



# Making the Most of OneDrive and SharePoint for File Management

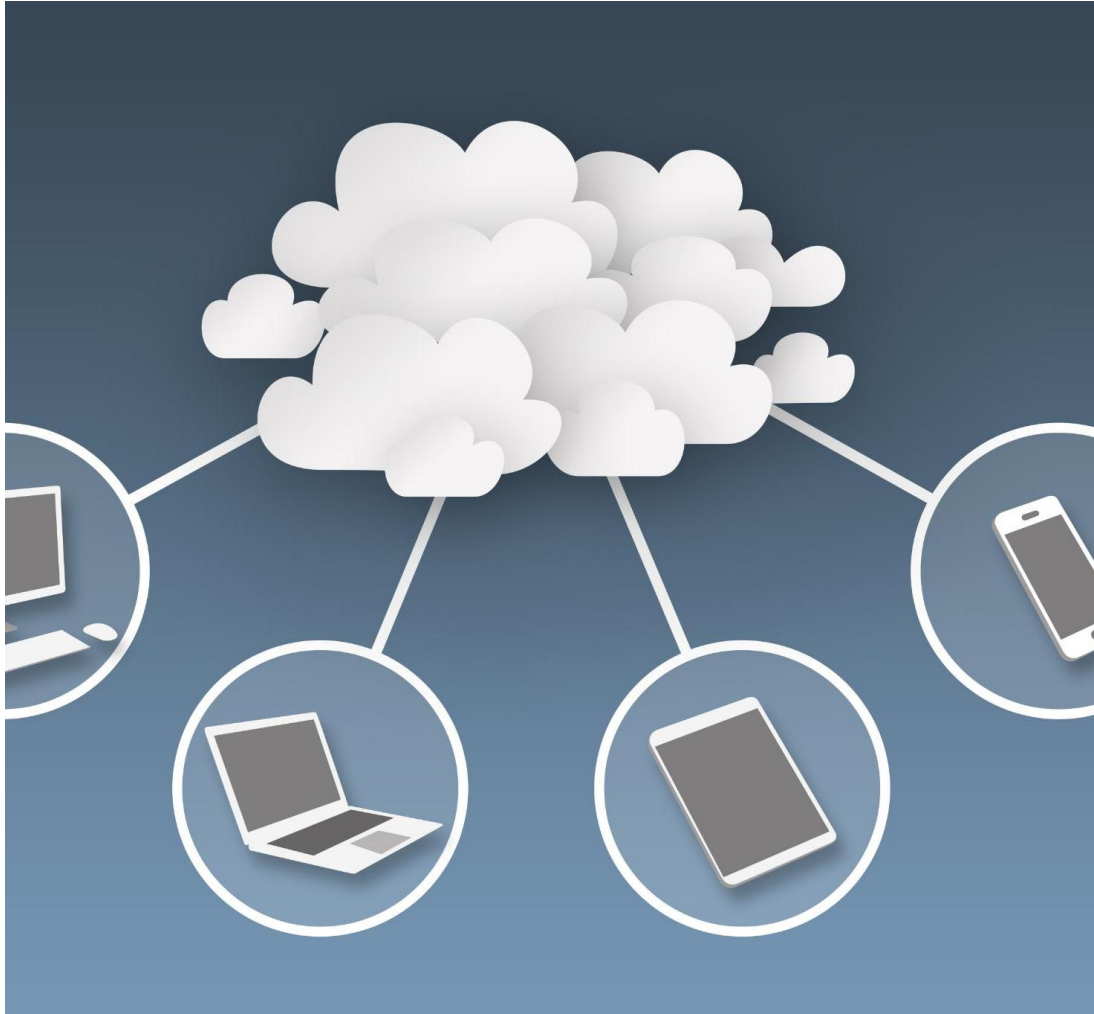
Optimizing collaboration and file handling in organizations

# Agenda Items

- Overview of OneDrive and SharePoint
- Key Feature Comparison
- OneDrive Use Cases and Best Practices
- SharePoint Use Cases and Best Practices
- Integration Scenarios

# Overview of OneDrive and SharePoint

# OneDrive for Business



## **Personal Storage Solution**

OneDrive for Business provides personal storage space in Microsoft 365, allowing individual users to manage their files efficiently.

