

OneDrive vs. SharePoint Decision Worksheet

Use this worksheet to decide where business files belong, document existing file locations, and plan improvements before moving content.

The ownership rule

OneDrive

Individual working files and drafts

SharePoint

Team-owned and lasting business content

If a file becomes difficult to find or transfer when its owner leaves, it probably belongs in SharePoint.

Assessment details

Organization

Reviewer

Assessment date

Target review date



Decide Where the File Belongs

Select the answer that best describes the file or collection. Use the result column as guidance, then document exceptions.

QUESTION	YES	NO	GUIDANCE
Is the file primarily an individual draft or working document?			OneDrive
Does a team need reliable, ongoing access?			SharePoint
Must ownership survive staffing or role changes?			SharePoint
Is sharing temporary and limited to a few people?			OneDrive may fit
Is the file tied to a department, project, client matter, or Teams channel?			SharePoint
Is the file an approved policy, template, or company record?			SharePoint
Does a legal, accounting, CRM, or project system govern the record?			Check policy
Does the file contain restricted or regulated information?			Check policy

Exceptions or decision notes



Inventory Current File Collections

List major file collections before moving anything. Record business ownership and the recommended destination.

FILE COLLECTION	CURRENT LOCATION	BUSINESS OWNER	RECOMMENDED HOME	NEXT ACTION

Before migrating

- Confirm the business purpose and owner of each collection.
- Review permissions, external sharing, file types, and application dependencies.
- Do not move governed records out of an approved system merely for convenience.



Confirm Governance Before Migration

Mark each item Yes, Needs Review, or Not Applicable. Assign owners and deadlines for unresolved issues.

Governance Check	Yes	Review	N/A
Departments, projects, and shared-business processes are mapped.			
Every SharePoint site or Team has accountable owners.			
External-sharing rules and approval requirements are documented.			
Restricted and regulated information has an approved location.			
Employee departure and OneDrive transfer procedures are documented.			
Retention, backup, and recovery requirements are defined.			
Users will receive clear training on where files belong.			
The migration plan includes permissions and application dependencies.			

Priority action plan

Action	Owner	Target Date
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Need help designing or migrating your Microsoft 365 file structure?

Professional Computer Concepts helps Bay Area businesses plan, secure, migrate, and support Microsoft 365.

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