# Microsoft
# OneDrive
**Reference Sheet**

connect
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## What is OneDrive?

Microsoft OneDrive is a file hosting service that allows users to upload and sync files to a cloud storage and then access them from a Web browser or their local device. It allows users to keep the files private, share them with contacts, or make the files public.

## The Fundamentals

- **To Upload a Document:** Click the upload button, find the document you want to upload then click Open or you can click and drag the document into the document section in your OneDrive.
- **Create a New Document:** Click the New button and select the type of document you want to create (Word document, Excel workbook, PowerPoint presentation, OneNote notebook or Excel survey).
- **Create a New Folder:** Click the New button and select the New Folder, then name your folder and click Save.
- **To Open a Document/Folder:** Click directly on the document or folder name.
- **To Delete a Document/Folder:** Click on the document or folder, then click the Manage button, and select Delete.
- **To Preview a Document:** Right click next to the document name.
- **To Download a Copy of a Document:** Click on the document, then click the Manage button, and finally select Download a Copy.
- **To Follow a Document/Folder:** Click on the document or folder, then click the Manage button, and lastly select Follow or you can right click next to the document name, then select Follow.

## To Sync

**To Sync a Document/Folder:** Click on the document or folder, click the Sync button, and then click Sync Now.

## To Save Directly to OneDrive

**To Save Directly to OneDrive when working on a document in Microsoft Office:** Go to File or the backstage area, go to Save As, click the OneDrive folder

OneDrive

select Documents and then click Save.
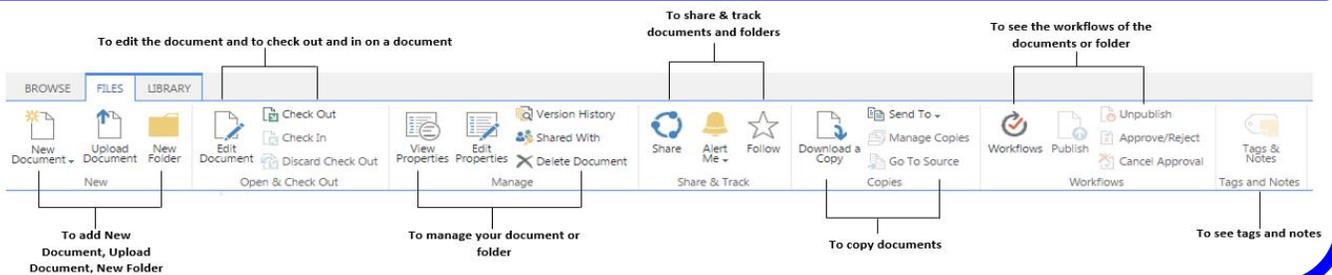
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## To Share a Document or Folder

• **To Share a Document/Folder:** Click on the document or folder, then click the Manage button, select Share With or you can right click next to the document name, then click Share, or you can click on the document or folder, then click Share.

A box will appear where you can invite people to share the document or folder, or you can get a link to email out to people who you want to share the document or folder with.

• **Invite People:** Enter the names, email addresses, or type "Everyone" who you want to share the document or folder with

• **Get a Link:** Create a link that can you email out to people you want to share the document or folder with. You can either create a link to allow people to only view and not edit it, or you can create a link that allows people to view and edit it.

• **To See Who the Document/Folder is Shared With:** Click on the document or folder, click the Share button, and then select Shared With.

## Documents Files Tab

To edit the document and to check out and in on a document

To share & track documents and folders

To see the workflows of the documents or folder

| BROWSE | FILES | LIBRARY |

New Document | Upload Document | New Folder | Edit Document | Check Out | Check In | Discard Check Out | View Properties | Edit Properties | Version History | Shared With | Delete Document | Share | Alert Me | Follow | Download a Copy | Send To | Manage Copies | Go To Source | Workflows | Publish | Unpublish | Approve/Reject | Cancel Approval | Tags & Notes

New — Open & Check Out — Manage — Share & Track — Copies — Workflows — Tags and Notes

To add New Document, Upload Document, New Folder

To manage your document or folder

To copy documents

To see tags and notes

## Documents Library Tab

To see tags and notes

To connect & export a document or folder

To set your library settings, share with setting, workflow settings

| BROWSE | FILES | LIBRARY |

View | Quick Edit | Create View | Modify View | Create Column | Navigate Up | Current View: All | Current Page | Tags & Notes | E-mail a Link | Alert Me | RSS Feed | Sync | Connect to Outlook | Connect to Office | Export to Excel | Open with Explorer | Form Web Parts | Edit Library | New Quick Step | Library Settings | Shared With | Workflow Settings

View Format — Manage Views — Tags and Notes — Share & Track — Connect & Export — Customize Library — Settings

View Format

To manage your views

To share & track documents and folders

To customize your library

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