## **File Synchronization**

OneDrive syncs files seamlessly across devices, ensuring that users have access to their documents anywhere, anytime.

## **Ad-Hoc Sharing**

OneDrive for Business is ideal for sharing drafts and work-in-progress files quickly and securely with others.

# SharePoint Online



## **Document Libraries**

SharePoint Online provides document libraries for managing and storing files, enabling easy access and organization.

## **Structured Collaboration**

It supports structured collaboration through metadata and versioning, ensuring efficient teamwork and document tracking.

## **Site-Level Permissions**

SharePoint Online allows for site-level permissions, enhancing security and control over shared content.

## **Intranet and Portals**

Supports the creation of intranet sites and departmental portals to facilitate communication and resource sharing.

# Key Feature Comparison

# Storage Scope



## **OneDrive Storage**

OneDrive offers individual users a quota of storage, typically starting at 1 TB or more.

## **SharePoint Storage**

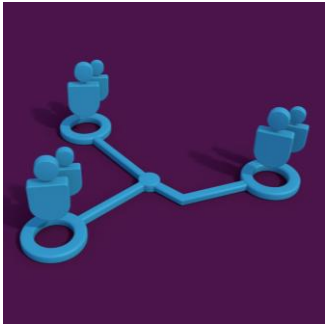
SharePoint allows for site collections and document libraries, pooling storage at the tenant level for shared access.

# Collaboration



## **OneDrive Co-authoring**

OneDrive enables users to co-author documents in real-time and share files easily with individuals or groups.



## **Advanced SharePoint Features**

SharePoint offers team-based libraries, advanced co-authoring, and the ability to organize content through metadata.



## **Check-in/Check-out Options**

SharePoint's check-in/check-out feature ensures proper version control and helps manage document changes effectively.



# Organization & Structure



## **OneDrive Overview**

OneDrive utilizes a folder-based organization, providing users with limited metadata capabilities for file management.

## **SharePoint Features**

SharePoint offers libraries with custom metadata, advanced views, and various content types, enhancing organizational efficiency.

# Permission Management



## **OneDrive Permissions**

OneDrive permissions are set to private by default, allowing users to share files on-demand through a simple interface.

