

Leaving Barnardo's: handing your files and meetings over

Glossary

Web or online version: this means online, using the internet. Instead of opening an Office 365 application (e.g. Word, Outlook, Teams, etc) using the icon on your desktop, you use **office.com** in a browser instead.

A file: in computer terms, a file is a collection of data stored in one unit, identified by a filename, similar to that of paper documents used in library and office files. It can be a document, picture, audio or video stream, etc.

OneDrive: this is Microsoft's own storage in the Cloud. It works in the background of Office 365 and is your personal storage space. It is secure and cannot be accessed by others.

Chat: the space attached to every Teams meeting where those invited can have a conversation during the meeting and access attached files. A chat can also take place between two or more people as instant messaging (without a meeting).

Uploading: means data is being sent from your computer **to** the Internet. For example, when you move a document from your desktop into your OneDrive, that is uploading because you are moving it to the Cloud.

Downloading means your computer is receiving data **from** the Internet. For example, if you want a document from a website, you can download it to your desktop.

Whiteboard: this is an application that you use to collaborate on a freeform canvas by pen, touch or keyboard. You can open it in a Teams meeting by sharing your screen and selecting Whiteboard.

File Explorer: the 'folder' icon that displays along your bottom taskbar; the one you have been using to find your documents, downloads, pictures and desktop.

Microsoft 365 and Office 365: this is essentially the same thing and both names are used for the applications such as OneDrive, Outlook, Teams, Word, PowerPoint, Excel and OneNote.

Ellipsis: the 3 dots you will find next to various names and commands. An ellipsis tends to be used when there is not enough room to display all options.

Collaboration: working with others either by attending a meeting to discuss topics or sharing documents to work on together.

SharePoint: this is the platform for storing and saving files in Office 365. You do not have to do anything currently as SharePoint is not 'active' at Barnardo's, other than behind OneDrive.

With Office 365 and Teams now in use at Barnardo's, once you have decided to leave the organisation you should start thinking about which meetings or documents you 'own' and how to hand them over or save elsewhere.

Your Outlook account will be deleted at some point after you leave the organisation but remember that your OneDrive account will be deleted too, as will any content you have **stored in and/or shared from** that space. You may even have files in your OneDrive of which you are not aware you are the owner.

Here is a list of things to look for so, if you are the leaver, you can check these items and decide if they needed to be handed over. You will save your colleagues and your manager a lot of hassle!

What do you own?	In which application?	What to do
A recurring Teams meeting	Teams	See pages 2-3
Documents in meeting chat spaces	Teams	See page 4
Recordings of meetings	OneDrive	See page 4
Documents and/or folders in your personal storage	OneDrive	See pages 5-6
Whiteboard sketches	Whiteboard app/Teams chats	See page 6
Outlook emails	Outlook	see page 7
Forms	Microsoft Forms app	See page 8-9
SharePoint sites	SharePoint	See page 9
Non-Office 365 files	Stored in local folders on your device – e.g. Desktop	See page 9

Note

Also remember to hand over content needed from internal systems you use, such as Content server and IBM SPSS, etc.

Alternatively, if you know that a colleague is leaving, you may want to help them with checking NOW which content you need after they have gone.

Teams Meetings

Are you the Organiser of a regular Teams meeting? In Teams, an Organiser is the one who set up the meeting(s) regardless of whether they attend (e.g. a PA or Project Support).

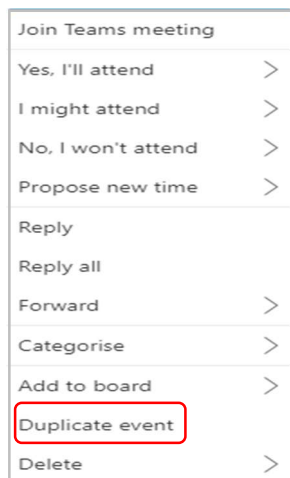
When the Organiser leaves Barnardo's, the meeting will continue to run but nobody will be able to change dates or times, add or delete invitees, or manage the meeting details.

