

# How to Use OneDrive for Business in the Cloud

This guide tells you how to use OneDrive for Business using the cloud version in Office 365.

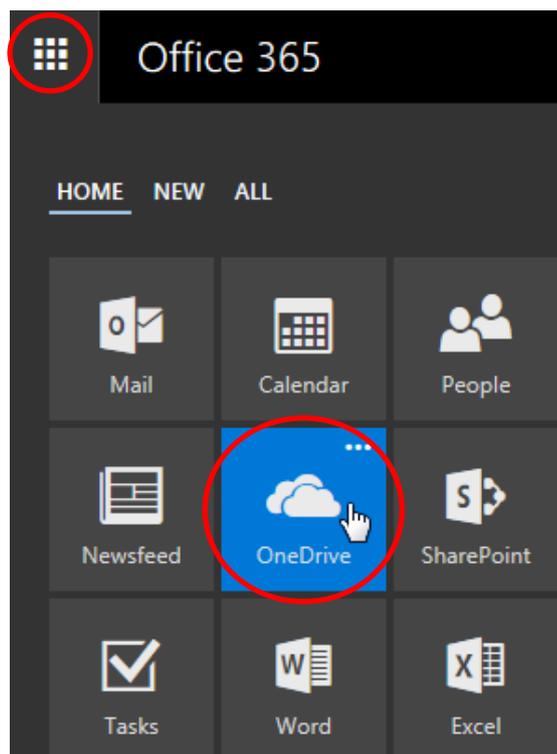
Please see the separate guide on how to use the OneDrive sync client.

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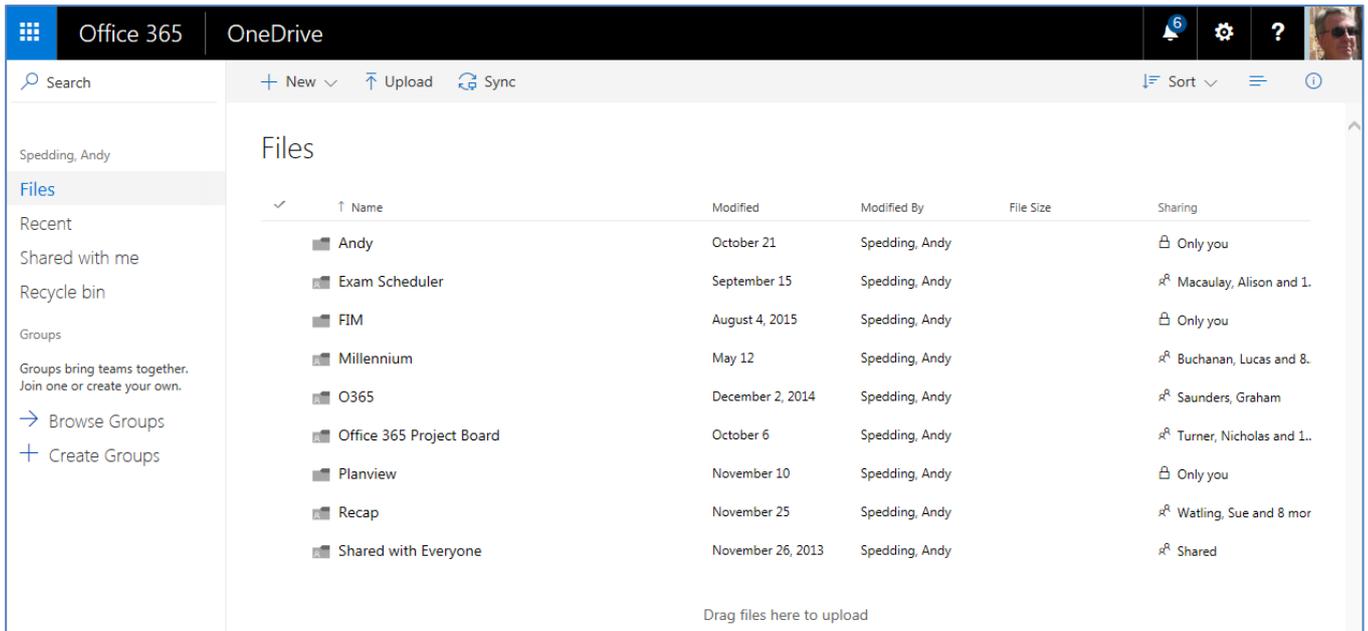
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## Managing your Files

1. Log in to Office 365. You can access this at work or remotely at <http://office365.exeter.ac.uk/>  
 ( *Please note: do not download Office 2016 to your work computer from this O365 homepage* )
2. In Office 365, click on the app launcher menu at top left of your screen, and then click on **OneDrive**

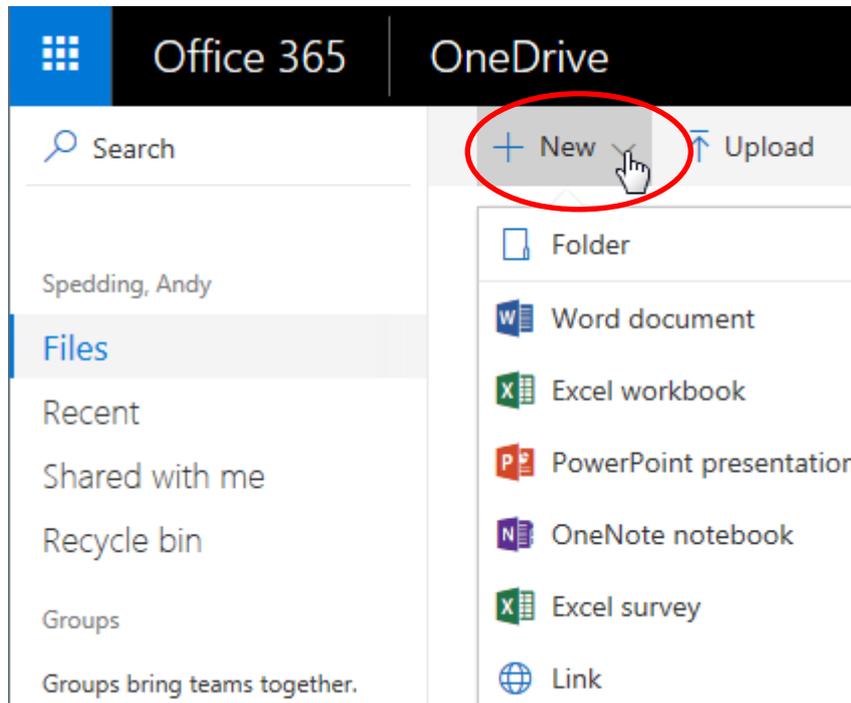


3. You will then see the OneDrive for Business homepage.



The **Files** area is where you can create new files and folders or upload existing files.

