

# GUIDANCE

## MS TEAMS Best Practice Guidance

XXXXXX Department

Approved

REVISION 0

PUBLISHED Dec 2020

Risk Level

LOW

Language

English

Country

US/Canada/Mexico

## PURPOSE

The MS TEAMS Best Practice Guidance is designed to bring consistency as well as streamline the approach to the various processes and tasks that occur within MS Teams.

## SCOPE & TIMELINE

The **Scope** of the MS TEAMS Best Practice Guidance provides advisable direction to the department and segments within Xxxxxxx departments. This documentation is recommended to be used, followed, and maintained for consistency and streamlining within MS Teams.

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

## ROLES & RESPONSIBILITIES

**MS TEAM Subject Matter Expert**– manages Basic and Advance Tools to setup, maintain and troubleshoot User quality issues. This role normally falls within the Xxxxx department.

**MS TEAM Owner** – A user that moderates 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.

## DEFINITIONS AND ACRONYMS

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

- Teams can be created to be Private to only invited users.
- Teams can also be created to be Public, open, and anyone within the organization can join (up to 10,000 members).

**MS Public Channel:** All individuals with access to the MS Team has permission to view content and edit. 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 Private Channel:** Only individuals with permission granted can view and edit. 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. The MS Folder is located in a MS Channel.

**MS SubFolder:** Folders under a Folder category

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

## GUIDANCE

### 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 (<250 people, 20 in a call, 10 files)

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**NOTE:** If you have more than 20 people in a chat, the following chat features are turned off: Outlook automatic replies and Teams status messages; typing indicator; video and audio calling; sharing; read receipts.

### 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.

**NOTE:** Ways to utilize Channels

- 1) Pin posts to capture useful threads in the channel information
- 2) Flag messages as IMPORTANT! for ensure that messages are noticed
- 3) Flag messages a URGENT! To notify person or group repeatedly (2 minutes for every 20 minutes or until the message is read) 3)
- 4) Notify a Team, Channel, or person(s) with the @mention function

### 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, please place a FreshService Ticket to request that a new MS Team be created.

## 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.

**NOTE:**

- 1) It is recommended that Folders be created in MS Team if the desired goal is for MS Team and SharePoint to mirror one another.
- 2) A site is created to store your documents. Meaning that each time you share files in a Team, they are stored in the associated site in SharePoint! **not** in Microsoft Teams.
- 3) Files shared in private chats will be stored in the sender's OneDrive for Business.

