K2's OneDrive's Best Practices

Although Windows incorporates the OneDrive app, you may not have configured it correctly for your specific needs. Using the OneDrive app and the related Cloud storage service to their fullest potential means you can access your files when and where you need them. Further, sharing your files and collaborating with others is easy when using OneDrive correctly. In this session, you will learn best practices for taking full advantage of OneDrive.

K2 Enterprises

Introduction

Although Windows incorporates the OneDrive app, you may not have configured it correctly for your specific needs. Using the OneDrive app and the related Cloud storage service to their fullest potential means you can access your files when and where you need them. Further, sharing your files and collaborating with others is easy when using OneDrive correctly. In this session, you will learn best practices for taking full advantage of OneDrive.

Learning Objectives

Upon completing this session, you should be able to:

- Identify options for accessing and managing your files in OneDrive,
- List the steps necessary to synchronize your files from the Cloud to your computer,
- Identify opportunities for sharing files and accessing previous versions of a file,
- Name the steps for creating a OneNote notebook in OneDrive, and
- List options for viewing OneDrive thru Teams or SharePoint.

OneDrive Fundamentals

OneDrive is an internet-based Storage system provided by Microsoft. You can download the free version of OneDrive onto virtually any device, including smartphones, tablets, or computers. Two critical considerations for this version are:

1. The Free version stores up to 5 GB of data.

2. You must create a Microsoft Account to access your OneDrive account.

In addition to the free options, you can access OneDrive through most Microsoft 365 subscriptions. The amount of storage you have available depends on your Microsoft 365 subscription, but the minimum amount is 1 TB (1,000 GB).

You can use OneDrive instead of storing or saving documents to locations such as:

- A hard disk installed on your device,
- Your network drive at work,
- DropBox, iCloud, or other Cloud-based storage services,
- Memory sticks, and
- Emails.

OneDrive accounts are unique for each user, similar to My Documents in Windows environments. For example, suppose you have twenty people in your organization running a Microsoft 365 subscription that provides access to OneDrive. In that case, you will have twenty OneDrive accounts, each with 1GB of storage.

- 20 OneDrive locations
- By default, each user has 1 GB of storage (you can change this size limit by purchasing additional storage)

With business-oriented versions of Microsoft 365, a OneDrive Admin Center exists where someone in your organization (or your IT company) can administer end-user needs.

Two of the significant benefits associated with OneDrive include access and collaboration. By storing your data in the OneDrive Cloud, you can access it virtually anywhere you have an Internet connection. Additionally, you can share OneDrive-based files easily with other users, facilitating real-time collaboration.

Accessing Your OneDrive Account

To access your OneDrive and set it up for your computer or device, you must log in to your Microsoft account from the Web.

Be sure to use the correct Microsoft Account Email address and password. It is possible to have more than one Microsoft account and OneDrive account.

Additionally, you should follow best practices for passwords to ensure your data remains safe and secure.