4. To create a new file or folder click on **New**.



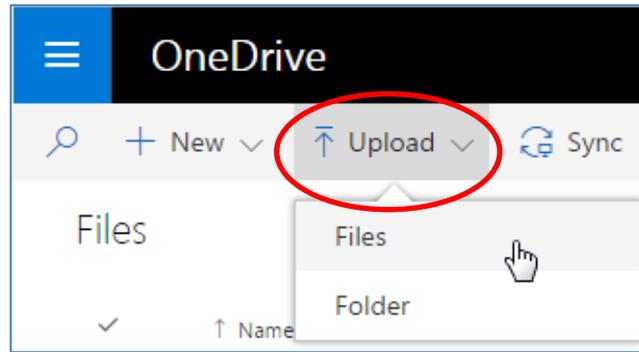
A dropdown list will appear for you to choose what you want to create.

You can create an Office document using Word Online, Excel Online, etc directly in your OneDrive for Business.

Choosing one of these options will open the relevant Office online app and automatically save the document. To give your new document a meaningful filename, you will need to use **Save As** or **Rename** in the **File** menu in Word Online, Excel Online etc.

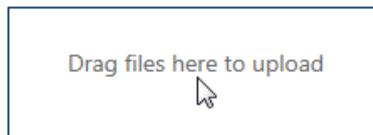
5. To upload a file or folder to OneDrive for Business, click on Upload.

**Please note:** Google Chrome, Firefox or Edge are the best browsers for doing this; you may not see the option to upload a folder if using Internet Explorer.

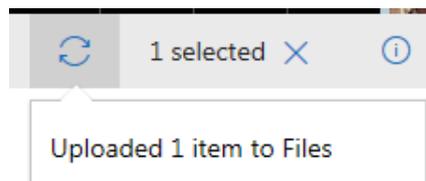


This will then open a window where you can browse for the files or folders you want to upload from other file storage locations.

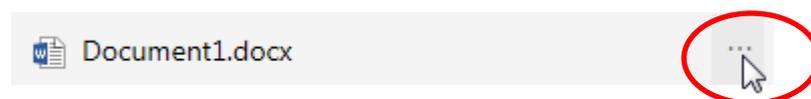
Alternatively you can drag files or folders from other storage locations in Windows Explorer to the whitespace in the **Files** area



You will see a notification briefly when the file has been uploaded

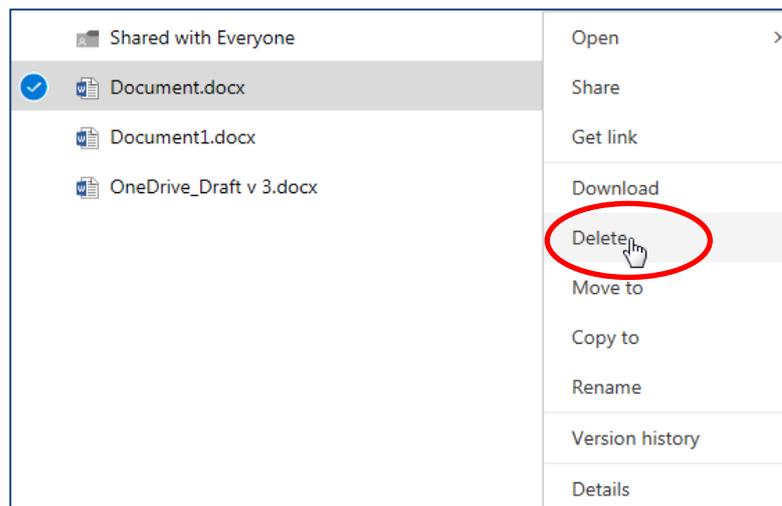


6. To delete a file or folder in OneDrive for Business, hover over the file or folder name until you see 3 dots appear then click on them.

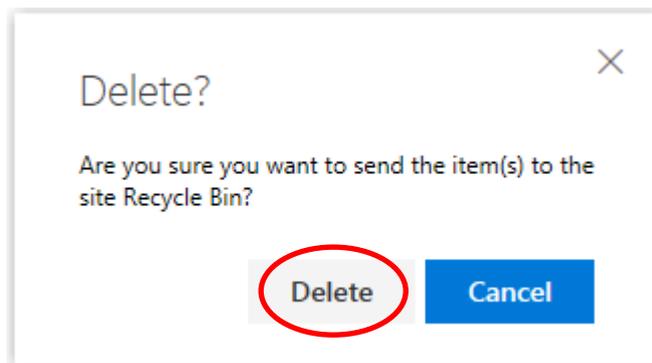


Alternatively right-click on the file or folder name itself.

You will see a dropdown list of file handling options.



Click on **Delete** and then confirm by clicking on Delete again



This will send your file or folder to the Recycle Bin in OneDrive for Business. Note that this is different from the Recycle bin on your PC or laptop

Deleted files will remain in the Recycle Bin for 30 days.

7. Occasionally you may need to refresh your browser to see the effects of creating, uploading, or deleting files in your OneDrive for Business.

# File Backup and Recovery

Please be aware that the University of Exeter IT department does not and cannot make separate backups of your files in OneDrive for Business.

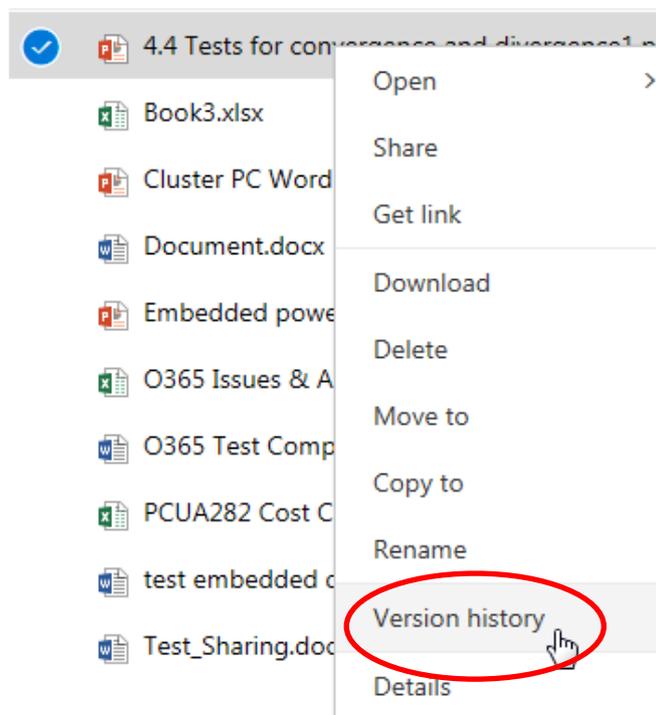
You as document owners are responsible for managing and maintaining your own files.