### 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 Share in SharePoint

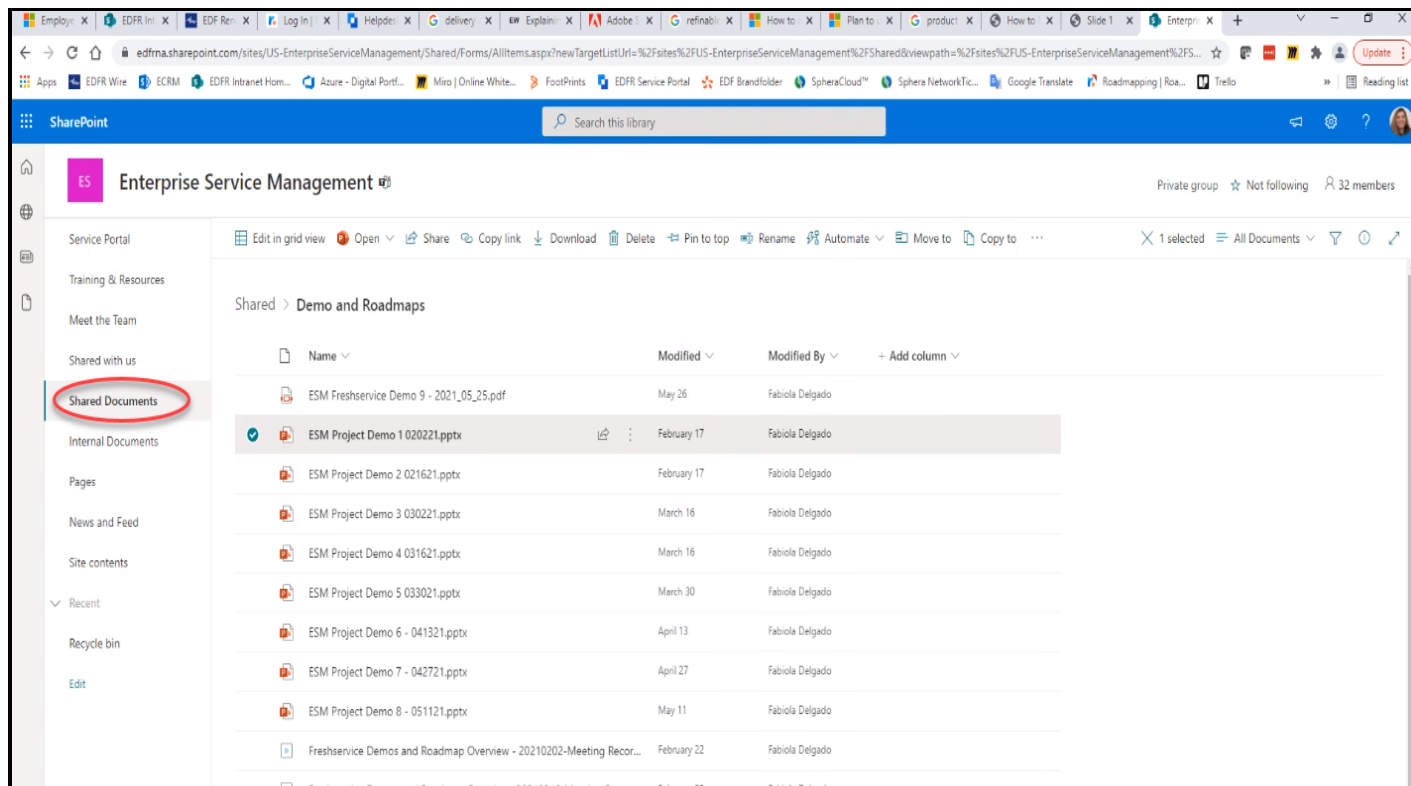
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**NOTE:** 1) If a Folder is created in SharePoint this will not mirror in the MS Team. If the desired goal is for MS Team and SharePoint to mirror one another, User should create Folder in MS Team.

## MS TEAM TYPES for the IT Department

**Definition:** Five MS Teams' Types have been identified for the IT Department. 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 XXXXXXXX.  
2) This will include SERVICES that the Department provides to internal customers.

### Xxxxxxx / Xxxxxx MS Team

**Definition:** A Xxxxxx 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.

### Xxxxxx MS Team

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

### Xxxxxx MS Team

**Definition:** A Xxxxxx 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 Xxxxxx Team it should be determined if it can be categorized as one of the other MS Teams types.

### Test MS Team

**Definition:** A Test Team is an area that is created to test functionality before provisioning the solution being tested in a LIVE team. It's a development environment and is not officially recorded as an active TEAM.

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Department MS TEAM	Xxxxxx MS TEAM	Xxxxxx MS Team	Xxxxxx MS Team	Test MS TEAM
<p>1) A Department Team is created based upon a department or segment within XXXXXXXX.</p> <p>2) This will include SERVICES that the Department provides to internal customers. The SERVICES can be created as a CHANNEL.</p>	<p>A Xxxxxxx Team may be created for a group who interacts around a subject matter expertise.</p> <p>The group communicates, creates best practices, and as regular interactions and 'how to do' tasks evolve efficiencies improve.</p>	<p>A Xxxxxxx Team is created to collaborate among cross-functional teams that work to achieve the common outcome of creating an exceptional product.</p> <p>NOTE: A Xxxxxxx Team will have Project Channels within it.</p>	<p>A Xxxxxxx Team is created for a group of individuals who work towards a common goal. They share responsibility for specific outcomes.</p> <p>NOTE: Prior to creating a Xxxxxxx Team it should be determined if it can be categorized as one of the other MS Teams types.</p>	<p>"A Test Team is an area that is created to test functionality before provisioning the solution being tested in a LIVE MS Team. It's a development environment and is <u>not</u> officially recorded as an active TEAM.</p>

Figure 1

**INACTIVE MS TEAM**

**Archiving vs Deleting an MS Team**

Over time, a Team created in MS Teams may no longer be in use or the Owner(s) may want to archive or delete a Team at the end of a project.

