

M365 OneDrive Overview



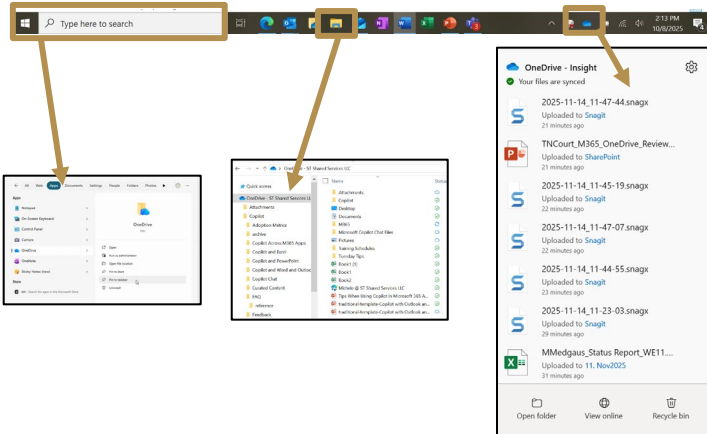
Accessing OneDrive on the Desktop

OneDrive is an integral part of Microsoft 365 and provides a place in the cloud to store, share, and synchronize your files.

- Update and share files from any device.
- Work on Office documents with others at the same time.

You can access **OneDrive from your Desktop**:

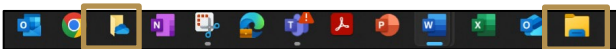
1. From the **Start Menu**.
2. Using **File Explorer**
3. Using the **OneDrive Cloud Icon** on the system tray:



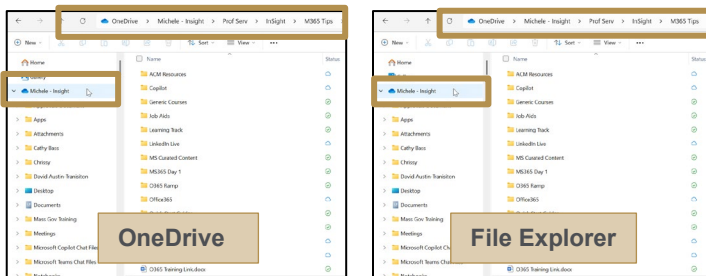
Access OneDrive from File Explorer

OneDrive is integrated into **File Explorer**. The OneDrive folder, indicated by the Cloud icon, includes all your synced files and folders.

- You can manage your files just as you would with any other folder on your computer – dragging and dropping files, creating new folders, and organizing your documents as needed.
 - Any changes made in this folder will automatically synchronize to OneDrive, ensuring you always have the latest version of your files.
1. Open the **OneDrive Folder** or the **File Explorer Folder** from your desktop.



2. Click the **OneDrive** folder, identified by the cloud icon.



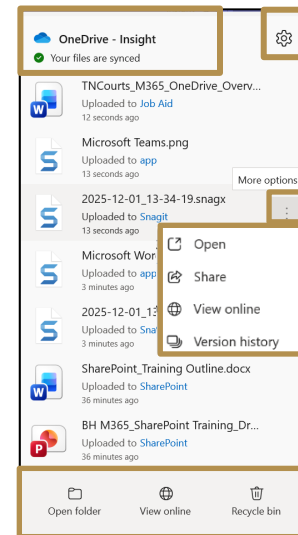
OneDrive Settings (Desktop)

To access your **OneDrive** settings, click the **OneDrive icon** (cloud) on the taskbar in the system tray.



Note: If you do not see the OneDrive icon, OneDrive might not be running. Go to **Start**, type **OneDrive** in the search box, and then click **OneDrive** in the search results.

The **OneDrive** dialog page displays:



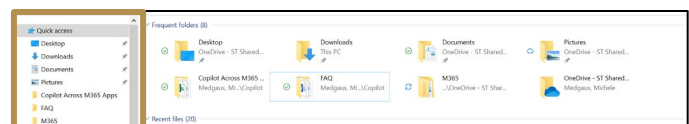
The **Dialog** page displays:

- Access to OneDrive Files
- File Synchronization
- Notifications and Status Updates
- Settings and Preferences
- Sharing and Collaboration
- View online
- Version History
- Access the Recycle bin

Quick Access

















Quick Access in OneDrive is a feature that allows you to quickly reach your most frequently used files and folders:

- **Pinning for Convenience:** You can pin files or folders to Quick Access so they're always easy to find.
- **Location:** The Quick Access menu is located on the left-hand side of the OneDrive interface.
- **Automatic Suggestions:** OneDrive may automatically add items to Quick Access based on your usage patterns.
- **Visual Indicator:** Files and folders pinned to Quick Access display a pin icon next to their name.









