Microsoft 365

# OneDrive: Personal File Management

# Welcome to M365 OneDrive

# What You'll Learn Today

## Overview of Microsoft OneDrive

- Topics covered include:
  - Introduction to OneDrive in Microsoft 365
  - Accessing OneDrive on Desktop
  - OneDrive Overview
  - Collaboration on OneDrive
  - Version History
  - Accessing and Using OneDrive on the Web

Lesson 1

# Introduction to OneDrive in M365

- Choose the Right Location

- Core Features and Benefits

# Choose the Right Location for Your Files

What, when, and where to store, share, and collaborate on files in Microsoft 365 comes down to choosing the right application according to how many people are likely to see your document.



**OneDrive**
**Files stored on OneDrive are private unless you share them**

# Core Features and Benefits of OneDrive

What, when, and where to store, share, and collaborate on files in Microsoft 365 comes down to choosing the right application according to how many people are likely to see your document.

## Cloud Storage and Sync
- OneDrive offers cloud storage to save and synchronize files seamlessly across all your devices anytime.

## File Sharing Capability
- Easily share files with others and control access from any device securely and efficiently.

## Real-time Collaboration
- Collaborate simultaneously on Office documents, enhancing teamwork and productivity in real time.
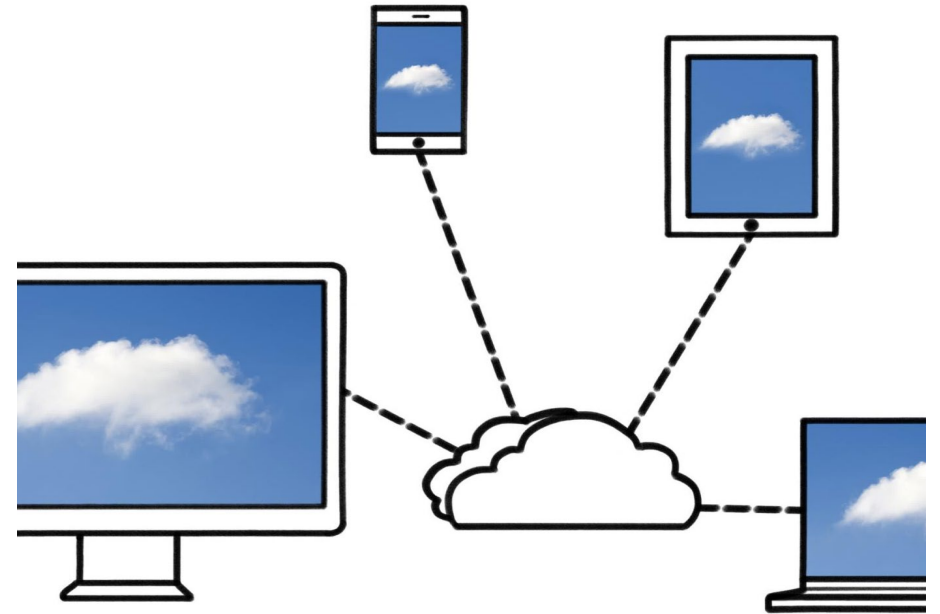
Lesson 2

# Accessing OneDrive on the Desktop

- Access OneDrive

- Integration with File Explorer

# Access OneDrive

1. From the **Start Menu**.

2. Using **File Explorer** from the task bar.

3. Using the **OneDrive** cloud icon on the system tray.

If at any time you are prompted to log in, use your TNCourts.gov credentials.

# Integration with File Explorer

OneDrive is seamlessly integrated into **File Explorer**, shown by a **Cloud** icon on the **OneDrive** folder.

1.  Open the OneDrive Folder or the File Explorer Folder from your desktop.

2.  Using File Explorer from the task bar.

3.  Using the OneDrive cloud icon on the system tray.

# OneDrive Overview

# Sync OneDrive to Your Computer

| Sync Icon | Description |
|-----------|-------------|
| | File or folder cannot be synced (in File Explorer or on the OneDrive notification area icons). |
| | Sync is in progress. |
| | Not signed in, or OneDrive setup hasn't completed. |
| | Files are not currently syncing. |

| Sync Icon | Description |
|-----------|-------------|
| | Signifies that sync is in progress. |
| | Account needs attention. Select the icon to see the warning message displayed in the activity center. |
| or | OneDrive is processing changes. |

# OneDrive Status Icons

| Icon | Name | Description |
|------|------|-------------|
| ☁ | Online only | The file is stored in the cloud and is available anytime you have an internet connection.<br><br>When you open the file, OneDrive automatically downloads it to your hard drive.<br><br>To download a file to work offline, right-click the file and choose **Always keep on this device**. |
| ✓ | Locally available | The file has been downloaded from the cloud to this device and is taking up space on the hard drive.<br><br>You can access this file if you don't have an internet connection.<br><br>To move a file from the hard drive back to the cloud, right-click the file and choose **Free up space**. |

# OneDrive Status Icons

| Icon | Name | Description |
|---|---|---|
| ✅ | Always available | The file is only available on your hard drive. When you choose **Always keep on this device** to work on the document offline, the icon changes to **Always available**. The file is currently not available from other devices.<br><br>To move a file from the hard drive back to the cloud, right-click the file and choose **Free up space** |
| 🔄 | Syncing | The file is currently being synced with the version on the cloud. |
| ❌ | Sync error | An error occurred during synchronization. |
| ☑👤<br>☁👤 | Shared | File or folder has been shared with other people. |

# OneDrive Status Icons

| Name | Status |
|------|--------|
| ☐ Name | Status |
| 📁 Approvals Document | ☁ |
| 📁 Apps | ☁ |
| 📁 Attachments | ☁ |
| 📁 Bass | 🔄 |
| 📁 Chrissy | ✅ |
| 📁 David Austin-Tranisiton | ☁👤 |
| 🖥 Desktop | ☁ |
| 📄 Documents | 🔄 |
| 📁 Mass Gov Training | ✅ |
| 📁 Meetings | ☁ |
| 📁 Microsoft Copilot Chat Files | ☁ |
| 📁 Microsoft Teams Chat Files | ☁👤 |
| 📁 Notebooks | ✅ |
| 📁 OutSource Project | ☁ |
| 🖼 Pictures | ☁ |

Online Only - stored in the cloud

Always keep on this device – can work offline

Shared

Syncing

Locally available - can access without connection

# Right-Click Menus

**File Right-Click Menu**
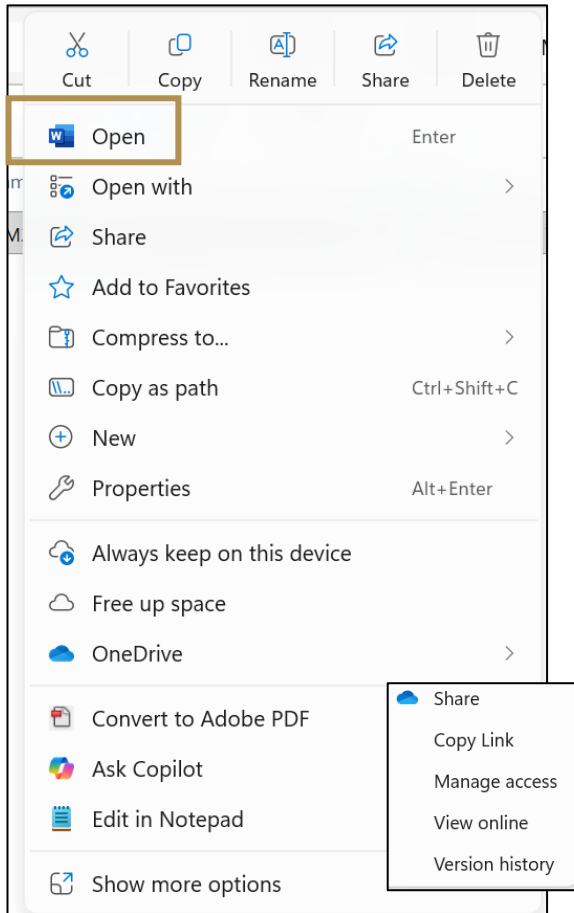
| Cut | Copy | Rename | Share | Delete |
|---|---|---|---|---|

- Open — Enter
- Open with
- Share
- Add to Favorites
- Compress to…
- Copy as path — Ctrl+Shift+C
- New
- Properties — Alt+Enter
- Always keep on this device
- Free up space
- OneDrive
- Convert to Adobe PDF
- Ask Copilot
- Edit in Notepad
- Show more options

OneDrive submenu:
- Share
- Copy Link
- Manage access
- View online
- Version history

**Common Actions Available**:

- **Share**: Share the selected file or folder with others, set permissions, or generate a sharing link.
- **Pin to Quick Access**: Pin frequently used files or folders for easy access.
- **Copy Link**: Generate a link to the file or folder for sharing via email, chat, or other platforms.
- **Move to / Copy to**: Move or copy the selected item to another location within OneDrive.
- **Delete**: Remove the file or folder (moves it to the Recycle Bin).
- **Rename**: Change the name of the file or folder.
- **Manage Access**: View and adjust who has access to the file or folder and change or revoke permissions.
- **Version History**: View and restore previous versions of the file.