When you archive a Team, all activity for that Team ceases. Archiving a Team also archives *private channels* in the Team and their associated site collections. However, you can still 1) add / remove members 2) update roles and 3) view all the Team activity in standard and private channels, files, and chats if Option 2 or 3 are chosen.

When you delete a Team, the activity in *standard and private channels* (and associated site collections), files, and chats is also deleted.

Please place a FreshService Ticket to request that an MS Team be deleted or archived. The IT Department has created three (3) options to choose from in archiving an MS Team. See Figure 2.

**NOTE:** Archived Teams can be *reactivated*, but you **cannot** directly restore a deleted Team. Consider archiving the MS Team first and postpone the deletion until you're sure that you no longer need the information.

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MS TEAM Archiving Options

<b>MS Teams Archive Options</b>			
<b>Guidance &amp; Best Practices</b>			
	<b>OPTION 1</b>	<b>OPTION 2</b>	<b>OPTION 3</b>
Lockdown of MS Team	X		
Removed from Lefthand Column	X	X	X
Remove All Owners	X		
Remove All Members	X	X	
Access Availability:	IT Request		
<u>Owners</u> ➤ Access is located in the Archive Section located under Active Teams. ➤ Owners can Edit data / membership		X	X
<u>Members</u>		No access	Read-only access
Archive Banner View	IT	IT / Owners	IT/ Owners / Members
No Edits icon			X
BENEFITS for each Option:			
	1) Retained for disposition purposes.	1) ➤ Owners continue to have access to data ➤ Membership can be edited	1) Owners continue to have access to data and can edit membership
	2) MS Team is no longer accessible unless <u>requested</u> through IT.	2) MS Team is removed from the left-hand column but is accessible through the Archive Section	2) MS Team is removed from the left-hand column but is accessible through the Archive Section
	3) Archived Banner located on MS Team is viewable to IT.	3) Archived Banner located on MS Team is viewable to IT and Owners	3) Members have Read-only access to all data.
	4) ➤ Out of Sight, Out of Mind for Owners and Members. ➤ MS Team is only viewable to IT.		4) Archived Banner located on MS Team is viewable to IT, Owners, and Members.

Figure 2

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**DOCUMENT HISTORY**

Rev	R&E ID	Author	Owner Approval	Date	Update Notes
Rev 1	N/A	Kim C. Lenard	XXXXXXX XXXXXXX	00/00/20XX	New document

Rev	[R&E ID]	[Author Name]	[Approver Name]		[Enter a brief description of the reason for the creation or revision of the document.]
Rev	[R&E ID]	[Author Name]	[Approver Name]		[Enter a brief description of the reason for the creation or revision of the document.]
Rev	[R&E ID]	[Author Name]	[Approver Name]		[Enter a brief description of the reason for the creation or revision of the document.]
Rev	[R&E ID]	[Author Name]	[Approver Name]		[Enter a brief description of the reason for the creation or revision of the document.]
-	-	-	[Approver Name]		-
-	-	-	-	-	-

DOCUMENT PROPERTIES & APPROVAL STRATEGY

**START-AUTHOR COMPLETES**

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12/2/2020	00/00/0000	00/00/0000	00/00/0000	00/00/0000

