

# OneDrive Best Practices

## Introduction – What is OneDrive?

OneDrive for business is a cloud storage service provided by Microsoft for your personal work files. OneDrive is connected with your Campus Wide Login (CWL) credentials and should be used primarily for work related records.

OneDrive serves as individual storage space. It is valuable to use for documents the only involve you or are only meant for you, such as:

- Documents that you are in the process of creating before sharing
- Records sent to you for review
- Personal records such as a resumé

This is similar to a home (H:) drive. Unlike a home drive, however, end-users are able to grant access to their OneDrive to others.

### Note

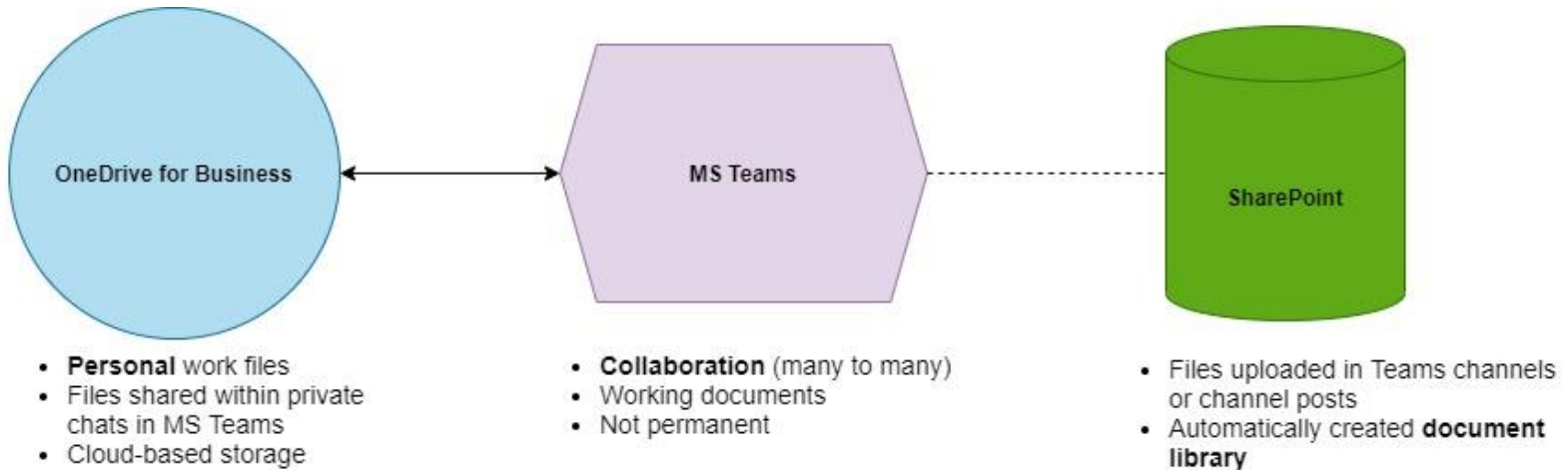
Anybody granted access to a file in OneDrive with editing privileges can share that file with others. If you anticipate a file needing to be accessed by a large group of people, move it to your Teams site or other shared repository instead of keeping it in your OneDrive (for more on these options [see below](#)).

## Advantages

- OneDrive reduces the reliance on email and therefore reduces email overload.
- By allowing web-based access, OneDrive eliminates the need to email files to yourself or download copies.
- Multiple people can edit a document remotely.
- Users can access their personal OneDrive accounts via the web without having to use a VPN to log into their desktop.

## OneDrive, MS Teams, and SharePoint

OneDrive, MS Teams, and SharePoint form a network of functionality within the Office 365 ecosystem. It is important to use the appropriate platform when working on, sharing, and storing university records.



## OneDrive

Acts as cloud storage for:

- Documents requiring collaboration but not other functionality associated with a Teams site.
- University documents not ready to be shared.
- Copies of university records whose originals are stored elsewhere (for example, unit to unit sharing as a better alternative to email).

Records shared via OneDrive remain connected to their original owner. If you leave UBC and your account is removed, the original files will be difficult to recover if they had not already been stored elsewhere. Additionally, extensive sharing through OneDrive will create a complicated network of permissions since unique permissions will be set for each individual file and/or folder that is shared.

## MS Teams

MS Teams is a collaborative tool that uses Channels, posts, and tags to enhance its functionality. The files uploaded within a Teams Channel are stored in an associated SharePoint site which can be accessed through the Teams page.

### Chats (Instant Messaging)

Files shared in private chats in Teams will be stored in your OneDrive account and subject to a 90 day destruction schedule.

