OneDrive for Business   Quick Reference Guide

Navigation

File and folder list

Information

Introduction

OneDrive for Business is Microsoft's cloud storage service. The business version is based on SharePoint technology. OneDrive for Business is managed by your organization and lets you share and collaborate on work documents with co-workers.

OneDrive for Business is three tools in one – it's a storage tool, a synchronization tool, and a collaboration tool.

OneDrive for Business is good for collaborating on a document with one or two other internal users for a limited period of time.

Accessing

OneDrive for Business can be accessed multiple ways – via a web browser, through a Windows app in File Explorer, and through the Open and Save menus in the Office products.

This reference guide focuses on using OneDrive for Business in a web browser. OneDrive for Business supports all major browsers.

To log into your OneDrive for Business:

1. Open Internet Explorer and go to **portal.office.com**.
2. In the **Pick an account** dialog box, click your username.
3. On the Office 365 portal home page, click the **OneDrive** tile.

Interface Elements

Element	Function
Navigation bar	Provides access to the other Office 365 apps, notifications, settings, help, and account details and settings for Office 365.
Search box	Provides instant results as search terms are entered into the box. Both filenames and file content are searched for matching information.
Ribbon	Displays commands and menus for working with files and folders. As in Office, the commands that appear on the ribbon change depending on what is selected.
Navigation pane	Displays shortcuts to different parts of OneDrive for Business and accessible SharePoint Online sites. The options on this list cannot be customized.
File and folder list	Lists all files and folders according to the view, sort, and filter options selected. A folder navigation trail is displayed at the top of the list.
Information pane	Displays information about the selected file, including a thumbnail preview, file details, sharing details, and recent activity.

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Ribbon Commands

Button	Action
Open ∨	**Open** the selected file. Depending on the file type, additional options may be available on the drop-down menu.
Share	**Share** the selected file(s) with other users. Generates an email. Options allow editing or view only.
Copy link	Create and **copy a sharing link** to the Windows clipboard to paste as needed into an email or document.
Download	**Download** the selected file to the local computer. If multiple files are selected, they are downloaded as a ZIP file.
Delete	**Delete** the selected file(s). Files are moved to the OneDrive Recycle Bin, where they can be restored from.
Move to	**Move** the selected file(s) and/or folder(s) to a different or new location within OneDrive.
Copy to	**Copy** the selected file(s)/folder(s) to a different or new location within OneDrive or to a SharePoint Online site.
Rename	**Rename** the file. File names can be up to 128 characters, and follow the same character restrictions as Windows.
Version history	Display the **version history** of the file. Previous versions of the file can be viewed and restored.
ⓘ	Open the **Information** pane on the right. Depending on what is selected, a variety of information will be displayed.
+ New ∨	The **new** drop-down has options for creating new folders, or one of several Office file types.
Upload	Open Windows File Explorer to select files to **upload** from the local computer to OneDrive.
Sync	**Sync** any connected SharePoint Online libraries with your OneDrive. This feature is not currently available.
Sort ∨	**Sort** the file list in ascending or descending order by the selected file attribute, such as by date or file type.
☰ / ☰ / ⊞	**View options**. Change how the files and folders are displayed. There are three options – list, compact list, or tiles.
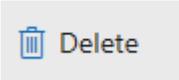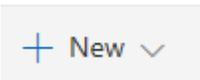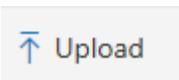
Basic Procedures

SELECTING FILES
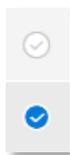
Files and folders are selected by clicking the gray circle-checkmark either to the left of the file name, or in the upper right corner of the tile. The icon turns blue when selected. The entire file/folder list can be selected by clicking the icon at the top of the list.

UPLOADING FILES

Use the **Upload** button on the ribbon, or drag files from any File Explorer window to your web browser window.

CHANGING HOW FILES ARE DISPLAYED
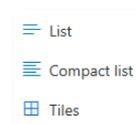
There are three options for displaying files – list view, compact list view, and tiles view. The default is tiles view. The view can be changed using the View Options button on the ribbon.

OPENING A FILE

Click the file name, or select the file and click **Open.**

SHARING A FILE

There are two buttons for sharing files, **Share** and **Copy link**. The **Share** button creates a link and sends an email. The **Copy link** button creates a link and copies it to the Windows clipboard so that it can be pasted in an email or document.
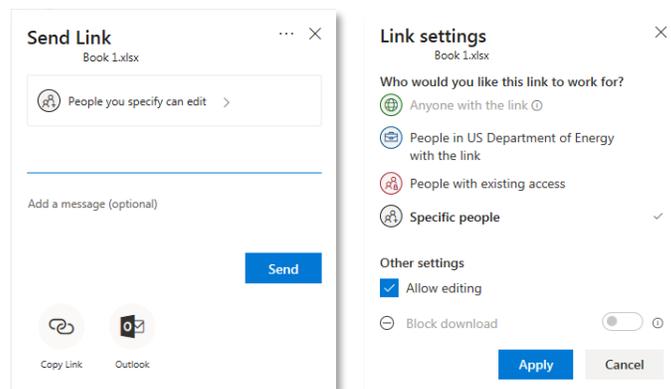
Files can only be shared with other internal users. The default permission is to **Allow editing**. Uncheck this box in **the Other settings** section to allow **Read only**.

SEARCHING FOR FILES

Use the **Search** box in the upper left corner to search for content. The search box provides instant results as you type. OneDrive searches both filenames and the content inside files for matching information. To display the search results in the file and folder list, click **Search Everything** at the bottom of the results list.

