# OneDrive for Business User Guide

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About OneDrive for Business and Office 365

OneDrive for Business is a cloud-based file storage system with online editing and collaboration tools for Microsoft Office documents and is part of Office 365. The University of St Andrews provide staff and students access to Office 365 with their university accounts. This includes:

- OneDrive for Business – Unlimited cloud based storage with the facility to edit documents online and share documents with anyone
- Office 365 Pro Plus – full versions of Microsoft Office 365 Pro Plus to install on 5 of your own devices (PC, Mac, tablet and mobile)

OneDrive for Business can be utilised in many different ways. It can be used as a simple store for documents, as a way to access files from any location on any device, or as a collaboration tool to share and jointly work on documents. Access to files can be in a web browser, directly from Office 2013 desktop programs, in Windows File Explorer, in the Office apps for iPads, iPhones and Android tablets, or synchronised with a local folder on your computer.

For the best experience using Office 365 and OneDrive for Business, you should be running a current version of Microsoft Office (at least 2013 for Windows and 2016 for Mac). If you need to upgrade your University computer, you should contact the IT Service Desk for assistance (do not download and install from Office 365 on your computer).

The University recommends the use of our central file servers or OneDrive for Business as the preferred location for storing files that are actively being worked upon. Due to the large storage capacity, OneDrive for Business is also suitable for storage of historic documents.

Storing university information in the Cloud

NOTE: CONFIDENTIAL or STRICTLY CONFIDENTIAL documents should not be stored in OneDrive if the data will be synchronised onto non-University owned devices. For more information and guidance see the Storing University Information in the Cloud and the Information Classification Policy web pages at the following link; http://www.st-andrews.ac.uk/itsupport/security/classification.

Signing in

To access OneDrive for Business and the download for Office 365 Pro Plus, sign in by opening a web browser and going to https://portal.office.com

Click in the first field to enter your St Andrews University account, using the fully qualified username:

my_username@st-andrews.ac.uk
When you click into the password field, you will be re-directed to the University of St Andrews Office 365 sign-in page. Enter your University password and click Sign in.

Note that all logins for all Office 365 products should be entered using the “username@st-andrews.ac.uk” format.

The Office 365 interface
Initially, login is directed to the main apps landing page. You can customise which page or app opens from the Settings pane (accessed by clicking the cog icon). From the landing page you can access the following features:

- The application tiles for opening the range of available Office 365 apps
- The Install button for downloading and installing the latest version of Office software onto your own personal devices. For other alternatives (iOS, etc) click the Other installs link; for more information on downloading Office software, see the section on Office 365 downloads on p17.
- Recent online documents: a list of the most recently active files for quick access.

The OneDrive for Business app
Open OneDrive for Business by either clicking the OneDrive tile on the Office365 homepage or by choosing it from the Quick App launcher (the grid icon in the top left hand corner).

The ellipses on each tile give the option to resize the app tile, which you could use to make a commonly used app more prominent.
Setting Timestamp Preferences

The default timestamp setting in OneDrive for Business is the Pacific time zone. This must be changed in order that all files will reflect the local time for file created/modified parameters. Timezone settings also impact other web apps, so there are 2 places to make this change to reflect local time.

To change the time zone on your O365 account:

1. From the main O365 homepage, click on the Delve tile;
   In Delve, select Me from the navigation pane, then click Update profile

On your profile page, scroll down to the 3 questions listed; click the more arrow beside “How can I change language…”, then the 'Click here' link

2. Click the more ellipses (…)
3. Select Language and Region

4. By default the ‘Always use regional settings defined by the site administrators’ is selected causing all the fields to be disabled.
   - Select the option ‘Always use my personal settings’
   - The default field entries are now visible and can be changed

5. In the Time Zone section change the option to ‘(UTC) Dublin, Edinburgh, Lisbon, London’.

Why can’t I edit my contact information? ▶
How can I change language and regional settings? ▶
Click here, click the ellipsis (...), and then choose Language and Region.
6. Click the **Save all and close** button at the bottom of the page to return to your Delve profile page.
7. Use the QuickApp launcher (grid in the upper-left corner of the screen) to select the OneDrive tile to return to your document library.

