# Moving from Shared Drives to Office365

**Introduction**

To support secure flexible working the School is moving from shared drives into Office365. You are unlikely to want to take everything sitting on your shared drive with you, so should use this as an opportunity to clear out the files you no longer need so you can concentrate on bringing over the files you do need to keep.

**Definitions**

Unit = your department, division, centre or institute.

SharePoint – your shared drive in the Microsoft O365 cloud, except that a) you will get access to more than one SharePoint site and b) you can link to specific documents to allow anyone with an LSE account or guest account access.

OneDrive – your H space in the Microsoft O365 cloud, except that you can link to specific documents to allow anyone with an LSE account or guest account access. It is expected that you would put most of your files into SharePoint and not OneDrive, as OneDrive files are destroyed when a staff member leaves.

Teams – your collaborative working space in the Microsoft O365 cloud. The files in Teams are actually in a SharePoint site attached to that Team.

Document Library – a collection of files/documents in SharePoint.

## Reviewing the shared drive – general instructions

The first task is to review what is on your shared drive. You will be looking to sort:

1. What to keep
2. What to archive on the shared drive
3. What to delete

Our shared drive is:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Our shared drive editors are: [add the names of the people who will keep access to the shared drive] \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Our Teams site owner is:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

It is unlikely that one team member will be able to review the entire shared drive, so the task should be parcelled out. If you are worried about team members deleting files and documents that are required by another team, you could mark the files and folders for deletion first e.g. rename the folder with a D at the front before making the final decision with the whole team or move to Directory called "\_archive-Date to be deleted" i.e. "\_archive-Old Projects-del-01-01-2024". Technically it’s easier to ignore directories in migration tools and reporting tools such as TreeSize.

1. **What to keep – for current and future work**

You will need to transfer any current working files and documents. This will include records relating to ongoing contracts and agreements, current versions of policies and procedures, meeting papers covering the last 7 years, current research data plus any other work, that you are currently undertaking or have only just recently finished e.g. within the last year or so and documents that are old but that you know you’ll refer back to and still need instant access to.

The guiding thought here is: **Will I need this information quickly e.g. today**

1. **What to archive**

There may be some files and documents that you legally need to retain, but will not need instant access to. These can stay on the shared drive until they meet their destruction date, though they may be moved once the decision is made to decommission the shared drives. It is likely that these will be up to 7 years old and needed for potential evidential reasons, but not in your current day to day work. Examples include recently expired contracts and agreements and working files and documents for work that has finished.

If you find you need something from the Archive folder at any point before its destruction, transfer the document into SharePoint or Teams.

These files can be put in a folder called Archive, with subfolders for year of destruction. A team member will need to be identified by role to go back yearly to delete the P drive documents that have reached their destruction date.

The guiding thought here is: **Will I potentially need this information, just not right now**

Once a year, based on your trigger date (see section D), that team member can delete the subfolder for that year. The table below gives the dates at which deletion can occur.

|  |  |  |
| --- | --- | --- |
| Creation year | Deletion year | Date for deletion for common triggers – note if using dates in folder names, use the format yyyymmdd |
| 2021 or 2020/21 | 2028 | Academic year – 31/8/2028  Calendar year – 31/12/2028  Financial year – 31/7/2028 |
| 2020 or 2019/20 | 2027 | Academic year – 31/8/2027  Calendar year – 31/12/2027  Financial year – 31/7/2027 |
| 2019 or 2018/19 | 2026 | Academic year – 31/8/2026  Calendar year – 31/12/2026  Financial year – 31/7/2026 |
| 2018 or 2017/18 | 2025 | Academic year – 31/8/2025  Calendar year – 31/12/2025  Financial year – 31/7/2025 |
| 2017 or 2016/17 | 2024 | Academic year – 31/8/2024  Calendar year – 31/12/2024  Financial year – 31/7/2024 |
| 2016 or 2015/16 | 2023 | Academic year – 31/8/2023  Calendar year – 31/12/2023  Financial year – 31/7/2023 |
| 2015 or 2014/15 | 2022 | Academic year – 31/8/2022  Calendar year – 31/12/2022  Financial year – 31/7/2022 |

If you use another type of year for your trigger, always use the last day of the month for deletion.

After the transfer, the shared drive will be set to Read Only status for all staff except the shared drive editors who will be able to manage any transfers and deletions on behalf of the unit.

1. **What to delete**

This is your chance to get rid of anything you no longer need. It is a good chance to clear out the ROT – redundant, obsolete, trivial information.

