Xxxxxxx Procedure

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Instructional Systems Design Example

Departments: Xxxxxxxxxx

REVISION 1

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Risk Level		Language	Country
LOW		English	US

PURPOSE

The MS TEAMS Folder Structure Guidance Procedure is designed to bring consistency as well as streamline the Folders and Files within the Xxxxxxxx MS Teams and Channels.

SCOPE & TIMELINE

The **Scope** of the MS TEAMS Folder Structure Guidance Procedure provides best practices to all departments and segments within Xxxxxxxxxxxx. It is to be used, followed and maintained within each MS Channel as of Xxxxxx XX, 20XX.

The **Timeline** of the MS TEAMS Folder Structure Guidance Procedure is used on an on-going basis. It should be reviewed and updated, Annually or As Needed.

ROLES & RESPONSIBILITIES

Xxxxxxxx MS TEAM Owner – manages certain settings for an MS Team. They add and remove members, add guests, change MS Team settings, and handle administrative tasks. There can be multiple owners in an MS Team.

Xxxxxxxxx MS Team Owners	
• Xxxxx Xxxxxxxxx	• Xxxxx Xxxxxxxxx
• Xxxxx Xxxxxxxxx	• Xxxxx Xxxxxxxxx
• Xxxxx Xxxxxxxxx	• Xxxxx Xxxxxxxxx
• Xxxxx Xxxxxxxxx	• Xxxxx Xxxxxxxxx
• Xxxxx Xxxxxxxxx	

Xxxxxxxxx MS Channel Administrator – manages an MS Channel. They are the Manager of the segment or department and are responsible in following and maintaining the guidance within this procedure and/ or the delegation of the tasks. Please note that this is an *Xxxxxxxx individual* _assigned_ *responsibility*. It is not through an IT role within MS Teams.

Xxxxxxxxx MS Channel Administrators	

• **General Channel**
    o Xxxxx Xxxxxxxxx , Xxxxx Xxxxxxxxx
	• **General Channel**
	    o Xxxxx Xxxxxxxxx, Xxxxx Xxxxxxxxx

• **Xxxxxx Channel**
    o Xxxxx Xxxxxxxxx
	• **Xxxxxx (Private) Channel**
	    o Xxxxx Xxxxxxxxx

• **Xxxxxx Channel**
    o Xxxxx Xxxxxxxxx
	• **Xxxxxx Channel**
	    o Xxxxx Xxxxxxxxx, Xxxxx Xxxxxxxxx

• **Xxxxxx (Private) Channel**
    o Xxxxx Xxxxxxxxx, Xxxxx Xxxxxxxxx
	• **Xxxxxx Channel**
	    o Xxxxx Xxxxxxxxx, Xxxxx Xxxxxxxxx

• **Xxxxxx Channel**
    o Xxxxx Xxxxxxxxx
	• **Xxxxxx Channel**
	    o Xxxxx Xxxxxxxxx, Xxxxx Xxxxxxxxx

• **Xxxxxx Channel**
    o Xxxxx Xxxxxxxxx
	• **Xxxxxx Channel**
	    o Xxxxx Xxxxxxxxx

DEFINITIONS AND ACRONYMS

MS Team: Determined by department, reporting structure. Two types of 1) Standard (public) and Private (Private conversations w/ a specific audience).

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MS Private Channel: Only individuals with permission granted can view. The Channel is dedicated to a specific topic, department, or project. Where the work such as text, audio, and video conversations happen, where files are shared, and where apps are added.

MS Public Channel: All individuals with access to MS Team has permission to view content. The Channel is dedicated to a specific topic, department, or project. Where the work such as text, audio, and video conversations happen, where files are shared, and where apps are added.

MS Folder: Organizing documents in applicable categories

MS SubFolder: Folders under a Folder category

MS File: Independent Files under a Folder or Sub-Folder category

WORK INSTRUCTIONS

MS TEAM Structure

Definition: The Xxxxxxx MS TEAM structure was designed and implemented in 20XX.

It should be noted that all future Xxxxxxxx TEAMs and CHANNELs will need to be discussed with Xxxx Xxxxxx prior to approval. She/ He will verify that the TEAM and/ or CHANNEL meet the Xxxxxxxxxx Guidance and Best Practices.

Below is the MS Teams Implementation Structure:

Xxxxxxxxx TEAM	Xxx Xxxxxxxx TEAM	Xxxxxxx Xxxxxxx TEAM
• General Channel	• General Channel	• Xxxxxxxx Channel
• Xxxxxx Channel	• Xxxxxx (Private) Channel	
• Xxxxx Channel	• Xxxxx Xxxxxx Channel	
• Xxxx (Private) Channel	• Xxxxxx Channel	
• Xxxxxxx Channel	• Xxxxxxxx Channel	

MS CHANNELs Standard Structure

Definition: All other CHANNELS within the Implementation TEAMs structure have been created on one of the following standards:
- Department or Segment
- Specialty
- Sensitive Materials (Private)

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MS GENERAL CHANNEL Standard Folder Structure

Definition: The General CHANNEL is a default channel within each of the MS Teams. The Xxxxxx group has xxx (X) MS TEAMs and xxx (X) General CHANNELs.