The Organiser is the **only one with access to change things** like who can bypass the lobby, who can present, when to allow meeting chat. Therefore, it is important to either:

1. Cancel the meeting and ask a colleague to re-schedule it from their calendar. This will mean that meeting links will change and the 'new' colleague becomes the Organiser. This person must re-send the meeting invite with the new Teams link.

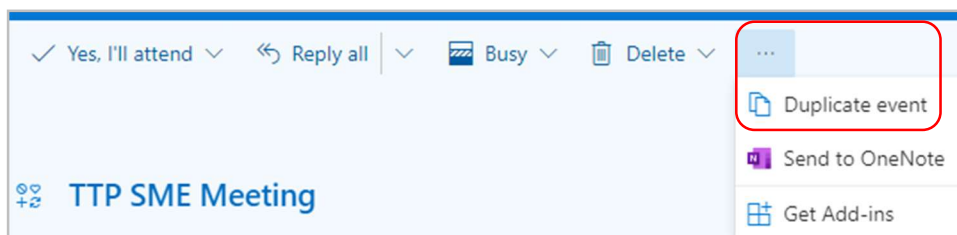
This is the best suggestion for smaller meetings with only a handful of attendees.

2. For meetings with many attendees, a colleague can duplicate the event in a couple of ways using the web version of Outlook (online via office.com)
 - a) In Outlook online calendar, right click onto the meeting and choose 'Duplicate Event' from the dropdown options.



or

- b) In Outlook online, open the meeting and click onto the ellipsis and then choose 'Duplicate event'.