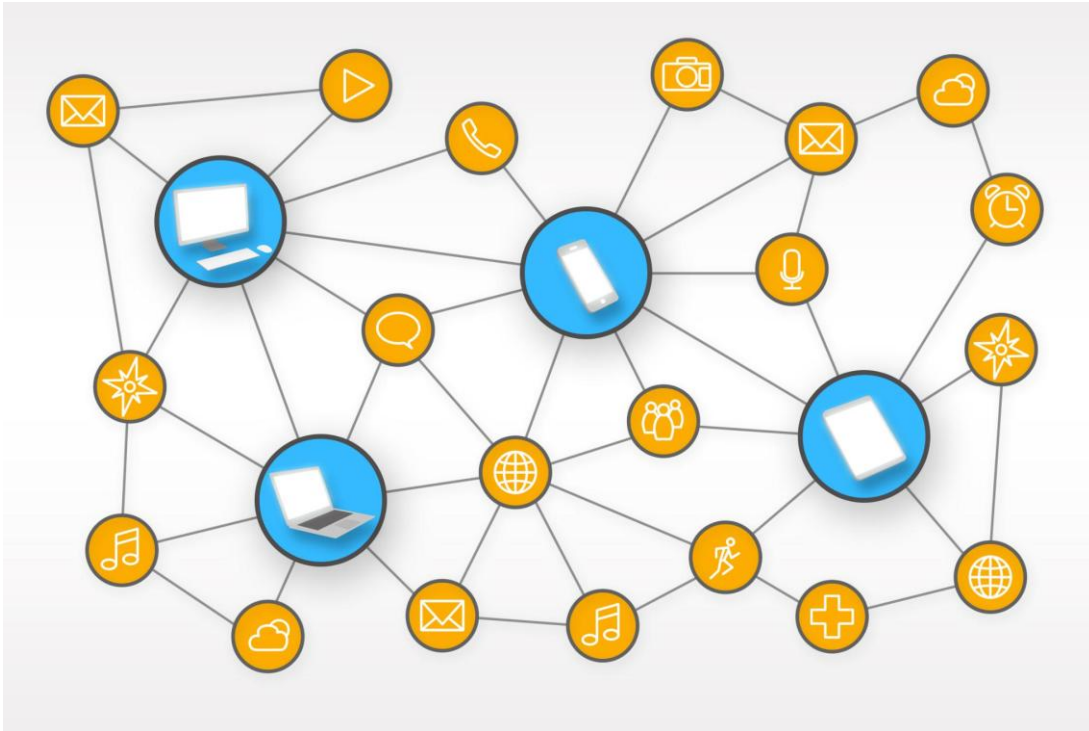
## **SharePoint Permissions**

SharePoint features inheritance of permissions from site to library and folder levels, enabling granular control based on groups.

## **Governance Policies**

Governance policies in SharePoint help manage access and permissions effectively, ensuring compliance with organizational standards.

# Integration & Extensibility



## Office Apps Integration

Both platforms seamlessly integrate with Office applications, enhancing productivity and collaboration.

## Microsoft Teams Collaboration

Integration with Teams allows for real-time collaboration, improving communication among users.

## Additional SharePoint Features

SharePoint provides additional functionalities such as pages, lists, web parts, and workflows for enhanced project management.

# OneDrive Use Cases and Best Practices

# Use Cases

## **Personal Work-in-Progress**

Utilize secure cloud storage for drafting documents and notes before sharing widely, ensuring privacy.

## **Ad-hoc Sharing**

Share files securely using links with expiration dates or passwords for enhanced privacy.

## **Mobility & Offline Access**

Sync files for offline access, allowing work without internet and automatic reconciliation later.

## **Version History & Recovery**

Benefit from automatic versioning to track changes and recover previous document versions easily.

## **Backup of Local Files**

Redirect known folders to cloud storage for automatic backup and data protection against loss.

# Best Practices



## **Folder Structure & Naming**

Maintain an organized folder structure with clear, descriptive names for easy navigation and access to files.

## **Sharing Governance**

Implement sharing governance by using 'Specific People' links, setting expirations, and monitoring access to avoid over-sharing.