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Xxxx Xxxxxx TEAM	Xxxxx Xxx Xxxxxxxx TEAM
• General Channel	• General Channel

MS FOLDER Standard Structure

Definition: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Xxxxx Xxxxxx
MS Folder Standard Structure
• 00_Folder Instructions
• 01_Admin
• 02_Tool Box
• 03_Xxxxx xxxxxx
• 04_ Xxxxx xxxxxx
• 05_ Xxxxx xxxxxx
• 06_ Xxxxx xxxxxx
• 07_ Xxxxx xxxxxx

00_Folder Instructions Folder

Definition: The *Folder Instructions Folder* contains 3 key guides to instruct the User(s) how to navigate within that Channel;
1) Mapping of the original Folder structure
2) Folder Structure Procedure and
3) Main Folder Flowchart.

Location: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua:

Xxxx Xxxxx
MS Folder Instructions
• MS TEAM Folder Structure Procedure
• Xxx Xxxxxx Folder Structure SUMMARY Flowchart
• MS TEAMS_Folder Mapping - Original Folders/ Files to new Structure

01_ Admin Folder

Definition: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
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02_Tool Box Folder

Definition: The *Tool Box Folder* contains all documents or instructions to complete tasks. The documents contain 1)Tools to complete the job, and 2) How to do the Work.

Location: The *Tool Box Folder* is within every MS Channel. It appears within every MS Channel. It appears as **02_Tool Box** and is the *third* Folder within the Channel. Following are Sub-folder examples that may be included in this area:

• Work Instructions	• Business Processes
• Templates	• Specifications
• Procedures	

03 to 07 Wild Card Folders

Definition: The Implementation MS Channel Administrator of the CHANNEL has the flexibility to create five (5) additional folders to assist the groups needs and specialties. These five options are defined as a Wild Card.

Location: The *Wild Card Folder* is within every MS Channel. It appears as **0X- Wild Card Name** and is the *third* to the *eighth* Folder(s) within the Channel. Below are examples that the *Wild Card Folder* may include:

• 03_Learning Res. Library EXAMPLE	• 05_Project Safety Improvements EXAMPLE
• 04_Roles & Resp EXAMPLE	• 06_Archives EXAMPLE
• 05_Project Safety Improvements EXAMPLE	• 07_Project Initiatives EXAMPLE

MS TEAMS IT DEPARTMENT - GUIDANCE/ BEST PRACTICES

MS TEAMs Types

Definition: Four MS Teams' Types have been identified as *Guidance by the IT Department* in December 2021 that would be applicable to Implementation. The MS Types have been defined and implemented in 2021.

Department MS Team

Definition: 1) A Department Team is created based upon a department or segment within EDF RE. 2) This will include SERVICES that the Department provides to internal customers.

Community of Practice / Expertise MS Team

Definition: A Community of Practice Team is created for a group who interact around a subject matter expertise. The group communicates and learns how to do it better as they interact regularly.

Product MS Team

Definition: A Product Team is created to collaborate, cross-functional teams that work to achieve the common outcome of creating an exceptional product. NOTE: A Product Team will have Project Channels within it.

Project MS Team

Definition: A Project Team is created for a group of individuals who work together towards a common goal and who share responsibility for specific outcomes. NOTE: Prior to creating a Project Team it should be determined if it can be categorized as one of the other MS Teams types.

User Needs - MS Team, Channel or Chats Defined

The creation of an MS Team is often what a User believes should be created when communication is taking place within a department, segment or for an upcoming project. Below is guidance on other possible solutions to creating a new MS Team:

Chat

Definition: Private direct messages between any number of people ($\leq$250 people, 20 in a call, 10 files)

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Channels
Definition: Channels automatically have a SharePoint location for files attached to them, viewable within Teams under the Files tab at top. A Post-Thread communication method, rather than the continuous chatter of Chat.

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Team
Definition: Determined by department and/ or reporting structure. Teams are a collection of people, content, and tools surrounding different projects and outcomes within an organization.

If it has been determined that the User needs to request an MS Team, *all future Xxxxxxx TEAMs and CHANNELs will need to be discussed with* <u>Xxxxx Xxxxxxxx</u> *prior to approval. She/He will verify that the TEAM and/ or CHANNEL meet the Xxxxxxxx Guidance and Best Practices.*

Relationship between SharePoint and MS Teams
MS Teams is the hub for teamwork. It allows for collaboration, chat, calls, meetings, etc. SharePoint and Teams are better together.

Teams doesn't natively incorporate file sharing and document management functionality — it leans heavily on SharePoint. SharePoint doesn't have a robust communication capability — it now leverages Teams.

SharePoint Online is *primarily* a document management and intranet platform where you store, collaborate, and share information seamlessly across the organization, and is also part of Microsoft 365. Both interact with each other in a collaborative way.

Creation of an MS Team
The following are also created in the background:
- Microsoft 365 Group (ex. Office 365 Group)
- SharePoint Online site
- Exchange Online shared mailbox & calendar
- OneNote notebook
- Other services like Power BI, Planner.

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Creation of a SharePoint Folder
The following are also created in the background:
- Folders in SharePoint can be shared with individuals that are not in the Team. This can be accessed through Xxxxx in SharePoint

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DOCUMENT HISTORY

Rev	R&E ID	Author	Owner Approval	Date	Update Notes
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DOCUMENT PROPERTIES & APPROVAL STRATEGY

↗ START–AUTHOR COMPLETES

Kim C. Lenard	[SME Name]	[Verifier Name]	[HSE Name]	Xxxx Xxxxx
12/7/2021	Review Date	Review Date	Review Date	9/27/2021

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