To ensure that you have the proper settings for all the Office web apps, click on the OneDrive tile to open OneDrive and navigate to your site settings:

1. **Settings** (cog icon on the header bar) > **Site settings** > **Site Administration** > **Regional settings**.
2. Choose the appropriate local region as before and save your changes.
3. Use the QuickApp launcher (grid in the upper-left corner of the screen) to select the OneDrive tile to return to your document library.
Basic File Management
Create, upload, sync and preview documents

The main Files window in OneDrive displays the contents of your OneDrive library arranged as a standard file display. The Navigation Pane to the left contains links to other parts of your OneDrive site such as the Recycle Bin for deleted file and Shared with me, for accessing documents others have shared with you.

The Quick Command Bar will allow you to carry out a range of basic file management tasks. The options listed on the command bar are context driven and will change depending on what you have selected. The default listings, are New, Upload and Sync as described below:

1. Click +New to create a new document or folder. You can then add and edit content with the online Office apps. In addition to all the main Office file types, you can also create an online survey with results exported to an Excel file stored in OneDrive (see the following link for more information on using the survey tool).

2. Click Upload and navigate to the files or folders on your computer to upload them to OneDrive. Alternatively, in some browsers you can just drag and drop files or folders onto the OneDrive window (currently this feature works in the Chrome browser only). NOTE: For large numbers of files, it is better to use the sync client for uploading into OneDrive (see the next bullet point).

3. Click Sync to sync OneDrive with a folder on your local computer. Use of the sync button activates sync client software to download and keep all files from OneDrive up to date. This client is pre-installed on all university machines with Office 2013 (for Windows) but must be installed on Macs. (For more information on syncing files see the section Syncing on page 12.)

4. To preview a document, click on its name to open a view-only version in a separate tab.

5. You can use standard drag and drop techniques to move and manage files and folders. Additional file actions (download, rename, copy, etc) are available by clicking the more ellipses (•••) beside each filename.

6. You can change the view for any folder from list to preview tiles.

7. The Information pane can toggle on and off. It displays a quick access pane to see a file preview, recent file activity and file sharing status.

Working with files
When you select a file or folder in the Files document library, the command bar will change to reflect a different range of options for managing the file.

These options are also listed in a fly-out menu from the file ellipses or by right-clicking the filename.
NOTE: There are restrictions on the naming of files and folders. Please see this link to Article kb2933738 for a list of the restricted characters and names.

Click on a filename to open a view-only preview of the document in another browser tab.

To edit the document:
1. Click on Edit Document:
2. From the drop-down select either (the choice will be for whichever application, Word in this case):
   - Edit in Word to use the full-featured desktop version of the program, or
   - Edit in Word Online to use the online Word web app in the browser

When editing a document online the changes are saved automatically. When you are finished editing, click on your username link on the command bar to return to your file library, or merely close the browser tab in which the document is displayed. When editing in the full desktop version of the program, any changes made must be saved in order to be synced back to the One Drive cloud.

Should you want to return to a previous version of the document (for instance, before the current edits), you can use the Version History feature described in the section below.

**Using version history**

Documents stored and edited in OneDrive have a full audit history available. Each editing session is saved as a version. These previous versions can be viewed and the document can be restored to any historical state from the point of the file’s initiation in OneDrive.

Tick to select the document in the library window and from the command bar, select Version History (or right-click on the filename and select it from the context menu).
Any previous versions will be listed for review. To view a previous version, click the version link to open it in the application. If you wish to restore one of the versions, use the dropdown menu beside the version date. From here you can View (this option only displays the version details), Restore or Delete the version. Restoring a version makes that selection the current state of the document; it does not over-write it.

Version History is also available when the document is opened from OneDrive in the full desktop application; the previous versions will be listed in the backstage File tab > Info > Manage documents.

Recycle Bin - deleting and restoring documents
To delete a document, tick to select the file in the library window and select the Delete option on the command bar or right-click on the file or folder name > select Delete.

The file will be moved to the account Recycle Bin. If you delete a file from your OneDrive for Business library, it will be stored in the Recycle bin for 90 days, allowing you to recover a deleted file.

To recover a deleted file
1. Click the Recycle Bin link in the navigation pane to open the Recycle Bin.
2. Tick to select the required file(s) and click Restore on the command bar. The file will restore to the location from which it was originally deleted from your library (for instance, within a particular folder or if the folder from which a file was deleted, was itself deleted, this too will be restored).

Features available in the classic OneDrive
OneDrive for Business is a constantly evolving service. The current interface is subtly different from the original view in form but more substantially different in function. There are several features that are only available in the original or what is termed ‘Classic’ interface.

Once you have changed to view the Classic OneDrive interface, these features are available from additional Ribbon tabs in the Navigation Pane.