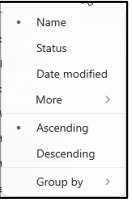

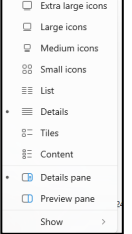

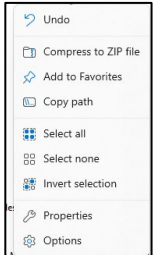


OneDrive Status Icons

OneDrive icons in the Desktop Notification areas, menu bars, Windows File Explorer, and macOS Finder tell you the sync state of the file or folder.

Icon	Warning	Solution
	A red circle with a white cross indicates that a file or folder cannot be synchronized.	 Click the blue or white OneDrive icon in the notification area to learn more about the problem.
	A grayed-out OneDrive icon with a line through it indicates you are not signed in, or OneDrive setup has not completed.	 Press the Windows key, search for OneDrive and then open the OneDrive Desktop app.
 	The paused symbol over the OneDrive icon means your files are not currently synchronizing.	Press the Windows key, search for OneDrive and then open the OneDrive Desktop app.
  	The circular arrows over the OneDrive notification icons signify that sync is in progress. This includes when you are uploading files, or OneDrive is synchronizing new files from the cloud to your PC.	If OneDrive shows "Processing changes" for a long time, it could be because you have an online file open, a very large file syncing, a lot of files stuck in a queue.
 	If you see a yellow warning triangle over your OneDrive icon, it means your account needs attention.	Select the icon to see the warning message displayed in the activity center.
File and Folder Icons		
	Indicates the file or folder is shared with other people.	
	Indicates that the file is only available online. Online-only files do not take up space on your computer.	
	When you open an online-only file, it downloads to your device and you can open the file anytime, without Internet access. If you need more space, you can change the file back to online only. Right-click the file and select Free up space .	
	Files that you mark as Always keep on this device have the green circle with the white check mark. These files are always available files download to your device and take up space, but they are always there for you even when you are offline.	
	OneDrive displays a padlock icon next to the sync status if the file or folder has settings which prevent it from syncing.	

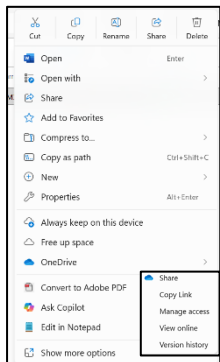
OneDrive Toolbar

OneDrive Toolbar	
	New (+) Icon: Creates new files and folders directly within OneDrive. This includes creating documents, spreadsheets, presentations, and more.
	Cut Icon: Moves files and folders from one location to another within OneDrive.
	Copy Icon: Creates a copy of selected files and folders in a different location within OneDrive.
	Paste Icon: Inserts files and folders that you have cut or copied into a new location within OneDrive.
	Rename Icon: Changes the name of your files and folders within OneDrive.
	Share Icon: Shares selected files and folders with others.
	Delete Icon: Removes files and folders from OneDrive. Deleted items move to the Recycle Bin.
 	Sort Icon: Sorts your files and folders by name, date, size, or other criteria.
 	View Icon: Switches between different view modes such as list, grid, or compact views.
 	More Options: Provides access to a variety of additional actions and settings within OneDrive.

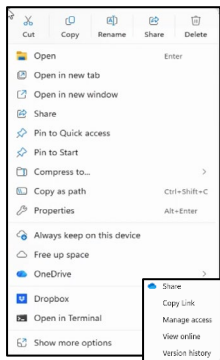
Right-Click Menu

The **Right-click menu** in OneDrive provides a quick way to access many file and folder actions directly from the OneDrive interface (both on the desktop and on the web).

Right-click on File



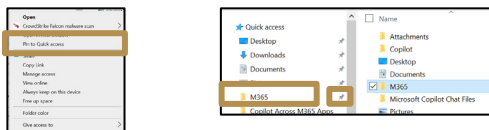
Right-click on Folder



Pin to Quick Access

Pinning a file or folder to **Quick Access** in OneDrive allows users to quickly access frequently used files and folders.

1. Right-click on the **folder** to open the context menu.
2. From the menu, click the **Pin to Quick Access** option.

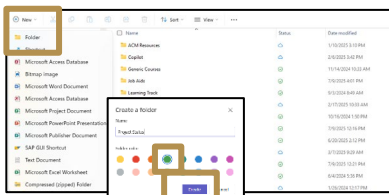


Files and folders in Quick Access display a pin icon next to the file name, signifying that they are pinned for easy access.

