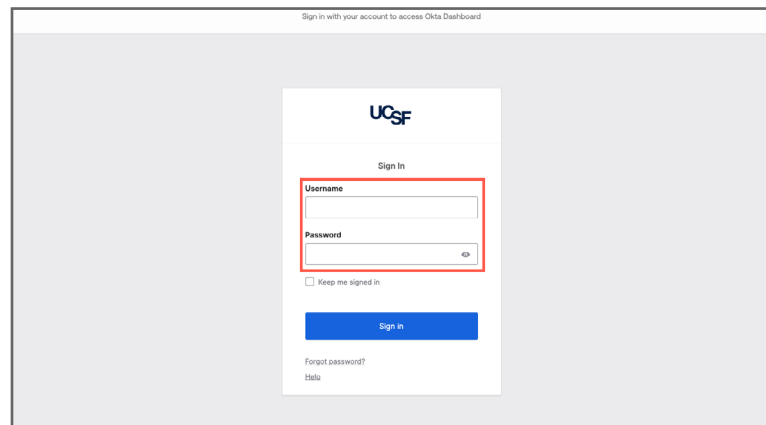


## Introduction

As a Community Provider, you will have access to the web only version of Microsoft OneDrive, Word, Excel, and PowerPoint in addition to Outlook Web Email. This document will assist you with accessing the web version of the Microsoft 365 applications before providing detailed instructions for using Microsoft OneDrive in your work.

## Accessing Microsoft 365 Applications in a Web Browser

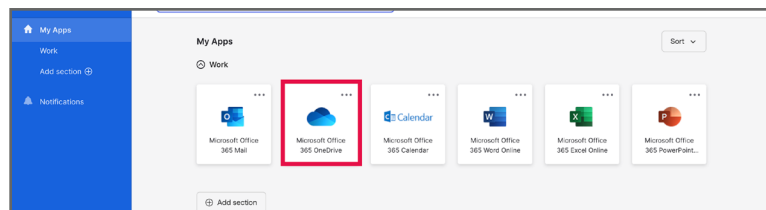
1. Navigate to <https://netlogin.ucsfhealth.org>.
2. On the **Okta login** screen, enter your **UCSF email address** and **Password**.



3. Click the **Sign in** button.

**NOTE:** If prompted to trust **network.ucsfhealth.org?**, click the **Continue** button.

4. Under **My Apps** heading, select the **Microsoft Office 365 OneDrive** tile.



5. Microsoft OneDrive has loaded successfully!

**NOTE:** You can access all the other Microsoft 365 applications by selecting the **App Launcher** icon (🗄️) in the **top left corner** of **any** Microsoft application before selecting the **application icon** to load the web version in another browser tab.

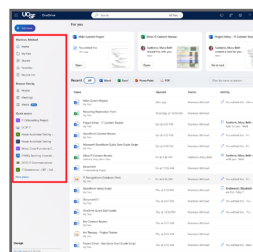
## Navigating OneDrive

OneDrive is a cloud service that connects you with your files. OneDrive has a simple interface that allows you to protect your files and share them with others. Let's review the initial landing page for OneDrive!

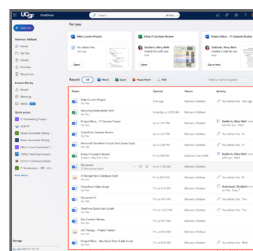
1. The *top navigation* will provide you with the ability to search for **files**, access **settings** and your **Microsoft 365 profile**.



2. The *left navigation* allows you to add new files, access different areas of OneDrive as well as browse your files in OneDrive and SharePoint.



3. The OneDrive *landing page* offers quick access to recent files that you have accessed that can be filtered based on file name, collaborator, or application.



## Accessing Files in OneDrive

1. Select the **My files** option.
2. Your files will load with your folders first then your files.

**NOTE:** If you would like to see a list of files that you have shared with others or have been shared with you, select the **Shared** icon.

3. To access a file in the applicable application, select the file's **title**.

## Accessing Files in OneDrive (continued)



4. The file will open in a new browser tab

## Creating Files and Folders in OneDrive

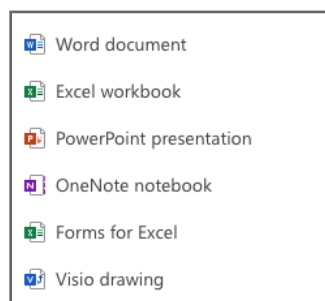
### Creating Files

1. Navigate to the desired folder to store the file or create a new folder.

**NOTE:** If you do not select or create a folder, your files will be accessible via the My Files page after all of your folders.

2. Select the **+ Add new** button.

3. Select the **File** type (e.g., Word, Excel, PowerPoint).



4. The blank file will load in a new browser tab

**NOTE:** OneDrive will autogenerate a file name (e.g., Document1, Book1, Presentation1), select the **File Name** to enter a specific file name for the document.

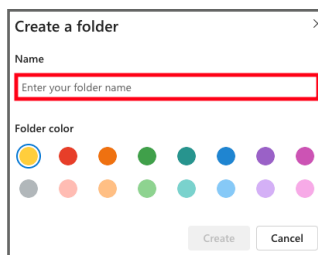
### Creating Folders

1. Select the **+ Add new** button.

2. Select the **Folder** option.

**NOTE:** Folders created within a *folder* will be created as **subfolders**.

3. Enter a **Folder Name** and select a **color**.



4. Click the **Create** button.

5. Your folder will be *created* successfully.

## Uploading Files and Folders to OneDrive

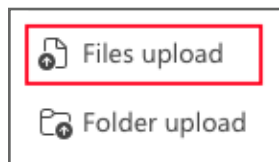
There may be files created locally on your workstation's desktop that you would like to collaborate with colleagues on, but you do not want to email copies. The following steps will demonstrate the process for uploading files and folders.