The features include options (see links for more information on each):

- **Check Out** a document which temporarily locks editing to a single user
- setting **Alerts** so that you are notified when changes have been made to a shared document
- work with files from a Windows Explorer local folder during the browser session without the need to sync your files (this feature is only available using Internet Explorer as your browser), see next page for more information.

You will need to switch to the Classic interface whenever you want to access these features as this cannot be set as an account preference for using Office 365 online.
To change your file library to the Classic interface and access the Ribbon options:

1. Click on Files in the navigation pane to ensure you are in the top level of your library.
2. At the bottom of the window, below the Navigation Pane, click on the link “Return to classic OneDrive”

Once in the Classic interface, you will then be able make visible the Ribbon tabs:

3. Click the settings button on the menu bar (the cog icon), select the Ribbon link to turn on Ribbon tabs in the Navigation Pane.

There are 3 tabs showing: Browse, File and Library

A feature available from the Library tab is Open with Explorer will allow you to open and work with the contents of a OneDrive folder as a standard desktop folder (the icon will appeared greyed out in all browsers except IE). This is only a temporary folder and will not be available after logout. Useful, for instance, if you need to copy multiple files from a folder on a computer that you haven’t synced with your OneDrive.
Using OneDrive to Collaborate

Sharing a document allows you not only to give permissions to others to view files but also to edit them collaboratively. In OneDrive, multiple users can edit a document simultaneously; no more being locked out of an Excel file until someone has closed it! You can share individual files or folders, the process is the same, but see the section on sharing folders on page 11 for additional information.

How to share files

1. Click the ‘Information Pane’ button on the command bar to display the Information Pane.
2. Select the file or folder you wish to share.
3. In the Information Pane, click the arrow to expand the Sharing section.
4. Click the ‘Add People’ button to bring up the Share window.

Using the Share window

The Share window consists of 3 tabs:
- Invite People—for sharing with specified users
- Get a link—generate a link that can be emailed
- Share with—displays all shared users and their file permissions

1. Internal sharing:
   - On the Invite people tab, click in the top field and enter the names or usernames of people with whom you want to share the document.
   - Typing a few letters will bring up a matched list of users from the University Global Address List, click on the person’s name to add them to the field. Continue to add all required users to the field.
   - To share with all users in the university, type ‘Everyone’ (you have the option to include only internal users). See the section on the Shared with Everyone folder on page 11 for other ways to share globally.

2. External sharing: For people external to the University, enter their full email address in the field.

3. Select whether you want to grant edit or view permission to invitees (the default permission is ‘Can edit’). NOTE: Those with Edit permission have full rights to delete a file.
   - You can change permissions subsequently for a given user. (see the section on Changing Permissions on page 11)

4. Type a message in the next field; this will be included with the email that’s sent to all invitees.

5. When you are finished adding invitees and assigning permissions, click Share to send a link to the shared document.
   - This will actually generate two emails, one to each person with whom you are sharing and one to yourself as a notification of sharing.
Option boxes on the Share (both are ticked by default)

- **Require sign-in**: It is more secure to require users to sign-in to their O365 account to access the document. External people without Office365 will require some form of Microsoft account (Hotmail, etc) to be able to access the shared file.
- **Send an email invitation**: Untick this option if you want to share a document without sending an email to the recipient. Users do not need the email link to access shared files as all shared files are listed and accessible from their Shared with me library. More information on viewing shared files see on page 12.

Once a document is shared, all shared users will be listed under the Has Access section of the Details pane. See the section below on changing or removing share permissions.

Moving a shared document to a different location in your OneDrive library will break the share links and users will no longer have access to it so think carefully before sharing files to ensure it is where it needs to be in your file management.

**Get a link to share a document**

In the share dialogue box, the ‘Get a link’ tab provides direct access to web links for sharing a document. Use these if you wish to embed a link to a shared document in a separate email that can then be sent to multiple people.

If you choose the option ‘no-sign-in required’, this means anyone with the link can access the document without having to sign in. As such you should set an expiry on the link from the drop down menu made available to improve security.

**Share a folder**

When you share a folder, you automatically share all items in that folder. Any document moved into a shared folder will inherit the folder share permissions. Sharing a folder provides a quick way to share many documents with other people at once and makes it easier to manage a set of shared documents. Folders are shared using the same procedure as for sharing a document by sending or creating an invitation link to selected people. Individual files within a folder may be given different sharing permissions if, for instance, you wanted to restrict access to certain files.