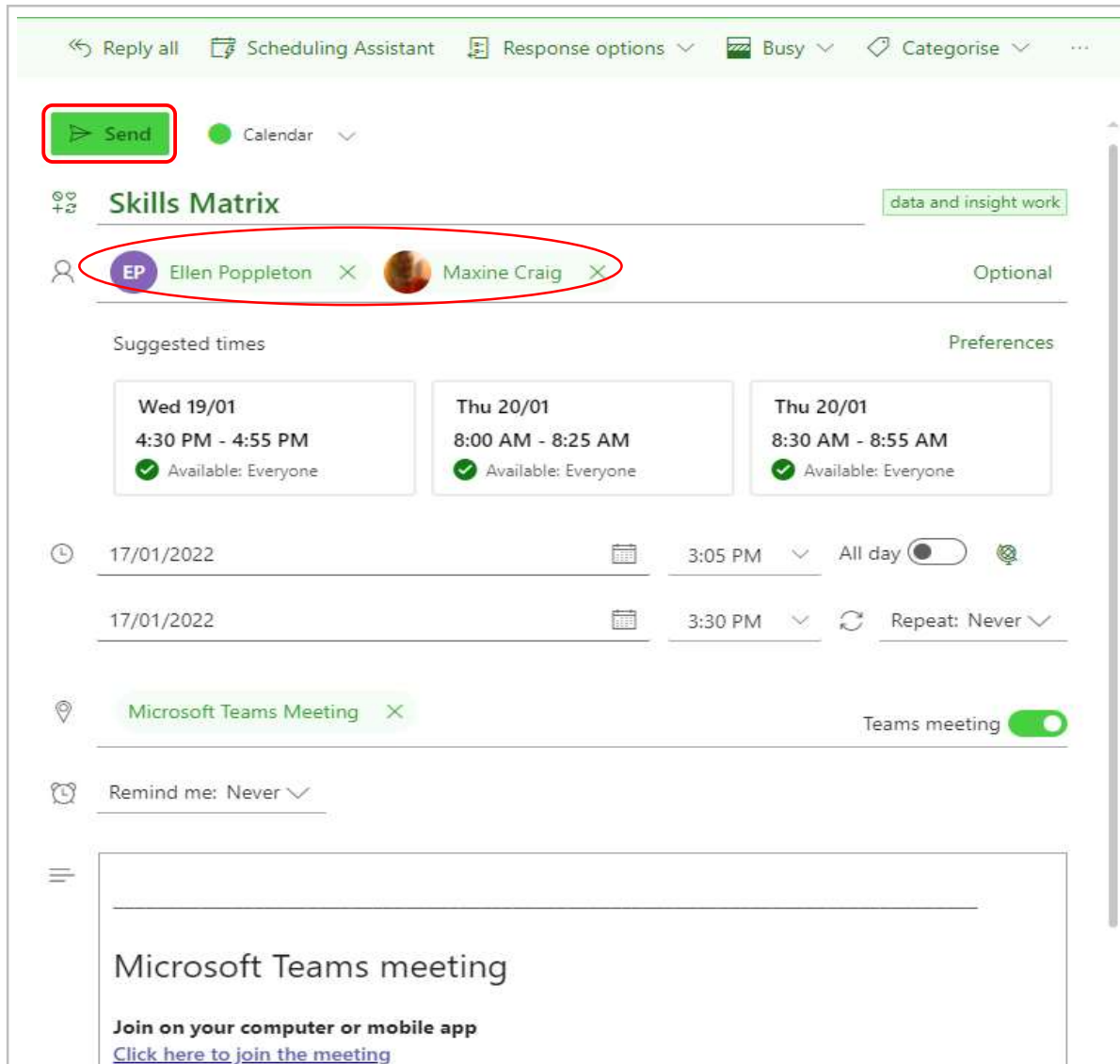


For both 'duplicate event' methods, a meeting set-up box will open which is auto-completed with current meeting details, including the same invitees.

The new owner can then remove the old organiser and make sure time and recurrence are still correct. This will send a message to all people invited so the new Organiser does not have to re-add them all.

This will also change the meeting link and any resources such as location, room, etc.

Then press Send.



Meeting chat spaces: everything you have shared in chats

You also should check your meeting chat spaces for important files or recordings that you 'own' and have shared in a chat. All the documents, videos and other things that you have posted in any chat actually are stored on your OneDrive and will be lost when you leave.

Therefore, you can either check the 'Microsoft Teams Chat Files' folder in your OneDrive or scroll through your private chats. When you find any files that are important to others, either upload the files to a relevant Teams site (if you have one set up) or send them as attachments to any colleagues who need them.

For the following, you can copy, share with someone, or delete.

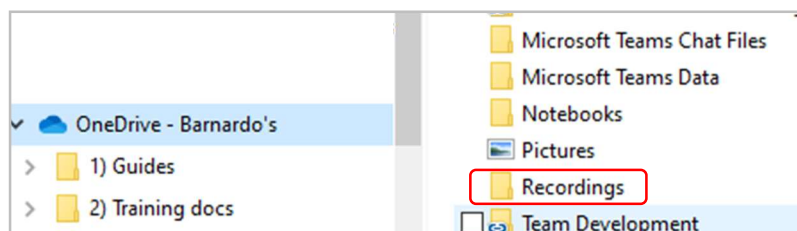
- Documents and pictures, videos and screenshots
- Outlook attachments
- Transcription files and recordings from meetings

Of course, it may be that none of the files you have shared in chats are needed when you leave.

Recordings: videos from Teams meetings

Recordings of Teams meetings are another shared resource that is stored in a personal location.

You should be aware that if you have pressed the Record button in any of your meetings, the recording will have gone into the Recordings folder of your OneDrive.



Make sure you move the video(s) that need to be kept, either to a Teams site or by sharing the video to a new owner. If the recording is too big to email via Outlook, you and the new owner can follow this process:

- You (as owner) share the recording with a new owner – this may have been done already.
- The new owner needs to then **download** the recording onto their computer (the Downloads folder)
- The new owner then needs to **upload** the file back into their own OneDrive.

This process only takes a couple of minutes. Doing it this way breaks the 'share' link and changes the file to Private in their OneDrive as the new owner.

Documents/files in your own OneDrive

Sharing documents from OneDrive is very useful, but what happens if the owner of the document leaves?