**Folder Right-Click Menu**

| Cut | Copy | Rename | Share | Delete |
|---|---|---|---|---|

- Open — Enter
- Open in new tab
- Open in new window
- Share
- Pin to Quick access
- Pin to Start
- Compress to…
- Copy as path — Ctrl+Shift+C
- Properties — Alt+Enter
- Always keep on this device
- Free up space
- OneDrive
- Dropbox
- Open in Terminal
- Show more options

OneDrive submenu:
- Share
- Copy Link
- Manage access
- View online
- Version history

SEAL OF THE TENNESSEE JUDICIARY 1796

# Create New Folders on OneDrive

## To create a new folder



1. From the ribbon, click the **+ New** button.
2. From the menu, select **Folder**.
3. Enter a filename for your folder.
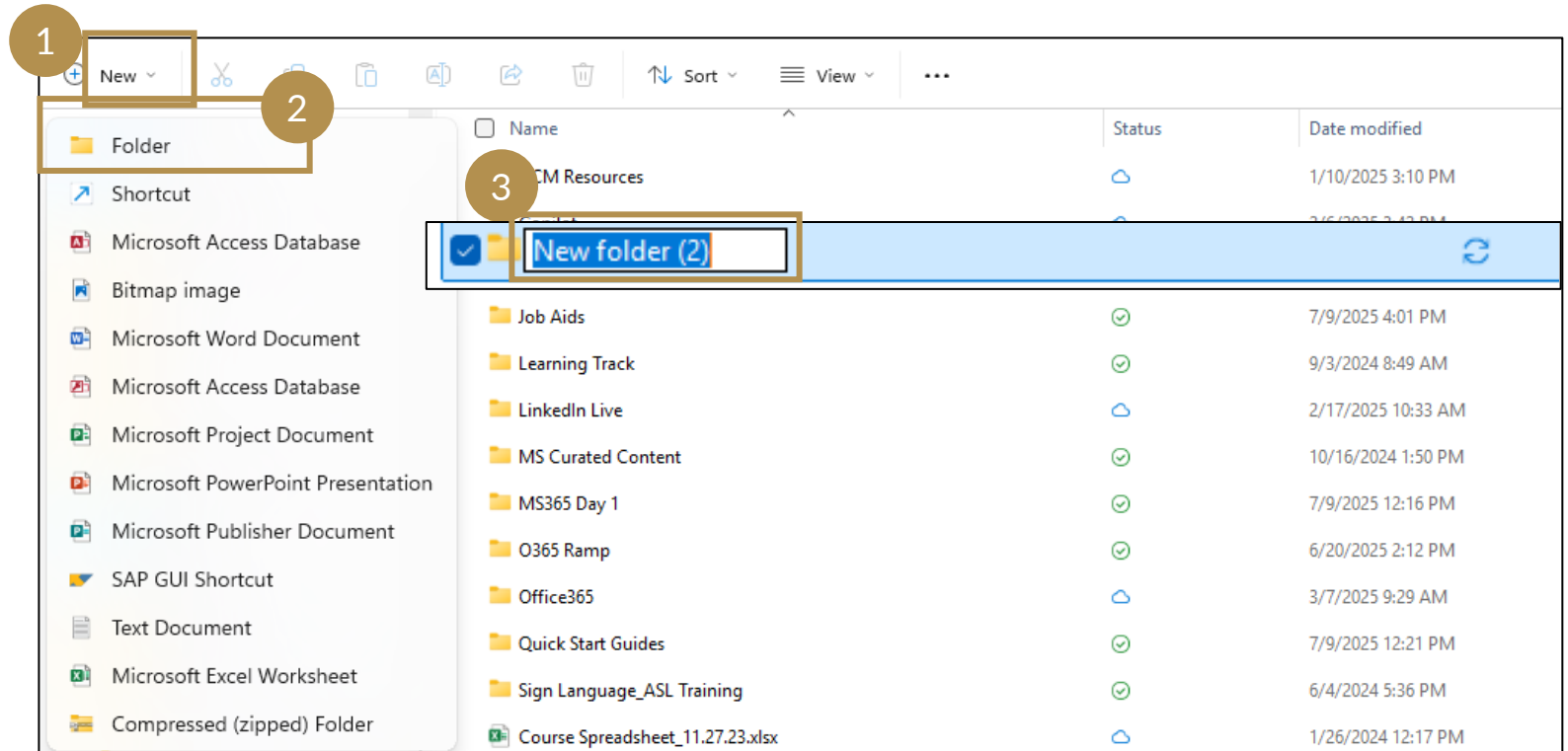
It is also possible to right-click inside the OneDrive window, select New, from the menu and select Folder

# Add Folder Colors

Applying color to folders in OneDrive personalizes their look, making it easier to organize and visually differentiate your files.

1. Right-click on the file, select **OneDrive** from the Menu and **Folder color** from the sub-menu. .
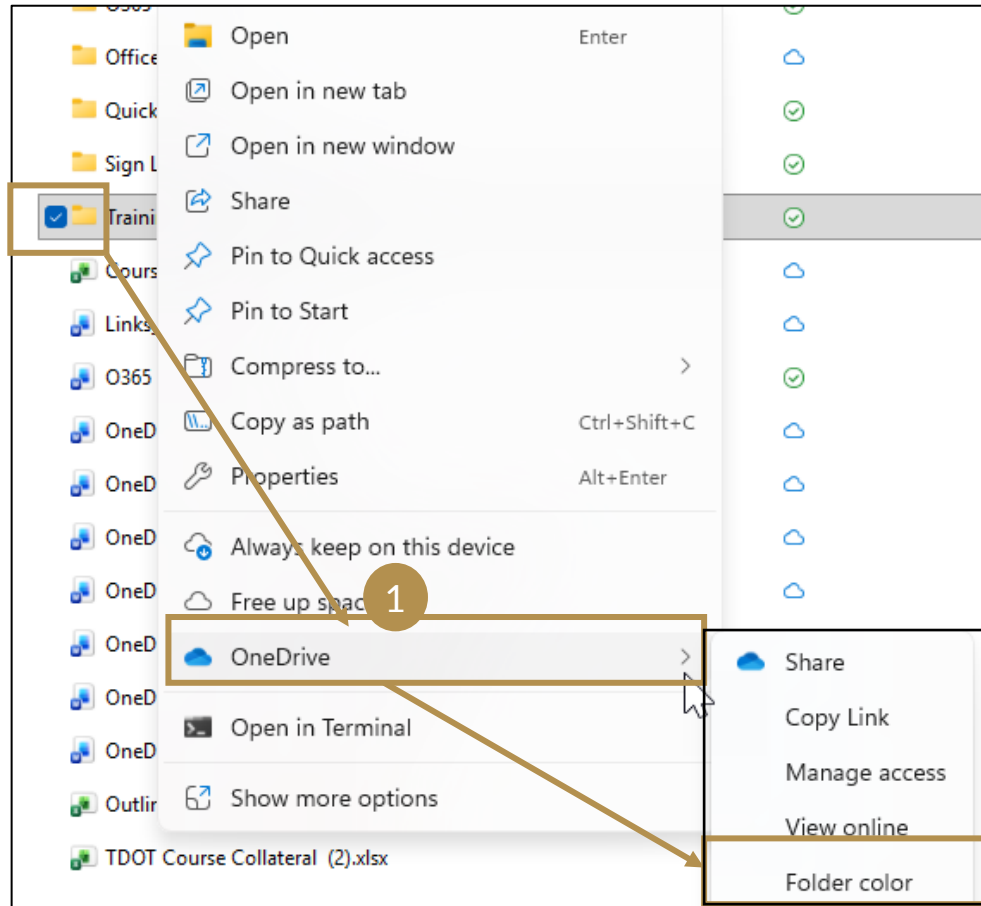


2. Select the folder color and click **Apply**.
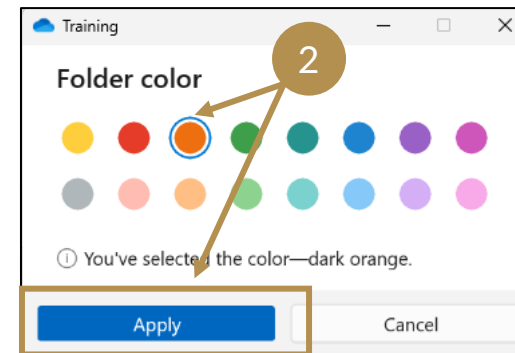


3. The folder displays in the selected color.
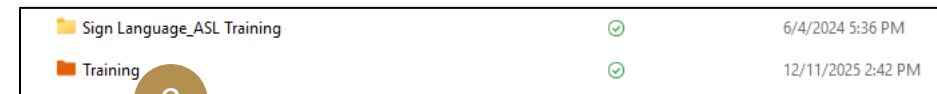
# Create New Files on OneDrive

## To create a new file (Word, PowerPoint, Excel, etc.)

1. From the ribbon, click the **+ New** button.

2. Select the type of file to create.

3. Name your file, and it will be saved directly to your OneDrive, automatically syncing to the cloud so you can access it from any device.
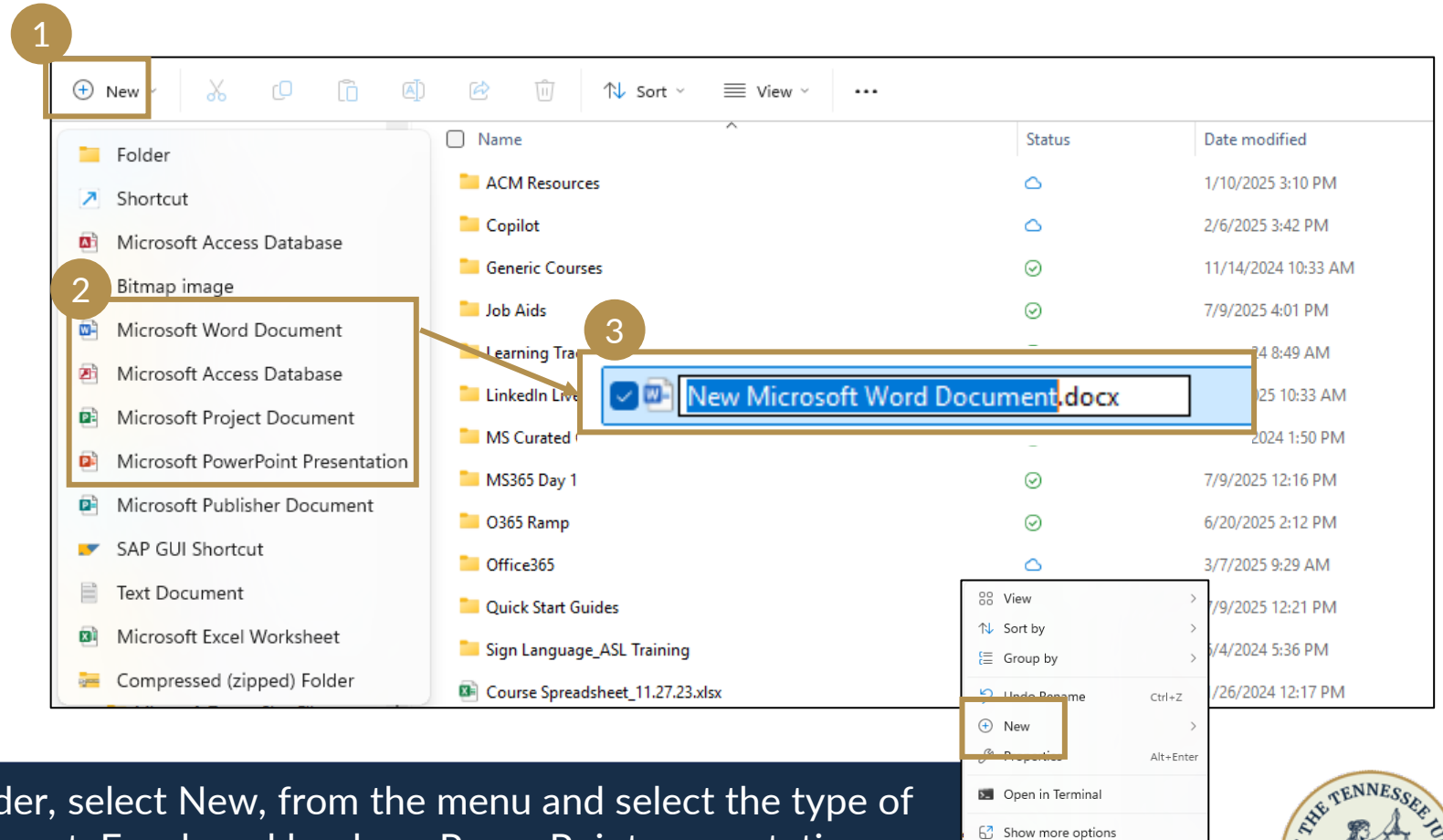