However there are some processes in OneDrive for Business which can help:

1. Each time you or a colleague edit a file stored in your OneDrive for Business, a new version is automatically created.

You will still only see the one filename in your OneDrive for Business folder, but previous versions of the same file are also stored as hidden backups.

2. You can see how many versions are stored for a file by right-clicking on the file name and then clicking **Version history**



3. You will then see a window showing you details of the various stored versions of your file. There can be up to 30 stored versions of a file.

Version history			
Delete All Versions			
No. ↓	Modified	Modified By	Size
2.0	12/12/2016 12:33	<input type="checkbox"/> Spedding, Andy	294.9 KB
1.0	12/12/2016 12:32	<input type="checkbox"/> Spedding, Andy	299 KB

- If you need to restore a previous version for any reason, hover your mouse over the date of the version you want to restore. A box with a small downward arrow will then appear

## Version history

Delete All Versions

No. ↓ Modified

2.0 12/12/2016 12:33

1.0 12/12/2016 12:32



- Click on the arrow and then click on **Restore**

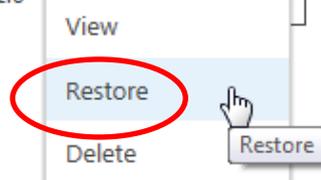
## Version history

Delete All Versions

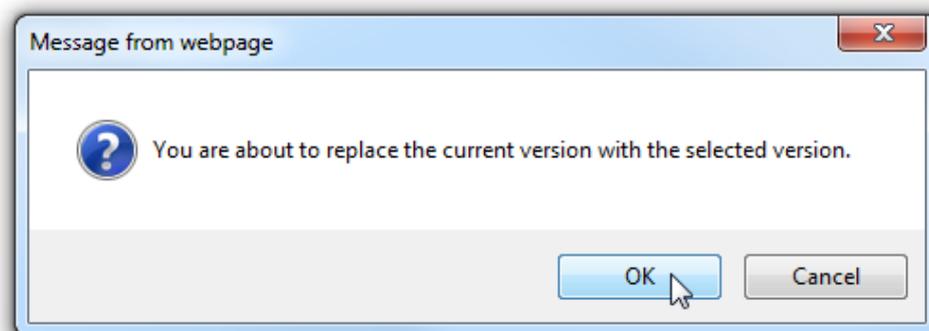
No. ↓ Modified

2.0 12/12/2016 12:33

1.0 12/12/2016 12:32



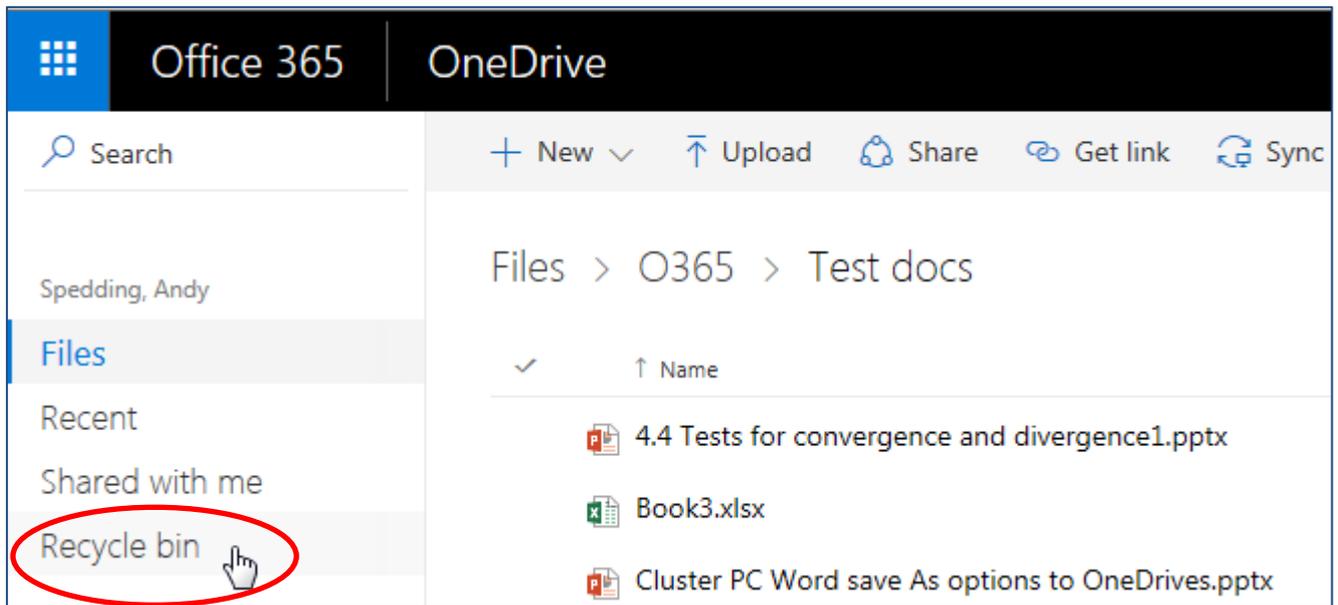
- You will get an “are you sure” message



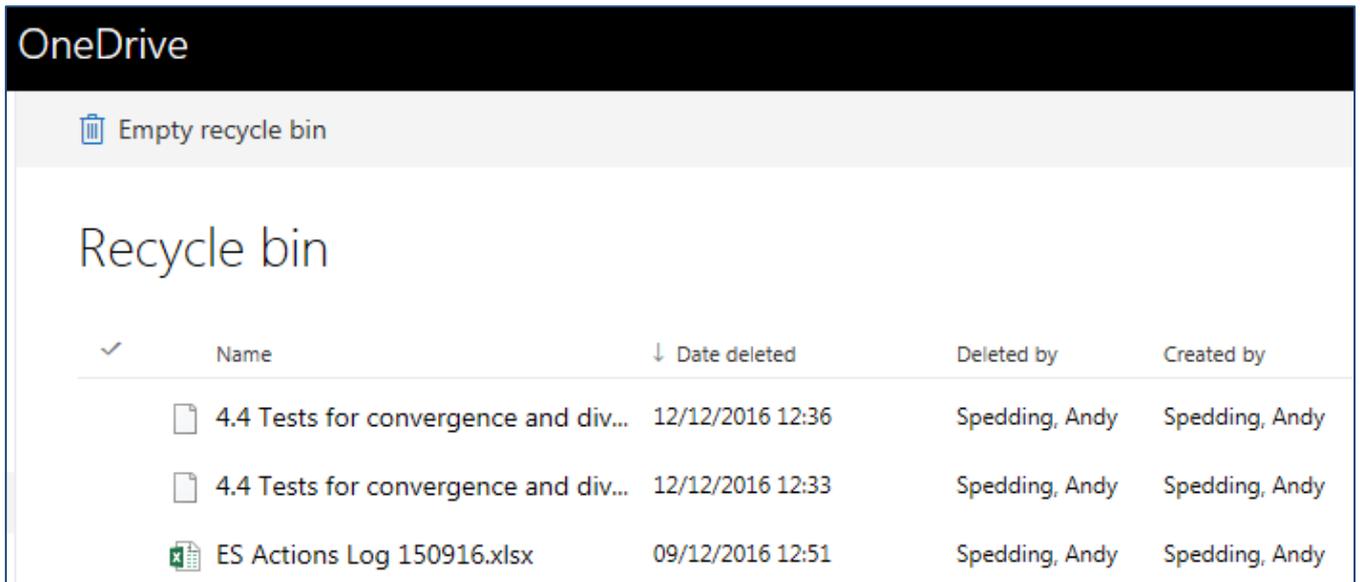
- Click on **OK** to create a new current version with a higher version number.

