

University Microsoft 365 Matrix

	OneDrive for Business	Teams	Exchange/Outlook	SharePoint	Unit Shared Drive
Primary Use	Individual business drive	Collaboration	Communication	Content Management	Content Management/ Retention
Features	<ul style="list-style-type: none"> • User Workspace • Informal Storage • Edit/View/Share • Attachments 	<ul style="list-style-type: none"> • Chat • Workspace • Meetings • Attachments 	<ul style="list-style-type: none"> • Messaging • Calendaring • Managing Tasks • Attachments 	<ul style="list-style-type: none"> • Formalized Storage • Structured Access • Business Continuity 	<ul style="list-style-type: none"> • Formalized Storage • Structured Access • Business Continuity
Intended Use	Individual user workspace to support personal work routines such as drafting, notetaking, personal reference, professional associations with limited need to share.	Team workspace to support routine communications and activities of a team, including internal workflows and day-to-day operations and processes.	Communication platforms for formal communications, whether routine or substantive, among users and internal and external parties.	Backend application. Office-wide platform for formalized storage of university records and information with structured access and workflows for records management. OneDrive and Teams documents appear in SharePoint where they can be managed on the backend.	Shared drives allow users to share and access information and allow for business continuity. Records that need to be retained per university retention schedules should be moved from Teams to a shared drive when they are in final form.
Retention Schedules	Transitory	<ul style="list-style-type: none"> • General Schedule & Unit Unique Schedules • Varies based on context/content • Recommended for transitory, administrative, and one-off projects 	<ul style="list-style-type: none"> • General Schedule & Unit Unique Schedules • Varies based on context/content 	<ul style="list-style-type: none"> • General Schedule & Unit Unique Schedules • Varies based on context/content 	<ul style="list-style-type: none"> • General Schedule & Unit Unique Schedules • Varies based on context/content
Retention Period	User manages in accordance with schedules	User manages in accordance with schedules	User manages in accordance with schedules	Users manage in accordance with schedules	Users manage in accordance with schedules

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Automation of record disposition	None	<ul style="list-style-type: none"> • Document disposition is currently a manual process. • Records Management is working with OCIO to roll out automated retention features in the future. These features will be applied in SharePoint, but will affect Teams. • Chats: If user does not manually delete chats in accordance with retention schedules, chat will automatically be deleted as follows: <ul style="list-style-type: none"> – Currently 1 year – Individual/1:1 Chats – auto deleted after 3 years – Group & Channel Chats – auto deleted after 10 years 	User can add retention labels to folders and emails (see Email Management Guideline and Guideline for Outlook 365 Online Users for instructions).	<ul style="list-style-type: none"> • Document disposition is currently a manual process. • Records Management is working with OCIO to roll out automated retention features in the future. 	None

In addition to the matrix above, university employees shall adhere to the following general guidelines when creating or receiving records using the University’s Microsoft 365 platform.

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Employee Access Deactivation	<ul style="list-style-type: none"> Termination date See KB07777 for supervisor to request access Prior to separation, ensure that any official university records are saved to Teams, SharePoint or a shared drive for retention purposes. 	<ul style="list-style-type: none"> Termination date See KB07777 to request new Team owner if no owner remains 	<ul style="list-style-type: none"> Termination date Emeritus faculty retain access to mailbox and/or email forwarding Retirees have access to mailbox for 60 days, then get forwarding only if set at my.osu.edu See KB05857 and KB07777 	Termination date	Termination date
Disposition	<ul style="list-style-type: none"> Shared links are removed on termination date 5 years after employee separates from the university Link to KB 	<ul style="list-style-type: none"> Disposition time periods should follow approved university retention schedules, which base retention on the content of the record. If multiple record series are contained within a Team, the records will have different retention periods and therefore different disposition dates. 	5 years after employee separates from the university	<ul style="list-style-type: none"> Disposition time periods should follow approved university retention schedules, which base retention on the content of the record. If multiple record series are contained within a Team, the records will have different retention periods and therefore different disposition dates. 	Disposition time periods should follow approved university retention schedules , which base retention on the content of the record.

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In addition to the matrix above, university employees shall adhere to the following general guidelines when creating or receiving records using the University's Microsoft 365 platform.

Exchange/Outlook	<p>Exchange/Outlook is a communication and calendaring application with a work email account that shall only be used for records and information created and received in the course of University business.</p> <p>Messages created and received through Exchange shall be managed in accordance with their respective approved university record retention schedules.</p>
OneDrive for Business	<p>OneDrive for Business is an individual business workspace and work drive that should only be used for records and information created and received in the course of University business that clearly fall under Transitory Materials, including supervisory records (e.g. draft performance evaluations, copies of final evaluations that are on file with the Department of Human Resources, work-sheets, notes, etc.). OneDrive can also be used for professional association material.</p>
SharePoint	<p>SharePoint is a file storage and collaboration application that shall only be used for records and information and received in the course of University business.</p> <p>All records and information created or uploaded to SharePoint shall be managed in accordance with their respective record schedules.</p> <p>If using SharePoint for records and information appraised as permanent (archival) on a record schedule, contact the University Archives for digital preservation and transfer requirements.</p>
Teams	<p>Teams is a communication and collaboration application that shall only be used for records and information created and received in the course of Office business that clearly fall under Transitory Materials or Administrative records. It can also be used for one-off projects where the whole Team clearly falls under the Events/Special Projects record series on the General Retention Schedule. The chat feature in Teams shall only be used for transient correspondence and should be deleted periodically in accordance with approved university retention schedules. Official correspondence should be done in Exchange/Outlook.</p>