It is also possible to right-click inside the folder, select New, from the menu and select the type of file you want to create—such as Word document, Excel workbook, or PowerPoint presentation.

**Lesson 4**

# Collaboration on OneDrive

- Share Files on OneDrive
- Copy a Link on OneDrive
- Share or Copy a Link from an Open File
- Use Manage access

# Benefits of Collaborating in OneDrive

**Real-Time Co-Authoring:**

Multiple users can work on the same document simultaneously

**Version History and Recovery:**

Track changes, restore previous versions, and audit edits

**Easy File Sharing:**

Share files or folders securely with colleagues

**Centralized Storage:**

Files are stored in a single, secure location, making them easy to find, manage, and recover if needed.

**Always Up-to-Date:**

Everyone works on the latest version of a file

# Best Practices for Sharing

**Share with Edit Permissions:**

- When you need to work on a file together with a teammate or group of teammates.
- When you need someone's feedback.

**Share with Review Permissions:**

- When your document is in a final form.
- When you want feedback without direct updates.

**Share with Links:**

It is best practice to NOT attach a file, send a link instead.

# Share Files from OneDrive

Sharing files from OneDrive enhances collaboration, increases productivity, and ensures data security.

**To share a file from OneDrive:**

1. Right-click on the file and click **Share** from the menu.

**OR**

- Select the **Share** icon on the ribbon.

**OR**

- Select the **Share** icon on the menu.

2. Add the name, group or email of the member to share the file with.

3. Enter a message, if necessary.

4. Click **Edit** to change the sharing permissions.

5. Click **Send**.
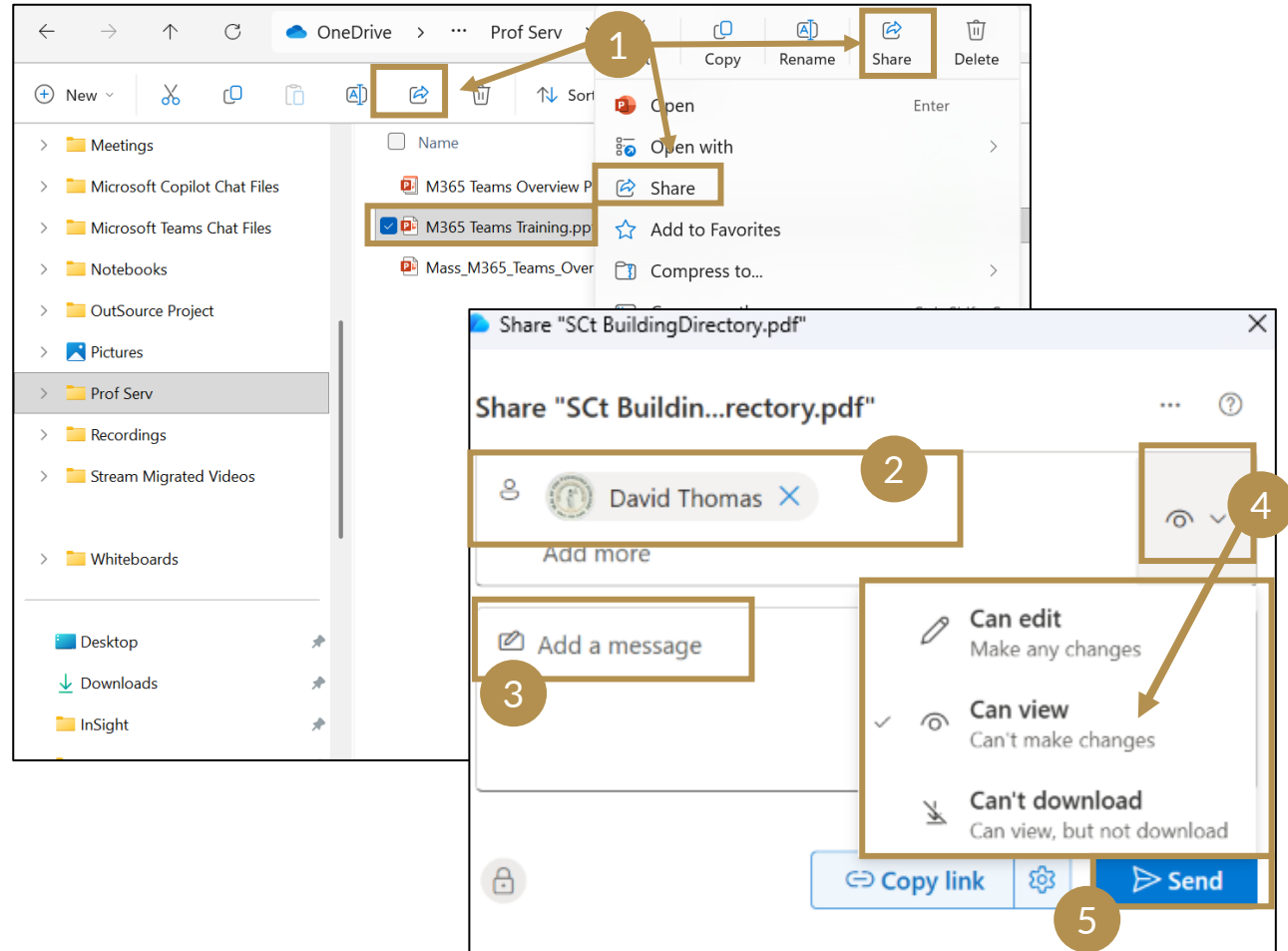
# Presence Indicators

**Presence indicators** show who has the file open and where in the file they are working.

Presence indicators are small visual cues—such as colored dots or icons—displayed next to a file to show when someone else is currently viewing or editing it.

Person who initially opened the file

Second person who opened the file

Person who is making edits in the file and where in the file the edits are being made

- Next to the document's name at the top, you might see small colored circles or avatars, each representing a person who is currently viewing or editing the file.
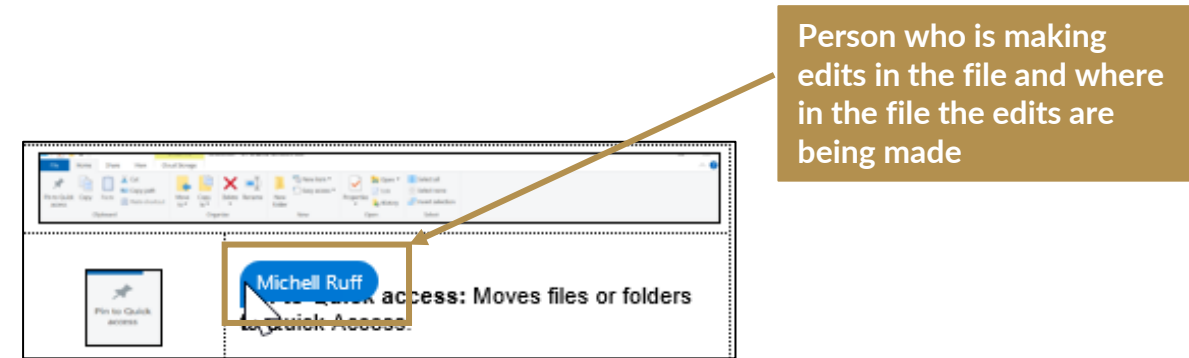
- Dots within the document indicate where and what the collaborator is doing.
    - A blue dot by  [Name]  means the person is viewing the document.
    - A green dot by [Name] means the person is editing the document.

These visual cues update in real time as people join or leave the document, helping you stay aware of who is present and reducing the risk of overlapping edits.

# Stop Sharing with Manage Access

The **Manage Access** option allows users to view the list of people who have access to a shared document and to change permissions or revoke access at any time.

