

OneDrive & SharePoint

Where does this file go? Your 45-minute answer.

2026 Digital Workplace Summit | State of North Carolina

Presented by Heather Masters
Microsoft

Today's Agenda | 45 Minutes

0:00 – 0:03

Welcome to the Summit — and meet Dana

0:03 – 0:08

The 4:47 p.m. problem we all know

0:08 – 0:14

OneDrive — my personal repository

0:14 – 0:20

SharePoint — team collaboration & sharing

0:20 – 0:26

The one rule: external sharing

0:26 – 0:36

Live demo — a day in the life

0:36 – 0:41

Guardrails and good habits

0:41 – 0:45

Five takeaways, resources, Q&A



Meet Dana

Dana's Monday Morning — Sound Familiar?

- Dana Whitfield is a program specialist in Raleigh. Her draft budget memo lives on her desktop — and nowhere else.
- She emails herself the file so she can finish it at home, then loses track of which version is the real one.
- Her laptop is swapped on Thursday. Four months of working files are gone, and IT can't get them back.
- 853 of you are registered today. If even a third of us work like Dana, that's a lot of files with no safety net.

The desire

"I want one place that is mine, that follows me everywhere, and that I never have to worry about losing."

OneDrive | My Personal Repository

OneDrive is your personal, state-provided repository — the home for the work in progress that belongs to you.



Private by default. Nobody sees a file in your OneDrive until you deliberately choose to share it.



It follows you: laptop, desktop, browser, phone. The same file, current, on every device you sign in to.



Version history and the recycle bin mean a lost file or a bad edit is a two-click recovery, not a crisis.



It is backed up, searchable, and protected by the state's security and compliance — no thumb drive required.

- Before: the draft lives on one laptop. After: it lives in OneDrive and opens on any device she signs in to.
- Before: she emails herself "final_v4_REAL.docx". After: one file, one link, one version history.
- Before: the team waits on her attachment. After: the finished memo moves to the SharePoint team site.

OneDrive vs SharePoint | The Whole Talk on One Slide

OneDrive	SharePoint
My personal repository — work in progress	Team collaboration and org-wide sharing
Private by default — only I can see it	Shared by default with the team or site members
Drafts, notes, and personal working copies	Policies, records, projects, and libraries
External sharing is NOT allowed	External sharing CAN be allowed
Follows me to every device I sign in to	Stays with the team when people change roles
Use for: your drafts, notes, and working files	Use for: team documents, policies, and projects



The One Rule on Sharing

External Sharing | Know the Line

OneDrive — no external sharing

- You cannot share a file in your OneDrive with anyone outside the State of North Carolina.
- The option is blocked by policy — it is not a setting you can turn on.
- Internal sharing with colleagues works normally: pick the person, pick view or edit.

SharePoint — external sharing is possible

- A SharePoint team site CAN allow sharing with approved people outside the state.
- Whether it's on depends on how your site was configured — check with your site owner.
- This is why work destined for partners, vendors, or the public belongs in SharePoint, not OneDrive.

The simple test

- Only I need it? OneDrive.
- My team needs it? SharePoint.
- Someone outside the state needs it? SharePoint — and ask your site owner first.

North Carolina Guardrails | Same Rules Apply

Your files are still state records

- Do NOT store or share PII, PHI, CJIS, or other regulated data outside the systems approved for it.
- Sharing a link grants real access — send it only to people already entitled to that content.
- Public records, retention, and eDiscovery apply in OneDrive and SharePoint exactly as they do in email.
- When you leave a role, your OneDrive goes with your account — team-owned work belongs in SharePoint.



Get Started in Five Minutes

Anatomy of Your OneDrive

My files

Everything you own. Folders you create, drafts in progress, personal working copies.

Shared

Two views: what you shared with others, and what colleagues shared with you.

Recycle bin & version history

Deleted by mistake or saved over a good draft? Restore it yourself in seconds.

Sync & mobile

The OneDrive folder in File Explorer and the mobile app — same files, everywhere you work.

Move In Today — Six Steps

1. Sign in at portal.office.com and open OneDrive from the app launcher
2. In File Explorer, look for the blue cloud OneDrive folder — that folder is your repository
3. Drag your Desktop and Documents work files into it, then wait for the green checkmarks
4. Create three folders to start: In Progress, Reference, and Archive
5. Install the OneDrive app on your phone and sign in with your state account
6. Share one file with a colleague using a link instead of an attachment



Live Demo

S.H.A.R.E. | Five Seconds Before You Send

A quick gut-check you can use every single time you share a file

S

Store it right

Personal draft? OneDrive. Team work? SharePoint.