## **Synchronization Management**

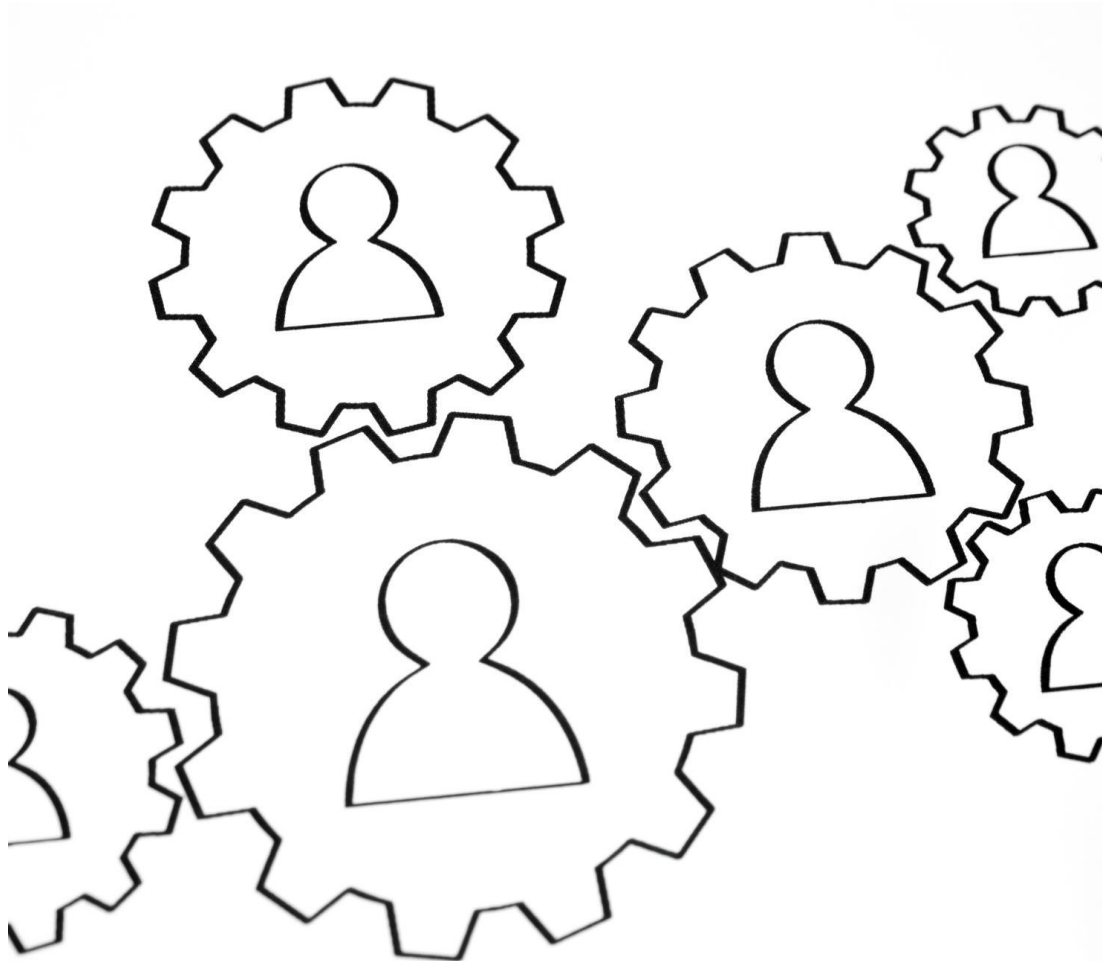
Manage synchronization effectively by syncing only necessary folders and utilizing Files On-Demand for efficiency.

## **Backup & Restore Procedures**

Ensure robust backup and restore procedures by enabling Known Folder Move and documenting restoration steps.

# SharePoint Use Cases and Best Practices

# Use Cases



## **Team Collaboration Sites**

These sites serve as central repositories for project deliverables and notes, enhancing team productivity.

## **Departmental Portals**

Intranets help departments publish news, policies, procedures, and maintain official document libraries.

## **Document-Centric Processes**

These processes involve approval workflows and document sets organized for grouped content management.

## **Knowledge Management**

Utilizing wikis, FAQs, and archives with metadata-driven search to enhance organizational knowledge sharing.



# Best Practices



## **Information Architecture**

Define the site's hierarchy and plan libraries with appropriate content types and metadata for better organization.

## **Metadata & Tagging**

Utilize metadata fields effectively to standardize content and improve retrieval without deep folder structures.