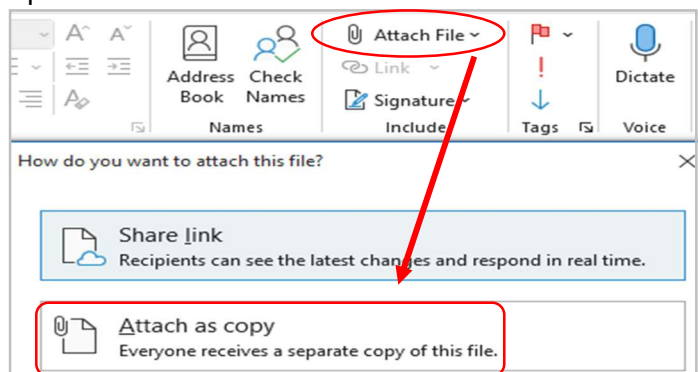
A document owner is the one who shared it because the document sits within their OneDrive, with sharing permissions giving colleagues access to view/edit.

There is a quick solution.

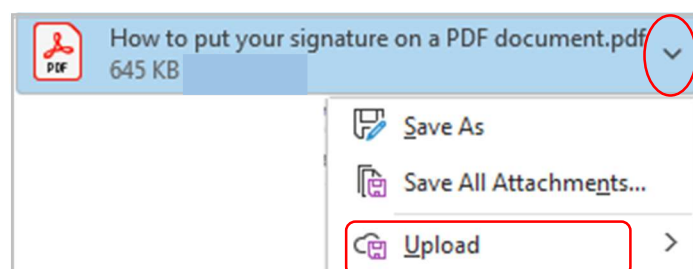
You and your colleagues need to decide who will now 'own' the document(s) and, therefore, be able to share it with others. *However, if there is no longer a need for the document to be shared, nobody has to be the owner and they can all just store it in their OneDrive or transfer it to Content Server or SharePoint.*

If not yet shared

If you have not yet shared the document(s) with others and there are only one or two documents, it may be easier for you to just email them across, using the '**attach as a copy**' option.



In the email, the recipients can then click onto the attachment and use the drop-down arrow to choose **Upload** to put it into their own OneDrive.



After this, they can either store it on OneDrive for themselves or they can share it with colleagues. There is nothing to stop more than one person uploading a copy but if it will need collaborating on, make sure there is only one person doing so, otherwise it will be complicated as to who has the latest version in their OneDrive.

If already shared or there is a folder to transfer

If you have already shared the document(s) with others or there are a lot of documents in a folder, follow this quick process:

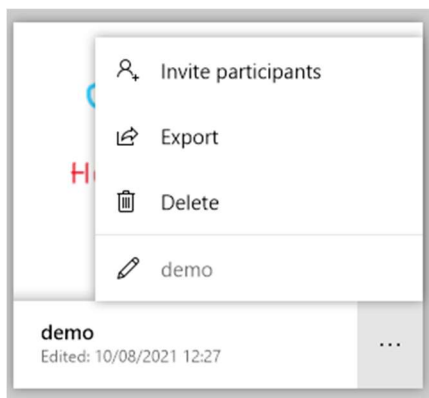
- You, as owner of the document, share the documents with a new owner – this may have been done already.
- The new owner needs to **download** the file onto their computer (the Downloads folder)
- The new owner then needs to **upload** the file back into their own OneDrive.

This process only takes a couple of minutes. Doing this breaks the 'share' link and changes the document to Private in their OneDrive as the new owner.