Don't use common words and numbers for your password. Use a different password for every account to which you log in. Utilize password management software to manage your passwords.
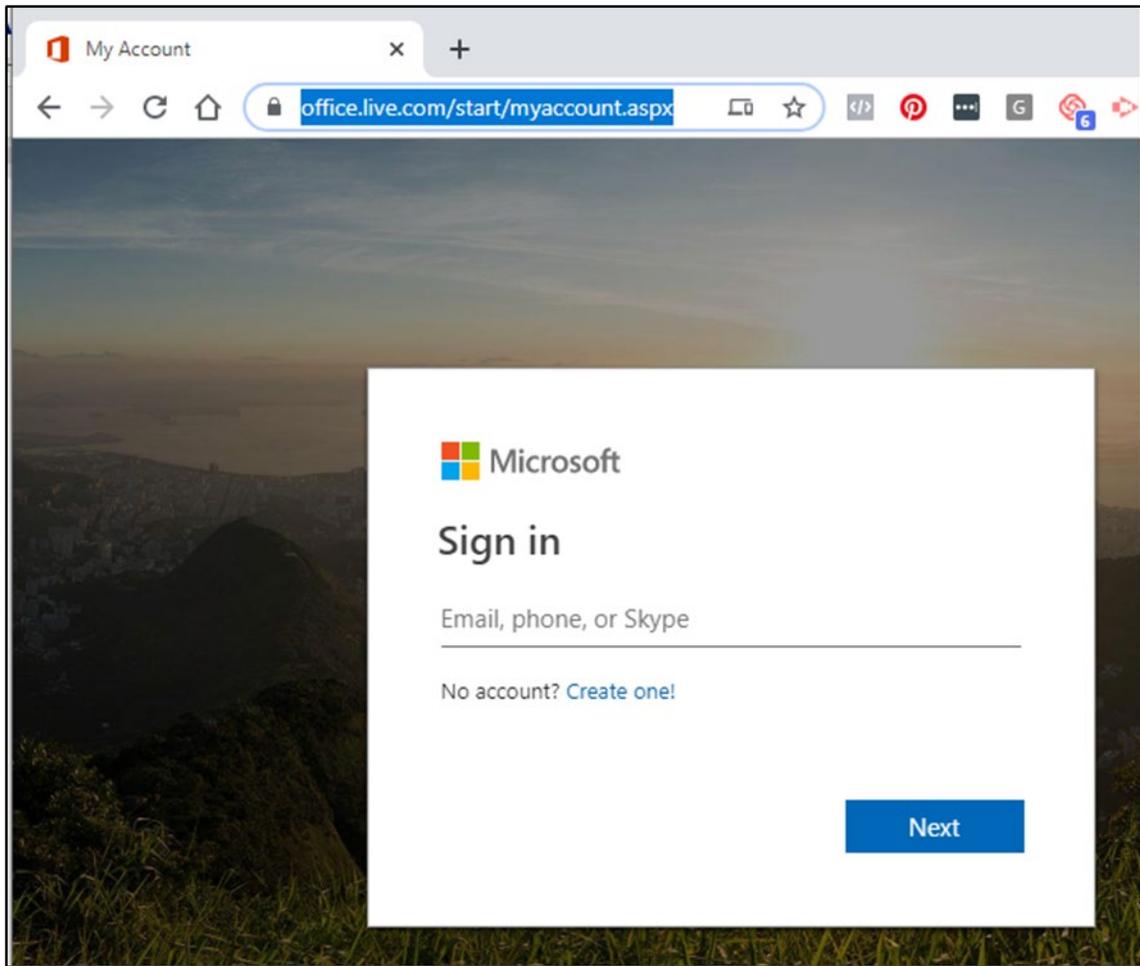
Microsoft 365 Online Menu

When logged into our Microsoft 365 account, you can access any application online or choose from the Online Menu.

If you do not see the icon for OneDrive on the screen, you can click on the "**WAFFLE" icon** near the top left corner.
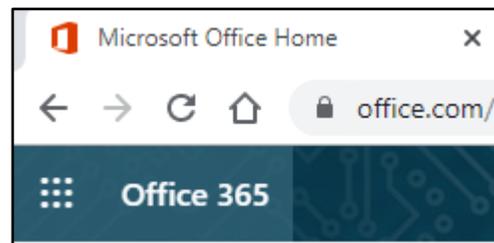
Clicking the Waffle icon allows you to see your Microsoft 365 Apps. Also, you can click **All Apps** to see any apps that do not appear initially.
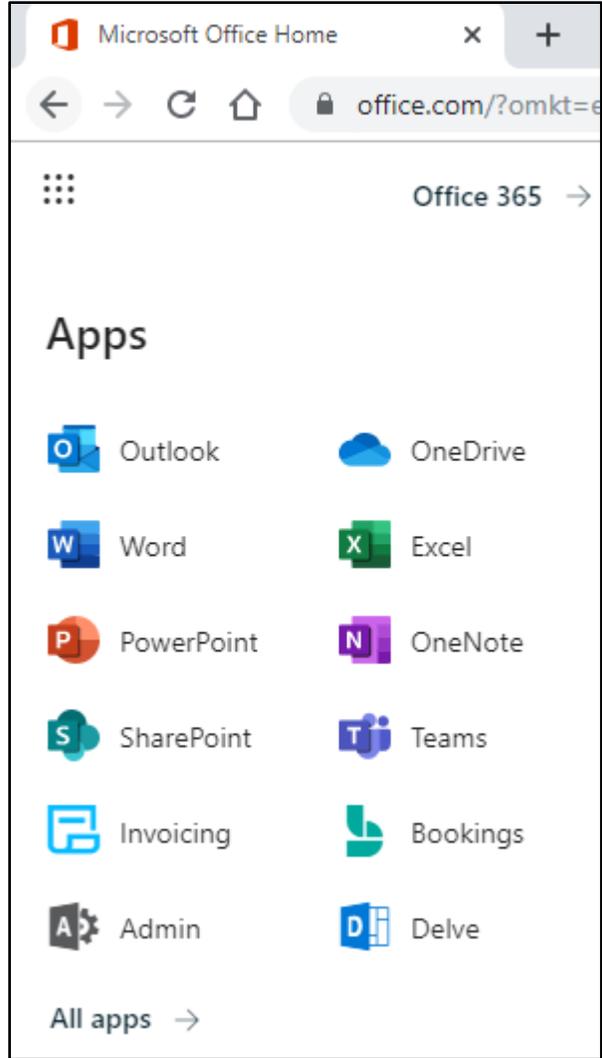
Creating New Folders Or Files