H

Hand it off

When it stops being yours, move it to the team site.

A

Ask about outside

External sharing means SharePoint — and your site owner's OK.

R

Right people only

Share with named people, not "anyone with the link".

E

Everywhere it follows

Send the link, never the attachment.

Rule of thumb

If you would not be comfortable seeing it forwarded, stop and check where it lives and who you're sending it to.



A Day in the Life | Three Demos

Demo 1 | The Draft That Can't Be Lost

What you'll see on screen

- Dana's budget memo saved straight into OneDrive from Word — no Save As gymnastics.
- The same document opened on a phone thirty seconds later, fully current.
- Version history: rolling back to this morning's draft after a bad paste.
- The recycle bin restoring a folder deleted "by accident".

Why it matters

The moment: Heather deletes the file live on stage—and restores it seconds later.

The habit: Save new work to OneDrive first, every time. Nothing else has to change.

The payoff: A swapped laptop, a spilled coffee, or a bad edit stops being a lost week.

Try it today: Move one folder you care about into OneDrive before you leave this room.

Demo 2 | Handing Off to the Team in SharePoint

What you'll see on screen

- Moving the finished memo from OneDrive into the team's SharePoint document library.
- Two people editing the same document at the same time, cursors visible.
- The team site's shared libraries, news, and lists — the organization's information in one place.
- Why the file now survives a role change, a promotion, or a retirement.

Why it matters

The moment: Two cursors edit the same paragraph at once — no attachments, no merge.

The habit: The second a file belongs to the team, it moves to the team site.

The payoff: Institutional knowledge stays with the agency, not in one person's account.

Try it today: Find one team file sitting in your OneDrive and move it where it belongs.

Demo 3 | Sharing Outside the State

What actually happens when you try

What you'll see on screen

- Dana tries to share a OneDrive file with a vendor — and watches the option refuse her.
- The same file, shared successfully from an approved SharePoint site.
- Choosing specific people instead of "anyone with the link".
- Setting view-only access and checking who already has it.

Why it matters

The rule: No external sharing from OneDrive. Ever. It's policy, not preference.

The path: External collaboration lives in SharePoint, when your site owner has enabled it.

The check: Share with named people and view-only unless there's a reason not to.

The takeaway: Knowing this one rule prevents the most common mistake we see.



Habits, Guardrails & Support

Sharing Links | Stop Sending Attachments

- Stop attaching. Send the link instead — one file, one version, one truth for everyone on the thread.
- Share from the file itself: Share, then type a name. The link goes to that person only.
- Choose view or edit deliberately; view-only is the right default for anything final.
- "Anyone with the link" is the riskiest option — it forwards as easily as it's created.
- A link can be rescinded; an attachment is gone the second you hit send. Use Manage access to remove people.
- Version history rides along — see who changed what and roll back, instead of digging through your Sent folder.
- Links don't bloat mailboxes, hit size limits, or strip the file's protections. Comments stay in the file, not the thread.
- Sharing a folder shares everything inside it, now and in the future.

Good habit

Send the link, never the attachment — then once a quarter, open Shared > Shared by you and clean up access you no longer need.

Things to Watch

- Files still on your Desktop or C: drive may not be backed up — if it isn't in OneDrive, it isn't protected.
- Watch for the green checkmark. A blue sync arrow means the file hasn't finished uploading yet.
- Team-owned work parked in a personal OneDrive disappears when that person changes roles.
- OneDrive is not the place for regulated data that has its own approved system.



Recap & Resources

Five Things to Take Back to Your Desk

- 1.** OneDrive is MY personal repository — private by default, backed up, and on every device.
- 2.** SharePoint is for team collaboration and organizational information sharing.
- 3.** No external sharing from OneDrive. External sharing can be allowed in SharePoint.
- 4.** If it's a draft, it's yours. The moment it's the team's, move it to the team site.
- 5.** Send the link, not the attachment — one file, one version, one truth.

Next Steps

Your next 7 days

- Move your Desktop and Documents folders into OneDrive today.
- Install the OneDrive mobile app and sign in with your state account.
- Create your three folders: In Progress, Reference, Archive.
- Send one link instead of one attachment this week.
- Find the team file hiding in your OneDrive and move it to SharePoint.

Questions?

Thank you, North Carolina. Enjoy the rest of the Summit.



Heather Masters | Microsoft