8. If you need to restore a file which you have deleted, you can do if it is still in your OneDrive for Business Recycle bin.

On the OneDrive for Business homepage, click on **Recycle bin** at the top left of the screen

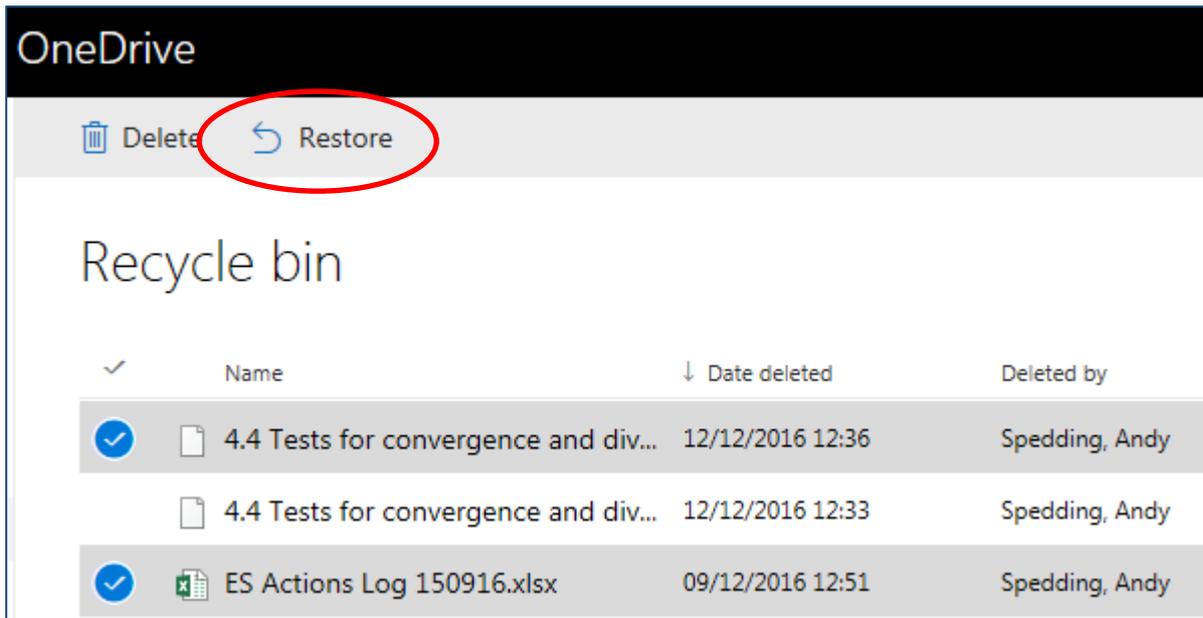


9. This will then show the contents of your OneDrive for Business Recycle bin.



Note that this is different from the Recycle bin on your PC or laptop.

10. Find the file or files you wish to restore. You can select multiple files by clicking in the circle to the left of each required filename.



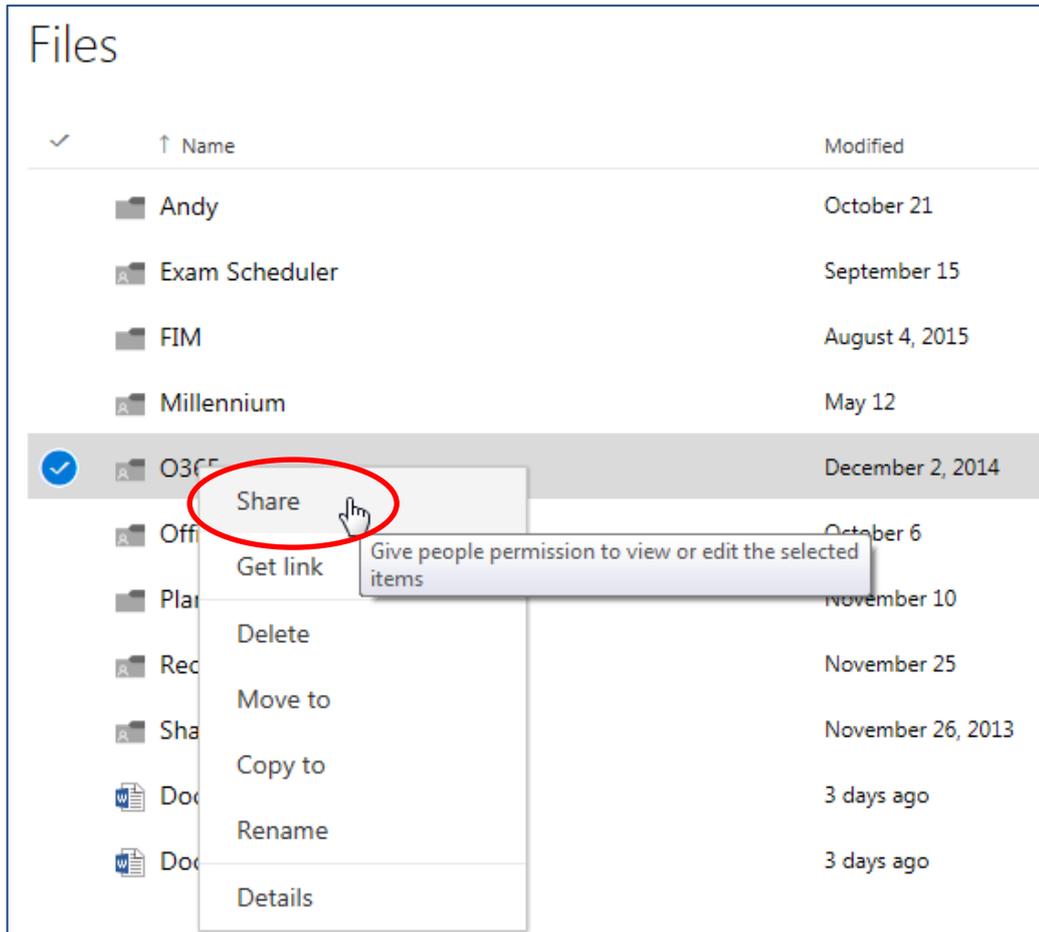
Click on **Restore** and the selected files will be restored to their original folder locations in your OneDrive for Business homepage.