- Click on **New** from Toolbar
- Choose Folder
- Create a new Folder
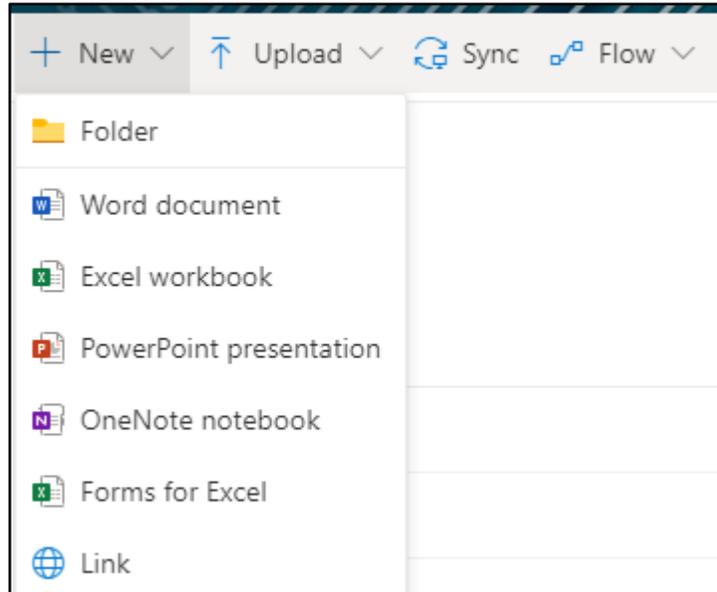
Uploading Files Or Folders

Upload files from your computer to the OneDrive Cloud.
1. Click the **Upload** Button
2. Click **Files**
3. Go to the location of the files on your computer and choose **Open**
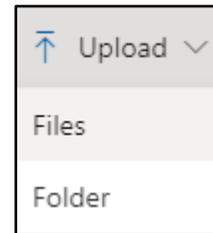
Once you open the OneDrive folder, you can drag files from your Computer into this OneDrive folder.

Working With Folders And Files
Once you click a folder, you will see more choices in your toolbar in OneDrive.
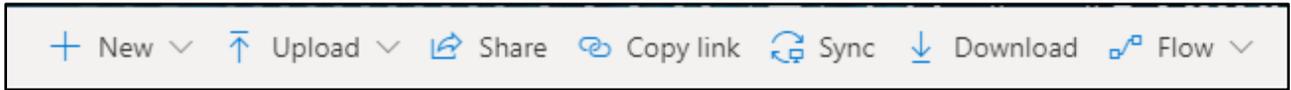
Click a folder to select it, and the toolbar changes again.
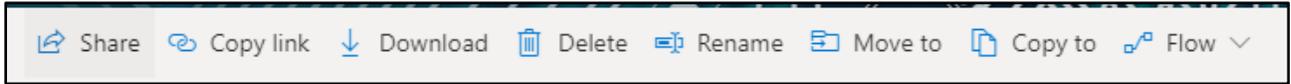
Selecting More Than One File
Not all options on the toolbar are available to you when you select more than one file.
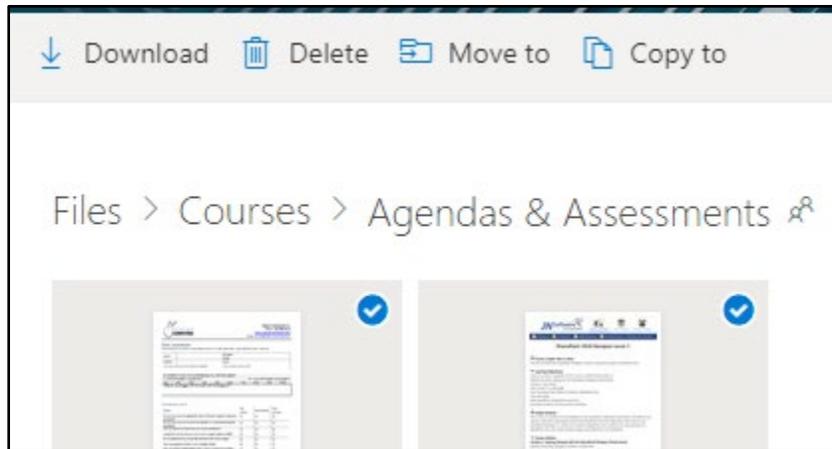
Searching For Files

At OneDrive's top left corner, you can use the **Search Everything** box to find files. Note that you can search not only by file name but also by the file's contents.

If you type a word or phrase in the **Search** menu and click **Enter**, you will see results and a list of other filters.

- Choose the time frame when someone last modified the file.
- Choose the type of file.
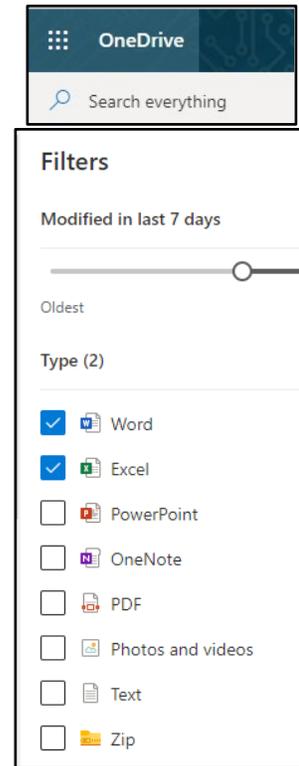
Sync Files to your Computer

You should sync your files to your computer to access your OneDrive-based files without an internet connection. When synching your files and folders, specify if you wish to **Always Keep on this Device**. This setting causes files to save in your OneDrive account with a copy also stored on a local drive.

Many users are familiar with File Explorer in Windows. Therefore, it can be handy to have a copy of our OneDrive files accessible there, in addition to the Cloud-based copy.

On your taskbar at the bottom right of your computer, you will see the OneDrive icon. Click that icon to change what files you are syncing or to view information about the sync process.
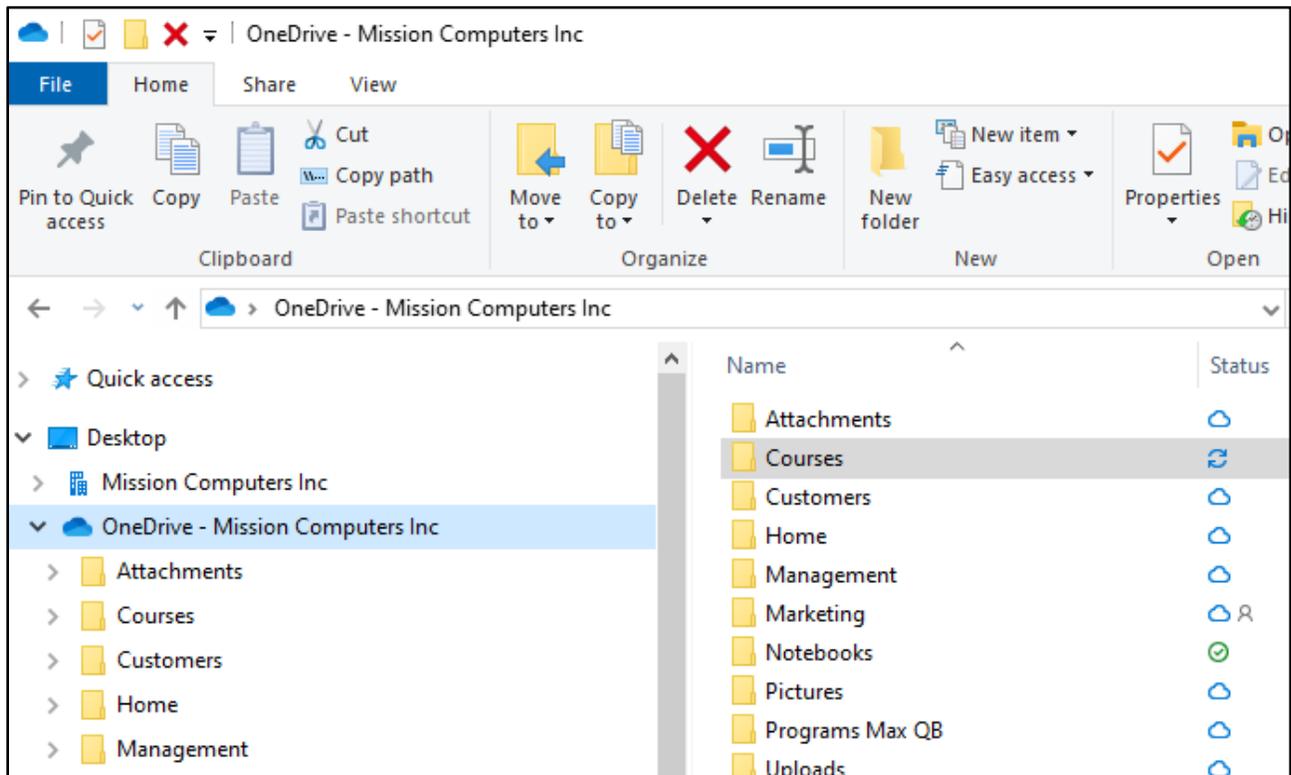
Status Icons Of OneDrive Files