1. Navigate to the file or folder on, right-click on the file, select OneDrive from the menu and select **Manage access** from the sub-menu.
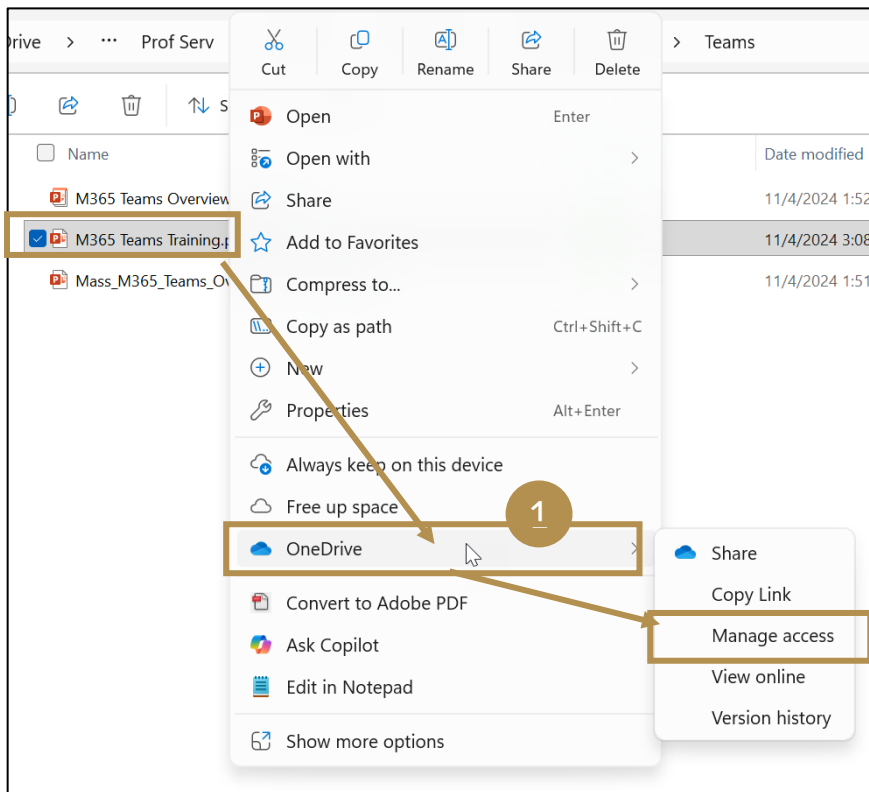


The **Manage Access** dialog box displays a list of people who have access to the file or folder, along with their permission levels.
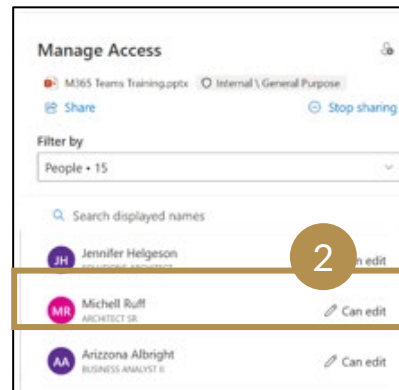


2. Select the person whose access you want to change or remove.

3. Click the **Direct Access** drop down arrow.
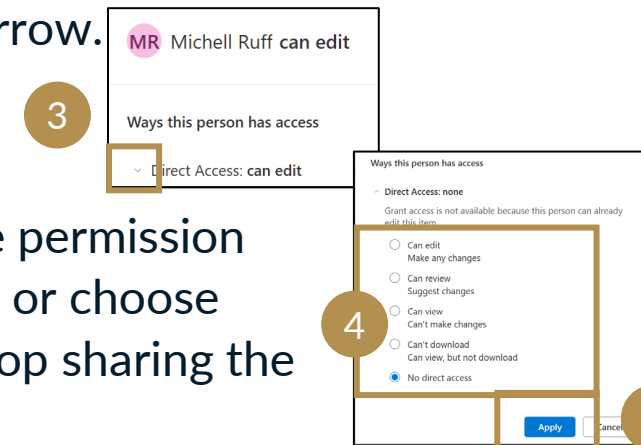


4. From the menu, choose the permission setting you want to change or choose **Remove direct access** to stop sharing the file.

5. Click **Apply**.

6. A confirmation message displays, click **Remove**.
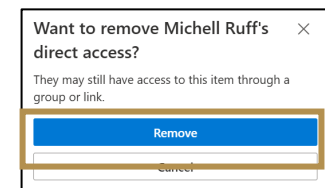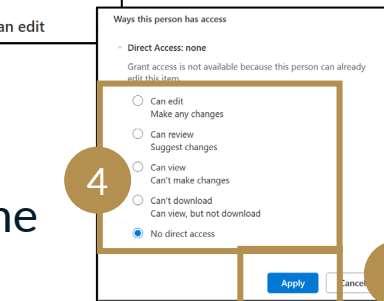
# Copy a Link to a File on OneDrive

**Copying a link** in OneDrive generates a shareable link that can be sent via email, chat, or other communication methods.

**To copy a link to a file from OneDrive:**

1. Right-click on the file and click **Share** from the menu.

**OR**

- Select the **Share** icon on the ribbon.

**OR**

- Select the **Share** icon on the menu.

2. Add the name, group or email of the member to share the file with.

3. Enter a message, if necessary.

4. Click **Edit** to change the sharing permissions.

5. Click **Copy Link**.
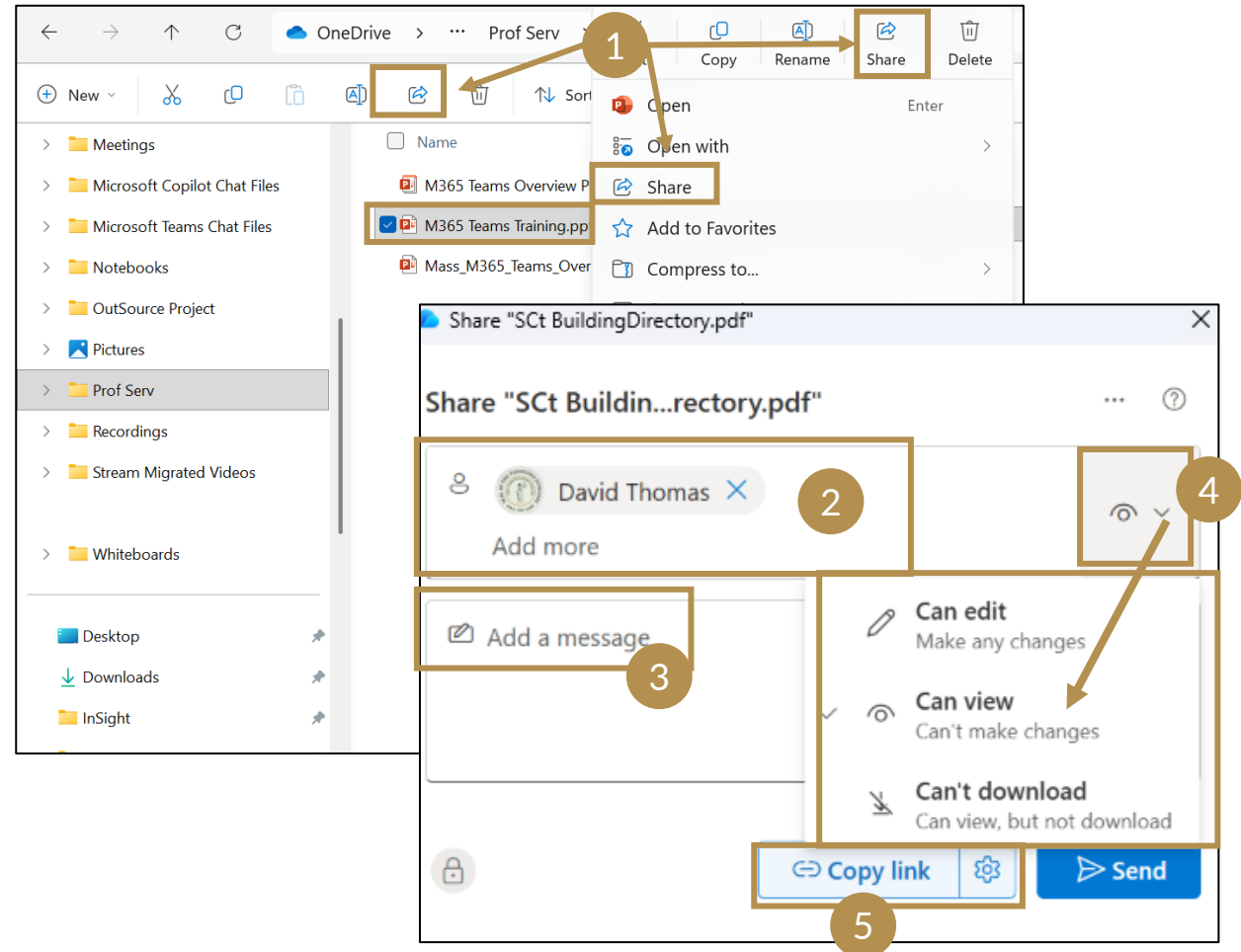
# Remove a Link to a File with Manage Access

**Removing a link** to file in OneDrive ensures that anyone with the link is no longer able to view or edit the file.

1. Navigate to the file or folder, right-click on the file and select **Manage access** from the OneDrive sub-menu.
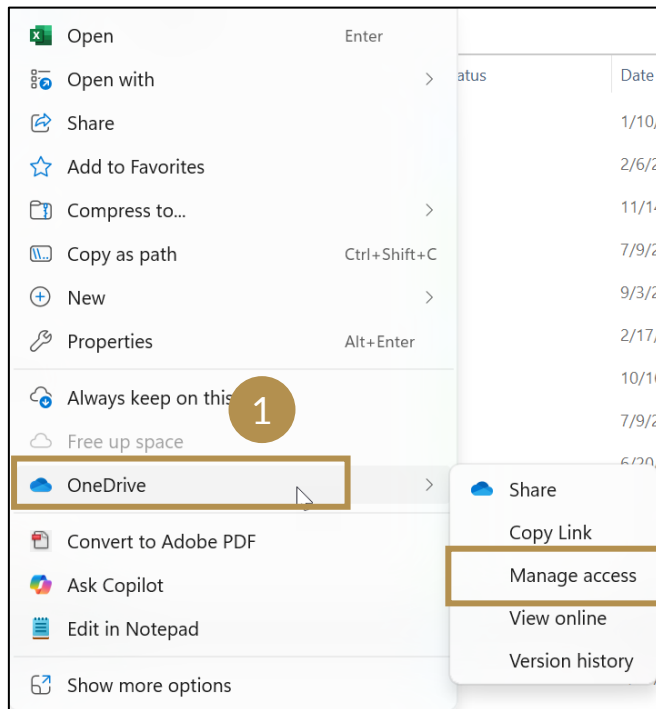
The **Manage Access** dialog box displays a list of people who have access to the file or folder, along with their permission levels.
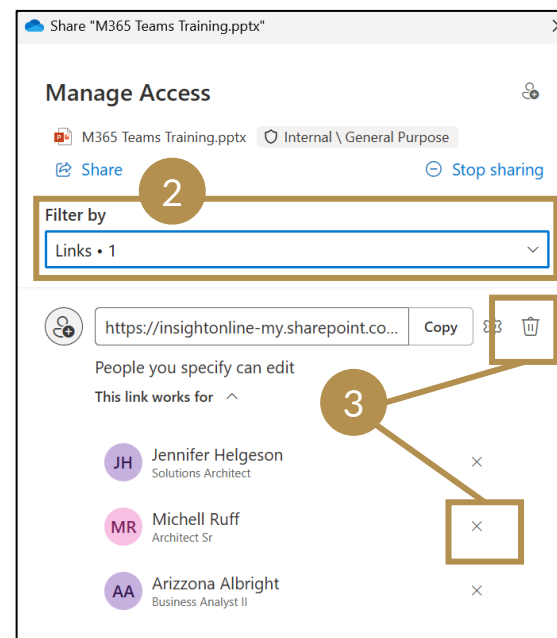
2. Click the **Filter by** dropdown arrow and select **Links** .

