Using *MS OneDrive for Business*

OneDrive for Business is a perfect place to store all of your documents in the cloud. They will always be at your fingertips whether you are on a laptop, an IPad or your smartphone. They will always be backed up and all versions of your document will be accessible.

Using documents in the cloud requires a slightly different mindset than keeping documents on your hard drive or on a fileserver. These documents are accessed using links rather than opening or sharing files from your hard drive. This means that if you want to share a document with someone or even send it to someone, you must send a link with the proper permissions. You will not be sending a copy of your document as an attachment anymore. Using OneDrive this way enables document sharing and collaboration in ways that you were unable to do using the traditional way of accessing documents.

* *OneDrive for Business* is different from any personal account you have with Office 365

Accessing OneDrive for Business

OneDrive for Business can be accessed through your web browser. To access OneDrive do the following:

- Launch your web browser and login to Office 365 at **http://login.microsoftonline.com**
- Click on or click on in the upper left-hand corner of your window and then click

Editing a document on OneDrive for Business

To edit a document in OneDrive, do the following:

- Navigate to the appropriate folder on OneDrive and right-click the file that you want to edit.
- Select **Open** and then **Open Word** (or Excel or any Microsoft application)**.** We recommend that you use the Microsoft application on your hard drive rather than the online version.
- Now you can edit your document and save it as you normally would.

Note: Word will automatically open in Word Online unless you specifically tell it to open in Word.

Uploading Files from your computer

To upload a document from your computer's hard drive, do the following:

- Navigate to the appropriate folder in *OneDrive for Business* where you want to upload your file
- Drag the file from your computer's hard drive into the open OneDrive folder in your web browser where it says *Drag files to upload* at the bottom of the window.

Creating new documents and folders in OneDrive for Business

- You can create a new document by navigating to the appropriate folder in OneDrive and then clicking on **New** at the top of your window and the clicking **Word document**. Note that you will automatically open to the *Word Online* application. If you want to continue using your desktop version of *Word* then select **Edit in Word** on the right side of the menu bar


- You can also create folders by clicking on **New** at the top of the window and then clicking **New Folder**
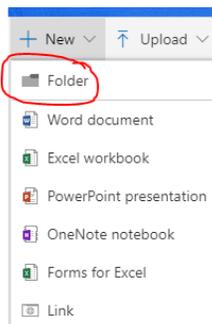
Saving Documents to New Locations

When editing a document you might want to save it to a new location. You might want to save it to another location on OneDrive or maybe you want to save it to the hard drive on your computer. Follow the directions below to accomplish these tasks:

- Select **Save as** from the **File** menu
- You should get to a page similar to the one below
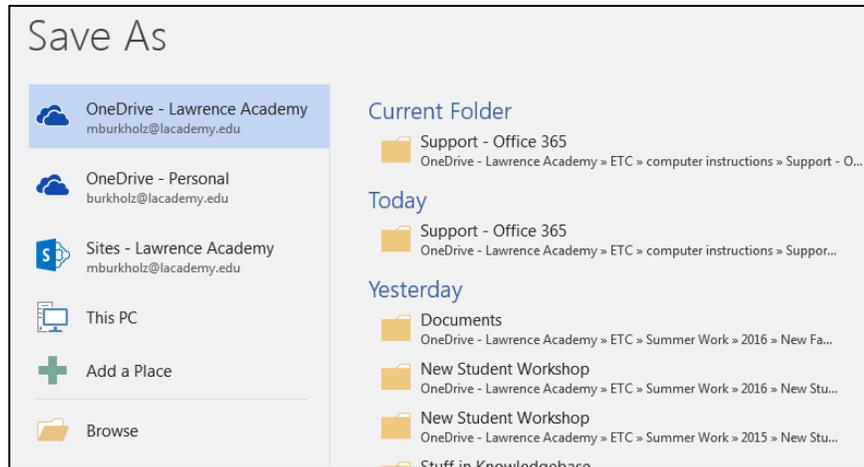
- Click on one of the following options:
  - **OneDrive – Lawrence Academy**: saves to your area on OneDrive for Business
  - **OneDrive – Personal**: saves to your personal area on OneDrive if you have a personal account
  - **This PC**: saves to a location on the hard drive of your computer
  - **Browse**: lets you browse for a location to save your file on the hard drive of your computer

- Note that you can select a location on the right-side of the page which lists your current location and recent locations.

Manipulating documents from OneDrive for Business

Note: All of the functions in this section can also be found in the menu bar after selecting the document.