# Collaborating and sharing files

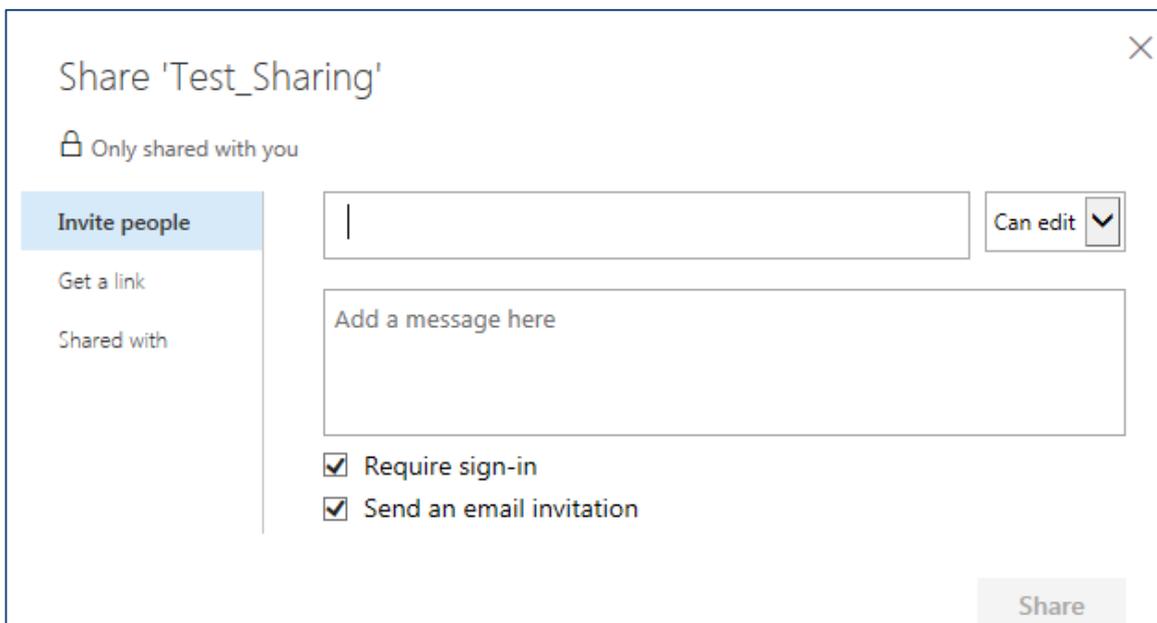
With OneDrive for Business you can share files or folders with all their contents with staff or students at the university, or externally, for example, with researchers at other institutions.

## Internal sharing

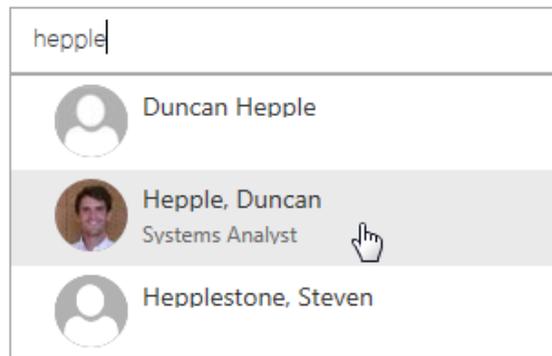
1. To share a file or folder internally, right-click on the file or folder name, or alternatively click on the 3 dots to the right of the file or folder name



This will then show the following options for sharing your file or folder



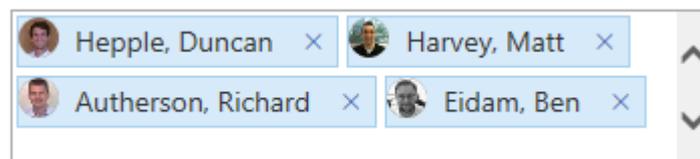
2. First choose with whom you want to share the file or folder
3. Start typing their surname in the Name box. If there are a lot of people with the same surname, add a comma before typing their first name, or scroll down the list of names until you find who you are looking for.



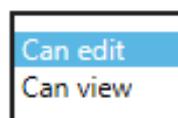
If there are multiple people with the same name, hover your mouse over their photo or silhouette to see their email address, which you can separately check is the correct person.

Click on their name and it will appear in the Name box.

Repeat this until you have all the names of the people you want to share with.



4. Then choose what sharing options you want to set for this file or folder.
5. Click on the **Can edit** dropdown to set the permissions for the people you are sharing the file or folder with to be either **edit** or **view**