Excel Online   Quick Reference Guide
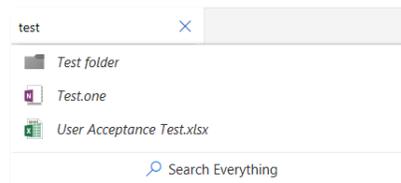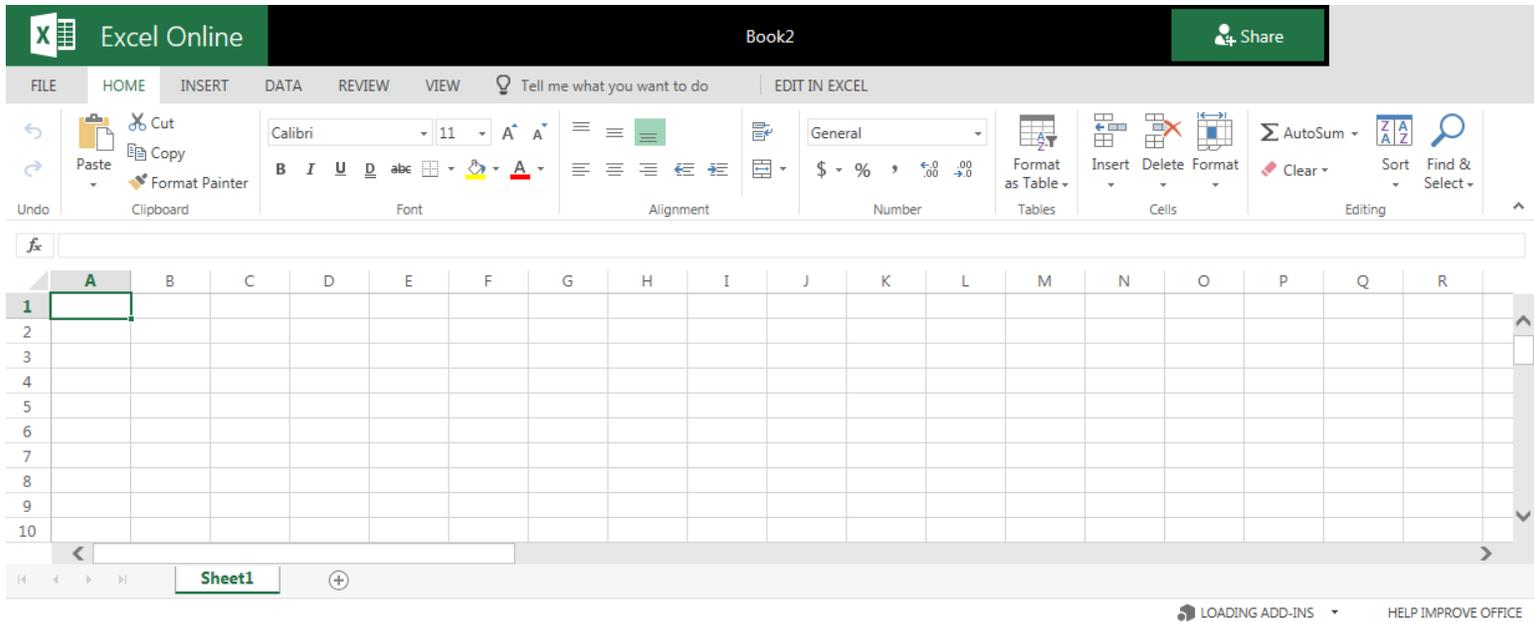
Introduction

Excel Online is a version of Excel that runs in a web browser. In many ways, Excel Online looks and works the same as the desktop Excel, however, there are some differences. Foremost, not all features of desktop Excel are available or work in Excel Online. A workbook can seamlessly move from online to desktop and back without losing any features or fidelity.

Workbooks created in Excel Online are automatically saved into your OneDrive for Business.

Excel workbooks opened from a SharePoint Online library will initially be opened in Excel Online.

Basic Tasks

Get Help
Type a keyword or phrase into the **Tell me what you want to do** search box on the ribbon to quickly find help.

Show or Hide the Ribbon
Double-click any tab on the ribbon to show or hide it.

Use the Status Bar
Click the drop-down arrow on the right side of the status bar to customize the quick functions that are displayed when highlighting numbers.

Open OneDrive for Business
Click your name next to the Excel Online logo to open your OneDrive for Business.

Basic Tasks

Switch from Reading View to Editing View
Click the **Edit Workbook** menu on the right and select **Edit in Excel** (for desktop Excel) or **Edit in Browser** (for Excel Online).

Open in Desktop Excel
Click **Edit in Excel** to the right of the ribbon tabs.

Save Changes
Excel saves your changes automatically. Look next to the workbook name at the top of the Excel Online window. It will either show **Saved** or **Saving**.

Share Workbooks Online
Click the **Share** button in the upper right corner. Then select the people to share with and select a permission level (Can View or Can Edit).

Rename a Workbook
Click the workbook name at the top center of the window and type a new name.

Print a Workbook
On the **File** menu, click **Print**.

Download a Copy to Your Computer
On the **File** menu, click the **Save As** tab and then select **Download a Copy**.

Close and Save
Close the browser tab to close Excel Online and automatically save any changes to the workbook.

Excel Online   Quick Reference Guide

Differences Between Online and Desktop

All of the following features are displayed or work in Excel Online similar to how they are displayed or work in the desktop version of Excel:

- Calculations
- Cells
- Charts
- Dates
- Field list for a PivotTable
- Filters, slicers, and timeline controls
- Formatting
- Line borders
- Named items *
- PivotCharts *
- PivotTables *
- Sparklines *
- Tables

* These items are displayed, but cannot be created or modified in Excel Online.

Data Validation – Workbooks that use data validation can be edited in a browser window, but data validation cannot be set up in the browser.

Fonts – Fonts are usually displayed using the same style and size in a browser as they are displayed in Excel. If a workbook uses a specific font that is not available on your device, then another font might be substituted when a workbook is displayed in a browser window.

Functions – Most Excel functions work in a browser window as they do in Excel, however some kinds of functions can behave differently, including CHAR, INFO, NOW, RAND, and TODAY.

Save – When you or other people edit a workbook in a browser window, changes are saved automatically.

Undo and Redo – When a workbook is edited by more than one person at a time, the Undo and Redo commands are not available as soon as another user makes a change.

Worksheet or Workbook Protection – Workbooks that are protected (encrypted with password protection) cannot be viewed in a browser window. Protected worksheets (not entire workbooks) can be viewed in a browser window in Excel Online.