Create New Folders on OneDrive

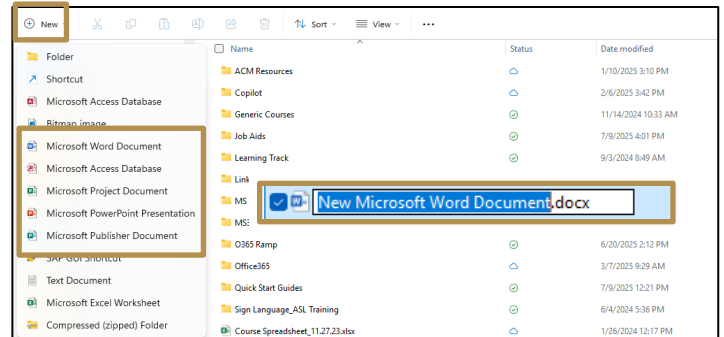
Folder colors in OneDrive are a visual tool that allows users to categorize and organize their files more efficiently.

1. From the ribbon, click the **+ New** button.
2. From the menu, select **Folder**.
3. Enter a filename and select a color for your folder.
4. Click **Create** and the folder will be created instantly.



Create New Files on OneDrive

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.

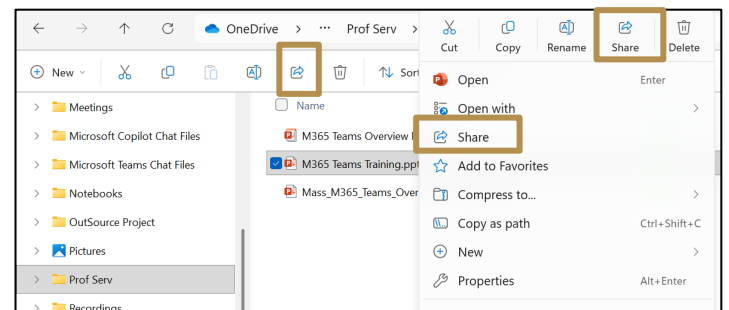


Sharing Files on OneDrive

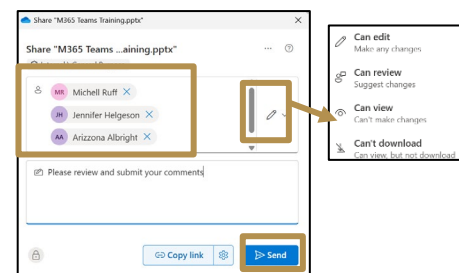
Sharing files from OneDrive is not only convenient but also enhances collaboration, increases productivity, and ensures the security of your data.

- Sharing a file involves granting specific permissions to other users to access and potentially modify the file.
- When you share a file, you can control who can view, edit, or comment on the document.

1. Right-click on the file and click **Share** from the menu.
 - a. Select the **Share** icon on the ribbon.
 - b. 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**.

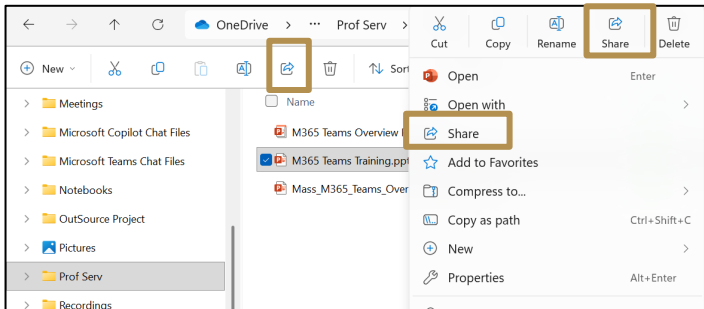
The recipient receives an email with a link to the document you shared.

Copy a Link to a File on OneDrive

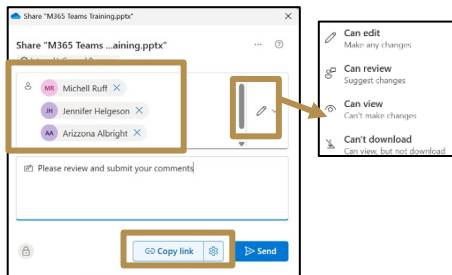
Copying a link in OneDrive generates a shareable link that can be sent via email, chat, or other communication methods.

Option 1: Copying a Link to a File on OneDrive

1. Right-click on the file and click **Share** from the menu.
 - a. Select the **Share** icon on the ribbon.
 - b. 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.

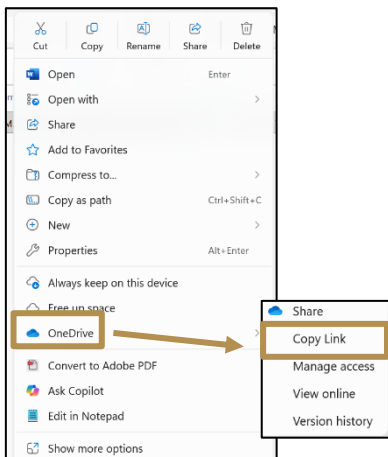


4. Click **Edit** to change the sharing permissions.
5. Click **Copy Link**.

Copied links do not automatically notify users.

