Fact Sheet

Managing Records and Information
in Office 365

Queen's uses the Office 365 service to support the teaching, learning, research and administrative activities of the University. With Office 365, Queen's faculty and staff can easily create, store, collaborate, share and access information, files, and documents from virtually anywhere. As with any platform used to handle university records and information, use of the Office 365 suite of tools must comply with the Records Management Policy and the Electronic Information Security Policy Framework. This means that records and information stored using any Office 365 application or service must be actively managed throughout their lifecycle.

Which records go where?

OneDrive for Business

OneDrive for Business is cloud-based storage provided to individual faculty and staff to store university information and materials related to your work at Queen's. It is similar to your local hard drive, and it is intended for retaining work files while they are still being drafted.

OneDrive for Business is best used for as a **short-term**[i] location to store files relevant to your job that you are actively working on. It is recommended that OneDrive for Business not be used for **long-term**[ii] storage of university records because accessing these departmental files/university records can be difficult once an employee leaves Queen's. You should be aware that files stored in OneDrive for Business will be deleted after you are no longer employed by Queen's.

SharePoint Online Team sites

Team sites are cloud-based virtual workspaces that can be created by faculty and staff to facilitate collaborative work. Team sites can be made using a variety of Office 365 applications including Outlook, Teams, Yammer, and Planner. Team sites are intended to be accessed by a group of people who are working on a common project or task where rapid, remote, or simultaneous access is anticipated or desired.

When the project or task has been completed, the Team site owners should determine which files, if any, are to be retained and transferred their unit's recordkeeping repository, traditionally a Windows File Service (Active Directory) or more recently, a SharePoint Online Communication site. Once the files have been transferred, the owner should delete them from the Team site to prevent duplication and potential over-retention. Note that Team sites (including any files still in them) are eligible for deletion by IT Services after one year of inactivity.

SharePoint Online Communication sites

Communication sites can only be created with the assistance of Queen's IT Services. Communication sites, when deployed and properly configured, are cloud-based repositories intended for storage and sharing of university records and information. Communication sites are intended to be accessed by a group of people who require access to a unit's documents where rapid, remote or simultaneous access is beneficial. Communication sites can act as a unit's long-term records repository for digital files because they are not subject to the same expiration rules as Team sites or OneDrive for Business document libraries, and avoid creating silos of university information and records.[iii] Note that university records with a final disposition of Archival need to be transferred to the Queen's University Archives once their period of retention has been met; it is not appropriate to retain these files in your unit's records repository indefinitely.

Key concepts to keep in mind

Office 365 tools are acceptable repositories for retaining university records if they are deployed properly and actively managed, taking into consideration the following points:

- University records and information must be managed no matter where they are kept. Do not allow any system or repository to become a dumping ground for files.
- The University's records retention schedules must be applied to all university records regardless of where they are maintained. Premature or otherwise inappropriate destruction of university records is unacceptable.
- When using Office 365 tools, access must be actively managed and reviewed on an ongoing basis. Updating access when changes to unit staffing occurs is critical.

At a glance

Editing & Collaborative Spaces

My Stuff
Your private working space that remains private until you share things.

OneDrive for Business
Personal files and initial drafts before they're ready for sharing

Use OneDrive for Business instead of personal drives, flash drives, or your computer's hard drive.

Team's Stuff
Small[er] groups of people usually all with edit permissions.

SharePoint Online
- Team sites
- Files tabs in MS Teams, Yammer & Outlook Groups use SharePoint

Use Team sites instead of shared drives & email attachments for collaboration.

Publishing Spaces

Everyone's Stuff
Large[r] groups of people usually read-only permissions for most of them.

SharePoint Online
- Communication sites
- Hub sites

Use Communication sites for centralized communications, official policies and documentation, and finding self-service information.

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Further guidance on managing University Records can be found on the [Records Management and Privacy Office](#) website.

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[i] Short term: The length of time needed to retain a record to complete a task or project. Lasting from days to years.

[ii] Long term: The length of time needed to retain a record to satisfy the minimum retention period of a record. Retention periods can range from one year to several decades.

[iii] An information or record silo is an isolating of those resources making them inaccessible to groups or parts of an organization that need them. Information silos severely limit the ability to collaborate with others.

[iv] Reproduced with modification from: https://www.jumpto365.com/blog/the-document-circle-of-life-in-office-365