Keyboard Shortcuts

To do this	Press
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Undo	Ctrl + Z
Redo	Ctrl + Y
Collapse or expand the ribbon	Ctrl + F3
Activate Ribbon tab shortcuts	Alt + Win
Move to leftmost cell	Home
Move to cell below	Enter
Move to cell above	Shift + Enter
Move to cell right	Tab
Move to cell left	Shift + Tab
Move to cell A1	Ctrl + Home
Go to a specific cell	Ctrl + G
Bold	Ctrl + B
Italic	Ctrl + I
Underline	Ctrl + U
Decrease font size	Ctrl + Shift + <
Increate font size	Ctrl + Shift + >
Start a new line in the same cell	Alt + Enter
Find text	Ctrl + F
Replace text	Ctrl + H
Edit selected cell	F2
Select all cells	Ctrl + A
Print	Ctrl + P
Insert a hyperlink	Ctrl + K
Insert a table	Ctrl + L
Insert a function	Shift + F3
Insert the Sum function	Alt + =
Insert a new sheet	Shift + F11
Insert a chart	Alt + F1
Open the comment pane	Shift + F2
Calculate workbook	F9
Activate the Tell Me box	Alt + Q

OneNote Online   Quick Reference Guide
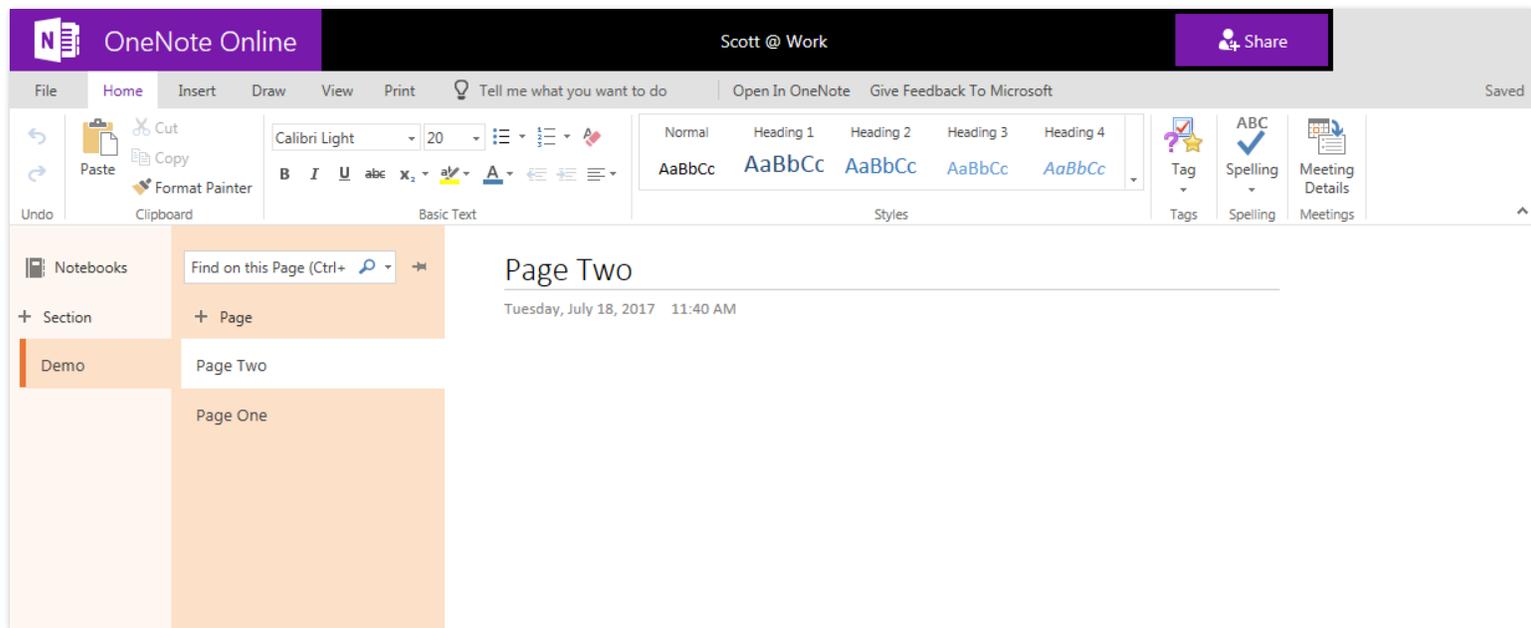
Introduction

OneNote Online is a version of OneNote that runs in a web browser. In many ways, OneNote Online looks and works the same as the desktop OneNote, however, there are some differences. Foremost, not all features of desktop OneNote are available or work in OneNote Online. A notebook can seamlessly move from online to desktop and back without losing any features or fidelity.

Notebooks created in OneNote Online are automatically saved into your OneDrive for Business.

OneNote notebooks opened from a SharePoint Online library will initially be opened in OneNote Online.

Basic Tasks

Get Help
Type a keyword or phrase into the **Tell me what you want to do** search box on the ribbon to quickly find help.

Show or Hide the Ribbon
Double-click any tab on the ribbon to show or hide it.

View the Notebook/Section/Page Pane
Click the three-line menu to open the navigation pane. Click the pin to keep the pane open.

Open OneDrive for Business
Click the notebook name next to the OneNote Online logo to open your OneDrive for Business.

Basic Tasks

Switch from Reading View to Editing View
Click the **Edit Notebook** menu on the right and select **Edit in OneNote** (for desktop OneNote) or **Edit in Browser** (for OneNote Online).

Open in Desktop OneNote
Click **Open in OneNote** to the right of the ribbon tabs.

Save Changes
OneNote saves your changes automatically. Look at the far right end of the ribbon. It will either show **Saved** or **Saving**.

Share Notebooks Online
Click the **Share** button in the upper right corner. Then select the people to share with and select a permission level (Can View or Can Edit).

Rename a Notebook
You cannot rename a notebook while it is open. Close the notebook and rename it from OneDrive for Business.

Print a Notebook
On the **File** menu, click **Print**. You can only print one page of a notebook at a time.

Close and Save
Close the browser tab to close OneNote Online and automatically save any changes to the notebook.

OneNote Online

Differences Between Online and Desktop

Print – Only one page can be printed at a time.

Audio and Video – OneNote Online does not play audio and video content, but the media is preserved in the notebook.

Search – Search is limited to the current section.

Zoom – Not available in OneNote Online.

Rule Lines and Page Color – OneNote Online cannot display these, but they are preserved in the notebook.

Format Painter – Not available in OneNote Online.

Insert Space – Not available in OneNote Online.

Tags – Tags cannot be customized in OneNote Online, and custom tags are not available to apply. However, OneNote Online displays custom tags, and they can be removed.

Find Tags – Not available in OneNote Online.

Outlook Integration – The Meeting Details feature is available, but the Email Page and Outlook Tasks features are not.

Proofing Tools – Check spelling and set the proofing language, using the built-in dictionary. OneNote Online does not use a custom dictionary and does not include a thesaurus.

Review Notes by Unread, Recent, and Author – Notes cannot be marked as read or unread, and reviewing edits by how recent they are or by author is not available.

Pictures and Clip Art – Sophisticated features for working with pictures, such as rotating or ordering in layers back-to-front, are not available.

Screen Clippings – The screen clippings command is not available, but screen clippings in notes display as pictures.

Symbols – These can't be inserted or edited in OneNote Online, but OneNote Online displays them as expected.