Option 2: Copying a Link to a File on OneDrive

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



2. Select **Copy Link** from the sub-menu.

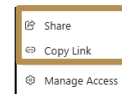
Share or Copy a Link from an Opened File

Sharing or copying a link from an open file allows multiple users to work on the document simultaneously. 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.

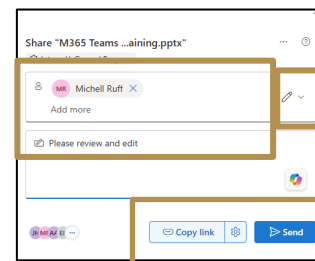
1. Open the file you want to share from OneDrive.
2. Click on the **Share** button, typically found in the upper right corner of the toolbar.

Application	Symbol
Word	
Excel	
PowerPoint	

3. Select **Share** or **Copy Link** to copy the link to your clipboard from the menu.



4. 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.



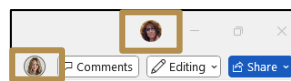
5. Add a personal message to provide context or instructions for the recipients and set the permissions.
6. Click **Send** or **Copy link**.

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.

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.
- 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.



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.



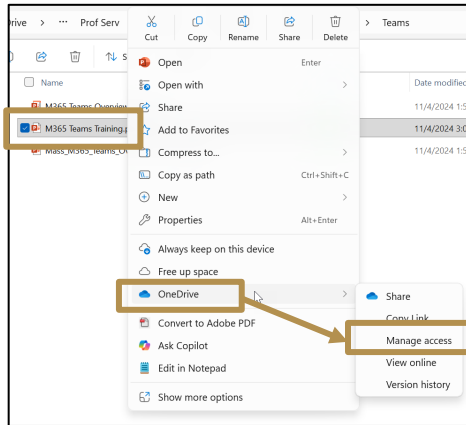
Dots within the document indicate where and what the collaborator is doing.

- A blue dot by [Name] means the person is viewing the document.
- A green dot by [Name] means the person is editing the document.

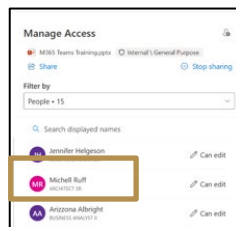
Stop Sharing with Manage Access

If you are the file owner, 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.

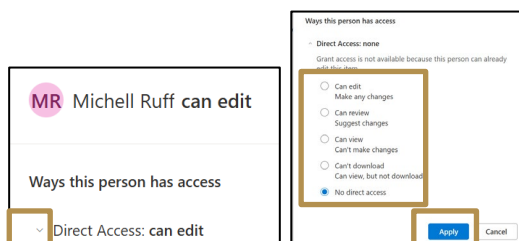
- If someone has been given direct access, or has access through a specific people link, you can also change the sharing permissions between view and edit.
 - **Manage Access** helps you track who has access to your files and adjust as needed to ensure proper collaboration and security.
1. Navigate to the file or folder on **OneDrive**.
 2. Right-click on the file and select **OneDrive** from the menu and then select **Manage access** from the sub-menu.



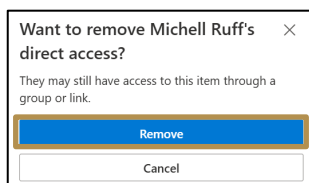
3. The **Manage Access** dialog box displays a list of people who have access to the file or folder, along with their permission levels (e.g., view or edit).



4. Select the person whose access you want to change or remove and click the **Direct Access** dropdown.
5. Choose the permission setting you want to change (edit, view download) or choose **No direct access** to stop sharing the file and click **Apply**.