**Change or remove share permissions**

To change share permissions, display the Details pane; under the Has Access section click Change permissions to get the Manage Permissions pane, which lists all shared users and their permissions. Click the drop down under each user to change permissions as required View/ Edit, or Stop sharing.

To stop sharing with everyone in one operation, click the Stop sharing link at the top of the Details pane.

**Shared with everyone folder**

Your account may have been setup with a folder called Shared with Everyone. Documents placed in this folder will be shared with everyone in the University with an Office 365 account. To stop
sharing, remove the file from the *Shared with Everyone* folder. If you prefer not to have this folder in your library, you may delete it.

**NOTE:** Documents shared using this folder are **View Only** and will include all external users that have been given share permissions. These files will **NOT** be listed under ‘Shared with me’, but can only be located by searching for the filename.

**View documents shared with you**
To view and access documents which other users have shared with you, go to the Navigation Pane in your Files library and choose ‘Shared with me’. This will display a page listing all documents that have been shared with you from which you can then open and edit them. You can sort this list by the various columns. However, as this is a virtual folder (that is, it is in reality just a list of links to other people’s files), you will not be able to use standard file management to organise it (create folders, move files, etc).

You can remove a file(s) from the shared list if you no longer need it by selecting it and clicking ‘Remove from shared list’ option. If you still have sharing permissions for the file, you can re-list it by clicking on the original sharing link you may have received for the file (or ask the owner to send you a link).

**Emailing OneDrive files as attachment links**
Using the Outlook Web App or Outlook 2016 desktop client you can insert a link and share any OneDrive file instead of attaching the file itself. If the file to be shared is not yet in your OneDrive library, it will be automatically uploaded to your Email attachments folder in OneDrive and shared from that location.

For full instructions see the following Microsoft web page:

**Syncing - Working from a Local Folder**
You can also access and manage your OneDrive library from a local folder on your computer by using the **OneDrive Sync client**, a small piece of software on your computer. Once your files are synced to your computer you can access and work on your OneDrive content in from the local folder even when you are offline. Changes made to files will be synced back to your OneDrive library in the cloud (or if you are offline, the next time you are connected to the network). Syncing may be configured to download either a selected range or **all** the files in your OneDrive library, thus depending on choice, you are limited by the amount of free space on your computer’s hard disk.

**NOTE:** If you have confidential or sensitive information stored in your OneDrive library, you should not sync it to insecure machines.
Setting up the sync client
University computers with Office 2013 for Windows should already have installed a OneDrive for Business sync client, but it may not be the most current version. Full instructions for installing and using the new Sync client can also be found at this link.

1. In your OneDrive library, click **Sync** on the command bar.

2. You will see this message screen indicating you may need to upgrade to the new sync client software before you can proceed with the sync.

   If you have permissions to install software, you can click the ‘get the latest version’ link, and follow the onscreen instructions to install the new client as prompted.

   When the download finishes you’ll be asked to sign in and you should skip to the next section, Setting up the Sync Client.

   If you do not have permissions to download and install software, you can install the Next Generation Sync Client from the IT Services Self-Serve Software Centre.

3. If the **Set up OneDrive** dialog box appears, select **Work or school** option and sign in.

   If you already have the latest version of the sync client, you’re already signed in, you’ll be at the next step.

4. The next window will show the folder path of where the sync folder will be located. The default location in the top level of your User profile (C:\Users\<your username>\OneDrive). If you want to change the folder location, select Change location. Click Next.
5. The **Sync your OneDrive files to this PC** dialog box will appear, choose the folders you want to sync, or select **Sync all files** and folders, and then click **Next**.

![Sync files from your OneDrive](image)

6. Sync is now set up. It may take some time for all the chosen files to sync, but through the various sync icons which will indicate the sync status of a given file and monitor progress.

![The green tick indicates the sync folder is up-to-date.](image)

**Using the sync folder**

Once file sync is complete, your OneDrive for Business files will appear in a folder on your computer labelled **OneDrive – University of St Andrews** and also as a Favorite in the File Explorer window. Files edited or copied into this folder will automatically be synced to OneDrive in the Cloud.

- A green tick on a file or folder means it is successfully synced
- A blue circular arrow means it is currently being synced
- A red cross indicates a folder or file that is out of sync

You will also get a OneDrive icon in your system tray. To change options and manage your sync folder, right-click on the OneDrive icon in the system tray, select **Settings**.