## **Permission Strategy**

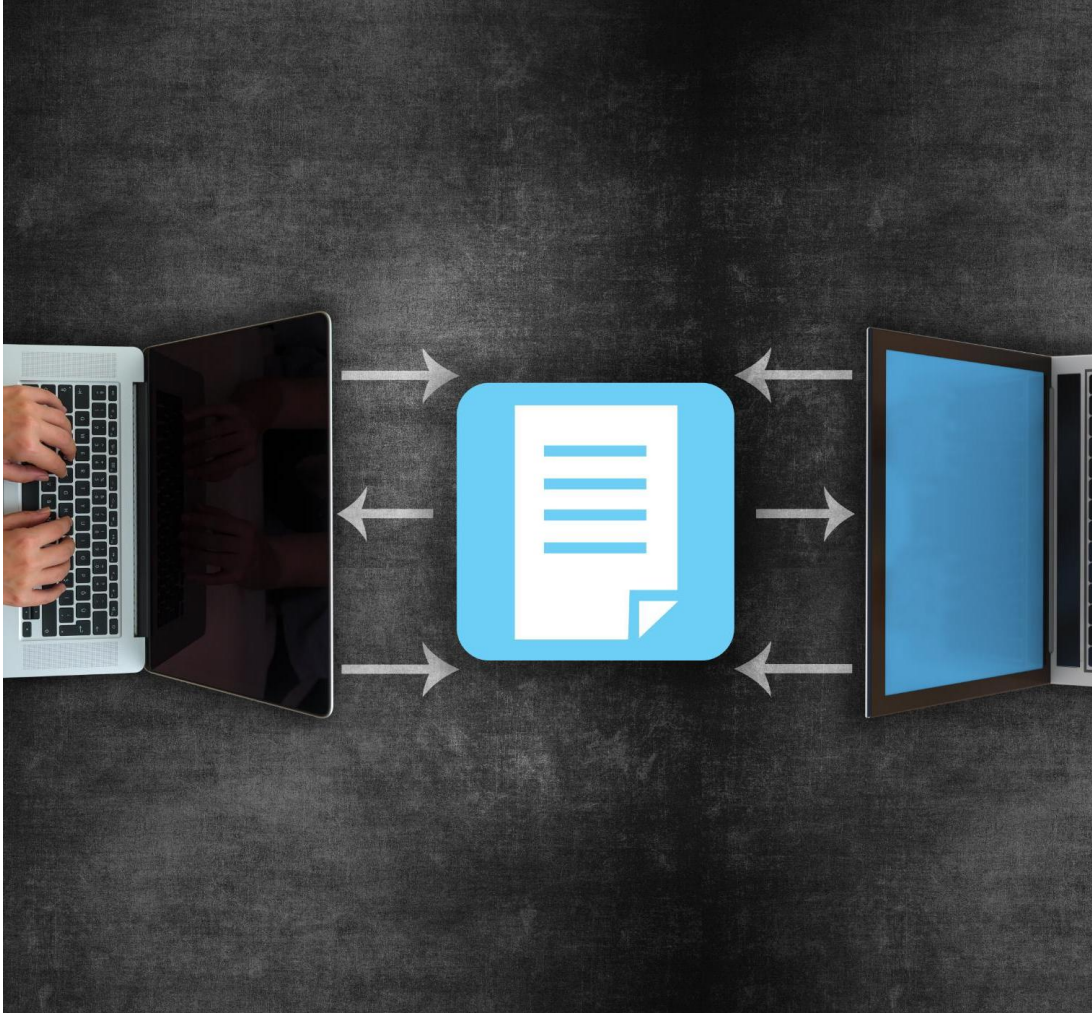
Implement a clear permission strategy using Microsoft 365 Groups and periodically review access to maintain security.

## **Document Lifecycle Management**

Define retention schedules and disposition processes for documents to comply with regulations using Purview.

# Integration Scenarios

# Office Applications



## **Seamless File Management**

Users can directly open and save files from Word, Excel, and PowerPoint, enhancing workflow efficiency.

## **Real-Time Co-Authoring**

Real-time co-authoring allows multiple users to collaborate on documents simultaneously, improving teamwork.

The Files tab in Microsoft Teams is integrated with SharePoint, enabling seamless file management and collaboration.

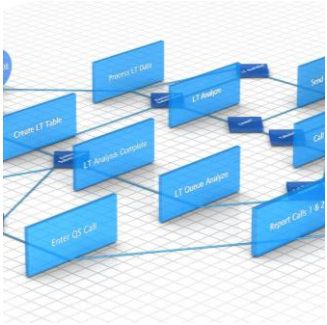
OneDrive allows for individual file sharing directly within chat, enhancing user collaboration and accessibility.

# Power Automate Flows



## **Automating Approvals**

Power Automate Flows allow users to automate approval processes, streamlining workflows and enhancing productivity.



