

Document Management Guidelines

The purpose of these guidelines is to assist our community in selecting an appropriate solution¹ when managing University documents. If you are unsure which tool to use for a project or team collaboration, please consult with your supervisor.

These guidelines must be used in combination with [Northeastern's Data Classification Guidelines](#).

In tandem with any use of an AI application you must consult the [Policy on the Use of Artificial Intelligence Systems](#) and the related [FAQ from the AI Review Committee](#).

Non-university cloud storage (e.g., Dropbox, Box, etc.) are not allowed and should not be used to support University business.

Legend	
✓	Allowed to use
⊘	Not allowed to use
[*]	Requires approval from the Office of Information Security
[**]	Please consult the Policy on the Use of AI Systems
[1]	Preferred for individual storage
[2]	Preferred when sharing internally
[3]	Preferred when sharing externally

Commonly Used Applications and Services

Tool	Lock 2 (Limited Risk) 	Lock 3 (High Risk)	Lock 4 (Critical Risk)
Amazon Web Services	✓	✓ [*]	✓ [*]
Claude	✓	✓ [**]	⊘ [**]
Co-Pilot	✓	✓ [**]	⊘ [**]
Google Drive	✓	⊘	⊘
Library Digital Repository Service	✓	⊘	⊘
Microsoft Azure	✓	✓ [*]	✓ [*]
Microsoft OneDrive	✓ [1, 2, 3]	✓ [1, 2, 3*]	✓ [1, 2, 3*]
Microsoft Outlook	✓	✓	✓
Microsoft SharePoint	✓ [2, 3]	✓ [2, 3*]	✓ [2, 3*]
Microsoft Teams	✓ [2, 3]	✓ [2, 3*]	✓ [2, 3*]
Personal or Non-University Service	⊘	⊘	⊘
Q: Drive / University Network Storage	✓ [1, 2]	✓	✓
Qualtrics	✓	✓	✓
Zoom	✓	✓	⊘
Zoom (HIPAA Approved)	✓	✓	✓

Research Related Applications and Services

Tool	Lock 2 (Limited Risk) 	Lock 3 (High Risk)	Lock 4 (Critical Risk)
Globus	✓	✓	✓
Research Computing HPCC	✓	✓ [*]	⊘

¹ These guidelines do not apply to University systems with integrated document management such as Salesforce, Banner Document Management (BDMS), or PowerFAIDS.

Frequently Asked Questions (FAQ)

Can I use non-Northeastern cloud storage solutions such as Dropbox or Box?

No. Only storage locations approved by Northeastern should be used to support University business. Without a contractual relationship with these providers, Northeastern cannot assure minimum security requirements are met. Use of these systems for University business is in violation of the [Policy on Appropriate Use of Computer and Network Resources](#) and [Policy on Confidentiality of University Records and Information](#).

How can I share documents with external users?

To the extent possible, avoid sharing Lock 3 and Lock 4 data externally. When necessary, choose a method that gives you the most control over access and security, such as Microsoft Teams or OneDrive. Never post sensitive documents publicly.

What will happen to my documents when I leave the University?

Documents on OneDrive and Google Drive will be removed upon termination. As part of offboarding, all documentation should be transferred to your supervisor. Documents on SharePoint will not be removed.

How do I share files using OneDrive?

[Visit the ITS Knowledge Base](#) for instructions on sharing files with OneDrive.

How do I set up a Q Share (Departmental Network Share Storage)?

[Visit the ITS Knowledge Base](#) for instructions on requesting network storage (Q: Drive).

How do I use NU Affiliated Google Docs?

Minimal Google Drive support is provided to active Faculty and Staff. We highly recommend using OneDrive or SharePoint instead. [Visit the ITS Knowledge Base](#) for instructions on moving files from Google Drive to OneDrive.

How do I request a SharePoint site?

[Visit the ITS Knowledge Base](#) for instructions on requesting a SharePoint site.

How do I obtain approval prior to sharing or collaborating with external users?

Consult with the [Data Classification Guidelines](#) on recommended practices. For Lock 4 data, the Office of Information Security must grant an exception. For Lock 3 data, individuals sharing this data must have authorization from their manager and/or relevant offices as necessary (e.g., Registrar, Human Subject Research Protection, Office of Information Security).

How can I set up workflow to share documents?

[Request a consultation with the ITS Digital Solutions team](#) to discuss your needs and find the best solution.