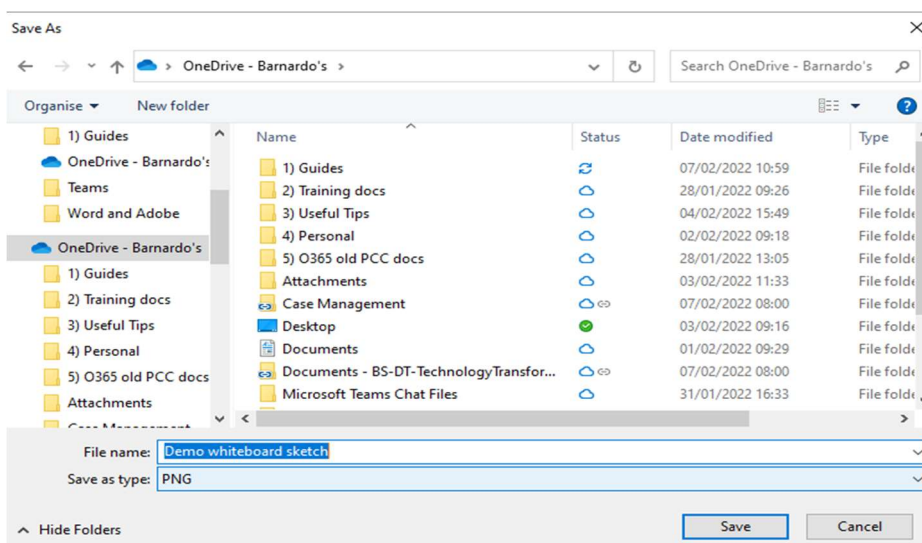
Whiteboard sketches (can be from Teams meetings)

If you are owner of any Whiteboard sketches, you can export them but only as a PNG image. You are the owner if you started up a Whiteboard session in a Teams meeting or if you have sketches sitting in your desktop Whiteboard created outside of a meeting chat.

To export a Whiteboard sketch, go into the ellipsis (3 dots) and choose Export.



Then choose a location in File Explorer to store the image so you can send it to others.



Outlook emails

Remember to check your Outlook inbox and sub-folders to make sure there are no emails you need to hand over to others before you leave.

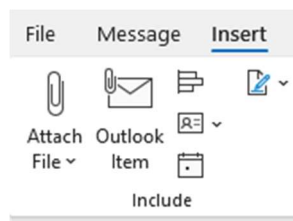
Forwarding as part of the email trail

You can forward the email(s) to a new recipient who can make use of the content in the email(s). Using Forward on an email means the recipient gets it as part of the email conversation in the same trail and any attachments within the trail will be delivered too.

If you have multiple emails to forward, it may be useful to create folders in your Inbox named after the people you want to send emails to, then move all relevant emails into each person's folder so you can keep track of what is going to who.

Forwarding as attachments

Instead of forwarding, you can also use the 'insert Outlook item' function to send multiple emails across to someone. To select more than one, press the CTRL key down and press space for each email you want to attach.



OR you can open a new blank email and use the simple 'drag and drop' method to move emails from your inbox/folders into the new email as attachments.

However, the difference is that your emails will arrive to the new person as attachments, not emails, which will affect what the recipient has to do when received.

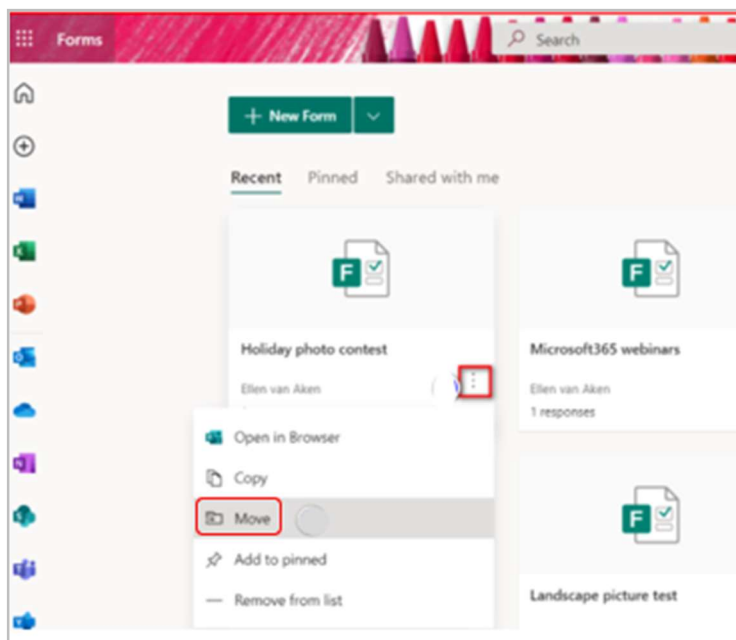
Microsoft Forms

A Form is by default owned by the person who has created it. You can share it with someone, but that person will not be the owner. So if your account gets deleted, your Form and all its content will be deleted as well.