3. Click the **Trash** can to remove all links or select the names of the links you want to remove and click the **X** to remove all links.

4. A confirmation message displays to remove all links or to remove the link for the person selected.

5. Click **Remove**.
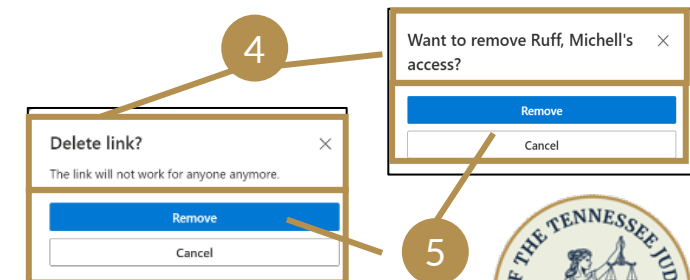
# Share or Copy a Link from an Open File

**Sharing  or copying a link** from an open file allows multiple users to work on the document simultaneously.
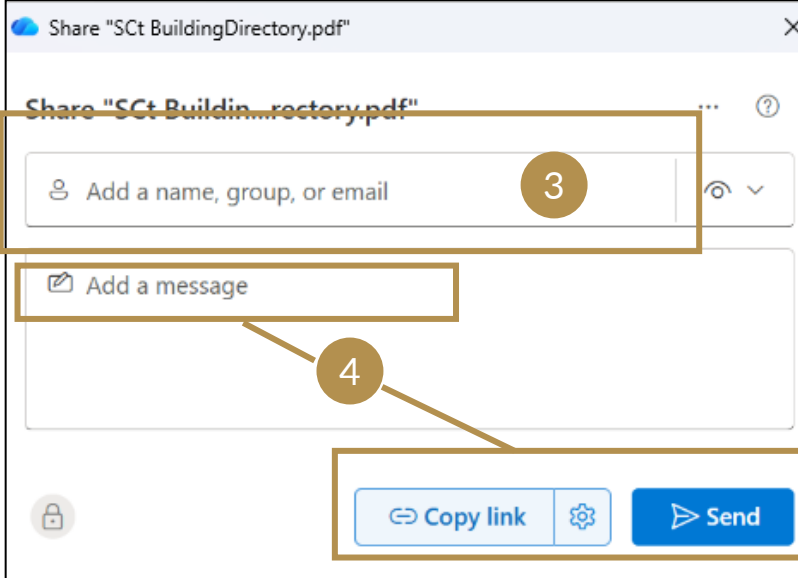
Open the document, spreadsheet or presentation you intend to share.

1.  Click on the **Share** button, typically found in the upper right corner of the toolbar.

2.  Select **Share** or **Copy Link** from the menu.

3.  The sharing dialog box displays, allowing you to enter the email addresses of the people you wish to share the file with or copy a link to and specify the permissions.

4.  Add a message and click **Send** or **Copy link**.

Changes made by any collaborator are visible in real time, reducing the need for multiple versions of the same file and ensuring everyone is working on the latest version.

| Application | Symbol |
|---|---|
| Word | 🖻 Share ⌄ |
| Excel | 🖻 Share ⌄ |
| PowerPoint | 🖻 Share ⌄ |

1

2

🖻 Share
⇔ Copy Link
⚙ Manage Access

Share "SCt BuildingDirectory.pdf"    ✕

Share "SCt Buildin...rectory.pdf"    ⋯  ⑦

👤 Add a name, group, or email    3    👁 ⌄

✎ Add a message

4

🔒    ⇔ Copy link  ⚙    ▷ Send

# Manage Access from an Open File

The **Manage Access** option is accessible from an open file.

Open the document, spreadsheet or presentation you intend to share.

1. Click on the **Share** button, typically found in the upper right corner of the toolbar.

2. Select **Manage Access** from the menu.

3. The **Manage Access** dialog box displays a list of people who have access to the file or folder, along with their permission levels.

| Application | Symbol |
|---|---|
| Word | Share ⌄ |
| Excel | Share ⌄ |
| PowerPoint | Share ⌄ |

**1**

- Share
- Copy Link
- Manage Access

**2**

Share "traditional-template-Excel-Copilot DRAFT A.pptx" ✕

**Manage Access**

traditional-t... DRAFT A.pptx

Share                    ⊖ Stop sharing

People • 4    Groups    Links • 1

**3**

https://spltybrd-my.sharepoint.com/:p:/...    Copy  ⚙  🗑

People you specify can view

This link works for ⌃

RM  Ruff, Michell
Senior Training Consultant                    ✕
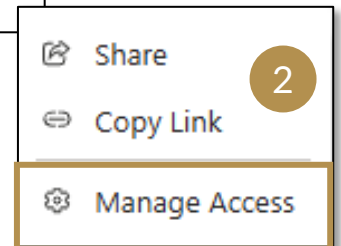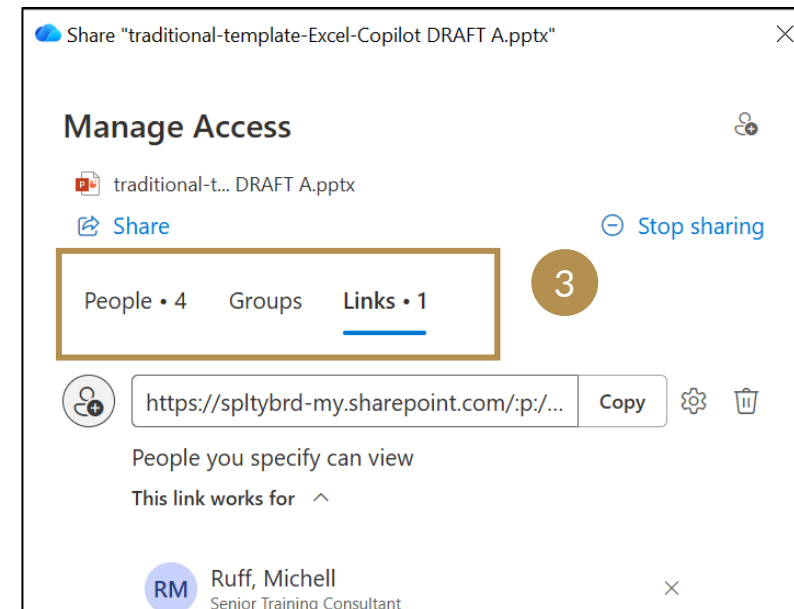
Lesson 5

# Version History

- Version History from OneDrive
- Version History from an Open File

# Benefits of Version History

**Document Recovery:**
Revert to a previous version of the document to restore the original content.

**Collaboration:**
View who made changes, when they were made, and what changes were made.

**Audit Trail:**
Track the evolution of the document and ensuring accountability for edits.

**Comparison:**
Compare different versions of a document to identify what changes have been made.

**Document Control:**
Keep track of changes and ensure the most up-to-date version is easily accessible.

**Improved Collaboration:**
Work more efficiently and effectively together knowing you are always working on the latest version of a document.

Document Recovery

Collaboration

Audit Trail

Comparison

Document Control

Improved Collaboration

# Version History from OneDrive

**Version history** allows users to track and manage changes made to their files over time. Users can view previous versions of a file, restore it to a particular version, and understand the evolution of their documents.

1.  Navigate to the file or folder, right-click on the file and select **Version history** from the OneDrive sub-menu.

2.  A pane opens displaying all versions of the file, including the date and time of each version and the person who the made changes.

3.  Click the **More options (three dots)** next to the Version and select the option from the sub-menu.

    - **Restore**: Overwrite the current version with the selected version.

    - **View online**: Open the document.

    - **Delete**: Remove the selected version.
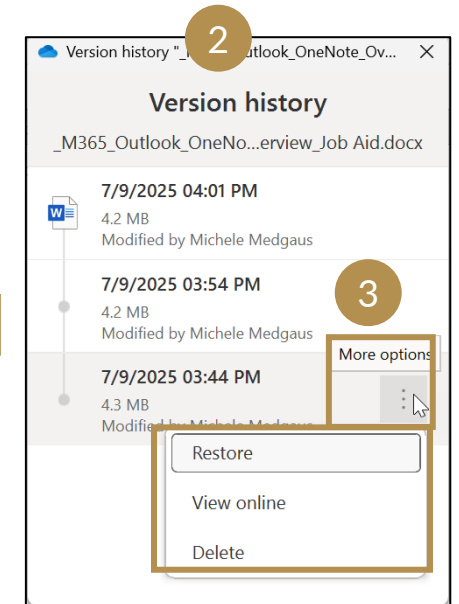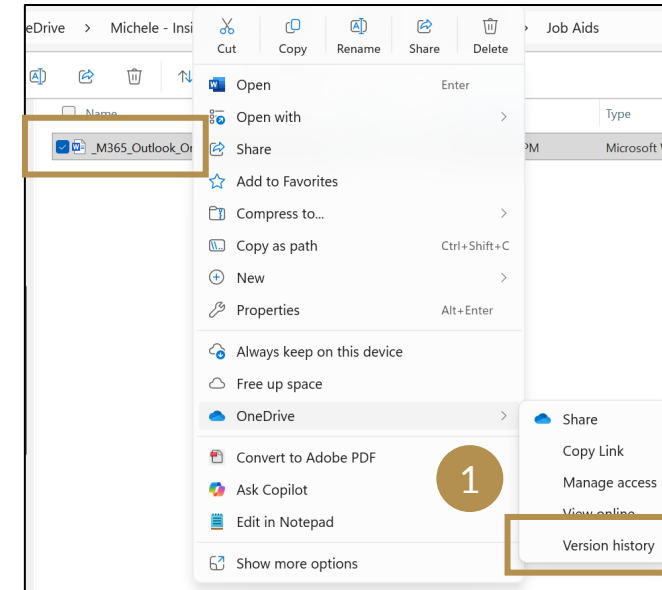
# Version History from an Open File

You can also access the history version directly from an opened file on OneDrive. This convenient feature allows users to review and restore previous versions without closing the document.