Anything over 7 years old that you do not need anymore is the general rule, but there may be exceptions. Check the School’s [retention schedule](https://info.lse.ac.uk/staff/divisions/Secretarys-Division/Assets/Documents/Information-Records-Management/Information-Records-Management/Retention-Schedule.pdf) or with the [Information and Records Manager](mailto:glpd.info.rights@lse.ac.uk?subject=Retention%20enquiry) if you are unsure. Examples of documents you may need to retain include strategy documents, records relating to the development and review of programmes, research related documents like funding agreements, health and safety documentation not kept by Health and Safety.

Otherwise, if you are not required to keep the files and documents based on the retention schedule and you have no need to them yourself, feel free to delete. You can check with a team member if you are not sure.

The guiding thought here is: **The data can go if over 7 years old and not mentioned in the retention schedule.**

## Reviewing the P drive – specific types of files

There are certain types of files that are held by most departments etc, but have either particular sensitivities e.g. CDR forms so need careful handling during review and transfer. There are other types of files that are only held by you but also have particular sensitivities e.g for PAGE this is donor records. The common types are listed below. For your specific types of files, an Appendix has been added to list and review with the Information and Records Manager where and how long to keep those files.

1. **Financial records**

**What?** Convenience copies of invoices, etc.

**Why?** While the majority of your financial records should be kept in OneFinance, you may have local copies for convenience.

**Who should have access?** Only the staff that need access. So within a SharePoint site, you could have a Document Library called FinancialRecords, then the site owner can set up access rights to the folder.

You can record below who these people with any subfolders. Feel free to tailor the staff titles to match your situation and you can add further categories as you see fit.

Don’t forget staff outside your unit that may want access. E.g. Finance Division staff, Procurement staff, etc.

**Staff with Access to the FinancialRecords folder/channel:**

|  |  |  |
| --- | --- | --- |
| **Folder/Subfolder** | **Staff with access – don’t forget LSE staff outside your unit** | **Where to store: either PAGE hub, Teams Heads SP, Individual Team SP or OneDrive** |
| FinancialRecords | e.g.Unit Director, Managers, staff with OneFinance sign off status | e.g.Teams Heads SP |
| BudgetRecords |  |  |
| TenderRecords |  |  |
| Receipts [suggested] | Individual staff members | OneDrive |

Add more rows if needed.

1. **HR records – add extra categories as above**

**Why?** Like financial records, there will be some HR records that will need to be kept locally.

**Who should have access?** Only the staff that need access. So within a SharePoint site you could have a Document Library called HRRecords, then the site owner can set up access rights to the folder. You may want to set up a separate Document Library for CDRs or keep these in individual staff member’s OneDrives with access granted to managers.

You can record below who these people with any subfolders. Feel free to tailor the staff titles to match your situation and you can add further categories as you see fit.

Don’t forget to give access to HR staff who may need it.

**Staff with Access to the HRRecords folder/channel:**

|  |  |  |
| --- | --- | --- |
| **Folder/Subfolder** | **Staff with access– don’t forget LSE staff outside your unit** | **Where to store: either PAGE hub, Teams Heads SP, Individual Team SP or OneDrive** |
| HRRecords | e.g. Unit Director, Managers, Team Leaders, your HR partner and HR advisor – subfolder for each team | e.g. Main hub with access limited to individual subfolders |
| JobDescriptions  Note includes Person specs, public docs |  |  |
| SalaryInformation&Budgeting |  |  |
| CDRs [suggested] | Managers and individual staff | OneDrive |
| Recruitment |  |  |
| PerformanceManagement&Grievances |  |  |

Add more rows if needed.

1. **Operational records as above**

**Why?** All departments etc at LSE need to keep certain records relating to business continuity and departmental etc matters like photos, birthday card lists and other miscellaneous files.

**Who should have access?** Only the staff that need access. So within a SharePoint site, you could have a Document Library called DepartmentalRecords\*, then the site owner can set up access rights to the folder. In a Teams site, it could be a separate channel.

You can record below who these people with any subfolders. Feel free to tailor the staff titles to match your situation and you can add further categories as you see fit.

**\*** If you are a division, this will be DivisionalRecords, a Centre CentreRecords, an Institute InstituteRecords

**Staff with Access to the DepartmentalRecords\* folder/channel:**

|  |  |  |
| --- | --- | --- |
| **Folder/Subfolder** | **Staff with access– don’t forget LSE staff outside your unit** | **Where to store: either PAGE hub, Teams Heads SP, Individual Team SP or OneDrive** |
| DepartmentalRecords | E.g.All staff | E.g Main hub |
| BusinessContinuity |  |  |
| Misc (Photos, birthday card lists etc) |  |  |
| Team Meetings |  |  |

Add more rows as necessary

## Managing the transfer

To manage the transfer, your unit will need to do the following.