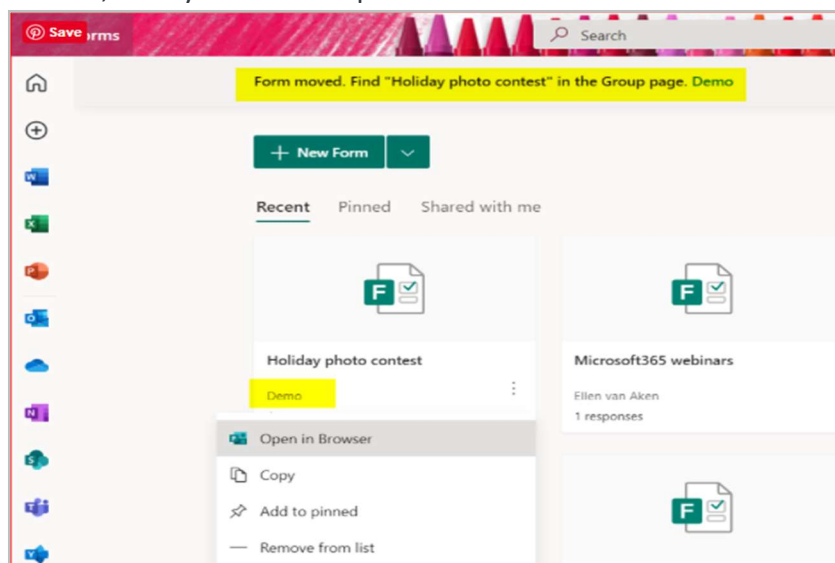
Forms that are still actively in use

You can move these to a Teams site which will transfer the ownership to that team.

- Make sure you have a Teams site with the people who will be responsible for the Form after you have left
- Open your Forms landing page and click the ellipsis (...) on the Form to be moved
- You will get a pop-up with the groups you are a member of
- Select the correct one and click 'Move'



- Your Form will now be owned by the Team and you will see a message about the move, with your name replaced with the Team name



All people with whom you have shared the Form with earlier will keep their permissions and see the Form on their Forms page.

A new folder “Apps” will be created in the Document library with the subfolders, but pictures uploaded before the move will still live in your OneDrive. Move them to the correct folder in the document library.

You can use the Form in your Team site by adding it as a Tab.

Forms that are not currently active, but may be re-used later

Do you have a recurring survey that may be re-used later?

- a. You can share it as a Template. The new owner can then create a new Form from your template and it will be theirs.
- b. You can move it to a Teams site if you have one.

Forms that have expired

Forms that have served their purpose can be left as they are. If those Forms have File Uploads that you want to keep, please move the files to a Team/SharePoint site.

You may want to export the Excel file and store that in a Team/SharePoint site, for future reference.

SharePoint sites

Make sure you appoint another Owner if you are the only one (which is not a good idea, it is always best to have at least two Owners for backup).

You may also want to check the permissions to content that is important for the team, and make sure it will still have an Owner after you have left. Appoint another Owner or, even better, make sure that the permissions of that content follows the permissions of the site.

Non-Office 365 files

Although all of this so far has been about files and meetings within an Office 365 set-up, you may also have files you have saved ‘locally’ onto your own device, say, within your Desktop, Document or Pictures folders.

If any of these files need saving for others when you have left, either email them to a new recipient or follow the process on [page 5](#) for someone else to own your files.

Internal Systems

Remember to handover content from any other systems such as Content Server, IBM SPSS, etc.