**\*\* It is important to note that you can only access Version History from within the online version of the file \*\***

**Open the file in Word, Excel or PowerPoint online.**

1. Click on the drop-down adjacent to the title.

2. Select Version History from the display.
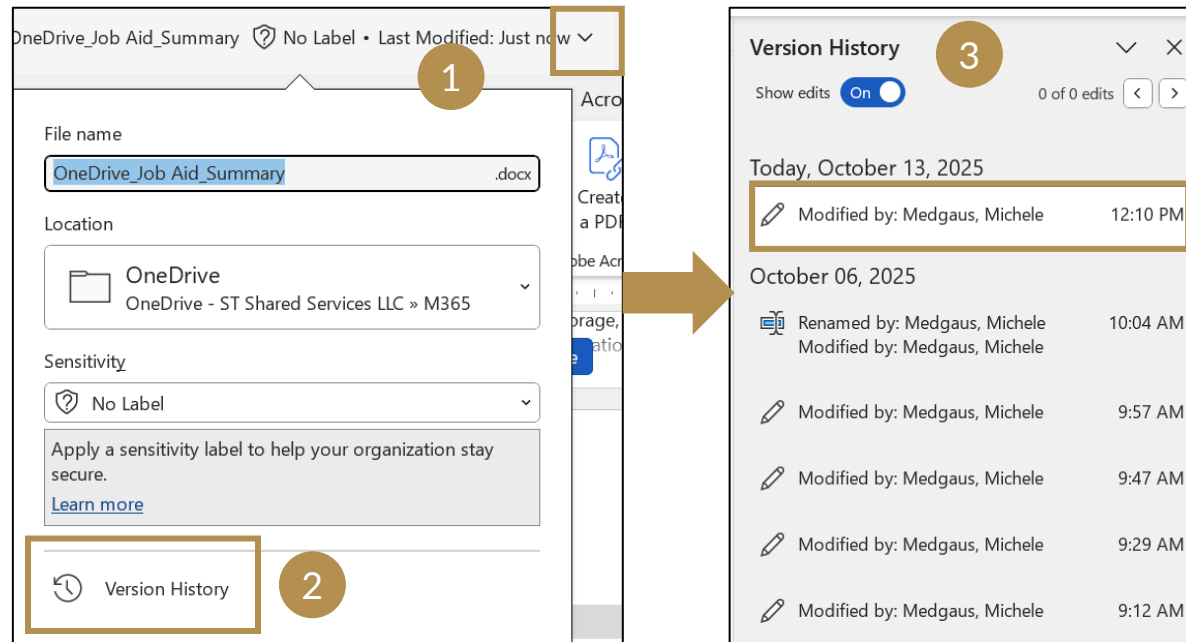
3. The Version History panel displays on the right.

4. Turn on Show edits and select the version to review the revisions.
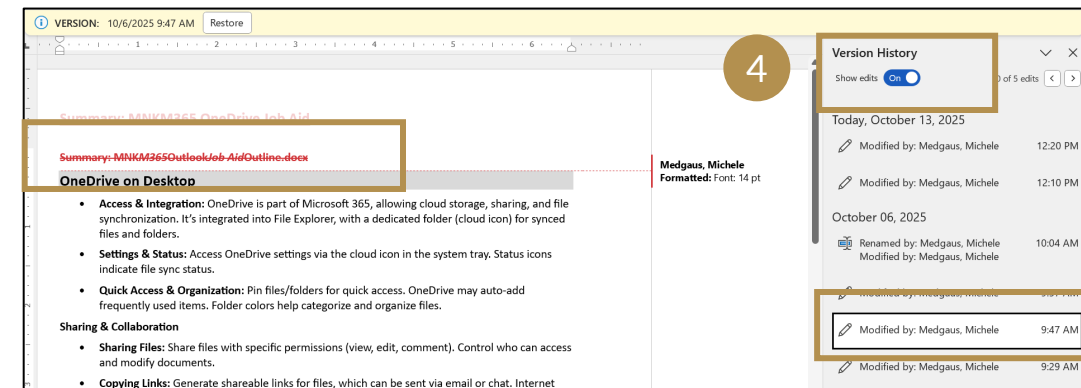
# OneDrive on the Web

- OneDrive on the Web Overview

- OneDrive Web Menus

- Add or Upload Files and Folders

- More Action Menus

# Access OneDrive on the Web

**Microsoft 365 for the web** lets you view and edit documents stored in your OneDrive directly from your web browser.

1. Type **myaccount.Microsoft.com** into your internet browser, **M365** opens.

2. From the Navigation Pane select the **App Launcher (nine dots)** and then select **OneDrive**.

3. Your **OneDrive** displays. The **For you** section in OneDrive Web is a personalized feed that appears on your OneDrive homepage. It highlights content Microsoft considers most relevant to you.
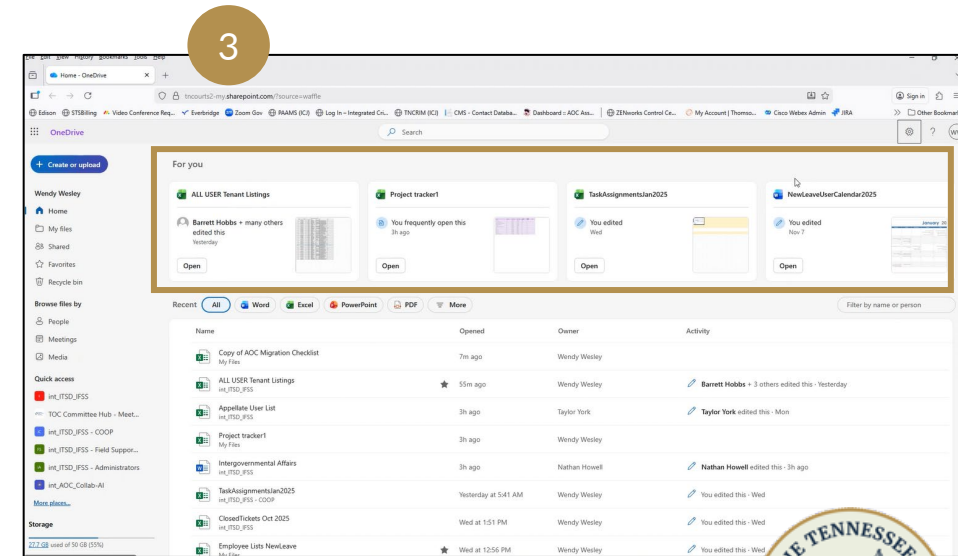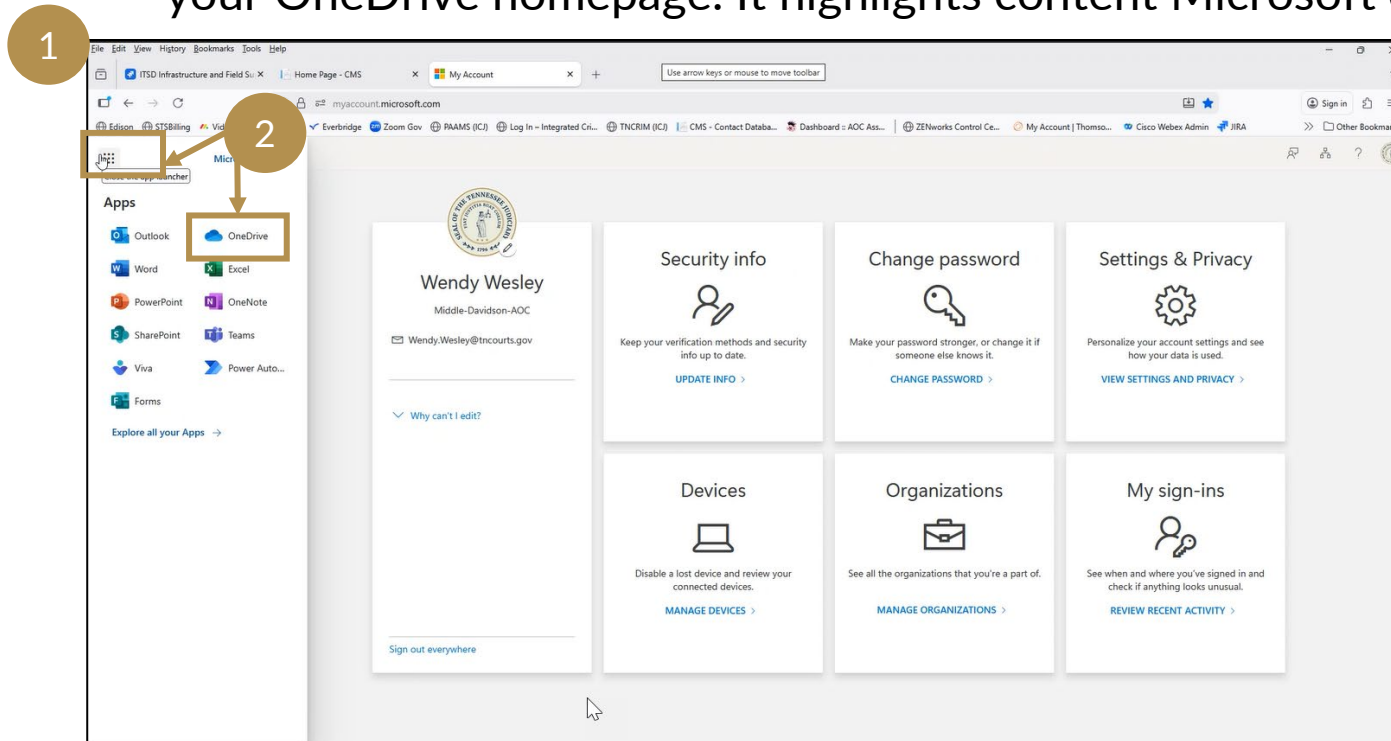
# Menus for OneDrive on the Web

OneDrive on the web has several menus to assist you in navigation.