OneDrive provides users with seamless integration between their local file system and the cloud-based storage service. When a user saves a file to the OneDrive folder on their computer, it syncs to the Cloud and is accessible from any device with an internet connection. In addition, to help you keep track of your files' status, OneDrive provides status icons in Windows Explorer. These icons offer visual cues indicating whether a file is synced, syncing, or has encountered an error.

1. A ***blue syncing icon*** indicates that a file is in the process of being synced.
2. A ***blue cloud*** indicates that a file is fully synced and up-to-date
3. A ***green checkmark*** indicates that a file is fully synced and up-to-date and always kept on this device (so it is available when offline).
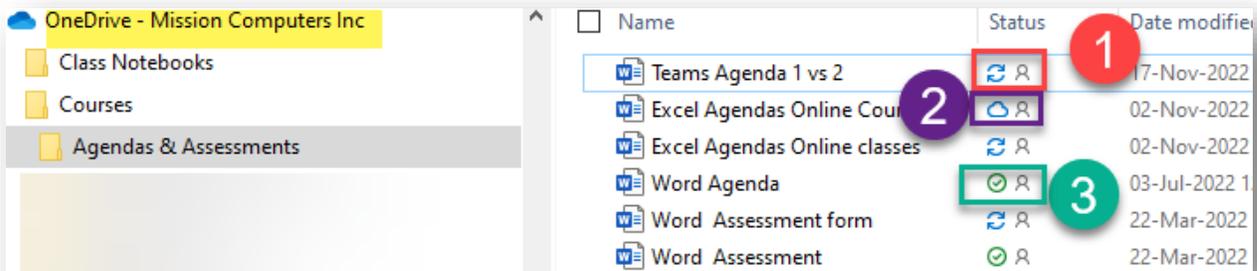
Providing these status icons, OneDrive makes it easier for users to manage their files and ensure they are up-to-date and accessible anywhere.

How To Ensure A OneDrive File Or Folder Is Available Offline

If you suspect you may need to access your files without internet access, you will need to change the status of that file on your device.

1. Right-click on the status icon beside any file with a blue icon.
2. Choose **Always keep on this device**.
3. If you are offline, you can update the file on that device. Then, when you regain internet access, the file also updates to the OneDrive cloud version.

Sharing Files

Sharing files in OneDrive is a simple and secure process allowing you to collaborate efficiently.

Choose a file or folder to share by selecting the **Share** option in OneDrive and then selecting the desired recipient or recipients.

OneDrive offers several options for sharing, including the ability to set permissions for each recipient, such as read-only or edit permissions.

You can also set expiration dates for sharing links to ensure file access is limited to a specific time.

Further, OneDrive provides security features to ensure shared files remain private and secure. These features include password-protected links, multi-factor authentication, and revoking access to shared files anytime. To