From here you can:

- Choose folders-change which folder are syncing
- Unlink your sync folder to stop syncing your files and permanently turn syncing off
- Manage storage – open your OneDrive for Business folder

To temporarily stop syncing, right-click on the system tray icon and select > Pause syncing

**NOTE:** Files deleted from a sync folder are also synced with OneDrive so that they can be restored from the Recycle Bin.
Limits on syncing OneDrive for business
Please note the following limitations related to syncing OneDrive for Business to your computer

- You can sync up to a maximum of 20,000 items, including folders and files
- You can upload individual files up to a maximum of 10 GB per file
- You must have sufficient free space on your hard drive for the quantity of files you choose to sync.

Installing the sync client on Mac OS or on a home computer
To sync files on a Mac, you need to first install the sync client software which you must download from the App Store. Please see the separate Sync Client for Mac User Guide for full installation and configuring instructions or see the following Microsoft link: Next Gen Sync Client for Mac

If you need to install the Sync client software on a Windows computer at home, you can do so from the following Microsoft link: Set up your computer to sync

Open OneDrive Documents from Desktop Applications
OneDrive files can be accessed directly from the Open and Save menus in all the desktop Office 2013/2016 applications, even if there is not a local OneDrive sync folder.

In the application:

1. Click File > Open
2. Choose Add a Place > Choose ‘Office 365 SharePoint’
   
   **Note:** if it's available, do not choose ‘OneDrive’ here; this refers to the consumer OneDrive product and not the OneDrive for Business product.

   ![Add a Place](image1)

3. You will be prompted to log in. Enter your St Andrews email address and password.
4. Once authenticated, you should see the ‘OneDrive-University of St Andrews’ location added to the list of places.
5. This location will now appear in the File |Open and File |Save menus automatically. This makes it extremely easy to create documents and store them directly on OneDrive for Business.
6. Click ‘Browse’ to view the OneDrive files store.

   ![Add a Place](image2)
Access OneDrive Files from your Mobile Device

You can easily access your OneDrive document library from a mobile device such as an iPad or iPhone. You can of course use the browser on your device to access OneDrive, but there are also other more direct methods and that allow you to work offline:

1) The **OneDrive app**. This is available as a free download from the iTunes store and will give you direct access to your OneDrive document library to view/edit/share files from your iPad/iPhone. The app will sync your entire OneDrive library to your device, there is no option to select content for syncing.

**NOTE**: Do not get the **OneDrive for Business** app as Microsoft have now superseded that with a new single app for both OneDrive and OneDrive for Business.

**Useful Links to Device-Specific Information**
- [Use OneDrive on iOS](#)
- [Use OneDrive for Android](#)
- [Use OneDrive on a Windows Phone](#)

2) The **Office mobile apps**. If you don’t want to sync your whole library, you can open and edit specific files through the mobile Office apps (Word, Excel, etc).

Open the desired app on your mobile device and sign in using your Office 365 account. Always choose ‘work account’, if you are given an option of signing in with a ‘Microsoft account’. Follow the screen instructions to enter your password.

Your OneDrive document library will display allowing you to select the file you want to open. If you subsequently go offline, your changes will be synced the next time you connect.
Office 365 Pro Plus Download

The Office 365 Pro Plus suite is available free of charge for up to 5 devices of your choice. Please note that this should not be installed on University machines due to licencing restrictions and will interfere with the version of Office provided.

To download Office 365 Pro Plus on your personal machine(s) login to Office 365 in a browser:

1. Click the Install button at the top of the main landing page.
2. The Office software page will load, click Install.
3. A small setup file will be downloaded. Run this setup file to install Office 365 Pro Plus.

To download Office 365 on other software platforms, go to the Software page within your Office 365 site:

1. From the main Office 365 landing page, click on the Other installs link, located below the Install button to open the Software page.
2. Choose the platform required from the list (eg Phone & Tablet)
3. Click Install.

Office for Mac download

To download the Mac version, go to the Software page (by clicking install the on the main portal); the Mac version of the setup file will be downloaded. To activate the Mac version, the username format of “username@st-andrews.ac.uk” is required when prompted to sign in.

Mobile and tablet versions

For mobile phone or tablet versions, click the Other installs link on the Office 365 main portal, select the Phone & Tablet link, choose your device and follow the instructions on-screen (alternatively get it direct from the app store on your device).

Signing Out

To sign out, click your user profile tile on the title bar to get the drop down menu with your account name and select ‘Sign out’. It is recommended that close your web browser to ensure your session is closed and you are fully signed out.