## Left Navigation Menu
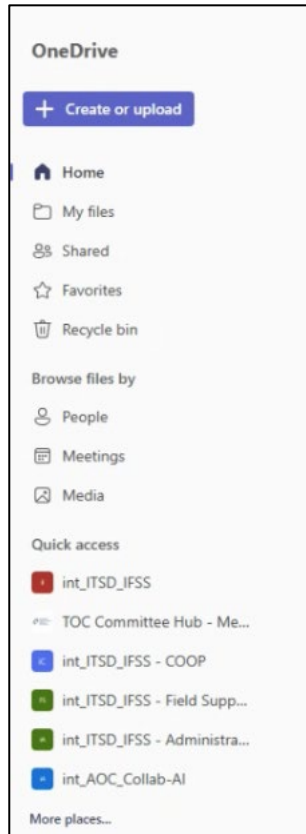


- **Home** - Displays all files.
- **My files** - Displays your files.
- **Shared** - View and sort files with date shared, activity, or who they are shared with.
- **Favorites** - Displays files that you have made a favorite.
- **Recycle bin** - Displays files you have deleted. By default, files stay in the Recycle Bin until you manually empty it, or the bin reaches its storage limit.
- **Browse files by** – Allows you to view files grouped by People or Meetings.
- **Quick access** - Gives you access to files contained in other areas such as a Team or channel.

## Top Menu

When a file is selected the menu displays:



- **Open** – Open allows you to access and view the selected file.
- **Share** - allows you to share files directly from OneDrive. Files are private until shared.
- **Copy Link** - Get a link to the selected file to insert in an IM, email, or site.
- **Copilot** – Opens Copilot and provides options to Summarize, Create an FAQ, or Ask a question to open Copilot Chat.
- **… (More Commands)** - This menu provides access to additional actions that go beyond the basic toolbar options.
- **Sort** - allows you to sort files and folders.
- **View** - Allows you to change the list to a list, compact or tile view.
- **Details** - Gives you information on the file or folder activity and who has access.

# View Shared Files on OneDrive on the Web

To view files that have been shared by you or with you on OneDrive Web select the Shared tab on the left navigation menu.
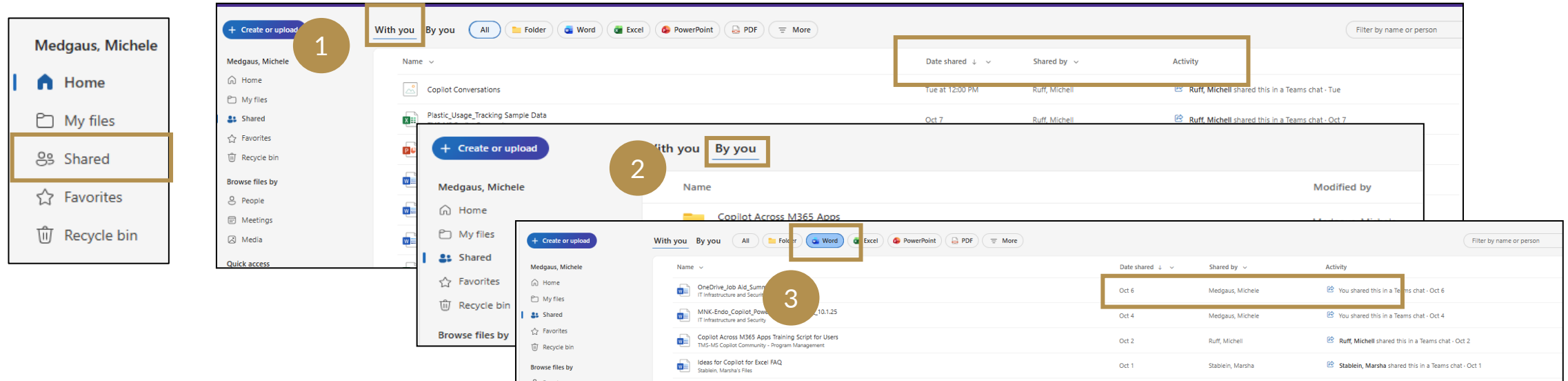


The top menu allows you to filter the shared files by:

1.  Files shared **With you**: displays files and folders that others have been shared with you, including the date shared, who it was shared by, and the activity.

2.  Files shared **By you**:  lists the files and folders you have shared with others.

3.  Files of a specific **Type**: lists all files by type (Word, Excel, PowerPoint, PDF, etc.) including the date shared, who it was shared by, and the activity.

# Create a New Folder on OneDrive-Web

1. To make a new folder in OneDrive online, just log into your account, click on the **+ Create or upload** icon.
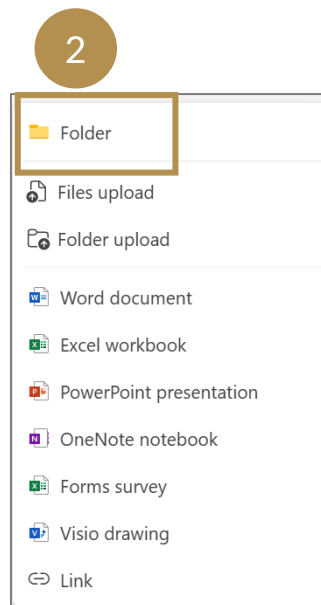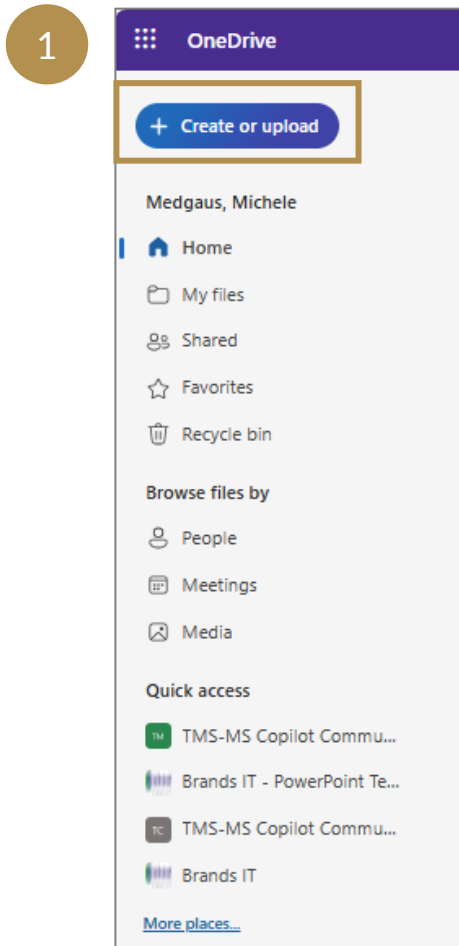


2. Select the **Folder** icon from the menu

3. Name the new folder and select a folder color to help organize your digital workspace and click **Create**.
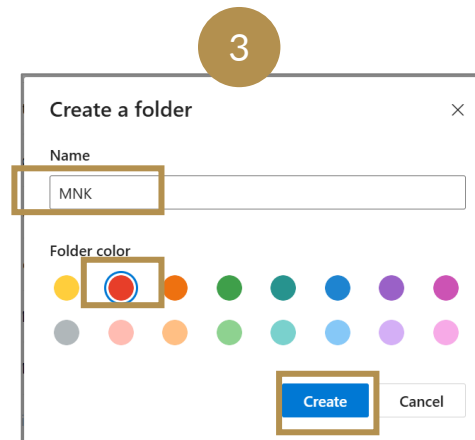
4. The new folder displays in your list My Files and displays in your OneDrive folders on your Desktop.

# Create a New File on OneDrive-Web

1. To make a new file in OneDrive online, just log into your account, click on the **+ Create or upload** icon.

**1**

**OneDrive**

**+ Create or upload**

Medgaus, Michele
- Home
- My files
- Shared
- Favorites
- Recycle bin

Browse files by
- People
- Meetings
- Media

Quick access
- TMS-MS Copilot Commu...
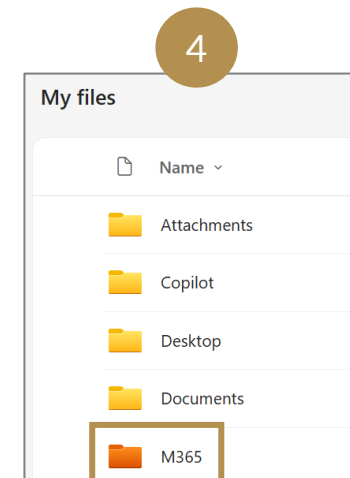- Brands IT - PowerPoint Te...
- TMS-MS Copilot Commu...
- Brands IT

More places...