### Upload Files

1. Navigate to *My Files landing page* or the desired *folder* for the file.

2. Select the **+ Add new** button.

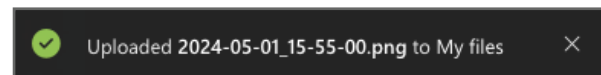
3. Select the **Files Upload** option.



4. From your workstation's file dialog window, navigate and select the file(s) to be uploaded.

5. Click the **Open** button.

6. A notification will be received that the file or files were uploaded to OneDrive successfully.



### Upload Folders

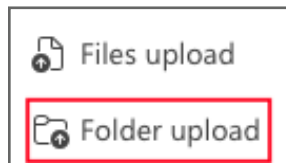
1. Navigate to *My Files landing page* or the desired *folder location* for the folder.

2. Select the **+ Add new** button.

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## Uploading Files and Folders to OneDrive (continued)

3. Select the **Folder upload** option.

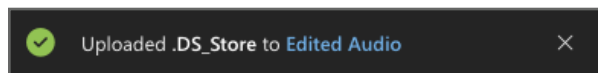


4. From your workstation's file dialog, navigate and select the folder to be uploaded.

**NOTE:** Only one folder can be uploaded into OneDrive at a time and all files within the folder will be uploaded, so it is a best practice to review the folder contents before uploading a folder.


5. Click the **Upload** button.


6. Notification received that the folder was uploaded to OneDrive successfully.



## Moving Files or Folders

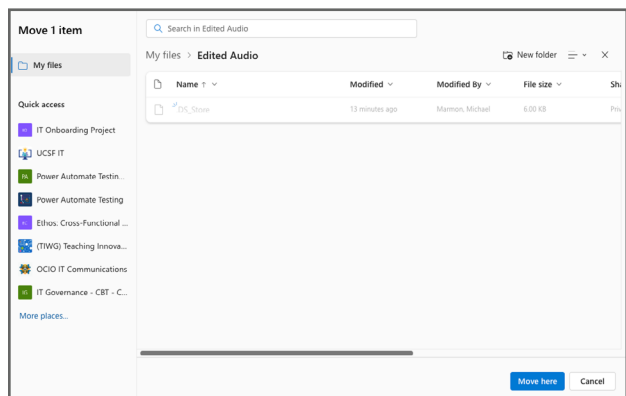
1. Navigate to the desired *file* or *folder* to move.

2. Select the  next to the item to highlight it.

3. Select the  for the selected item.

4. Click the  option.

5. In the **My Files** dialog window, navigate to the new Folder location for the file or folder being moved.



6. Click the **Move here** button to move the selected file or folder to its new location.

7. A notification is received that the folder was moved successfully.

## Sharing Documents and Folders in OneDrive

OneDrive simplifies the collaborative process on uploaded files by facilitating real-time collaboration by including a version history and saving changes automatically as updates are made.

1. Navigate to the desired *File* or *Folder* to share.

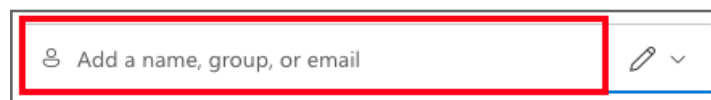
**NOTE:** Files or folders shared with you or others will be updated with the  icon.


2. Select the  button.

**NOTE:** If you are sharing a folder, it will provide access to all the current files and those created/housed within the selected folder in the future.

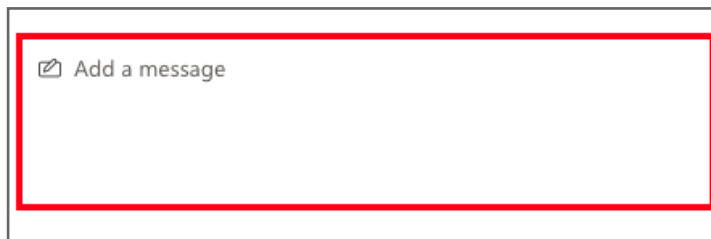
3. Enter the following within the **Share Dialog** window:

a. Enter the intended recipient's **name** or **email address**.



b. Set the **permissions** () for the file or folder being shared (e.g., Can edit, Can view, or Can't download).



c. Add a **message** to describe the file or folder being shared.



4. Click the  button to send a link to the recipient.




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## Sharing Documents and Folders in OneDrive (continued)




**NOTE:** If you select the  **Copy link**  option, you can provide access to user's by pasting the link in an email or chat. Remember to set the **permission level** (e.g., Can View or Can Edit) first by clicking the **Gear** icon.

## Deleting Files or Folders in OneDrive

There are times where you might not need a file or folder any longer in OneDrive and you can delete items to keep your documents and folders organized.

1. Navigate to the *file* or *folder* to be deleted.
2. Select the  next to the *file* or *folder name*.
3. Select the  **Delete** button.
4. Click  to confirm sending the item to the recycle bin.
5. You will receive a notification that the item has been deleted.



**NOTE:** If you would like to restore an item, select the  **Recycle bin** option to load the recycle bin. Then select the  next to the *file* or *folder* before clicking the  **Restore** option.