## **Custom App Development**

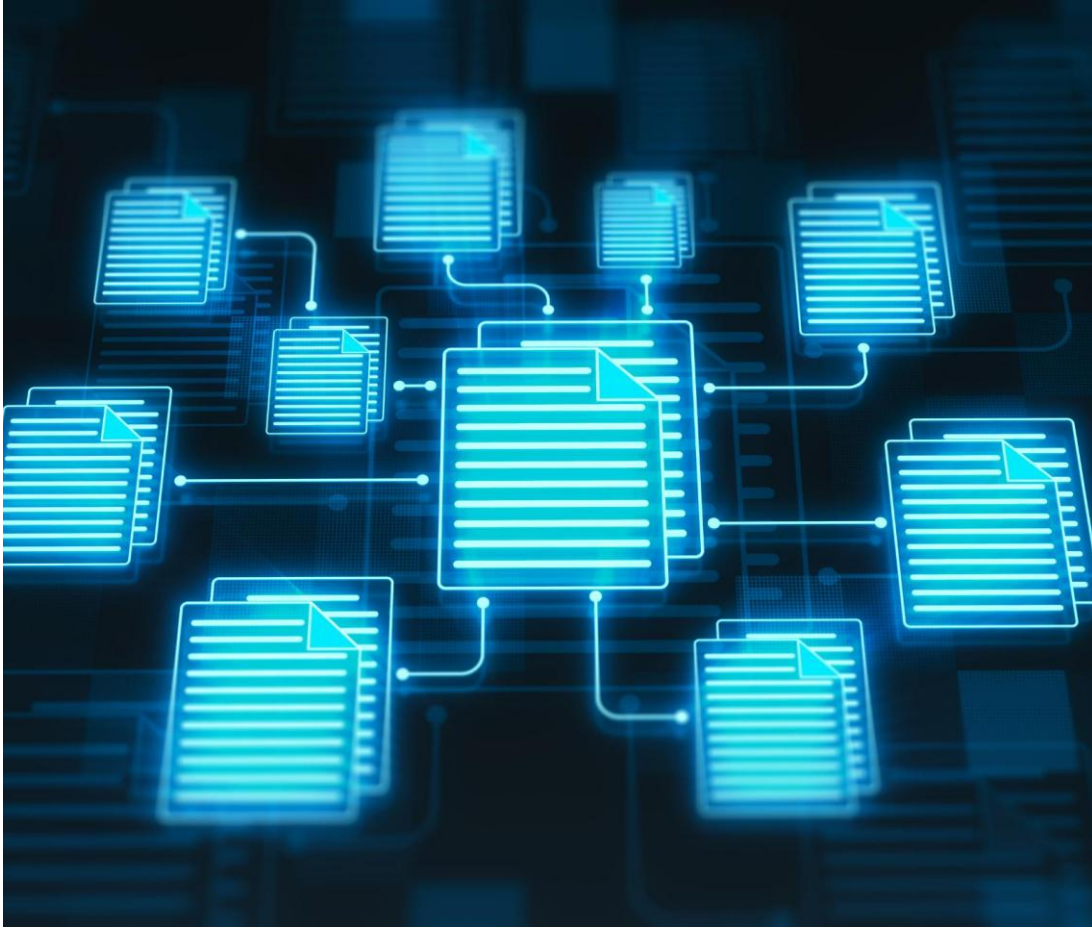
Power Apps enable the creation of custom applications that interact with documents and metadata in SharePoint libraries.



## **Unified Search Experience**

Microsoft Search provides a unified search platform that allows easy access to content across OneDrive and SharePoint.

# Third-Party Integrations



## **Document Management via API**

APIs enable seamless archiving and retrieval of documents, enhancing the efficiency of document management systems.

## **Using Azure Logic Apps**

Azure Logic Apps provide a platform for automating workflows and integrating various services efficiently.

## **Custom Connectors**

Custom connectors allow for tailored integrations with different services, improving connectivity and functionality.



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# Conclusion

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## **Essential Collaboration Tools**

OneDrive and SharePoint are key tools that facilitate efficient file management and collaboration within organizations.

## **Enhancing Productivity**

Understanding the features of these tools allows organizations to significantly improve their productivity.

## **Data Security**

Implementing best practices with OneDrive and SharePoint ensures better data security for organizations.



# NC DIT Innovation Summit Follow-Up







**Q & A**