**2**

- Folder
- Files upload
- Folder upload
- Word document
- Excel workbook
- PowerPoint presentation
- OneNote notebook
- Forms survey
- Visio drawing
- Link
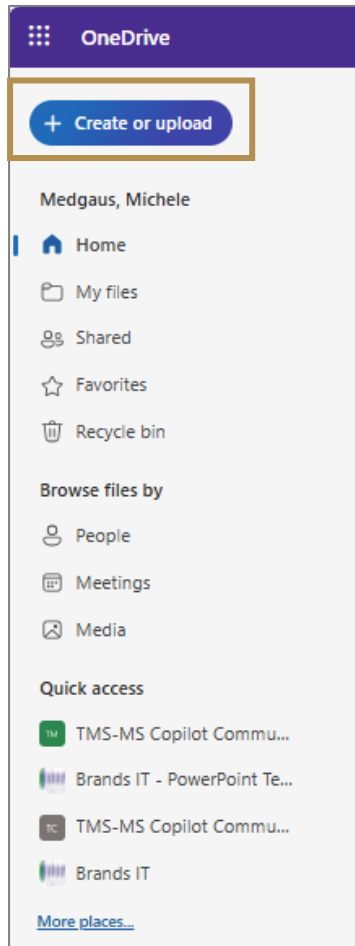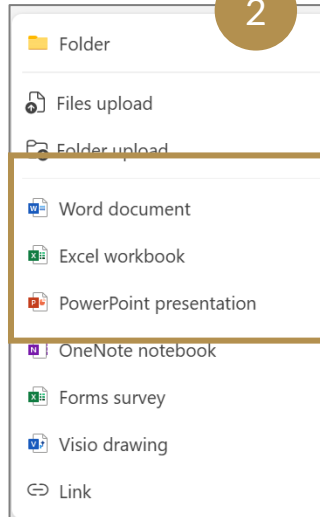
2. Select the type of file you want to create.

3. When the file opens, click the **Document Save** drop-down arrow at the top left and name the file.

**Word**

Document1

File Name

Document                                    .docx

Location

Medgaus, Michele > Do

**Excel**

Book

**3**

File Name

Book

Location

Medgaus, Michele > Documents

**PowerPoint**

Presentation

File Name

Presentation1                              .pptx

Location

Medgaus, Michele > Documents
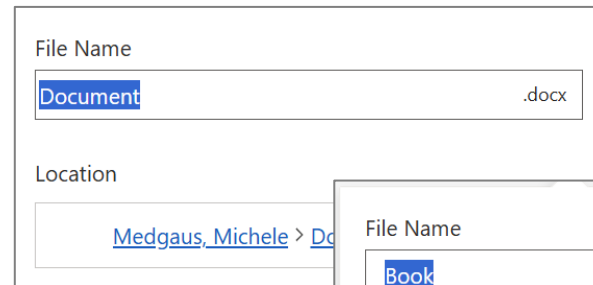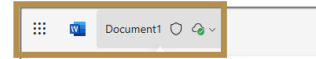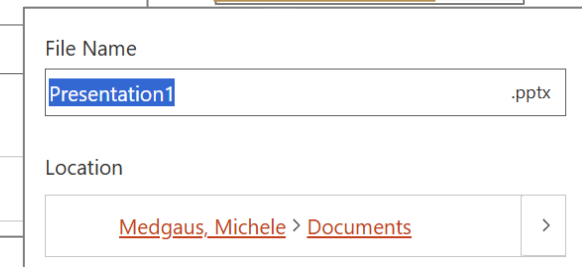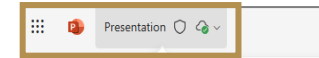
**The file is automatically saved in the designated folder.**

# Upload Files and Folders to OneDrive-Web

Uploading a file or folder to OneDrive on the web allows you to securely back up your documents, access them from any device with an internet connection and easily share and collaborate in real time.

1. Select the folder, click the **+ Create or upload** icon.

2. Click **Files Upload** or **Folder Upload**.

3. Locate and select the file or folder you wish to upload, then click **Open** for a file or **Upload** for a folder.
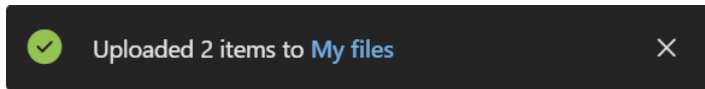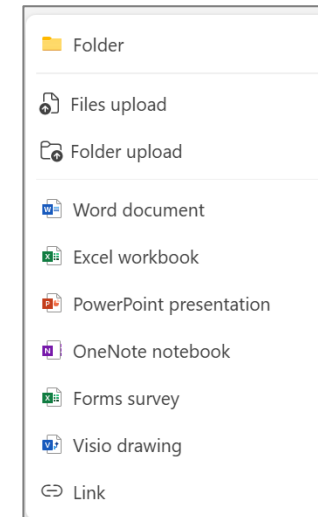   - When the upload is complete, a notification displays, and the file is listed in the folder.

   ✅ Uploaded 2 items to **My files**      ✕

   - The folder and all its files will be uploaded to OneDrive. You will receive a caution before you upload.

**+ Create or upload**

- 📁 Folder
- Files upload
- Folder upload
- 📝 Word document
- 📊 Excel workbook
- 📑 PowerPoint presentation
- 📓 OneNote notebook
- 📋 Forms survey
- 📐 Visio drawing
- 🔗 Link

**Upload a file to this site?**
This will upload all files from "Login". Do this only if you trust the site.

Upload    Cancel

✅ Uploaded 8 items to **Documents**      ✕
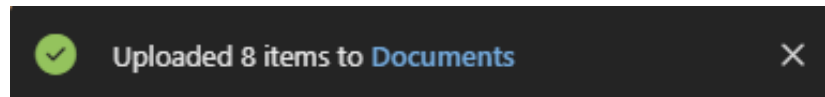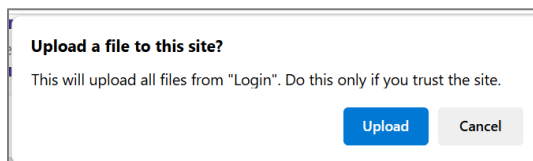
# More Actions /Right-Click Menus

## File More Actions/Right-Click Menu
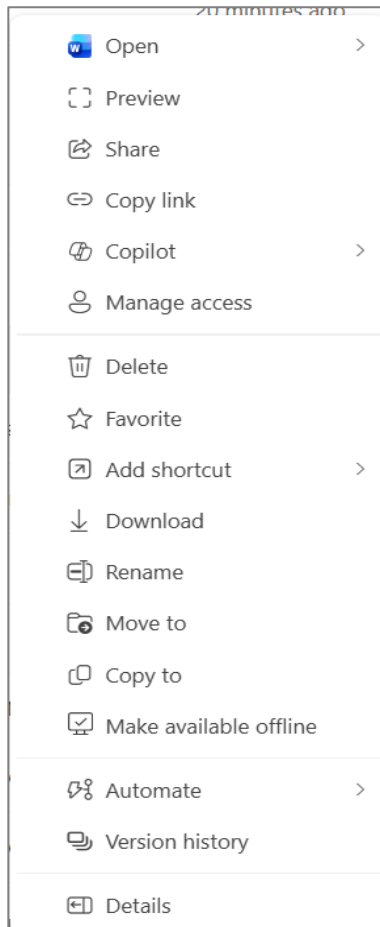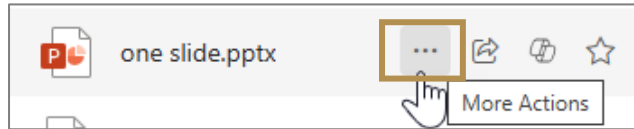


one slide.pptx    ···    More Actions

- Open
- Preview
- Share
- Copy link
- Copilot
- Manage access
- Delete
- Favorite
- Add shortcut
- Download
- Rename
- Move to
- Copy to
- Make available offline
- Automate
- Version history
- Details

**Common Actions Available:**

- **Share**: Share the selected file or folder with others, set permissions, or generate a sharing link.
- **Copy Link**: Generate a link to the file or folder for sharing via email, chat, or other platforms.
- **Move to / Copy to**: Move or copy the selected item to another location within OneDrive.
- **Delete**: Remove the file or folder (moves it to the Recycle Bin).
- **Rename**: Change the name of the file or folder.
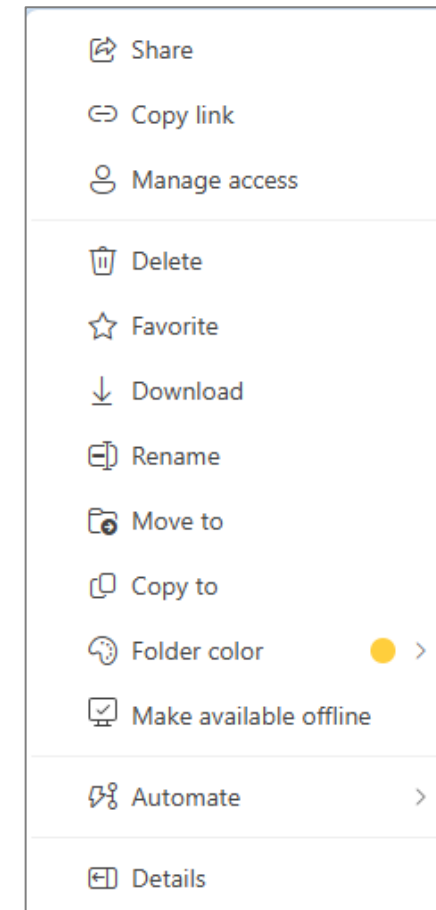- **Manage Access**: View and adjust who has access to the file or folder and change or revoke permissions.
- **Version History**: View and restore previous versions of the file.
- **Folder Color**: (For folders) Assign a color to help organize and visually distinguish folders.
- **Make available offline**: Lets you select files or folders that you want to access even when you don't have an internet connection.

## Folder More Actions/Right-Click Menu



1. Copilot    ···    More Actions

- Share
- Copy link
- Manage access
- Delete
- Favorite
- Download
- Rename
- Move to
- Copy to
- Folder color
- Make available offline
- Automate
- Details

# OneDrive On the Go

- Use OneDrive from your mobile device (smartphone or tablet).

- Access, manage, and share files anytime, anywhere.

- Download the OneDrive app from the App Store (iOS) or Google Play (Android).

- Sign in with your TNCourts.gov account.

- Browse, upload, and manage files just like on your desktop or web.

- OneDrive app integrates with **Teams**, **Outlook**, and **Office apps**.

# Quick Recap

- Use OneDrive for personal and ad-hoc file sharing

- Introduction to OneDrive in Microsoft 365

- Accessing OneDrive on Desktop

- OneDrive Overview

- Collaboration on OneDrive

- Version History

- Accessing and Using OneDrive on the Web

QUESTIONS?

THANK YOU