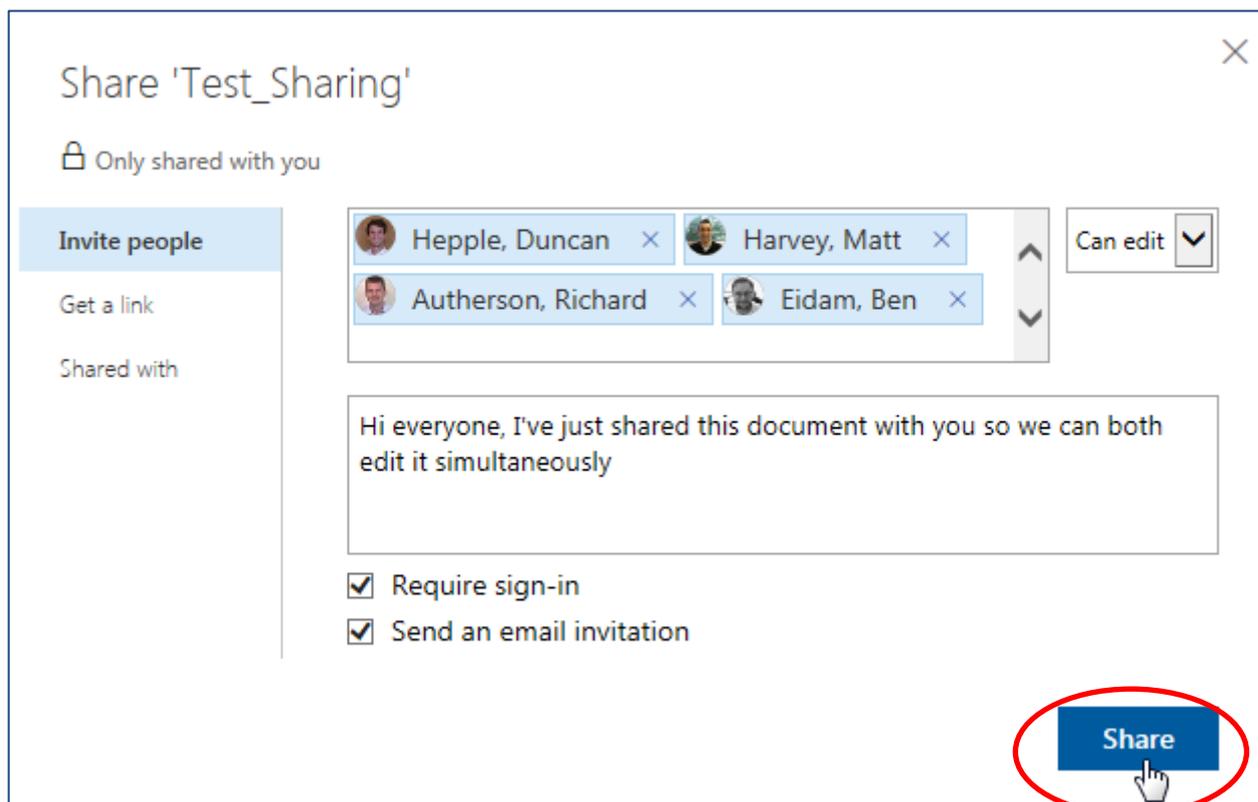


6. Check or uncheck the **Require sign-in** box to choose whether the people you are sharing with need to log in themselves to Office 365 or not.
7. Check or uncheck the **Send an email invitation** box to choose whether the people you are sharing with receive an automatic email when you have shared the file or folder.

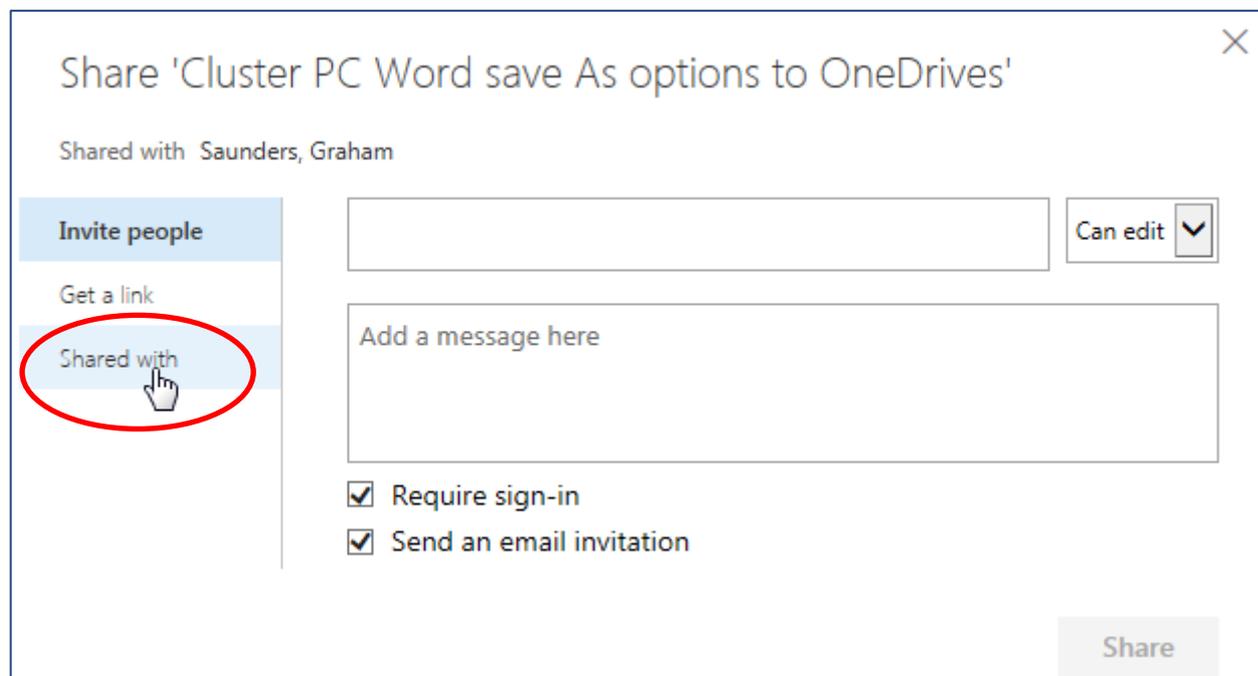
If you do decide to send an email, you can add a message in the central box which will be included in the email.

The email will also contain a hyperlink to the file or folder so the recipient(s) can jump straight in to see your file or folder.

