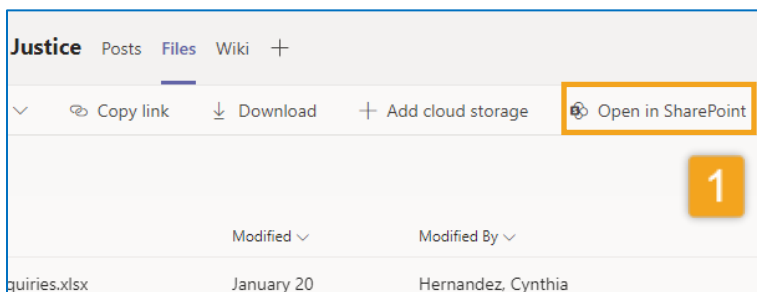# Content Manager Guidance
File Electronic Records from SharePoint or Teams

This is guidance for how to **file electronic records** from **SharePoint or Teams** into 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. This guidance works for managing records in SharePoint or Teams using any internet browser with proper SharePoint permissions/access. 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.**

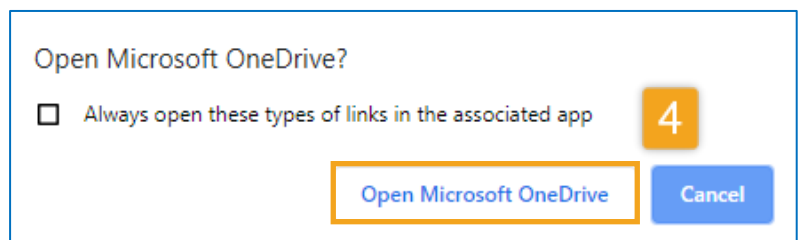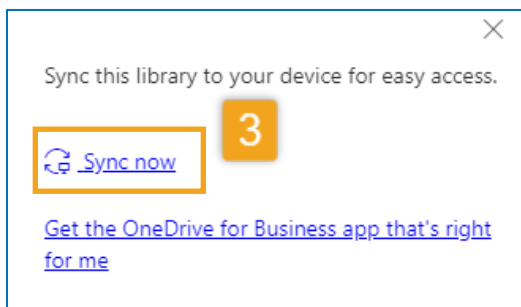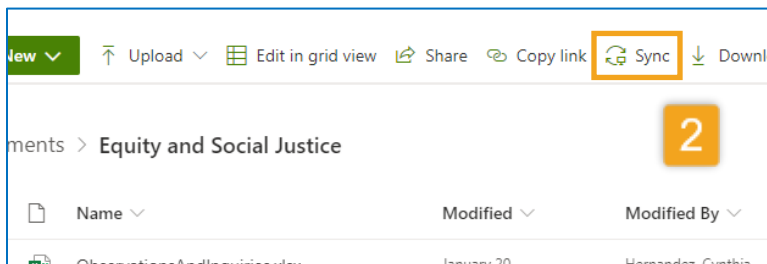**1.** Open Teams, then navigate to the appropriate **Team**, **Channel** and **Files**. Then click **Open in SharePoint**

2. Click **Sync**

3. Click **Sync now**

4. Click **Open Microsoft OneDrive**

[continued on next page]

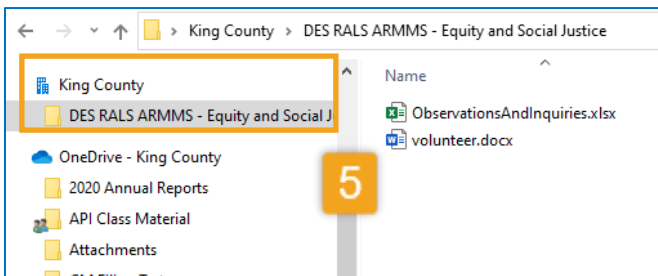**Or, starting from a SharePoint site:**

Content Manager Guidance

File Electronic Records from SharePoint or Teams

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. Drag and drop records to a folder in Dropzone. You can either file one at a time, or highlight and drag multiple records at one time.

(To access Dropzone, open Content Manager and then minimize it. If a folder does not already exist in Dropzone, you either need to create one, or search for an existing folder and add it to your Dropzone.)

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. Simply press **OK** and proceed.

RECORDS MANAGEMENT