6. A confirmation message displays.

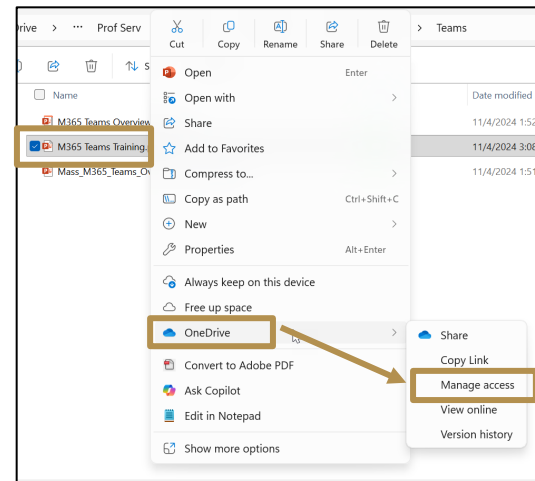


7. To confirm, click **Remove**.

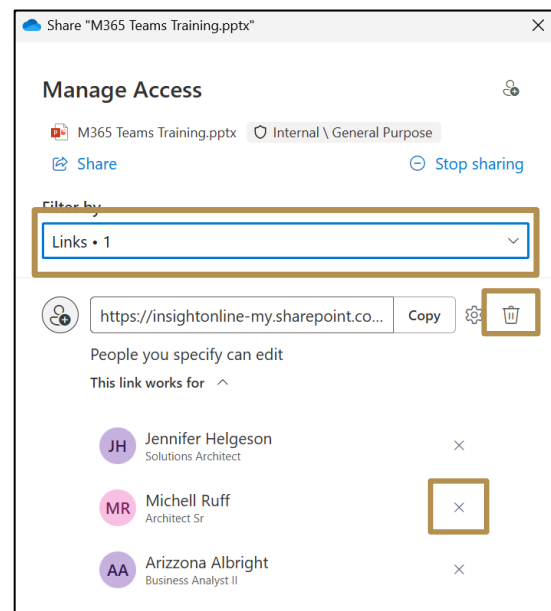
Remove a Link to a File with Manage Access

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

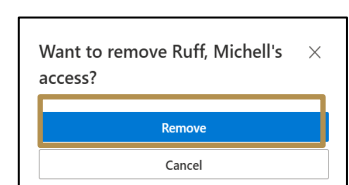
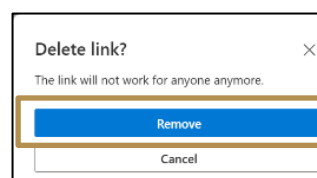
1. Navigate to the file or folder on **OneDrive**, right-click on the file, select **OneDrive** from the menu and then select **Manage access** from the sub-menu.



2. The **Manage Access** dialog box displays a list of people who have access to the file or folder, along with their permission levels (e.g., view or edit).
3. Click the **Filter by** dropdown arrow and select **Links**.



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

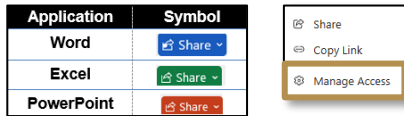


6. To confirm, click **Remove**.

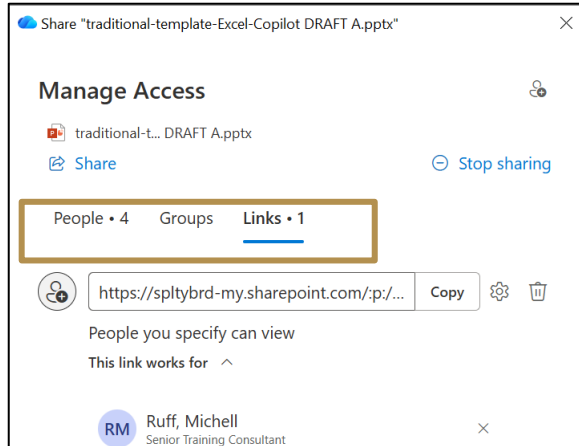
Manage Access from an Open File

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

1. Open the document, spreadsheet or presentation you intend to share, click on the **Share** button, typically found in the upper right corner of the toolbar.



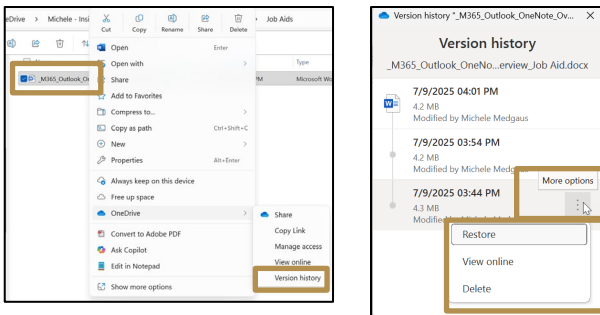
2. Select **Manage Access** from the menu.
3. The **Manage Access** dialog box displays a list of people who have access to the file or folder, along with their permission levels.



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 (ellipses)** next to the Version and select the option from the sub-menu.
 - **Restore:** Overwrite the current version with the selected version.
 - **Open File:** Open the document.
 - **Delete:** Remove the selected version.

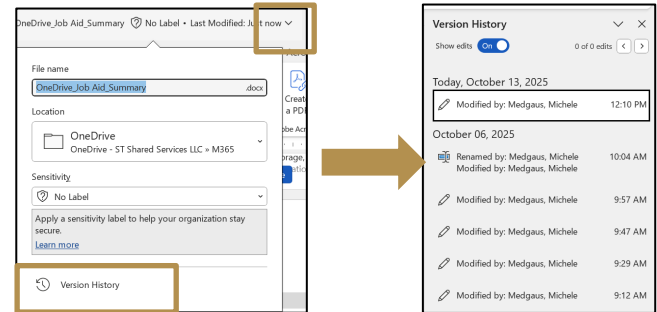
Version History from an Opened File

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.

