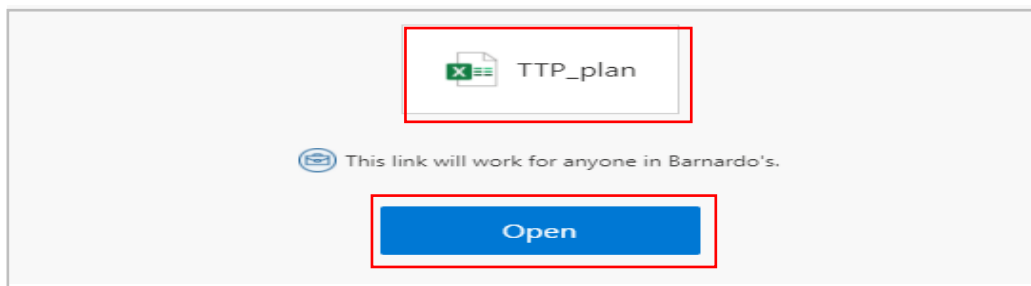
The screenshot shows a list of documents in OneDrive. The document 'Intune iOS Enrolment - EXISTING.docx' is selected, and its context menu is open. The menu options are: Open, Preview, Share, Copy link, Remove from shared list, and Details. The 'Remove from shared list' option is highlighted with a red box.

If you click on the ellipsis and select Details from the drop-down list, you can see more detail about the document:

- You can see who else has access – hover over the head icons
- And you can see when it was created, last modified, and shared.



When a document is shared with you, you get it in an email that says who has shared a file with you. You can either click on the document icon and name or the 'open' button to access the document.

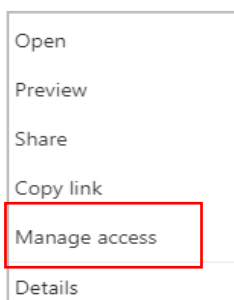


Shared by you:

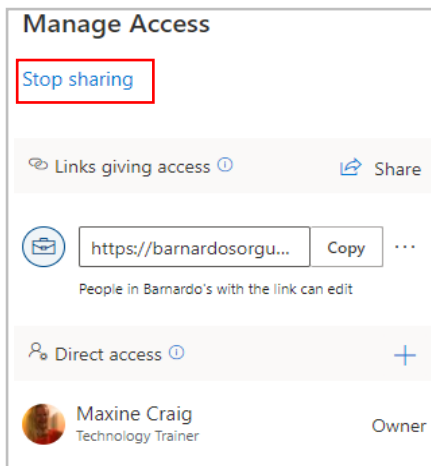
This section helps you keep track of what you have shared and with whom.

Shared with you		Shared by you	
Shared by you			
Name	Location	Activity	
Getting started with OneDrive.pdf	O365 stuff	Maxine Craig modified 6 days ago	

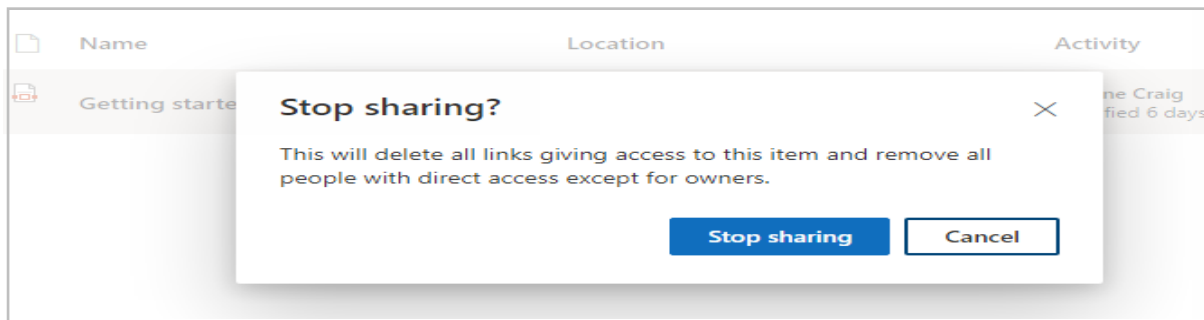
If you want to **stop sharing** a document, you can click on the document's select button, go into the ellipsis and choose Manage Access



Select 'stop sharing'.



It will then bring up a confirmation box to make sure you do want to stop sharing.



Select 'stop sharing' and the document will then disappear from this 'shared by you' list.

RECYCLE BIN

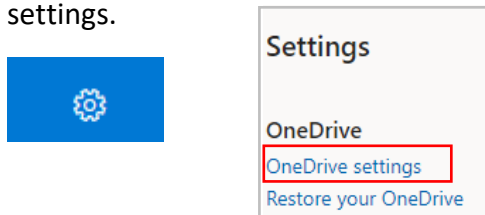
Does what it says on the tin, BUT you can restore documents if needed. Or you can delete for good by using the bin icon. Deleted documents remain in the recycle bin for 93 days.

The Restore option returns the deleted document to where it was before you deleted it. If you cannot remember where this was, check the 'original location' column before you restore!

Recycle bin					
Name	Date deleted	Deleted by	Created by	Original location	
Document.docx	6/15/2021 10:54 AM	Maxine Craig	Maxine Craig	personal/maxine_craig_barnardos_or	
Picture2.png	6/14/2021 2:34 PM	Maxine Craig	Maxine Craig	personal/maxine_craig_barnardos_or ctures	

SETTINGS

If you click onto the cog icon in top right of the OneDrive screen, you can change some settings.

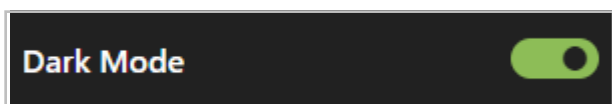


Colour and theme

You can change the Theme colour – there are various patterned or blocked colours.



You can switch to 'dark mode' by switching the toggle button across, which displays OneDrive in black rather than white.



Notifications

If you click onto OneDrive settings, you can switch off/on the various notifications, such as when others comment on your shared documents, when a link you shared is clicked, etc.

Reminders for missed Sharing emails	<input checked="" type="checkbox"/> On
Email notification when OneDrive detects lots of files are deleted at once	<input checked="" type="checkbox"/> On
Email notification when others reply to your comments	<input checked="" type="checkbox"/> On
Email notification when others comment on my documents	<input checked="" type="checkbox"/> On
Email notification when the link in a sharing email you sent was clicked	<input checked="" type="checkbox"/> On
Email notification when others upload files to your file requests	<input checked="" type="checkbox"/> On