8. Click on **Share** to give everyone permission to access your file or folder

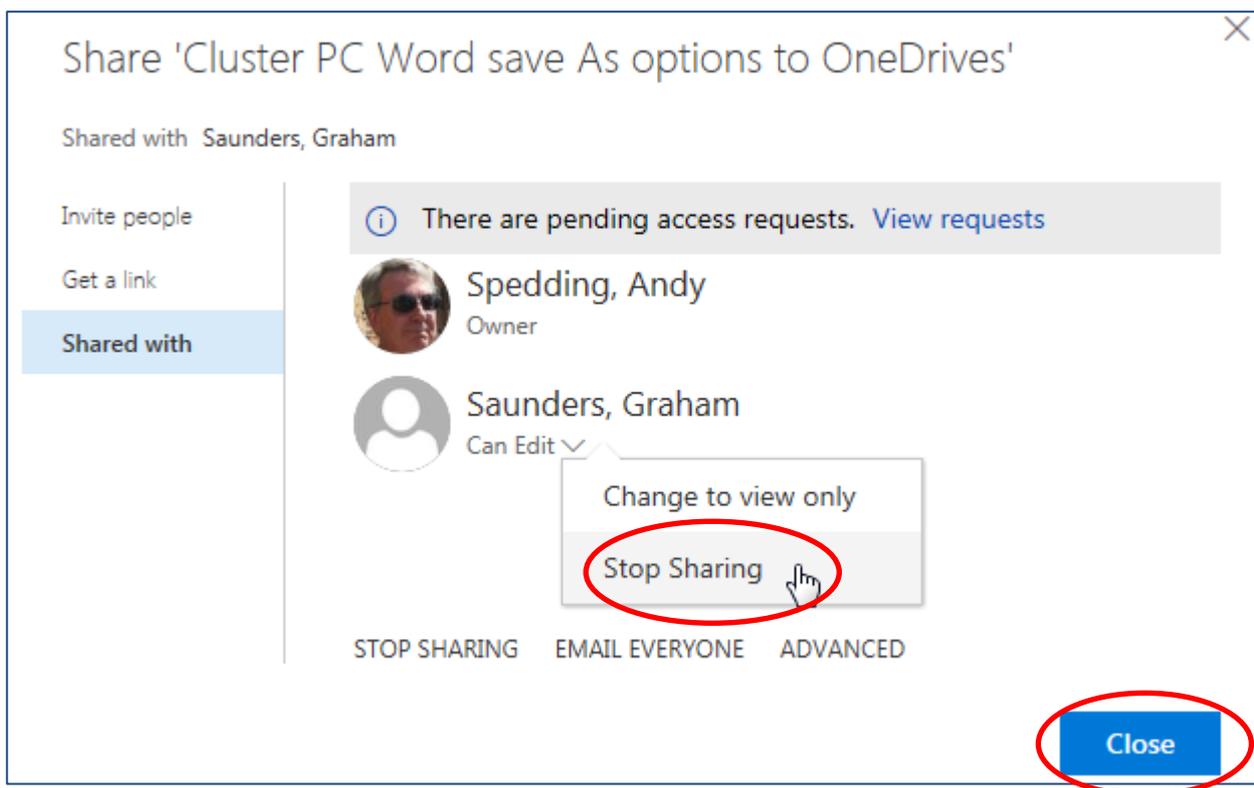


9. To stop sharing a file with one person or everyone, right-click on the file name, or alternatively click on the 3 dots to the right of the file name.
10. Then click on **Shared with** at the bottom left of the window



11. You will then see a list of the people with whom the file is shared.

12. To remove sharing options for one person, click on the dropdown below their name and select **Stop Sharing** then click **Close**.



13. You can also change their view / edit permission here instead of stopping sharing.
14. To stop sharing a file with everyone, click **STOP SHARING** at the bottom of the list of names, then click **Close**.

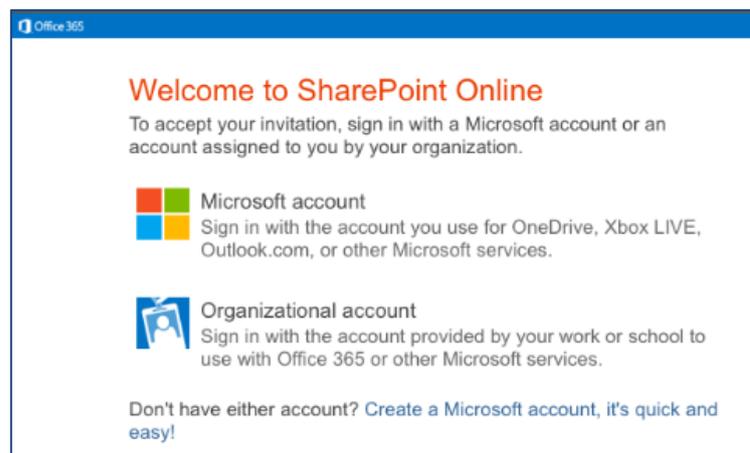
## External sharing

There are two ways to share a file or folder with external colleagues – either by entering their full email address(es) in the Name box and following the process above for sharing; or you can create a URL link which you can email to them.

Entering the sharer's email address is the recommended approach, as when you and they are co-authoring a document their email address will be shown in the edit audit trail. The disadvantage of sending a link is that, if you have allowed the external sharers to edit your file(s), it will be anonymously.

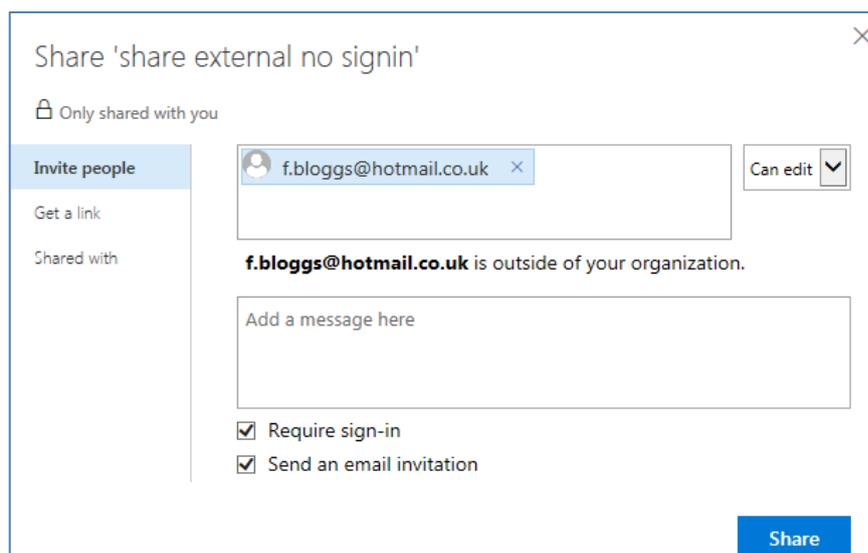
All external sharers must have a Microsoft account to be able to access your file(s) or folder.

If they don't already have a Microsoft account, they will see this message and they will need to create a Microsoft account as a one-off activity, they just need to fill in an online form using the link provided.



## Sharing using external email address

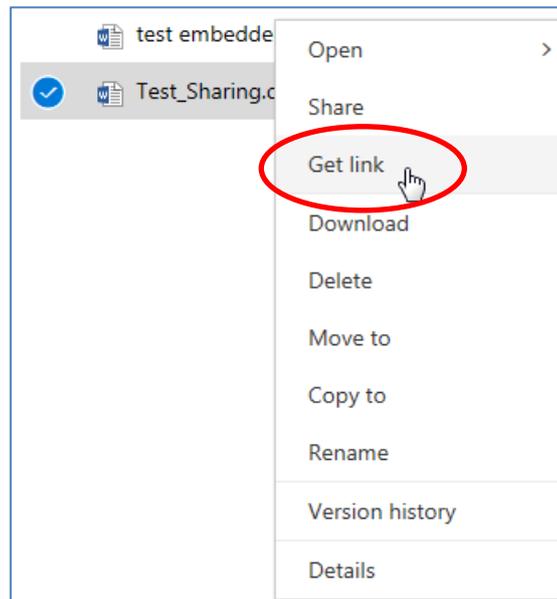
1. Right-click on the file or folder name you want to share, or alternatively click on the 3 dots to the right of the file or folder name.
2. Enter one or more external email addresses for the external colleagues you want to share with.