1. Click on the **File** button
2. Click on **Share** in the Toolbar

You can link with people inside your organization or outside your organization.
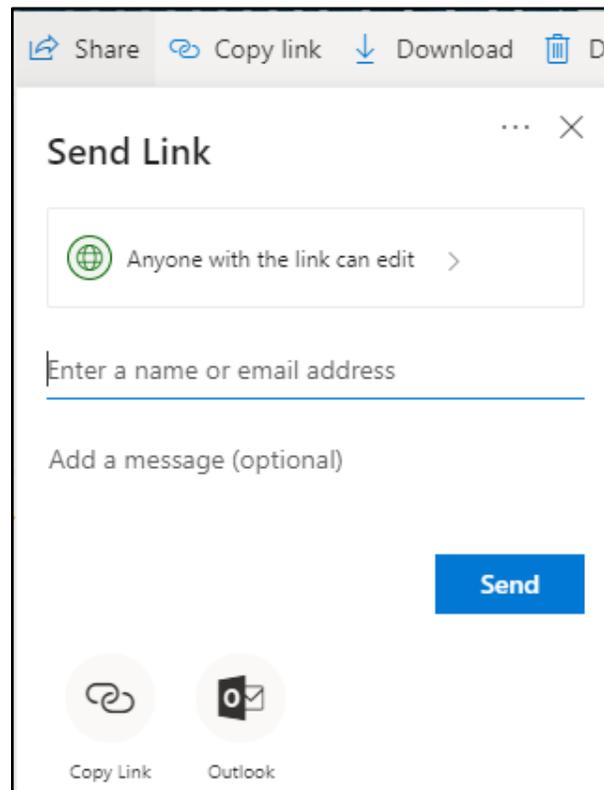
If you click **Anyone with the Link can Edit**, you will see the choices to the right of this text.
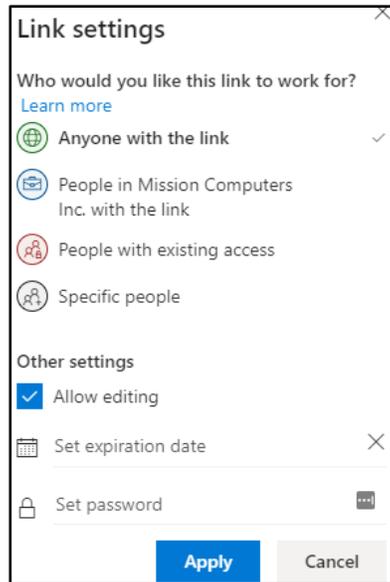
The screen capture to the right illustrates who can access a file shared through OneDrive.
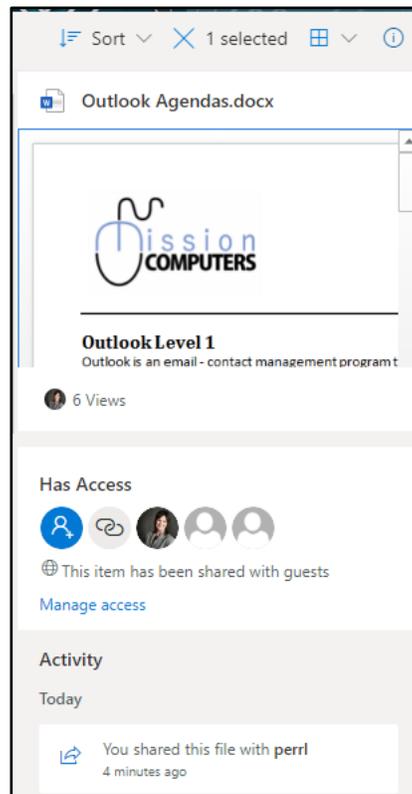
Sharing Files With People Outside Your Organization

1. Click the file you want to share.
2. Click the **Share** button.
3. Type in the **Recipient's Email Address**
4. If they are outside your organization, you will see a notification such as that shown to the right.

Send Link

🌐 Anyone with the link can edit >

connieclark11@icloud.com ✕

Add another

ⓘ connieclark11@icloud.com is outside of your organization.
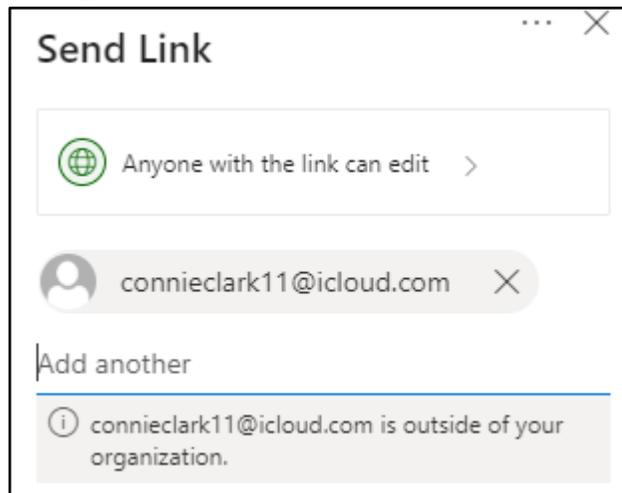
The screen capture to the right illustrates what sharing recipients see in the sharing email message they receive.

