

# WHERE SHOULD *this file* LIVE?

A practical guide to choosing the right place for work to live in Microsoft 365 so files are easier to find, easier to trust, and less likely to multiply into confusion.

**A lot of workplace friction starts with one simple problem: people aren't sure where a file should live. It gets drafted in one place, shared in another, dropped into chat, emailed around, and copied again just in case. That is how duplication starts.**

**The Simple Rule:** Draft private. Collaborate centrally. Publish intentionally.



START

Use these three questions to decide where a file should begin, where it should move next, and when it needs to stop living in personal or temporary spaces

## 1 Is it just for you right now?

If you are drafting alone, collecting notes, or working on something before the wider team needs it, start in **OneDrive**. This is the right home for personal working material that hasn't yet become shared team work.

## 2 Will a team need to work in it together?

If the file belongs to a project, department, client, or shared process, move it into a **Teams** or **SharePoint** library. Shared work should live where the team can find it, edit it, and trust it over time.

## 3 Is it only being shared in a chat?

That may be fine for a quick exchange, but if the file needs to be found later, updated by a group, or treated as the trusted version, it should move into a **shared workspace** rather than staying inside a conversation.



**If the original document owner left tomorrow, would the right people still know where the file is and which version to trust?**

### Source of truth

The one place everyone trusts as the correct and current version of a file.



# The file location guide

The best home for a file depends on who owns it, who needs to work on it, and how long it needs to stay visible and trusted.

## OneDrive

### **Best for personal drafting**

Use it for:

- Early drafts and rough working versions
- Private notes and personal preparation
- Files that are still being shaped by one person

**Watch out:** If other people start relying on the file, it probably needs to move into a shared location.

## Teams channel/SharePoint

### **Best for shared work**

Use it for:

- Project files and team documents
- Shared client work and reference material
- Anything that needs one trusted version

**Watch out:** This is usually where the real version should live once the work belongs to 2+ people.

## Teams chat file share

### **Best for quick exchanges**

Use it for:

- Temporary sharing in the moment
- One-off hand-offs between people
- Short-term conversation context

**Watch out:** Chat is useful for speed, but not for long-term structure or team-owned working files.

## Email attachment

### **Use sparingly**

Use it for:

- Final external versions or formal static copies
- Situations where a live file is not appropriate

**Watch out:** Avoid using attachments for internal live documents or shared files that are still changing. A link is usually better.

## Your takeaway...

**The right file location isn't just about storage. It's about clarity, ownership, and making work easier to find, share, and trust.**

### **Channel vs chat**

A channel is for shared team work. A chat is for quick conversation.

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