



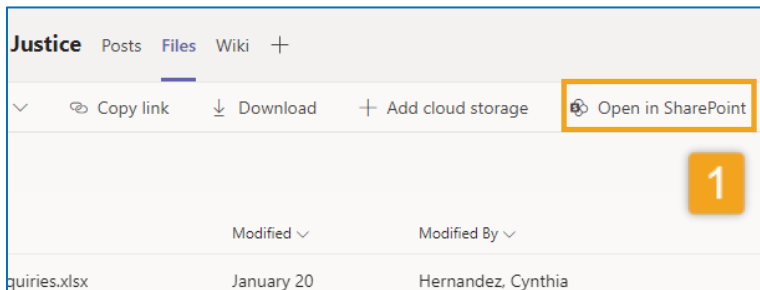
Content Manager Guidance

File Electronic Records from SharePoint or Teams

This is guidance for how to **sync electronic records** from **SharePoint or Teams** to OneDrive, 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.

Warning! The process described on this document has certain risks. Specifically, if you Sync a SharePoint library to OneDrive, it is possible to inadvertently delete records (when you delete from OneDrive, the records in SharePoint are also deleted). **This process should only be used when records are ready to be filed to Content Manager.**

Starting from a Teams site:



If starting from a Teams site, start with Step 1. **If you are already in SharePoint, skip to step 2.**

1. Open Teams, then navigate to the appropriate **Team, Channel** and **Files**. Then click **Open in SharePoint**

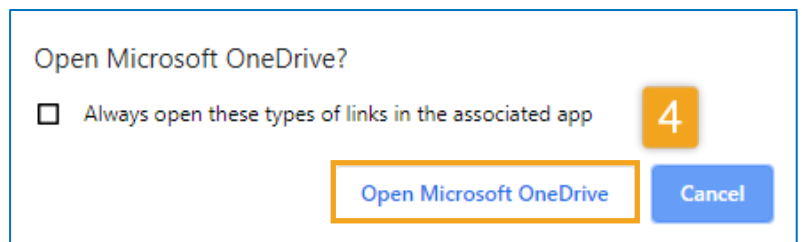
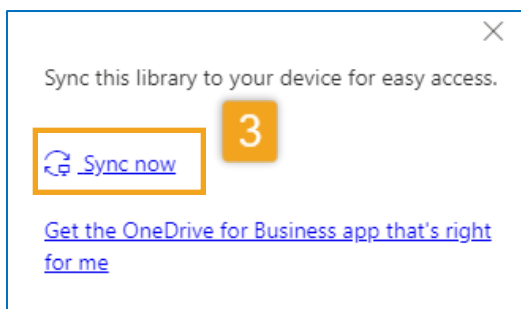
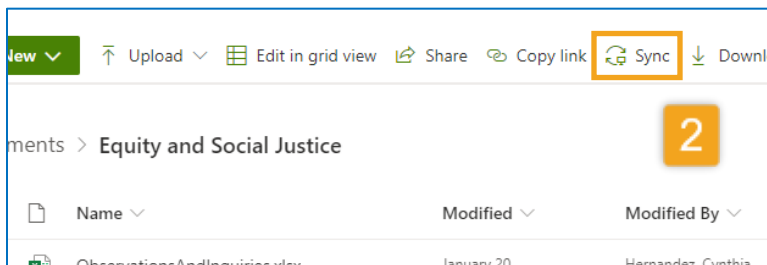
2. Click **Sync**

3. Click **Sync now**

4. Click **Open Microsoft OneDrive**

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Or, starting from a SharePoint site:



**RECORDS
MANAGEMENT**

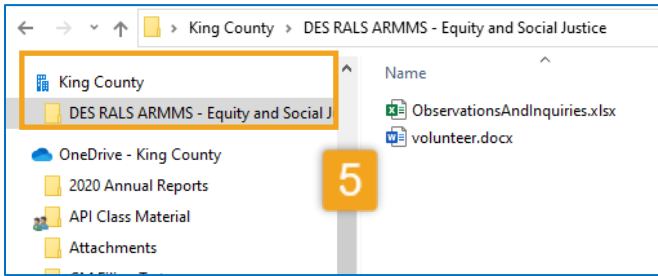
King County Records Management Program
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5. Click on the folder in File Explorer to view the records. You now have access to all files you synced in steps 2-4.

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

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



When you are finished filing from a SharePoint/Teams folder, you can manually Unsync them (**right click** on the folder in File Explorer, select **Settings** and then **Stop sync**). When you Sync a different library, you will have to manually delete the old one.

Note that you might receive the below message when doing a Stop sync. Click **OK** and proceed.

