

Training Guide

OneDrive



To book training or to speak to a trainer, please get in touch via:

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Disclaimer

Periodically changes to business processes or updates to systems or applications result in the update of training guides and materials. It is the responsibility of the delegate to check that they have the most up-to-date guides. All guides contain a Change Control table at the front which will detail when the document was updated. If you want to check if you have the correct version please email training@imerseyside.nhs.uk

Change Control

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Training Guide			OneDrive	
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Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	30 November 2021	Claire McGrady	IT Training Manager

Hints and Tips





	This symbol suggests a tip or a good method of working for speed and efficiency
	This symbol suggests a caution or an action to be aware of
	This symbol indicates an Information Governance warning
	This symbol indicates hints and tips that support digital optimisation

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OneDrive Overview

OneDrive is a cloud-based application within the Microsoft Office 365 suite of products. OneDrive automatically synchronises files, folders from the primary device, such as a laptop, with the cloud and enables users to access files, folders, and images from any device or online.

OneDrive also enables files and folders to be easily and securely shared from the cloud or device's desktop. Options include sharing with an individual, group of individuals or a team.

Access Files, Folders or Images

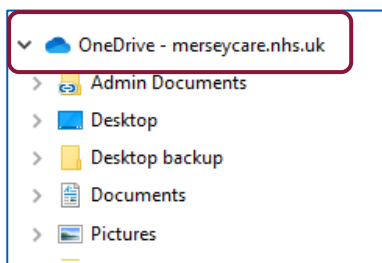
Files and Folders contained within OneDrive can be accessed from a variety of places including desktop and online.

File Explorer

- Open [File Explorer](#).



- [Select OneDrive](#) to search for the required file or folder.



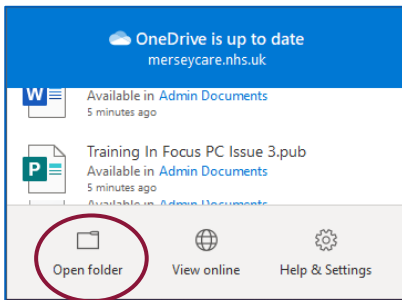
OneDrive Desktop

- Click [OneDrive](#) icon on the [system tray](#).



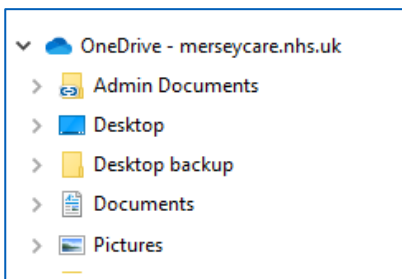
A list of the last files or folders viewed will display.

- Select [Open folder](#) to browse for additional documents other than those displayed in the list.

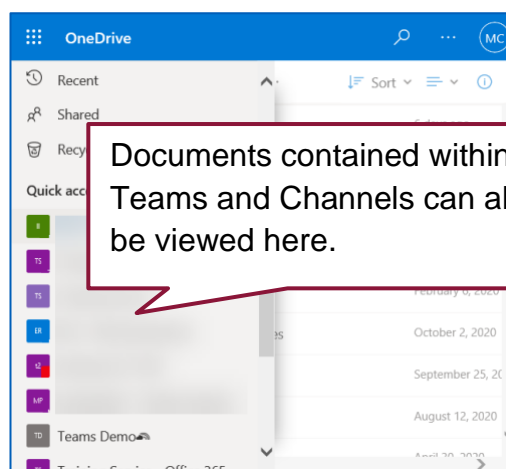
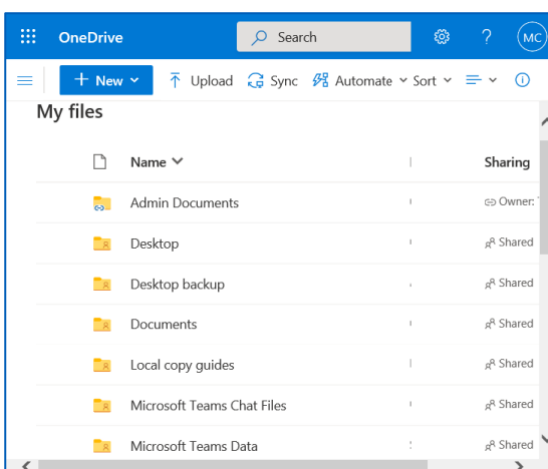
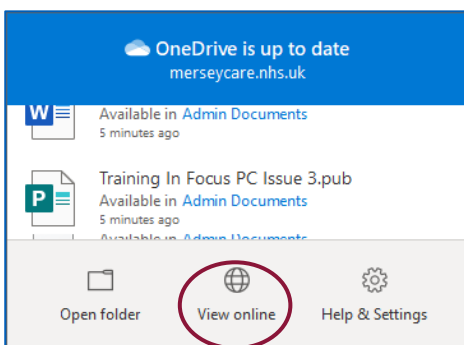


- To access a document, select the **file name** → **double click** to open.

OneDrive will open.



- Alternatively, select **View online** to see all files, folders accessible to the user in Office 365 Online.

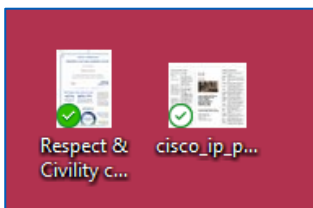


OneDrive Icons

OneDrive Files and Folders are displayed with a **Status icon** which shows to the right of the File or Folder name. The status advises where the File or Folder is accessed and if it has been shared.

Name	Status
Media	✓
My Received Files	✓
OneNote Notebooks	✓
Outlook Files	✓
Snagit	✓
Transfer to WIP	✓
Zoom	✓
2021-09-16_11-01-15	✓
One Drive QRG TEST	☁️ 👤
Save and View Documents from a Zip File	✓

OneDrive status icons are also visible for documents saved on the desktop.

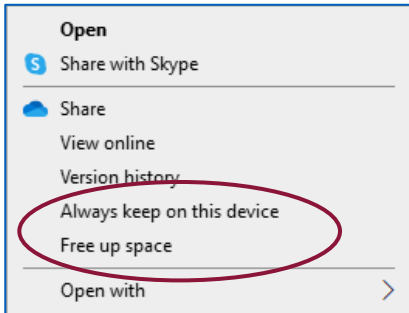


Common Statuses

- ✓ On a **device** as well as the **Cloud**
- ✓ On a **device only**
- ☁️ In the **Cloud only**
- ☁️ 👤 Shared with others

Change the status

- **Right click** on the required **File or Folder** → select one of the following options:



Always keep on this device: only one copy is kept and maintained on the device. No copy is in the Cloud.

Free up space: Converts the File or Folder to an online copy only which is accessed via OneDrive.

Share via OneDrive

Files and Folders in OneDrive can be shared with others, whilst maintaining them in a central place, enabling users to access a specified file at the same time. Users are also able to control who can view or edit each file.



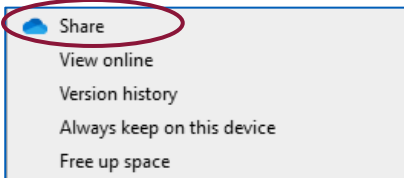
The ability to access and co-edit the same file at the same time reduces the need to save multiple copies of the file or to send emails and attachments back and forth between users, this significantly improves efficiency.

Share from the device

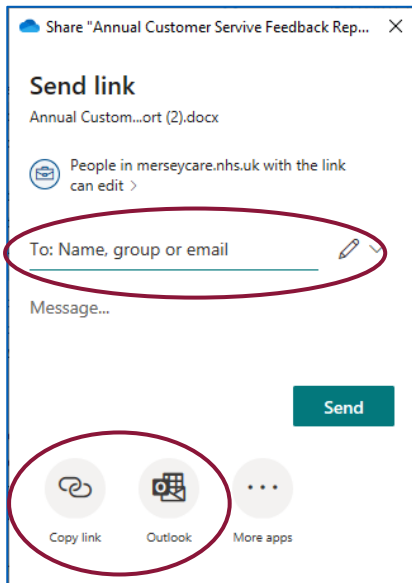


Sharing via OneDrive should not replace systems and processes currently used by your team to save and share files, for example Microsoft Teams channels or SharePoint libraries.

- Select the **File or Folder** to be shared, **right click** → select **Share**.



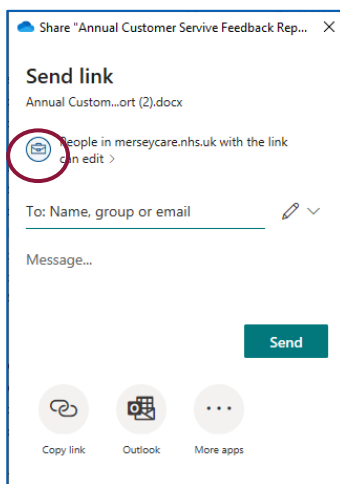
- Choose who the item is to be shared with in the **To field**.
- **Type in the names** of the person or people that the Files or Folders are to be shared with.
- **Type a Message** if required.
- Select how this is to be shared, for example, via a link or an Outlook email → click **Send**.



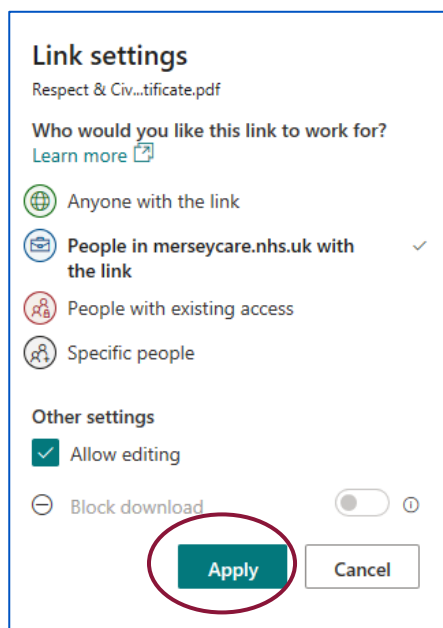
Link Settings

To update the [Link Settings](#), this includes who a link is to be sent to and the access level.

- Click the [icon](#).



- Update the settings as required → select [Apply](#).



Anyone with the link: enables anyone inside and outside the specified organisation to view.

People with existing access: those who have viewed and/or shared the item in the past.

Specific people: specify individuals or groups to view the item.

Other settings: select or deselect 'Allow editing' to allow the recipients to be able to edit.

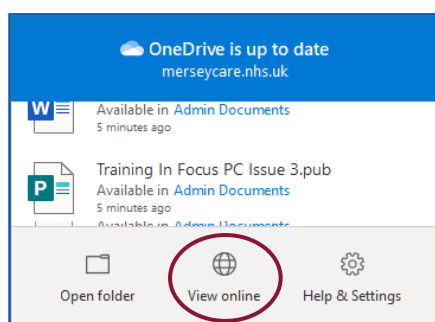
Manage Share Options in OneDrive

OneDrive sharing options can be edited online.

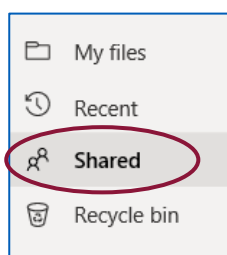
- Click **OneDrive** icon on the **system tray**.



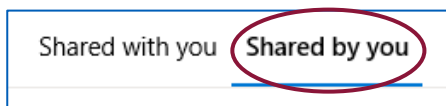
- Click **View online**.



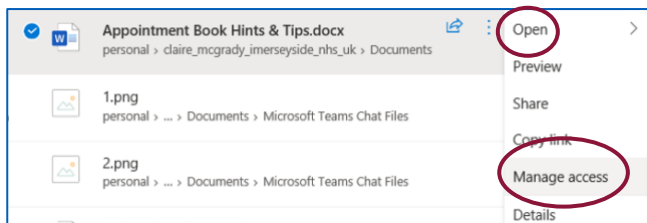
- From the menu bar on the left, select **Shared**.



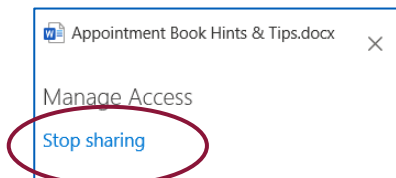
- Choose the option **Shared by you**.



- Select the [three dots icon](#) → [Manage Access](#).



- Select [Stop sharing](#)



The file will no longer be shared.

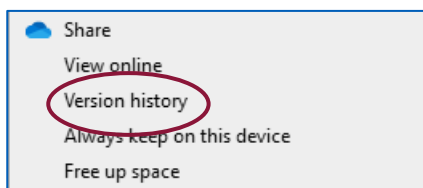
Version History

It is possible within OneDrive to access previous versions of a file and where required a previous version can be restored.

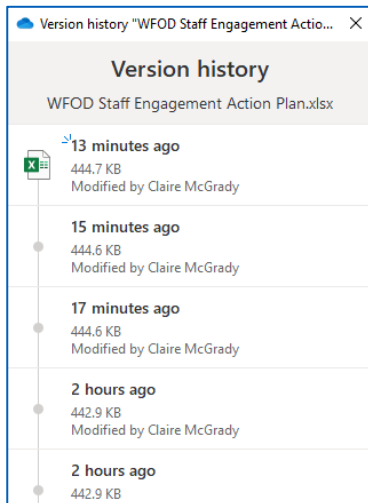


Office 365 documents have AutoSave function (unless turned off) which automatically saves the changes as a document is edited. It can be useful to access previous versions to roll back changes that are made in error.

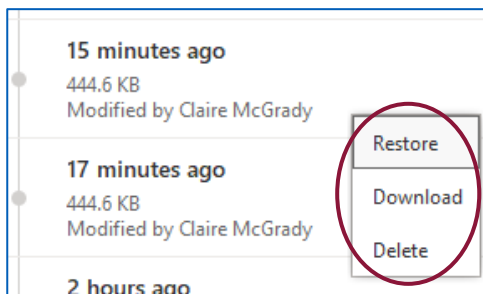
- Select the file required → [right click](#) → select [Version History](#).



The version history for the document will display, detailing when it was last updated and by who.



- Select the required version → click on the **three dots** → **Restore**, **Download** or **Delete** as required.



Contact Details

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