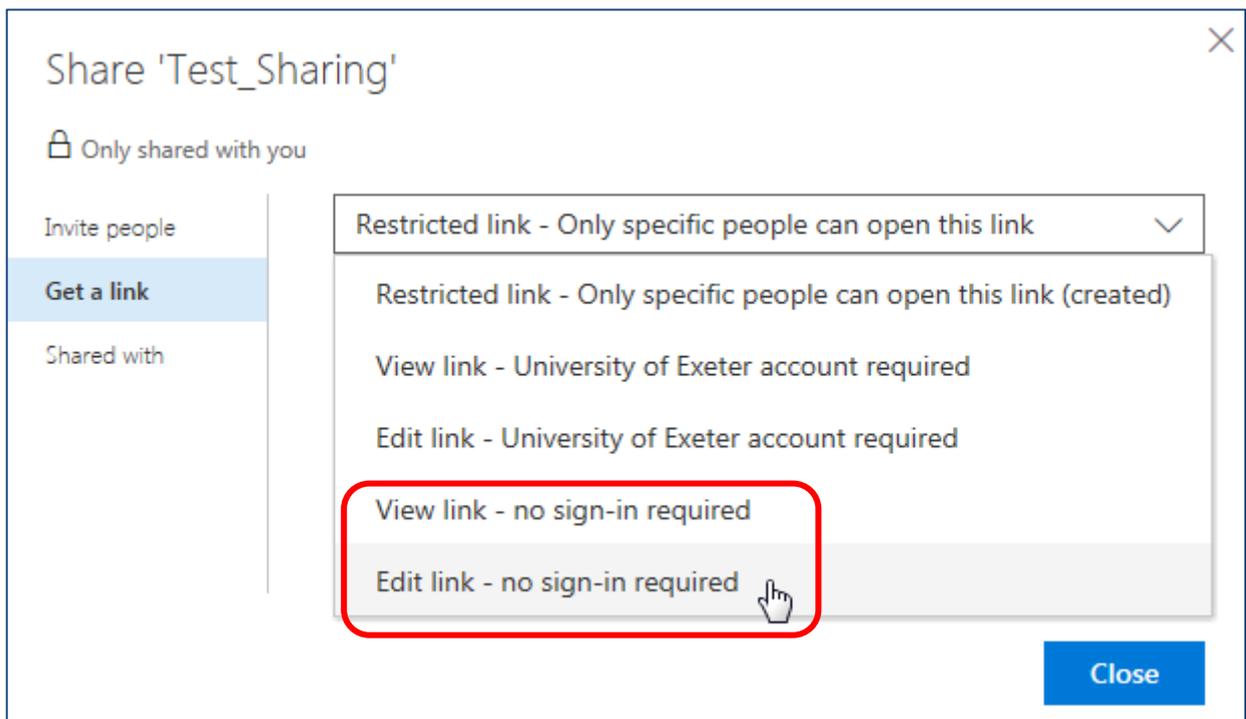
3. Complete the sharing options as above for Internal Sharing
4. If you have ticked "Require sign-in", the external sharers will see the "Welcome to SharePoint Online" box as above, and they will need to click on "Microsoft account" to be able to access your file(s).

## Sharing using a URL link

1. Right-click on the file or folder name, or alternatively click on the 3 dots to the right of the file or folder name.
2. Click on **Get link**

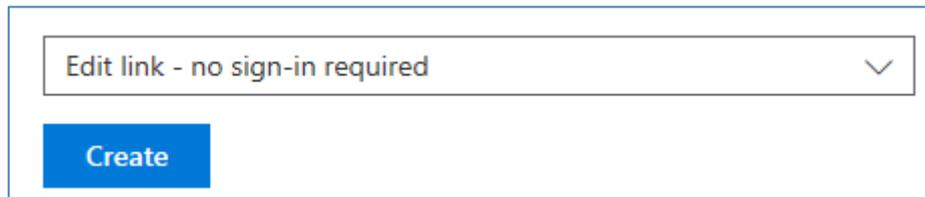


3. Click on the dropdown list on links

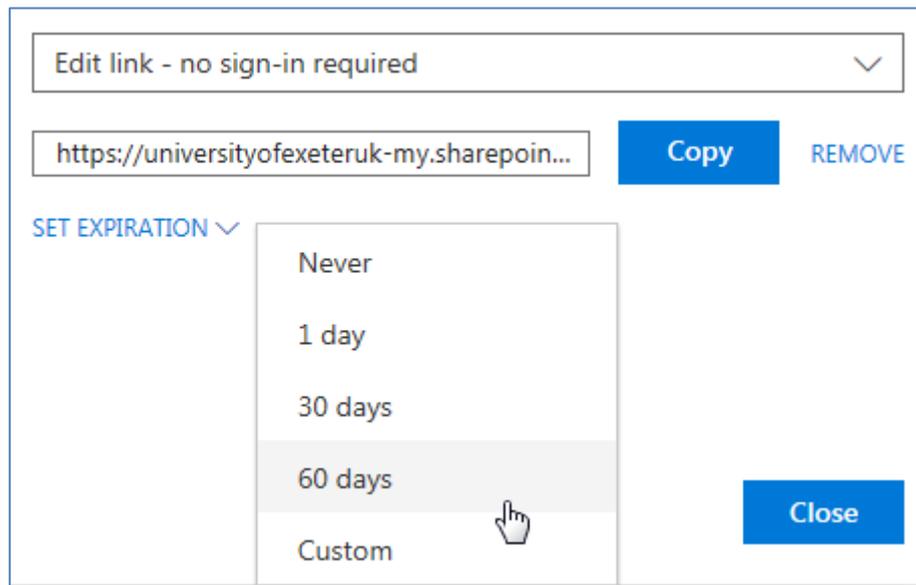


4. The first 3 options won't work for external people for sharing, so choose whether you want them to be able to only **View** your file or folder or contribute to it via **Edit**

5. Clicking on one of these options will then show the **Create** button



6. Click on **Create** to generate a URL as a link



7. Click on the SET EXPIRATION dropdown to choose how long the link will be valid. The default expiry is Never.
8. Then click on **Copy** to save the link to your computer's Clipboard, and then click **Close**.
9. You can now paste the link in an email to the people with whom you want to share your file or folder
10. They will then be able to click on the link in the email and have instant access to your file or folder.
11. To stop sharing a file or folder with someone external to the University, either the link you have sent them will expire after the time you chose, or you can **Stop sharing** the file or folder as described above for Internal Sharing.

## If you leave the University

When you leave the University and your IT account is closed, any files stored in your OneDrive for Business will become inaccessible to anyone else.

This includes files that you have shared with colleagues, internally or externally.

You will need to download all the files that need to be kept for other people to use and they should then be stored in a shared file storage area that can be accessed by those people who need to use these files.

Any files in your OneDrive for Business that you had shared with other people will lose the "Shared with" details when you download them. So your colleague(s) may need to share them again with other users, internally or externally.

This can be via someone else's OneDrive for Business account, or for Exeter colleagues only, a team or departmental SharePoint Site, or your shared network N: drive.