Connie Clark shared "Excel Agendas v2" with you.

Connie Clark <Connie@mission-computers.com>
To ○ connieclark11@icloud.com

↩ Reply   ↩ Reply All   → Forward
Sun 2019-11-24

ⓘ Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this m

Here's the document that Connie Clark shared with you.

🌐 This link will work for anyone.

📄 Excel Agendas v2

Open

■ Microsoft OneDrive

Sender will be notified when you open this link for the first time.

Microsoft respects your privacy. To learn more, please read our Privacy Statement.
Microsoft Corporation, One Microsoft Way, Redmond, WA 98052

Recipients do not need to have OneDrive to open this File. However, if a recipient does not have the file's source application installed, OneDrive may try to download it for them.

Info

OneDrive saves a great deal of metadata about each file. As shown below, you can see a wealth of information about each file. For instance, you can see who has accessed, who has accessed and edited documents, and when others applied their edits.
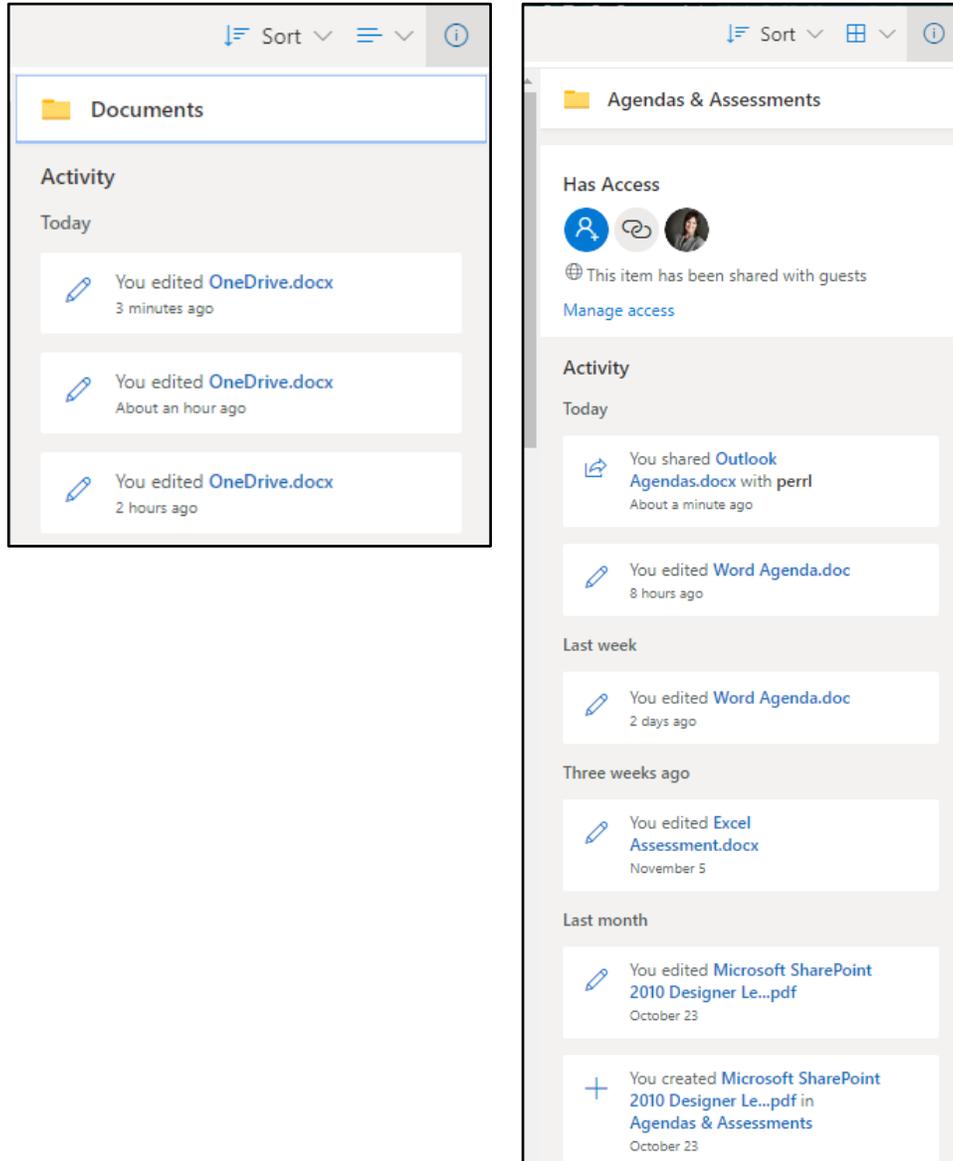
File Versions

One of the best features of OneDrive is its ability to keep multiple versions of a file. As a result, you will have a complete history of changes made to any file. This feature is superb for collaboration, allowing multiple users to work on a document or project and track changes made along the way.