To download a document from OneDrive do the following:

- Navigate to the appropriate folder on OneDrive.
- Right-click the document and select **Download**

To rename a document on OneDrive do the following:

- Navigate to the appropriate folder on OneDrive.
- Right-click the document and select **Rename**

To delete a document from OneDrive do the following:

- Navigate to the appropriate folder on OneDrive.
- Right-click the document and select **Delete**

To move or copy a document on *OneDrive for Business* do the following:

- Navigate to the appropriate folder on OneDrive.
- Right-click the document and select **Move to or Copy to**
- In the menu that appears on the right side of the page navigate to the folder where you want to move or copy your document
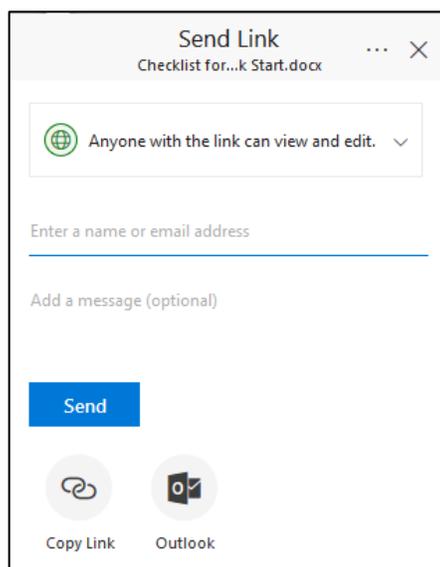
Sharing documents

Navigate to the appropriate folder on OneDrive.

- Right-click the document and select **Share**
- In the pop-up menu enter the names of the people with whom you want to share. If it is a member of the Lawrence Academy community their names should appear. Otherwise enter their email addresses.

Note: The shared document will appear in their **Shared with me** folder. It is usually better to just send a link (see next section) or share a folder in order to avoid cluttering up peoples **Shared with me** folders.

- If you want, type a message to be included with an email that's sent to all invitees, enter the message in the *Add a message here* field.

Send Link

Checklist for...k Start.docx

Anyone with the link can view and edit.

Enter a name or email address

Add a message (optional)

Send

Copy Link   Outlook

- Select a permission setting by clicking on the *Anyone with this link can edit this item*. A permissions window should open:
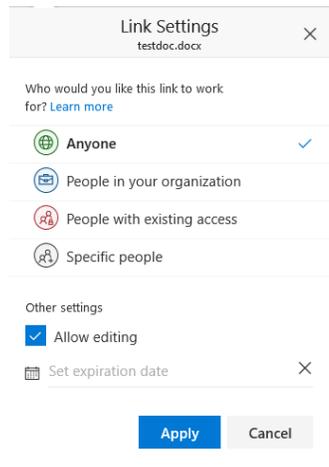
The sharing settings are as follows:

Select one of the following by clicking on the triangle next to *Anyone with this link*:

- **Anyone**: Anyone who has this link can access the document whether or not they have an LA Office 365 account.
- **People in your organization:** Only people with an LA Office 365 account can access this link. They will be asked to login to Office 365 upon clicking this link
- **People with existing access -** returns a link that can be used by people who already have access to the document or folder
- **Specific people:** An *Enter a name or email address* field appears and only people whose name has been entered in this field can access this link.

Next click on one of the check boxes:

- **Allow editing** – The invited users can edit your version of the document. Only do this if you are collaborating on a document that you are all editing together. If you only want users to be able to view the document or download a copy but not edit it then do not check this box.
- **Set expiration date**: This field only appears if the **Anyone** option has been checked. Select this option if you want your link to expire in a set amount of days. You will be prompted to enter a value greater than zero.
- Click **Apply (Note:** You also have icons for copying the link or sending it through Outlook.)

To read a document that has been shared with you:

- Navigate to OneDrive
- Click the **Shared with me** folder on the left side of the computer to access your file
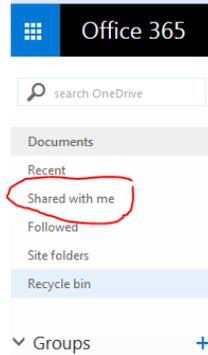
- Open the document

To share a document by using Copy Link

You can share a link to a document by using **Copy link**. Copy link is available only for individual files, but it's the easiest way to share documents with everyone in your organization or to share with people externally (as long as external sharing is enabled for your sites).

Navigate to the appropriate folder on OneDrive.

- Right-click the document and select **Copy link**
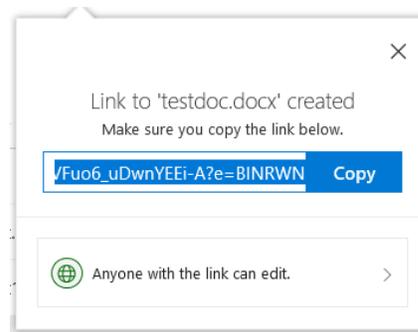
- Select a permission setting by clicking on the *Anyone with this link can edit this item*. The directions for this window is identical to the **share setting directions** in the previous section.
- Click **Apply**

Back in the **Share document** window, right-click on the link address and select **Copy.** Your link will now be copied to the clipboard. You can now paste the link into a document, email message, etc. Some faculty share links with students in homework assignments this way

Sharing folders

If you want to share multiple documents with specific users then it would be advisable to share a folder. That way you can continue to add documents to that folder or update files in the folder. The directions for sharing a folder are identical to the directions for sharing a document detailed above.

