



Using a Cloud Storage Account

Using a cloud storage account has many benefits over traditional physical storage including the ability to have multiple people access resources from the same location and working collaboratively on documents. Additionally, it allows for an easy transfer of information when Directors transition in and out of their roles.

Commonly used cloud services include Google Drive, Dropbox, and Microsoft SharePoint. The usage details of each are outlined below. Note that Google offers a Google for Non-profits program for free programs and other technology can be obtained for a discount through Techsoup Canada (<https://www.techsoup.ca>).

Google Drive

Pros:

- Centralized location of documents and folders.
- Can be accessed via web browser, a downloaded app to a mobile device or a desktop app.
- 15 GB of storage space, free of charge.
- Clubs can create generic club email addresses (ease in transition of information between old and new board members).
- Can share files/folders with individuals without a Google address.
- Files are automatically synced and saved between cloud storage, computer, and mobile device.

Cons:

- File owners must have a free Google account.

Step 1: Create a Google account

If you do not already have one, create a Google email address. COAST recommends that your club creates and uses generic email addresses (e.g., treasurer@yourclubname.here), rather than personal email address for positions on your board. This allows for organized communication and an easy transition of documentation when new board members are elected.

Step 2: Access the Google Drive

1. Go to <https://drive.google.com/>.
2. Log into your google account.
3. Click on "My Drive". Your dashboard displays:
 - a. Files and folders that are uploaded
 - b. Google Docs, Sheets, Slides, and Forms that you create.

Step 3: Upload or Create Files

1. To upload or create a new file, click “+ New”.
2. You can:
 - a. *Create* a new folder.
 - b. *Upload* a new file or new folder.
 - c. *Create* a new Google Doc, Google Sheet, Google Slide, Google Form + more.

Step 4: Share and Organize Files

Google Drive allows you to share files or folders, so that other people can view, edit, or comment on them.

1. How to [share files from Google Drive](#).
2. How to [share folders from Google Drive](#).
3. How to [make someone else the owner of a file](#).

Dropbox

Pros:

- Centralized location for documents and folders.
- Can be accessed via web browser, a downloaded app on a mobile device, or a computer desktop app.
- Free option available with limited options.
- Files are synced and saved between cloud storage, computer, and mobile device.

Cons:

- Users must create and be logged into Dropbox to access files.
- Limited storage for free users (2 GB).
- File size limits for free users – files cannot exceed 100 MB.
- Monthly fees for Professional (\$19.99/month), Standard (\$15.00), or Advanced (\$25.00) Dropbox options.
- Requires the user’s local hard drive to have plenty of space to enable file syncing.

Step 1: Create a Dropbox Account

Create a new account via www.dropbox.com or on the Dropbox mobile app. Once created, log into your account on your desktop or mobile app.

Step 2: Adding Files to Your Account

1. Click “All files” in the left sidebar.
2. Select the folder within Dropbox that you’d like to save your file or folder to.
3. Click “Upload” and select “Upload files” or “Upload folder”.
4. Select the correct file or folder from your computer’s file system and click “open”.

Step 3: Syncing Files

Dropbox synchronizes the content between your cloud storage, computer and/or mobile app, meaning that the most recent version of a file is always available. Sync updates happen in the background if you have an active internet connection, and you are signed into your account.

Even if a file is synced to the cloud, the file in your Dropbox folder on your computer hard drive will remain on your computer.

Be sure to download Dropbox on your computer and any device you plan on using to access your files. Sign into each device with the same email and password.

Step 4: Sharing Files

Dropbox allows users to share files in two modes: view-only and with edit permissions.

View-Only

Recipients will receive an email link and will have access via their own Dropbox account, can download the document, but will not be able to change the content. View-only content can also be sent to recipients who don't have a Dropbox account.

For more information, please see [Dropbox Share view-only](#).

Edit Permissions

If you want your recipient to be able to edit your files, the recipient must have and be signed into a Dropbox account. When a file/folder is shared, the recipients become its members.

For more information, please see [Dropbox shared folders](#). For more information, on sharing with groups, please see [Dropbox Groups](#).

Microsoft SharePoint

Pros:

- Centralized location for documents and folders.
- Accessible from web browser or mobile app.
- Files are synced between cloud storage, computer, and mobile device.

Cons:

- Users must purchase a Microsoft 365 package (Home, Office, Student, etc.) .
- File owners must have a Microsoft 365 account.
- Enhanced security on shared files to recipients without Microsoft 365 accounts.

Step 1: Create a Microsoft 365 account

1. If you do not already have a Microsoft 365 account, purchase an account from the [Microsoft 365 website](#).

Step 2: Log into the SharePoint Library

1. Sign into your account. After signing into Microsoft 365, click “SharePoint” or “Sites” in the app launcher navigation or top bar.

Step 3: Uploading Documents

1. Open the SharePoint library.
2. Select “Upload” and select “Files” or “Folder”.
3. Navigate to the file or folder that you want to upload. Select “Open”. Your file/folder has now been uploaded to your SharePoint library.

For more information, please see [Upload files and folders to a library](#).

Step 4: Sharing Files or Folders with Specific People

When sharing files and folders, the owner of the file/folder can decide whether to let people edit or view them. The owner can see who a SharePoint folder is shared with, stop sharing files or folders, or change the permissions at any time.

To share a file or folder:

1. Open your SharePoint site, go to the library where you want to share your files from.
2. Pick the file or folder that you want to share by selecting its circle icon. If you want to share multiple files, collate them into a single folder, and share the entire folder.
3. Select “Share”  at the top of the page.
4. Under “Send Link”, select “Anyone with the link can edit” to activate the drop-down menu.
5. Select “Specific people”. This option gives access only to the people that you specify. If people forward the sharing invitation, only those who the invite was sent to, will be able to open the link.
6. Under “Other settings”, you can choose to:
 - a. Allow editing;
 - b. Block download;
 - c. Set an expiration date;
 - d. Set a password;
 - e. Open in review mode only.
7. Once you have set your permissions and settings, select “Apply”.
8. In the “Name, group, or email” field, enter the email address of people who you want to share with.
9. Optional: Include a message below the “Name, group, or email” field to indicate what you are sharing.
10. Select “send”. Your file or folder has been shared.

For more information, please see [Share SharePoint files or folders](#).

Accepting a SharePoint Invitation as an External User

As mentioned above, SharePoint places additional security steps on recipients of shared folders/files who do not have a Microsoft 365 account.

1. Users will receive the initial sharing link to the file or folder. Users should “pin” or “star” this email, so that it is easy to find.
2. Every time the user wants to access the shared link, a time-sensitive code is sent via email to the user to verify their identity. This Microsoft code may show up in the users “Inbox”, “Junk” or “Spam” folder.
3. The user must enter the code to access the file or folder.
 - a. Note, each time the user clicks the shared link, a new code will be sent. An old code cannot be reused.
4. After the code is entered, the user should have access to the shared item.