1. Review the shared drive
2. Create a draft Document Library and folder structure
3. Sharepoint training, including reviewing the Document Library and folder structure
4. Migrate shared files to SharePoint
5. Destroy any shared drive files not in the Archive folder
6. **Review shared drive**

Use the guidance above to review your shared drive. This can be happening before and while the training is ongoing.

Enter your shared drive review dates below:

Review start date:\_\_/\_\_/\_\_\_\_  
Review end date:\_\_/\_\_/\_\_\_\_

1. **Create a draft Document Library folder structure**

Work out how you will set up your SharePoint Hub/Teams site and what folders you will need. This will help with transfer from the shared drive to SharePoint as you will have already done some thinking about where files should go.

A draft Document Library and folder structure will be needed before you start SharePoint training as you can modify the folder structure during training. Go no more than three folders deep as anything more can cause issues. SharePoint collects a lot of metadata and allows for the addition of metadata you can add that can be shown in columns, so it is worth thinking about what metadata you want to display as well.

If you already have a good functional folder structure on your shared drive, you should be able to map quite easily between the shared drive and the new SharePoint site, see Appendix B for a mapping table. If not, contact the Information and Records Manager for guidance on how to set up the new structure or if you are not sure about your current structure or think it could do with some improvement.

Drive Folder structure OK? Yes/No

Contacted Information and Records Manager? Yes/No

Date of meeting with Information and Records Manager: \_\_/\_\_/\_\_\_\_

1. **Sharepoint training**

This will be organised with DTS. All staff should receive training. It would be useful to also do the Cybersecurity training if your department etc has not already done this. Post training revise folder structure.

Enter your training dates below:

Training start date:\_\_/\_\_/\_\_\_\_  
Training end date:\_\_/\_\_/\_\_\_\_

1. **Transfer**

First set up the Document Libraries, folders and channels in the new Hub or Teams site. DTS will be providing support for the move based on the pilots, but the work will be undertaken by your unit.

Enter your Transfer dates below:

Transfer start date:\_\_/\_\_/\_\_\_\_ (should not be before the training end date)  
Transfer end date:\_\_/\_\_/\_\_\_\_

1. **Destroy shared drive files**

It’s worth having a three month period after transfer finishes to ensure that all the files needed have been transferred. It could be that after transfer staff realise they did need some of the material that had been marked for deletion. After that date however, the staff member(s) tasked with deletion should delete the unwanted material from the shared drive.

Staff member(s) responsible for deletion:

Date deletion can start: \_\_/\_\_/\_\_\_\_ (should be three months from transfer end date).

## Managing files once in the new Hub/teams site

**Managing retention**

Automatic retention tools are coming to Office365, though are not deployed yet. However, a general retention policy of seven years will be set overall. Depending on whether your main trigger is academic year, financial year or calendar year, your overarching retention policy will be set to that trigger.

Our main retention trigger is (choose one): academic year / financial year / calendar year

As the retention tools are deployed, you can either use the map in Appendix B to list specific retention requirements or update your Information Asset register entry.

Any Archive documents should be moved into the relevant folder in SharePoint if needed.

**Managing staff changes**

Staff will leave and when they do, the work they have put on SharePoint Document libraries will be retained. However, OneDrive files will be destroyed as soon as 30 days after a staff member leaves.

While SharePoint should be where files are stored, managers should ensure that staff transfer any work in progress necessary to SharePoints sites before leaving.

SharePoint/Team site owners will also need to manage access permissions as staff who have left could still be granted access to sites.

## Appendix A – P drive review for our specific files

Our specific files are:

o E.g. Donor records/contacts

o

**Staff with Access to the following folder/channel:**

|  |  |  |
| --- | --- | --- |
| **Folder/Subfolder** | **Staff with access** | **Retention and notes** |
| Donor records/contacts | PAGE, managed through individual team sites | Donor records – permanent; organisational contacts records – refresh yearly |
|  |  |  |
|  |  |  |
|  |  |  |

Add more rows as necessary

## Appendix B Shared drive to SharePoint Hub/Teams site mapping

Use the table below to map between your shared drive and your new Hub/Teams site. Contact the Information and Records Manager if you need any guidance for this. The example given is for PAGE.

|  |  |  |  |
| --- | --- | --- | --- |
| **Current folder** | **Hub folder/Teams channel** | **Team(s)** | **Notes** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |