

## How To Store a Group's Records

**Problem:** Many groups (committees, clubs, RAC) need to have a way to store and archive their records so that they are safe and accessible in the future.

When they rely upon their secretary or other member to do this on their personal computer, there is a risk that these may be lost. The device can fail, or the person may suddenly become incapacitated.

So, an alternate plan needs to be made. And that requires examining the possibilities of using cloud storage – a place to store the documents on a website but make them available to authorized users.

**Purpose:** Advise committees, groups, and clubs on how to setup and maintain a record of minutes, reports, member lists, etc. to document the groups history and records. How to archive important records for the future.

### Privacy and Security issues: Do the records need to be private?

The group should discuss the following:

- Do you really need to keep these records private?
- If you share the account name and password only with the group members is that sufficient security?
- Are only some records private? E.g., names, addresses, etc.
- Are you concerned that someone might edit and change an existing document?
- Should only some group members (officers) have edit privileges?

By answering these questions, you can choose the type of cloud storage you are looking for.

For most groups a cloud account with Google, OneDrive, or DropBox will meet their needs. However, the free accounts have limited storage space, and several groups need more space they must pay for. See the table below.

### RiderwoodLife.com for Public Records

If you wish your group's item to be publicly available, then the group leader can post it to RiderwoodLife.com. A group can keep the Riderwood community aware of its current activities.

- Some groups keep the latest versions of their important documents online on their group pages, including forms for residents to use to join the group.
- Other groups maintain minutes of their past meetings on the website.
- Some have a gallery of photos of their projects and activities.

Since we don't want personal information to be stored on the website, it can't be used for member contact lists or that type of information.

### Creating the Cloud Account

Suppose you want to create a cloud account with the name '*mygroup*'. Here is what you do. If you want to utilize Google Drive or OneDrive, you must first create a gmail or outlook account.

- Google Drive. Browse 'gmail account' and then sign up. You create a new gmail account '*mygroup@gmail.com*', and then this gives you access to Google Drive.
- OneDrive. Browse 'Outlook' and then sign up. You create a new Outlook account '*mygroup@outlook.com*', and then this gives you access to OneDrive.
- DropBox is similar.

You may be offered several choices for a free or paid account. There is more information comparing the different plans below.

### **Using the Cloud Account**

The usual workflow follows these steps.

Organize the cloud account by setting up specific folders for minutes, members, or other documents.

Create the group minutes, member list, etc. on your personal computer using Word, Excel, etc.

Then drag and drop the document to the cloud account.

### **Protecting a Document**

If you would like to protect the document from someone else accidentally changing or deleting it, you can protect it. In Word or Excel go to File > Info > Protect Document. Make your choices. One is to give READ ONLY access to the document.

Once the document is in the cloud account (Google Drive or OneDrive) you can change the permission to READ ONLY.

### **Share with Specific People Only**

If you decide that your group's information needs to be shared only with a select group of people who you choose, then this can be done. Both Google Drive and OneDrive allow you to do this. See below.

#### **Share files from Google Drive**

Share with specific people.

[Share files from Google Drive - Computer - Google Docs Editors Help](#)

#### **Share OneDrive files and folders**

[Share OneDrive files and folders \(microsoft.com\)](#)

Go to the OneDrive website.

In HELP go to **Share OneDrive files and folders**, and the further down **Share with specific people**.

Choose this option if you want to send an email invitation to people or groups and keep track of who you invited. This also lets you remove permission for specific individuals or groups later if you need to.

### **Do Not Share – Forms**

If you are using Forms for signups (such as Short Courses or Navigating as We Age) then you do not want to allow anyone except a limited number of people access to *mygroup*. In other words, you only want to share the group's password with those who are needed as backup owners of the account and can be trusted not to inadvertently alter the Forms being used.

## Details of Cloud Plans

Here is a summary of the cloud storage options available.

### Cloud Storage

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#### Cloud Storage Options

	<b>Storage</b>	<b>Cost</b>	<b>Users</b>
<b>Dropbox</b>			
Free	2 GB	free	1
Plus	2 TB	\$9.99/mo	1
Business	9 TB	\$20/mo	6
<b>Google</b>			
Free	15 GB	free	1
Basic	100 GB	\$2/mo	5
Standard	200 GB	\$3/mo	5
Premium	2 TB	\$10/mo	5
Google Workspace Business Starter	30 GB/user*	\$6/user /mo	
Google Workspace Business Standard	2 TB/user*	\$12/user /mo	
<b>OneDrive &amp; Microsoft 365</b>			
Microsoft 365 Personal	1 TB	\$69.99/yr	1
Microsoft 365 Family	6 TB	\$99.99/yr	6
Microsoft 365 Business Basic	1 TB/user*	\$6/user/mo	
Microsoft 365 Business Standard**	1 TB/user*	\$12.50user/mo	

\* user = employee or person authorized to use acct

\*\* desktop versions of Word, Excel, etc included