Timestamp – The command for inserting the current date/time is not available, but OneNote Online displays them as expected.

Linked Notes – This command is not available, and links to files are hidden. However, existing links are preserved in the notes.

Keyboard Shortcuts

To do this	Press
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Undo	Ctrl + Z
Redo	Ctrl + Y
Collapse or expand the ribbon	Ctrl + F3
Activate Ribbon tab shortcuts	Alt + Win
Bold	Ctrl + B
Italic	Ctrl + I
Underline	Ctrl + U
Align left	Ctrl + L
Align center	Ctrl + E
Align right	Ctrl + R
Apply heading styles 1-6	Ctrl + Alt + #
Find text	Ctrl + F
Print	Ctrl + P
Bulleted list	Ctrl + .
Numbered list	Ctrl + /
Increase indent	Alt + Shift + –>
Decrease indent	Alt + Shift + <–
Insert a hyperlink	Ctrl + K
Move to top of page	Ctrl + Home
Move to end of page	Ctrl + End
Tag as To Do	Ctrl + 1
Tag as Important	Ctrl + 2
Tag as Question	Ctrl + 3
Tag as Remember for later	Ctrl + 4
Tag as Definition	Ctrl + 5
Tag as Highlight	Ctrl + 6
Tag as Contact	Ctrl + 7
Tag as Address	Ctrl + 8
Tag as Phone Number	Ctrl + 9
Activate the Tell Me box	Alt + Q

PowerPoint Online   Quick Reference Guide
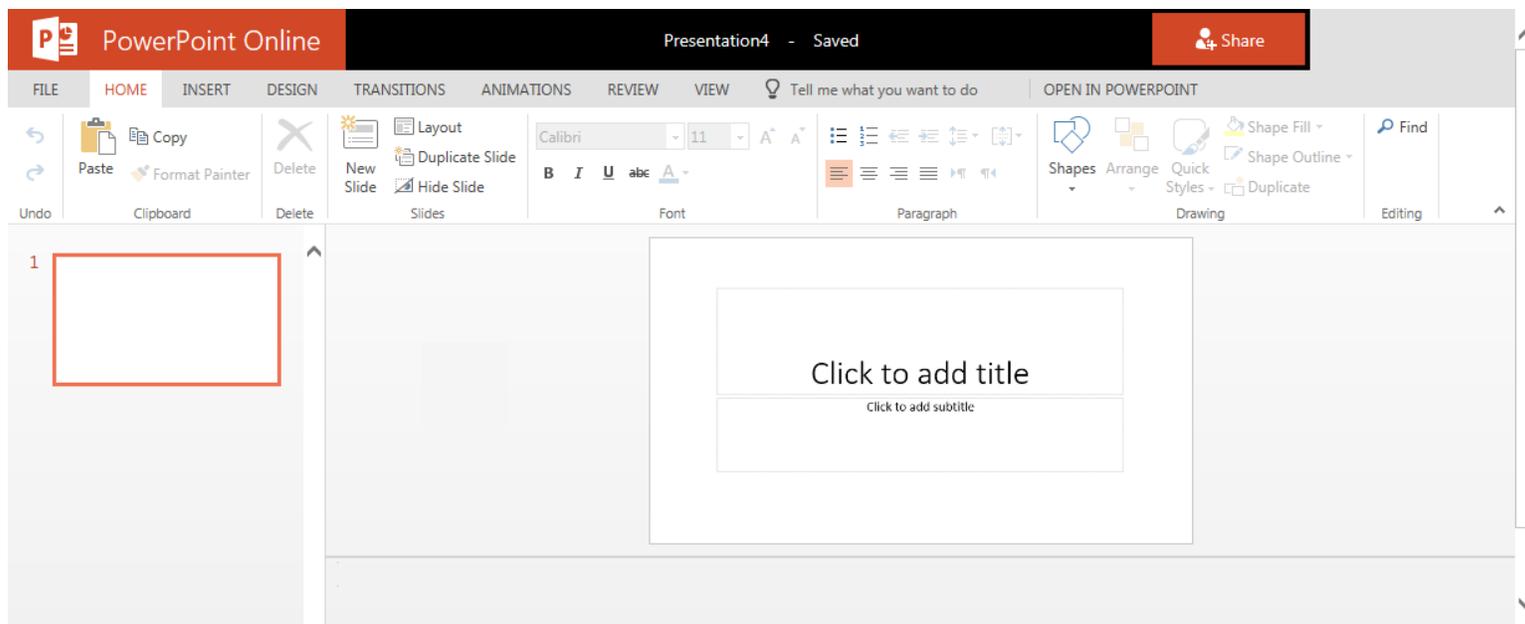
Introduction

PowerPoint Online is a version of PowerPoint that runs in a web browser. In many ways, PowerPoint Online looks and works the same as the desktop PowerPoint, however, there are some differences. Foremost, not all features of desktop PowerPoint are available or work in PowerPoint Online. A presentation can seamlessly move from online to desktop and back without losing any features or fidelity.

Presentations created in PowerPoint Online are automatically saved into your OneDrive for Business.

PowerPoint presentations opened from a SharePoint Online library will initially be opened in PowerPoint Online.

Basic Tasks

Get Help
Type a keyword or phrase into the **Tell me what you want to do** search box on the ribbon to quickly find help.

Show or Hide the Ribbon
Double-click any tab on the ribbon to show or hide it.

Use the Status Bar
From the status bar you can select the language, open and close the notes pane, switch views, change zoom, and fit to window.

Open OneDrive for Business
Click your name next to the PowerPoint Online logo to open your OneDrive for Business.

Basic Tasks

Switch from Reading View to Editing View
Click the **Edit Presentation** menu on the right and select **Edit in PowerPoint** (for desktop PowerPoint) or **Edit in Browser** (for PowerPoint Online).

Open in Desktop PowerPoint
Click **Open in PowerPoint** to the right of the ribbon tabs.

Save Changes
PowerPoint saves your changes automatically. Look next to the presentation name at the top of the PowerPoint Online window. It will either show **Saved** or **Saving**.

Share Presentations Online
Click the **Share** button in the upper right corner. Then select the people to share with and select a permission level.

Rename a Presentation
Click the presentation name at the top center of the window and type a new name.

Print a Presentation
On the **File** menu, click **Print**.

Convert to PDF and Download a Copy
On the **File** menu, click the **Save As** tab and then select **Download as PDF**.

Close and Save
Close the browser tab to close PowerPoint Online and automatically save any changes to the presentation.

PowerPoint Online   Quick Reference Guide

Differences Between Online and Desktop

Password Protection – Presentations that are protected with a password cannot be opened in PowerPoint Online.

Print – The only print layout available is one slide per page.

Outline, Master, Presenter, and Slide Sorter Views – These views are not available in PowerPoint Online.

Speaker Notes – Can be shown or hidden, but cannot be printed.

Rulers and Gridlines – Rulers and gridlines are not available. Smart guides automatically appear to help align objects.

Replace – Find is available, but Replace is not.

Design Themes – A limited gallery of built-in themes are available for new slides. Themes added to a presentation from desktop PowerPoint are preserved in PowerPoint Online.

Animation Effects – Animations added using desktop PowerPoint (that are not available in PowerPoint Online) are preserved and will play, but they cannot be modified.

Transitions – A limited gallery of transitions is available. Transitions added in desktop PowerPoint are preserved, but can only be played or changed in desktop PowerPoint.

Pictures – Sophisticated picture formatting, such as applying special effects and removing the background, are not available.

Charts and Equations – Cannot be inserted but are displayed as expected.

WordArt – Not available in PowerPoint Online.

Symbols – A limited set of symbols can be inserted. If the font for a symbol is not available, it is displayed as a placeholder.

Headers and Footers – Cannot be inserted, edited, or deleted, but are displayed as expected.

Macros – Cannot be run in PowerPoint Online.

Customize Slide Show – Options for setting up and customizing the slide show, broadcasting the slide show, or setting up monitors aren't available.

Keyboard Shortcuts

To do this	Press
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Undo	Ctrl + Z
Redo	Ctrl + Y
Duplicate object	Ctrl + D
Collapse or expand the ribbon	Ctrl + F3
Activate Ribbon tab shortcuts	Alt + Win
Bold	Ctrl + B
Italic	Ctrl + I
Underline	Ctrl + U
Align text left	Ctrl + L
Align text center	Ctrl + E
Align text right	Ctrl + R
Align text justify	Ctrl + J
Decrease font size	Ctrl + [
Increase font size	Ctrl +]
Find text	Ctrl + F
Print	Ctrl + P
Insert a new slide	Ctrl + M
Edit text in placeholder	F2
Go to next slide (Editing)	Page Down
Go to next slide (Editing)	Page Up
Go to next slide (Reading, Slide Show)	N
Go to previous slide (Reading, Slide Show)	P
Go to specific slide (Reading, Slide Show)	G
Select all text and/or objects	Ctrl + A
Insert a hyperlink	Ctrl + K
Add a new comment	Alt + N
Reply to a comment	Alt + R
Exit slide show	Esc
Activate the Tell Me box	Alt + Q

Word Online

Quick Reference Guide
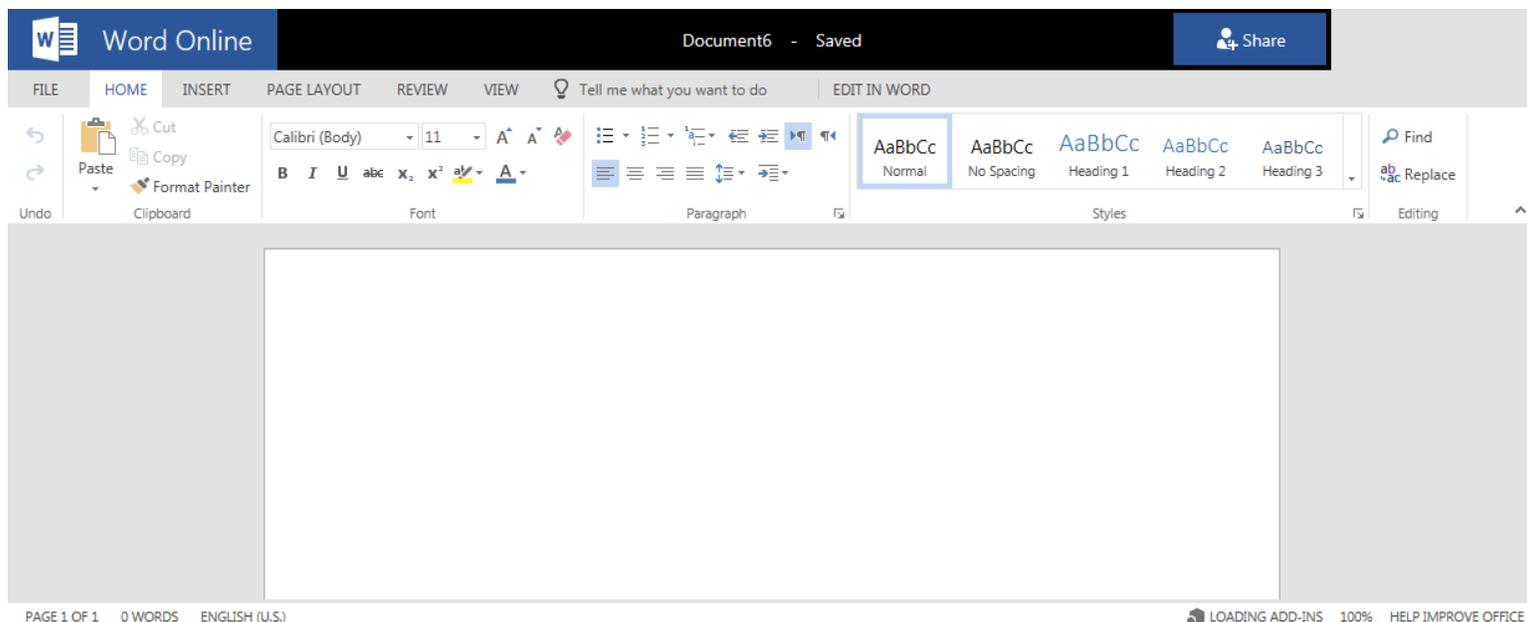
Introduction

Word Online is a version of Word that runs in a web browser. In many ways, Word Online looks and works the same as the desktop Word, however, there are some differences. Foremost, not all features of desktop Word are available or work in Word Online. A document can seamlessly move from online to desktop and back without losing any features or fidelity.

Documents created in Word Online are automatically saved into your OneDrive for Business.

Word documents opened from a SharePoint Online library will initially be opened in Word Online.

Basic Tasks

Get Help
Type a keyword or phrase into the **Tell me what you want to do** search box on the ribbon to quickly find help.

Show or Hide the Ribbon
Double-click any tab on the ribbon to show or hide it.

Use the Status Bar
From the status bar you can change page number display, turn the Word Count on and off, change the document language, and change the document zoom (the percentage on the right).

Open OneDrive for Business
Click your name next to the Word Online logo to open your OneDrive for Business.

Basic Tasks

Switch from Reading View to Editing View
Click the **Edit Document** menu on the right and select **Edit in Word** (for desktop Word) or **Edit in Browser** (for Word Online).

Open in Desktop Word
Click **Edit in Word** to the right of the ribbon tabs.

Save Changes
Word saves your changes automatically. Look next to the document name at the top of the Word Online window. It will either show **Saved** or **Saving**.

Share Documents Online
Click the **Share** button in the upper right corner. Then select the people to share with and select a permission level (Can View or Can Edit).

Rename a Document
Click the document name at the top center of the window and type a new name.

Print a Document
On the **File** menu, click **Print**.

Convert to PDF and Download a Copy
On the **File** menu, click the **Save As** tab and then select **Download as PDF**.

Close and Save
Close the browser tab to close Word Online and automatically save any changes to the document.

Word Online

Quick Reference Guide

Differences Between Online and Desktop

Document Views – Word Online displays a document in Print Layout view. Other views available in desktop Word are not available including side-by-side viewing and split windows.

Rulers and Gridlines – Not displayed.

Password Protection – Word Online cannot open documents that are encrypted with a password.

Styles – Use built-in styles or custom styles that are already in the document. You cannot create new styles or modify styles.

Columns – Preserved but cannot be added or edited.

Sections and Section Breaks – Preserved but cannot be added or edited.

Design Themes and Watermarks – Preserved but cannot be added or edited.

Proofing Tools – Spelling check uses the built-in dictionary. Word Online does not use a custom dictionary and does not include grammar checking, translation, or a thesaurus.

AutoCorrect – Uses built-in settings and cannot be customized or turned off.

Tracked Changes – Document is displayed as though all tracked changes have been accepted. Changes are still tracked, but visual cues and markup symbols are not displayed.

Tables – Sophisticated table features, such as table styles, cell size, text direction, and sort order, are preserved in the document, but cannot be configured.

Pictures – Cannot be dragged to a new location (use Cut/Paste to relocate). More sophisticated features for working with pictures, such as cropping, are not available.

Shapes, Charts, Text Boxes, SmartArt, WordArt – These display in the document as expected. They can be deleted, but they cannot be edited, moved, or resized.

Footnotes, Endnotes, Table of Contents, Indexes – These display in the document as expected. They can be deleted, but they cannot be edited or updated.

Macros – Preserved but cannot be run or executed.

Keyboard Shortcuts

To do this	Press
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Undo	Ctrl + Z
Redo	Ctrl + Y
Collapse or expand the ribbon	Ctrl + F3
Activate Ribbon tab shortcuts	Alt + Win
Beginning of line	Home
End of line	End
Beginning of document	Ctrl + Home
End of document	Ctrl + End
Bold	Ctrl + B
Italic	Ctrl + I
Underline	Ctrl + U
Decrease font size	Ctrl + [
Increase font size	Ctrl +]
Bulleted list	Ctrl + Period
Numbered list	Ctrl + /
Align left	Ctrl + L
Align right	Ctrl + R
Align center	Ctrl + E
Align justified	Ctrl + J
Reset paragraph formatting	Ctrl + Q
Find text	Ctrl + F
Replace text	Ctrl + H
Insert a hard page break	Ctrl + Enter
Open the Navigation pane	Ctrl + G
Close the Navigation pane	Esc
Select all text and objects	Ctrl + A
Print	Ctrl + P
Insert a hyperlink	Ctrl + K
Activate the Tell Me box	Alt + Q
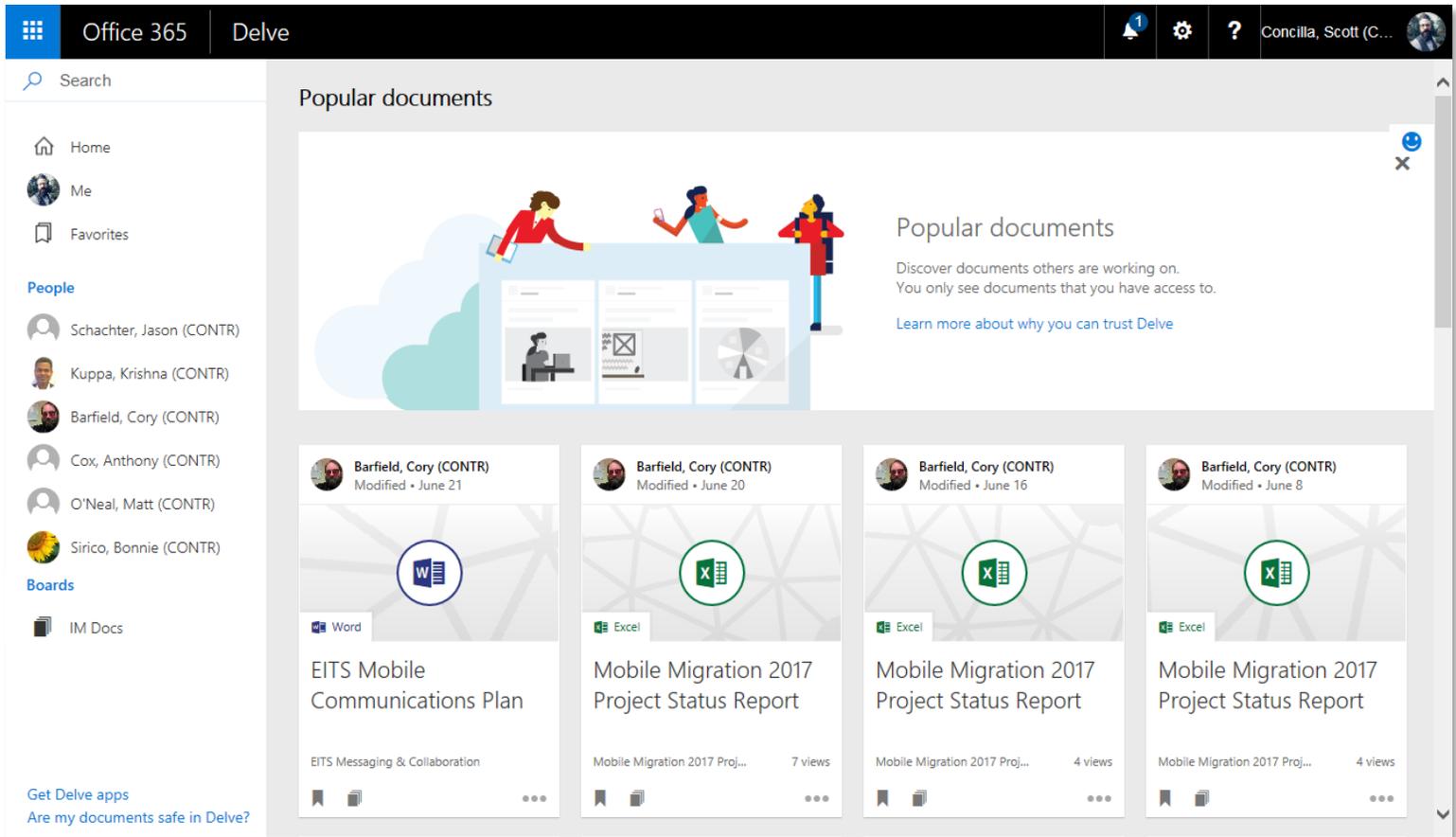
Delve

Introduction

Use Delve to manage your Office 365 profile, and to discover and organize the information that's likely to be most interesting to you right now – across Office 365. Delve shows you documents no matter where they're stored in OneDrive for Business or SharePoint in Office 365.

Delve never changes any permissions, so you'll only see documents that you already have access to. Other people will not see your private documents.

With Delve you can:

- Connect and collaborate with other people.
- Discover and organize information across Office 365.
- Stay connected and productive wherever you are.

Accessing

To log into Delve:

1. Open Internet Explorer and go to **portal.office.com**.
2. In the **Pick an account** dialog box, click your username.
3. On the Office 365 portal home page, click the **Delve** tile.

Interface and Elements

Navigation pane – The left pane of the Delve home page displays links to other views, people, and boards.

Home – This is the default view of Delve. Cards for popular documents are displayed in this view.

Me – Displays your Delve profile. This is the same view other users will see when clicking on your People link.

Favorites – Documents can be added to **Favorites** for easy access. Click the bookmark symbol in the bottom left corner of a document card to add it to this view.

People – Links to other users' Delve profiles. This list is built automatically as you interact and collaborate with other users.

Boards – Favorites can be grouped into **Boards** of related documents. Click the multi-paper symbol in the bottom left corner of a document card to create and manage boards.

Cards – Documents are represented by cards. A variety of data is displayed for each document, including user info, document name, number of views, and where the document is located.

Delve   Quick Reference Guide

Working with Document Cards
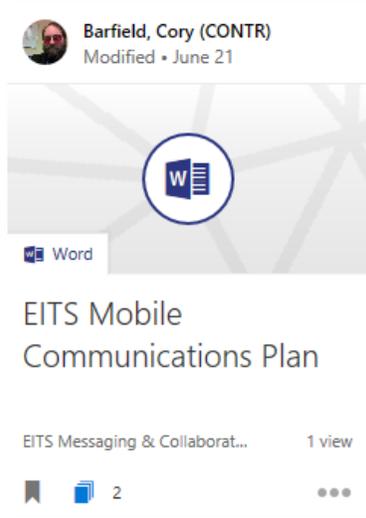
View Another User's Profile
Click the user information header of the document card.

Open a Document
Click the preview thumbnail or document name.

Open the Document Location
Click the location name below the document name (to the left of the view count). A new browser tab will open.

Add a Document to Favorites
Click the bookmark icon in the bottom-left corner. The icon will turn blue. To remove from Favorites, click the blue icon.

Work with Document Boards
Click the multi-paper icon in the bottom-left corner of a document card to begin working with Boards. The **Manage boards** dialog box appears.

- To create a new board, type a new board name in the **Add to a board** section.
- To add a document to a board or boards, select all the boards that apply.
- To remove a document from a board, click the **X** of the board name.

Share a Document
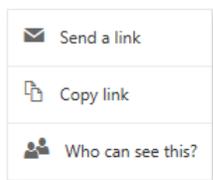
Click the three-dot menu in the bottom-right corner to view the sharing options. You can send a link via Outlook, copy a link to the Windows clipboard (which can then be pasted into a document or email), or you can view (and manage) who currently has access to the document.

Customizing Your Profile

View Your Profile
Click the **Me** link in the navigation pane, or click your name in the upper-right corner of the nav bar and select **My profile**.

Update Your Profile
Click the **Update profile** link and update your information as desired. You cannot update your contact information.

Keep Information Private
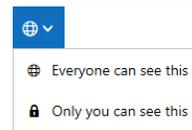
Your profile information is available to all other DOE users. To keep some information private, click the globe symbol and change the privacy.

Change Your Profile Photo

Click the camera icon next to your photo to upload a new picture. This photo is displayed throughout Office 365 and in Outlook.

Change Your Profile Cover Photo
To change your Delve profile cover photo, click **Change cover photo** in the upper right corner and select from the available categories and options. You cannot upload a photo.

Frequently Asked Questions

I see very few or no documents in Delve. What can I do?
Make sure that you and your colleagues store and share your documents where Delve can get to them: in OneDrive for Business or SharePoint Online. Documents on the network or your desktop computer will not appear in Delve.

Can anyone see my content?
No. Only people who already have access to see your documents in OneDrive for Business or SharePoint can see them in Delve. Delve never changes any permissions. Only you can see your private documents.

Can I delete a document from Delve?
Documents are not stored in Delve, so you can't delete documents from Delve directly. The documents are stored other places in Office 365, for example in OneDrive for Business or in SharePoint. Delete the document in its original location or change the permissions to make it private.