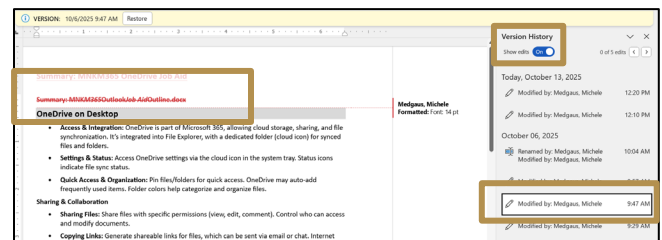
It is important to note that you can only access Version History from within the online version of the file.

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.

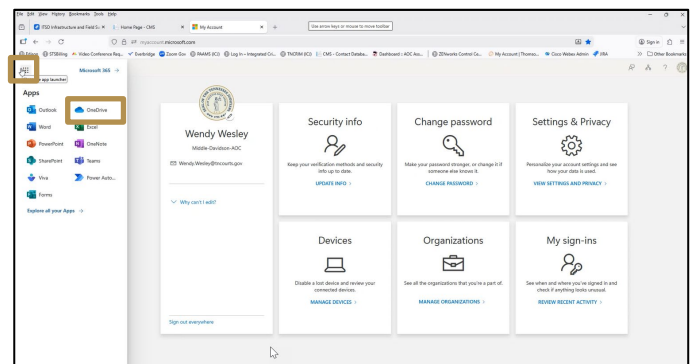


Accessing OneDrive on the Web

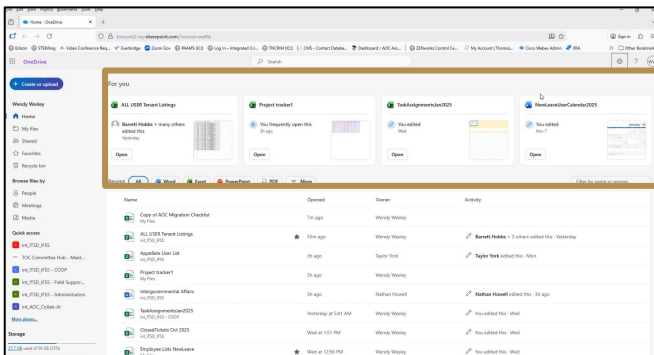
Microsoft 365 for the web lets you view and edit documents stored in your OneDrive directly from your web browser.

- Microsoft 365 for the web gives you the full functionality of editing without having to start up an Office program.
- Update and share files from any device that's connected to the Web.
- Work on Office documents with others at the same time.
- Everything you do in OneDrive on the web is reflected in OneDrive for the Desktop.

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.



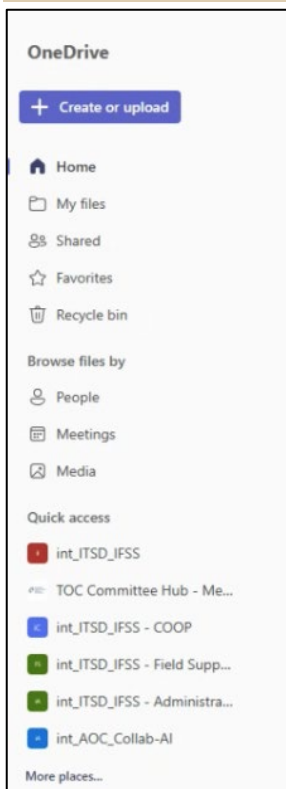
- **Suggested files:** Based on your recent activity and collaborations.
- **Recent files or activity:** Documents you or your colleagues have recently modified.
- **Shared files and recommendations:** Items shared with you or recommended for collaboration.
- **Photo memories or personal content:** Especially if your OneDrive is connected to your photo library.

This section is designed to help you quickly access files and memories that may be important or interesting, streamlining your workflow and encouraging collaboration.

OneDrive Web Menus

OneDrive on the web has menu items to assist you in navigation.

The Left Menu



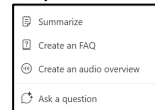
- **Home:** Displays all files.
- **My files:** Displays your files.
- **Shared:** View and sort files with date shared, activity, or who they are shared with.
- **Favorites:** Displays files that you have made a favorite.
- **Recycle bin:** Displays files you have deleted. By default, files stay in 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.