For example, if you want to share several files with your colleagues or students in your class, share the folder to them. You can then add as many files to that folder as you wish. If a document needs to be modified, then you simply modify the document in the folder and the people who have share permissions will automatically be able to access the newly modified document. This avoids the case where you have to continue sending modified documents to the users.

You can easily share a folder by right-clicking on it and select **Share** or **Copy link.** The directions are identical to the directions in the **Share** or **Copy link** sections for files.

Collaborating Using *MS Word* and *Word Online*

You can collaborate on any Word document that you have saved to OneDrive. You can open the document by right-clicking on it and either selecting *Word* or *Word online*.

When several people who have edit permission to work on a document in *Word* or *Word Online*, you'll see each other's changes as soon as they're made. Some users can be using *MS Word* and others can be using *Word online*. The collaboration works in all combinations. Below is a picture of a document that is being edited by two different people. The user *TestUser19* can be seen editing the last sentence in the document that the other user is also working on.
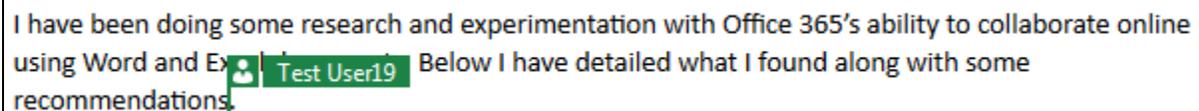
I have been doing some research and experimentation with Office 365's ability to collaborate online using Word and Ex   Test User19 Below I have detailed what I found along with some recommendations.

There is a more detailed discussion on Collaboration on Word documents here.

Collaborating Using Excel online

Collaborating on an Excel document using *Excel Online* or *Excel* works the same way as collaborating on a *Word* document

Sending and receiving attachments via email

You can attach documents from OneDrive whether you are in MS Outlook or Outlook onlineThe directions below describe the procedures

MS Outlook:

Sending Attachments

1. Open up 365 email in your web browser
2. Click **New Email** (creates new email message)
3. Fill out **To, cc** and **Subject fields** and write body of message
4. Click **Attach File** under the **Message** tab
5. Select the file that you want to attach in OneDrive from the dropdown menu. If it is not there, then select **Browse Web Locations** at the bottom of the dropdown menu and select **OneDrive – Lawrence Academy**
6. Navigate in the new window to the file
7. Select the file
8. You will now be given the option to share the link to the document or to attach it as a copy. See picture below
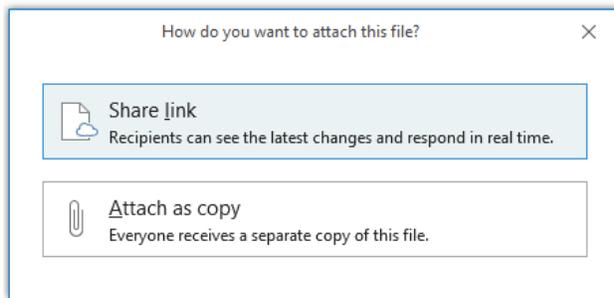
9. If you select *Share link* **you must be careful!** The attachment is a link to the original file and the user will have edit permissions. If you want to change the permissions :
   a. Click the triangle to the right of the attachment and select **Change Permissions.**
      o **Recipients can edit:** This option allows the recipient to edit your original document
      o **Recipients can view:** This allows the recipient to view the document but not to change it
10. If you select *Attach a copy* then the recipients receive a copy of the file which they can edit. However their changes will not affect your original document.

Note: You are not able at the present time to save an attachment directly to OneDrive. To do this you would have to save it to your hard drive and then upload it to OneDrive. To save it directly to OneDrive you would have to use Outlook online. Those directions are given in the next section.

Outlook Online:

Sending Attachments

- Open up 365 email in your web browser
- Click **New** (creates new email message)
- Fill out **To, cc** and **Subject fields** and write body of message
- Click **Attach.** You will be given the option to attach from your computer or from the cloud
- Navigate to the file that you want to attach in OneDrive
- Select the file
- Click **Next**
- You now have two options:

   Attach as a OneDrive File (user can edit so be careful. To change permissions, see below)

   - o Click **Attach as a OneDrive Link**
   - o Back in Outlook online, click on the arrow next to the attachment and **Change Permissions**
   - o Select the correct permission.

   Attach as a copy

   - o Click **Attach as a copy**

Receiving Attachments and Saving to OneDrive

- Click triangle to right of attachment and select - **Save to OneDrive- Lawrence Academy**
- Once the documents have downloaded, you will see confirmation that reads "Saved all to Email Attachments "
- To open up the **Email attachments folder**, go to the top level of your OneDrive. Here you will find a folder called **Attachments** with all of your downloaded documents from Outlook.
- You can move any of these documents to another folder