Access to previous versions of a file can be a lifesaver in the event of accidental deletion or data loss. In this way, OneDrive's versioning feature can help users work more efficiently and with greater peace of mind.

How Version History Works

1. Go to the file name at the top of the Microsoft Office desktop application window.
2. Click **Version History**.
3. You will then see a side panel show with all the different version dates of your file.
4. You can click on any version and compare it to your current version.
5. Alternatively, you can click on any version and restore it.
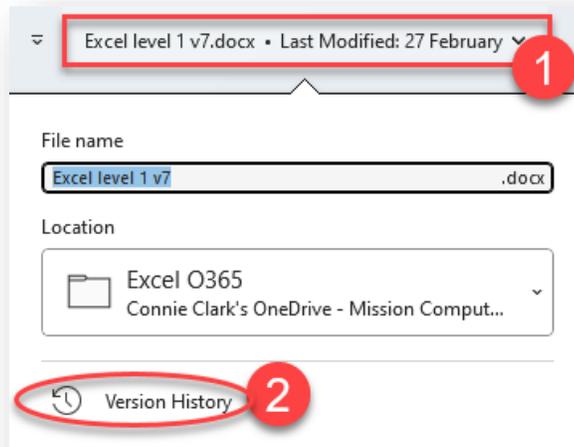
How Many Versions Can You Access?

With a *personal* Microsoft account, you can retrieve the last 25 versions.

With a *work* or a *school* Microsoft account, the number of versions depends on the library's configuration. By default, you could have hundreds of document versions. However, remember that each version consumes space, so you may want to limit this number in your settings.

How OneDrive Works With OneNote, Teams, And SharePoint

As you know, OneDrive is a cloud storage service that allows users to store and share files online. Individuals and organizations use the platform to store and share documents, photos, videos, and other files. OneDrive also works seamlessly with other Microsoft apps such as OneNote, Teams, and SharePoint, allowing users to collaborate and work together more efficiently.

Let's examine how OneDrive works with these apps and how you can use their integration to improve your productivity and collaboration.

OneDrive And Teams

Within Microsoft Teams, you can easily access your OneDrive files.

1. Open the Microsoft Teams desktop application or open Microsoft Teams through the web portal.
2. Next, click the **Files** icon in the left app window.
3. Under Cloud Storage, click the **OneDrive** option. Upon doing so, your OneDrive files will load in the window to the right.

It's worth noting that while you can access your OneDrive files from Teams, they are not visible to your team members, providing a secure and private way to work on your files.

Another possibility for viewing OneDrive files is going to the Files area in Teams. Then click the **Recent** button. Upon doing so, you will see all files you worked with recently, whether they are from Teams or OneDrive.

In addition to accessing your OneDrive files from Teams, you can also create shortcuts to Teams files within your OneDrive files list. This handy feature allows you to access files easily from Teams while working in OneDrive. These shortcuts appear as folders with links, making it easy to differentiate them from your regular OneDrive folders.

OneDrive And SharePoint

While in the OneDrive web app, you can see any SharePoint sites you can access. These SharePoint sites appear under the **Quick Access** panel on the left. If you click on one of these SharePoint sites, you will see an option to **Go to Site**, which appears in the top right corner of the screen. Also, it's worth noting that you can add shortcuts to OneDrive for any folder or site.

OneDrive And OneNote

If desired, you can store OneNote notebooks in OneDrive. Of course, the advantage of doing so is that you can access your OneNote data from virtually any connected device when you are on the go. Further, with OneDrive's synching capabilities, you can access your notebooks from your local disks should you enable the **Always keep on this device option**.

Summary

Not as widely understood as it should be, OneDrive offers excellent options for ensuring you always have access to your personal and corporate data. Further, OneDrive allows you to collaborate with others easily and securely, regardless of whether they are in your organization. So, whether you have a Microsoft 365 subscription with OneDrive access, a personal OneDrive account, or both, take advantage of the best practices outlined in this session to make the most of Microsoft's Cloud-based synchronization and sharing platform.