The Top Menu

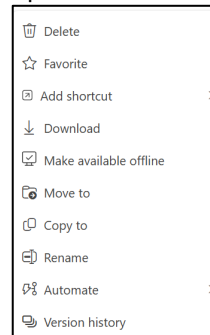
When a file is selected the menu displays:



- **Open:** Open allows you to access and view the selected file.
 - **Open in browser:** Opens the file in a web-based viewer or editor (such as Word Online, Excel Online, or PowerPoint Online).
 - **Open in App:** If you have the corresponding desktop application installed, this opens the file in that app (such as Microsoft Word or Excel).
 - **Open in Immersive Reader:** Once opened, you can click Play to hear the text read aloud or adjust the settings to suit your reading preferences.
- **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.



- **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.
- **... (More Commands):** This menu provides access to additional actions that go beyond the basic toolbar options.

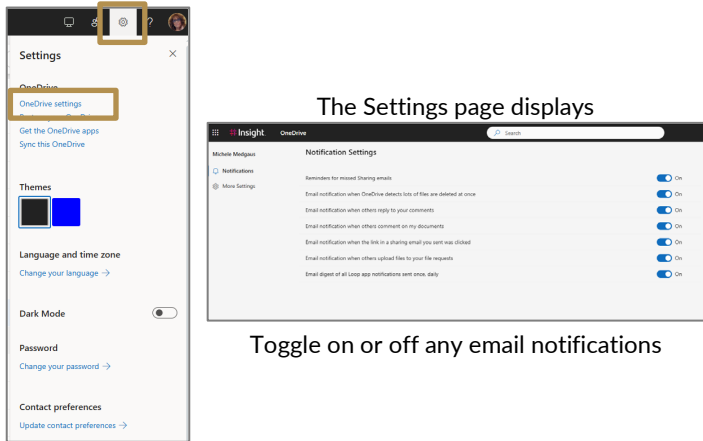


- **Delete:** Moves the file to the Recycle bin.
- **Favorite:** Allows you to quickly mark files or folders as important.
- **Add Shortcut:** OneDrive creates a direct link to that item within your own OneDrive account.
- **Download:** Allows you to download a copy of the file.
- **Make available offline:** OneDrive downloads the file(s) to your device's local storage.
- **Move to:** Move to allows you to relocate the selected file to another folder within your OneDrive.
- **Copy to:** Creates a duplicate of the file in a location of your choice.
- **Rename:** You can change the file's name.
- **Automate:** Allows you to automate a flow using Power Automate.
- **Version history:** Version history gives access to previous versions of the file.

OneDrive Web Settings

Most settings are available for adjustment in your OneDrive on your Desktop. In OneDrive on the web, you can adjust notification settings.

1. Click the **Gear** icon and select **OneDrive settings**.

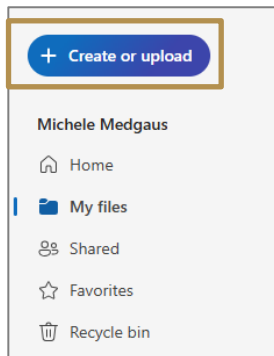


Add or Upload Files and Folders to OneDrive on the Web

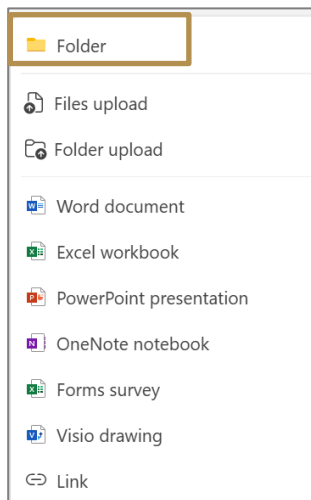
Uploading and adding files or folders to OneDrive on the Web is a simple yet powerful way to safeguard your data and enhance your workflow. You can upload multiple files and folders simultaneously by selecting them in your file picker or dragging them into OneDrive's web window.

Add a New Folder on OneDrive Web

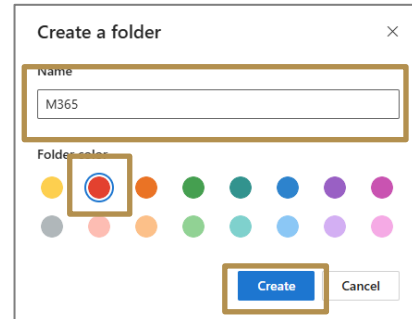
1. To add a new folder, click the **+ Create or upload** icon.



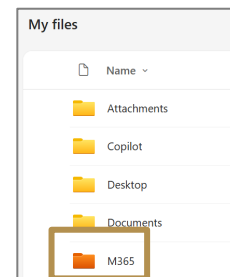
2. Select the **Folder** icon from the menu.



3. Name the new folder and select a folder color to help organize your digital workspace.



4. Click **Create**. The new folder displays in your list My Files and displays in your OneDrive folders on your Desktop.

