

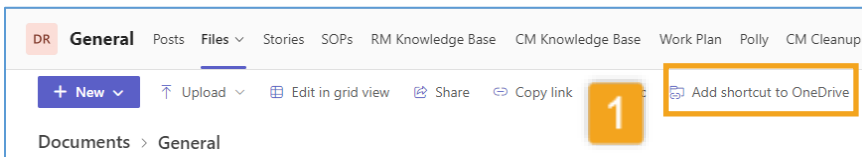


Content Manager Guidance

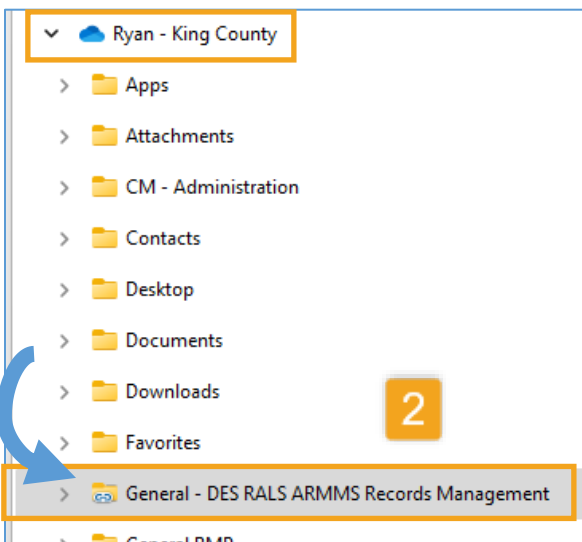
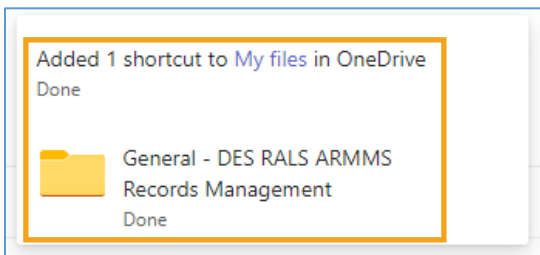
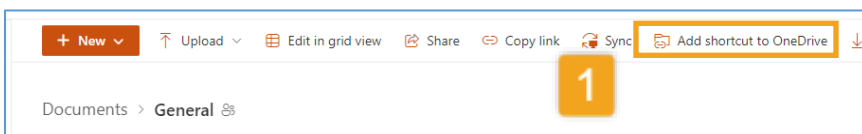
File Electronic Records from SharePoint or Teams

This is guidance for how to create a **OneDrive shortcut** for records in **SharePoint or Teams**, which is necessary to file them to Content Manager. Any record in SharePoint or Teams can be filed to Content Manager as long as it meets the [File Format](#) guidance. Records should be filed to Content Manager if they have retention value and are inactive. Review our [Managing Records in Teams](#) guidance for information about how to capture other Teams information (Posts, Lists, Planners, Wikis, etc.) that can be filed. After a shortcut has been added to OneDrive, records can be filed using either [Dropzone](#) or [Direct Drag-and-Drop](#).

Starting from a Teams site:



Or, starting from a SharePoint site:




The process is identical for both SharePoint and Teams. Start by navigating to “Documents” or “Files” where the records are stored.

1. Select **Add shortcut to OneDrive**

A small window “Added 1 shortcut to My files in OneDrive” will then open. You can close it.

Note that if you have previously synced or created shortcuts for the same folder(s), you might need to first unsync and/or remove those shortcuts before starting this process.

2. In **File Explorer**, locate the folder you synced as a folder underneath your OneDrive in File Explorer. The folder will look the same as your other folders but will have a “link” symbol: 

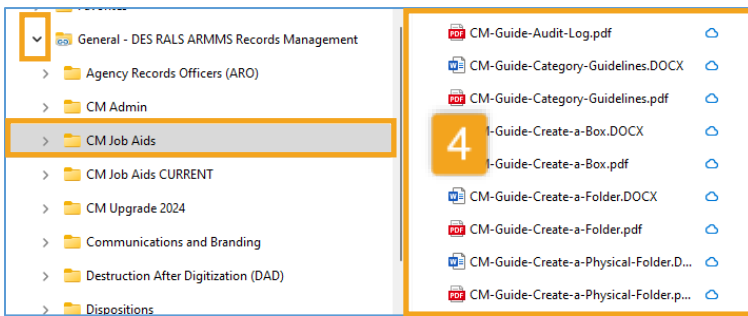
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3. Click on the folder in File Explorer to view the records. You now have access to all documents you added a shortcut for.

4. File the records using either [Dropzone](#) or [Direct Drag-and-Drop](#)

When records are filed using this process, they are **removed from SharePoint/Teams**, and **moved to Content Manager**.

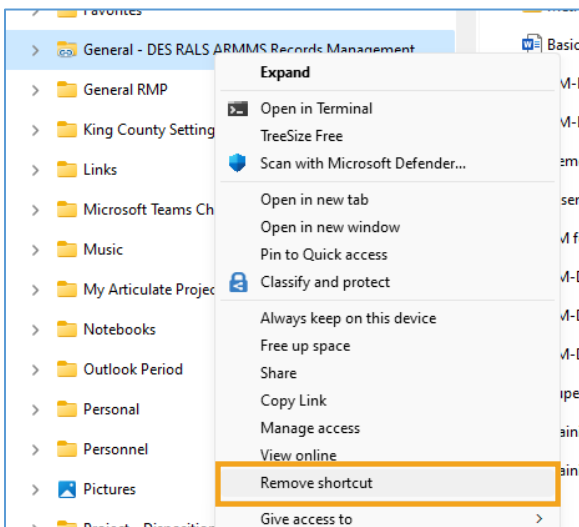


When you are finished filing from a SharePoint/Teams folder, you can manually remove the shortcut.

From File Explorer, **right click** on the shortcut folder and select **Show more options** and then **Remove Shortcut**.

Or, from the **online version of OneDrive**, select the folder and choose **Remove**.

To remove the shortcut after filing is finished:



Or