Why can't I change all of my profile information?
Some of your profile information is managed via Active Directory. Please contact the Service Desk for assistance.
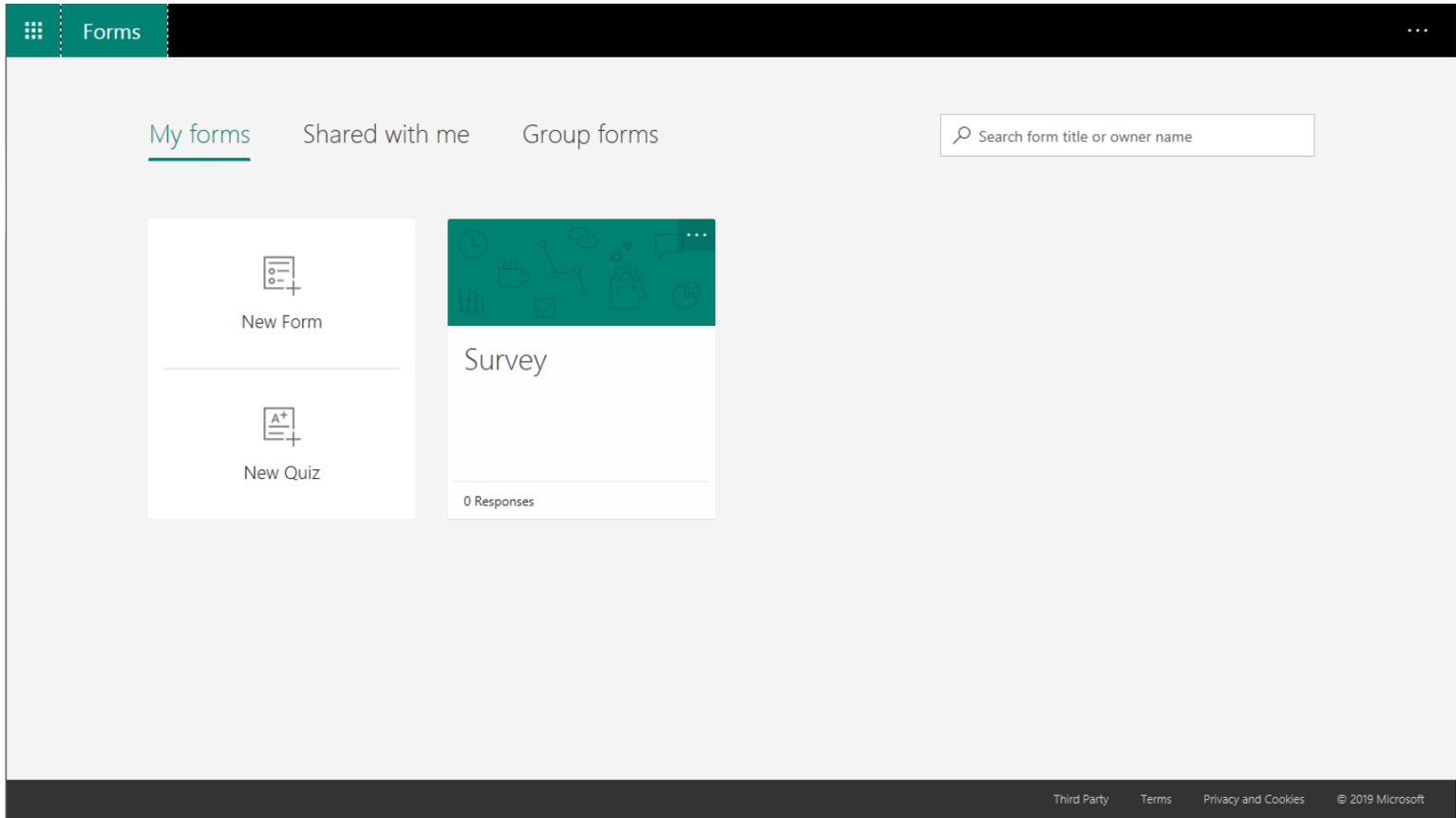
Forms

Introduction

Forms is standalone Office 365 app that allows you to create surveys, quizzes, and polls. Forms can be used to collect feedback, measure employee satisfaction, improve your product or business, or organize company events. With Forms, you can:

- Create surveys, quizzes, and polls, and see the results as they come in.
- Invite others to respond using any web browser.
- Use built-in analytics to evaluate responses.
- Export form data to Excel for additional analysis.

Accessing

To access Forms:

1. Open Internet Explorer and go to **portal.office.com**.
2. In the **Pick an account** dialog box, click your username.
3. On the Office 365 home page, click the **Forms** tile.

If you do not see the **Forms** tile on the portal home page, click **Explore all your apps ->** and then select **Forms** from the list.

Interface and Elements

My forms – Any forms that you have created are displayed as document cards. The **New Form** and **New Quiz** buttons also appear here.

Shared with me – Any forms that other users have shared with you to complete or use will appear here.

Group forms – Forms in this section are organized around Office 365 groups. Any form created in this section can be edited, viewed, and updated by any member of the group.

New Form/New Quiz – Use these buttons to create new forms or new quizzes. Quizzes can do the following that forms can't:

- Add answers and scores.
- Add math type questions and equations.
- Provide feedback on the user's selected answer (i.e. explaining why it is right or wrong.
- Keep a count of the scores awarded.

Search – A live search box to search form titles and owners. Results are displayed as you type.

Forms

Quick Reference Guide

Creating a Form

The first step to get started with Forms is to create a new form for users to fill out.

1. Under **My Forms**, select **New Form** or **New Quiz**.

2. Enter a name for your form. You can also enter an optional subtitle for it. Forms names can contain up to 90 characters and a subtitle can contain up to 1,000 characters.

3. Select **Add Question** to add a new question to a form or quiz. You can choose to add **Choice**, **Text**, **Rating**, **Date**, **Ranking**, or **Likert** questions (click the more button to see the additional options).

   - For choice questions, enter the text you want to display for the question and each of the choices.

4. Select **Preview** at the top of the window to see how your form will look on a computer or mobile device.

Sending a Form

While there are multiple ways to share your Form with other users to collect responses, two of these methods are the most commonly used options.

Send a form link to others
If you don't have the email addresses of the people you want to view your form or quiz, or if you don't want to use email for this purpose, you can easily copy a custom link that lets you send your form to others.

1. In Microsoft Forms, open the form you want to send and select **Share**.

2. Make sure the **Link** button is selected, and then click **Copy** next to the text box that displays a form URL.

3. Copy and then paste this link wherever your intended audience can see and select it to gain access to your form or quiz (for example, a shared class notebook).

Invite others through email
This option creates an email in Outlook and pastes a link to the form in the email message.

1. In Microsoft Forms, open the form you want to send and select **Share**.

2. Select the **Email** button.

3. When Outlook opens, type the email addresses of the people you want to view your form in the **To** box of the email. Microsoft Forms includes a brief note for the recipient in the email body so they have proper context for your invitation and a link to your form.

4. When you're ready to send your form or quiz invitation, select **Send**.

Viewing Results

After you create your form, adjust its settings, and share your form with others, it's time to view the results. Open the form for which you want to review the results, and then select the **Responses** tab.

1. Select **View results** to see individual details for each responder, such as time it took to complete your form and the option(s) selected.

2. To easily view all of the response data for your form in Microsoft Excel, select **Open in Excel**.

3. Select the **More Details** link to see the name of each responder and his or her answers for each question.