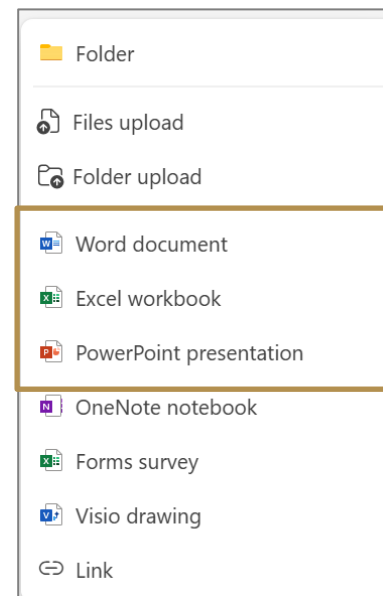


Create a New File on OneDrive Web

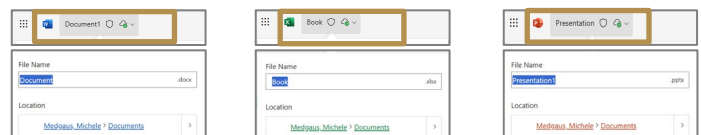
1. Select the folder, click the **+ Create or upload** icon.



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.

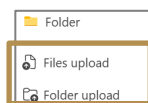


4. The file is automatically saved in the designated folder.

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.

Files:

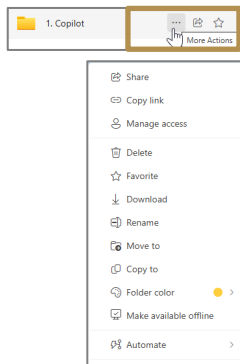
- The folder and all its files will be uploaded to OneDrive. You will receive a caution before you upload.

Folders:

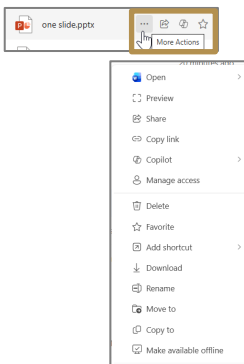
More Actions Menus on OneDrive Web

The **More Actions** option (ellipses), adjacent to the file name. Clicking this icon reveals the extended context menu, which contains a variety of actions beyond the most obvious ones.

More Actions from a Folder



More Actions from a File



You can also access the **More Options** menu by right-clicking on the file or folder.

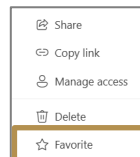
- **Share:** Share the selected file or folder with others, set permissions, or generate a sharing link.
- **Copy Link:** Generate a link to the file or folder for sharing via email, chat, or other platforms.
- **Move to / Copy to:** Move or copy the selected item to another location within OneDrive.
- **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.

File and Folder Favorites on OneDrive Web

Favorites help you organize your OneDrive workspace and streamline your workflow by keeping your most-used content just a click away.

Create a Favorite

1. Locate the file or folder you want to mark as a favorite
2. Click on the **More Options (ellipses)** or right-click on the file or folder and select Favorite from the menu.

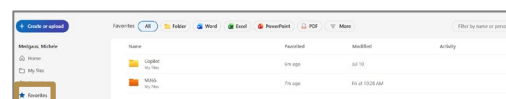


Or click on the **Star** to the right of the file or folder.



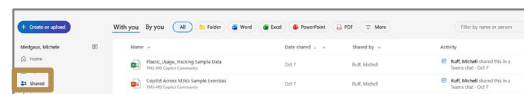
View Favorites

In OneDrive on the web, files that you have marked as Favorite are easy to locate through a dedicated section. In the left-hand navigation pane, select the **Favorites** option



View Shared Files or Folders on OneDrive Web

The **Shared** option located in the left navigation pane provides users with quick access to files and folders that have been shared with them by others, as well as content they have shared with others. In the left-hand navigation pane, select the Shared option

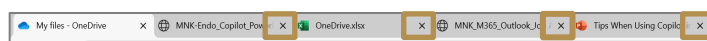


The top menu allows you to filter the shared files by:

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

Closing Files and Folders on OneDrive Web

When you open a file on OneDrive Web—such as a Word document, Excel spreadsheet, PowerPoint presentation, or PDF—it displays in your browser.



- Each file opened from OneDrive Web appears in a new browser tab or window.
- To close the file, simply close the browser tab or window where the file is open.
- If you have several files open in different tabs, repeat the process for each tab to close all files.
- Always ensure your changes are saved before closing the file, especially when working on documents.
- You may receive a prompt if there are unsaved changes before closing the tab or window.
- **Mobile Devices:** On mobile browsers, use the browser's tab management features to close files, or use the "Back" button to exit the file view.
- Your browser remains open for other work.