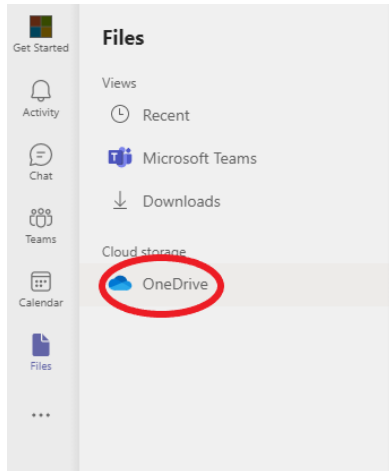
## SharePoint

SharePoint acts as the storage location for anything uploaded to Teams channels or channel posts. All members of a Teams site have access to these document libraries.

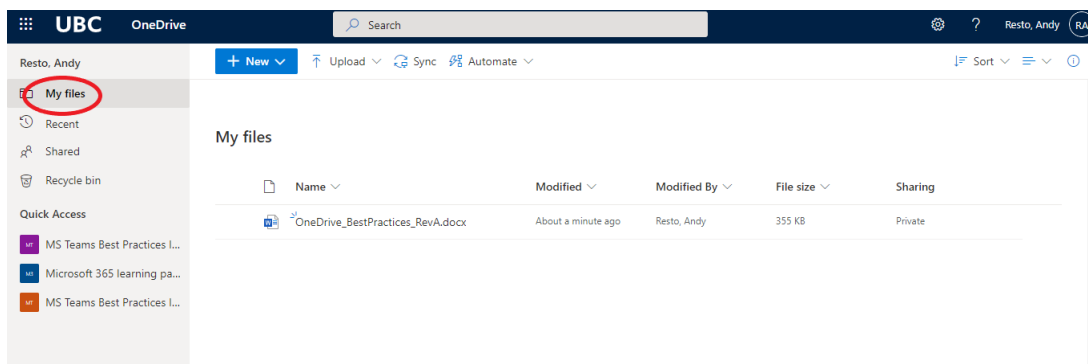
## Accessing OneDrive

### From MS Teams

To access your OneDrive account from MS Teams, find the Files app on your Teams sidebar, and under Cloud Storage select OneDrive.



Once you select “Open in OneDrive”, you will be directed to your personal site in an external page.



On the sidebar, you can see quick links to other collaborative sites that your account is connected to, including your Teams.

### From the Web

To access your OneDrive from the web, go to [www.portal.office.com](http://www.portal.office.com) and log in with your UBC CWL account. From here you can access all of your Office 365 products.

## Managing Records in OneDrive

Your OneDrive is not meant to be a central location for storing university records. Records must be transferred approved central storage locations or collaboration sites when documents are ready for review or for sharing. When staff leave the university it is more complicated to recover records from your personal storage.

## OneDrive Quick Guide

### What to Store in OneDrive

| Type  | Examples   |
|---|--|
| Information about you as an individual            | Your hiring information, your contracts, resume              |
| Early drafts of document not yet ready for review | Documents prior to “RevA”, notes                             |
| Personal research                                 | Published articles or other information for a future project |
| Information about you as an individual            | Your hiring information, your contracts, your resumé         |

### What Not to Store in OneDrive

| Type                                     | Examples   |
|--|--|
| Documents meant to be accessed by a team | Project revisions  |
| Official documents                       | Any finalized university record, such as policies and procedures |
| Personal material                        | Holiday photographs, personal finances                           |

### Tips / Recommendations

- Have a schedule for reviewing and cleaning your OneDrive. Transfer records out of OneDrive and into your central repository regularly.
- Follow similar naming conventions and folder structures in your OneDrive as are used within your organization’s shared drive.
- When leaving a position, transfer any relevant records to your unit’s central repository according to standard offboarding procedures, then delete all remaining material.

## Further Information

- [MS Teams Best Practices](#)
- [Electronic Records Management Guidelines](#)
- [Microsoft OneDrive Student Guide](#)



## Glossary

|                        |  |
|------------------------|--|
| Channel                | Channels are what make up a Teams site. They are used to organize conversations, file sharing, and meetings pertaining to specific topics, departments, activities, or projects.         |
| Chat                   | A chat is a private conversation that is separate from the overall Teams environment. This is comparable to instant messaging.   |
| Naming convention      | A way to format names of documents in a consistent and efficient manner to facilitate workflow.  |
| Post                   | A post is a way to have discussions with your Teams within specific Channels. This is a space for group conversations, meetings, and collaborative work.                                 |
| Retention              | The amount of time a record is kept before it is securely destroyed, as established in university retention schedules.   |
| Tag                    | A way to connect with a subset of people in a Teams site. Can be assigned to categorize people based on specific attributes.   |
| Transitory information | Records or data of temporary usefulness needed only for a limited time in order to complete a routine action or prepare a final record. This includes chats, posts, and draft documents. |