**END**

## MS TEAM SUBJECT MATTER EXPERT GUIDANCE

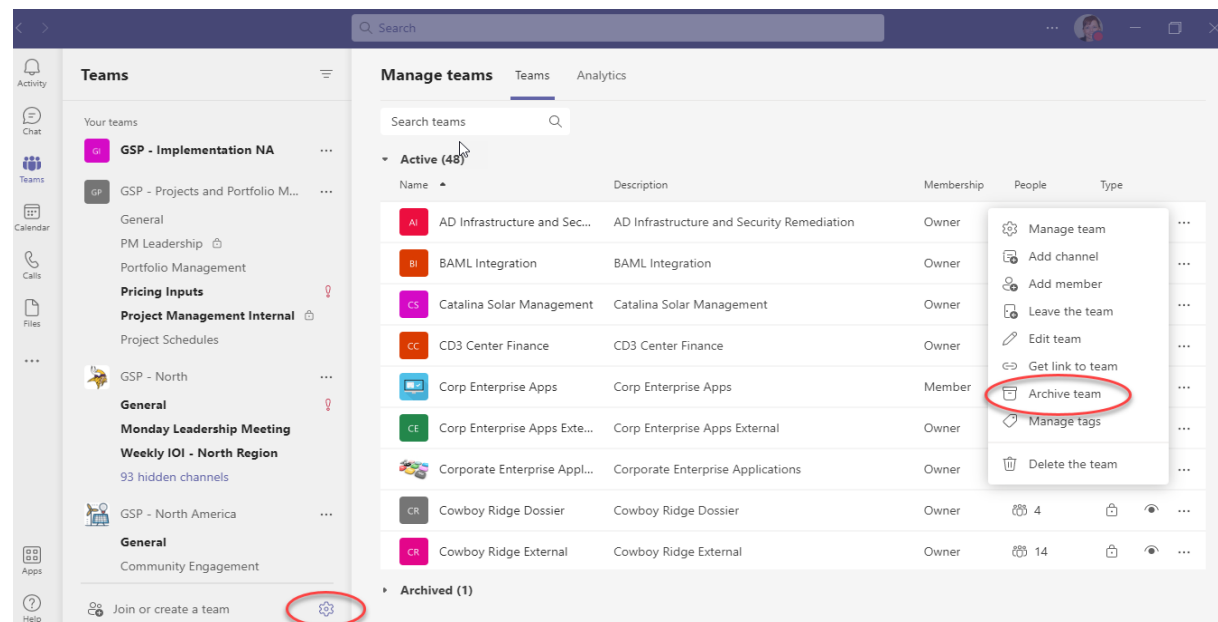
If the User has chosen Option 1, complete the following prior to archiving Team:

- 1) Run script to save all Owners and Members as a Folder/ File/ Tab in the Teams that is to be Archived
- 2) Remove all Owners and Members. Leaving only IT to have access to the Archived Team including the SharePoint Folders

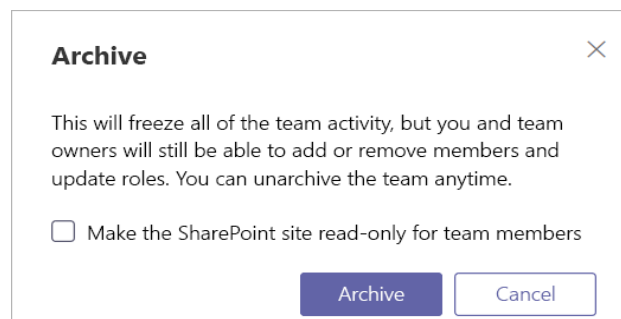
### Archive an MS Team

Follow these steps to archive n MS Team. You must be a MS TEAM Subject Matter Expert to make these changes. In the admin center, select **Teams**.

1. Select a team by clicking the Team name.



2. Select **Archive**. The following message will appear.



3. To prevent people from editing the content in the SharePoint site and Wiki tab associated with the team, select **Make the SharePoint site read-only for team members**. (Teams owners will still be able to edit this content.)
4. Select **Archive** to archive the team. The team's status will change to **Archived**.

### Make an archived MS Team active

Follow these steps to make an archived team active again.

1. In the admin center, select **Teams**.
2. Select a team by clicking the team name.
3. Select **Unarchive**. The team's status will change to **Active**.

### Delete an MS Team

If the team will not be required in the future, then you can delete it rather than archiving it. Follow these steps to delete a team.

1. In the admin center, select **Teams**.
2. Select a team by clicking the team name.
3. Select **Delete**. A confirmation message will appear.
4. Select **Delete** to permanently delete the team.

### Restore a deleted MS Team

Follow these steps to restore a deleted team by restoring the Microsoft 365 group that's associated with the team. Restoring the Microsoft 365 group for a team restores team content, including tabs, standard channels, and private channels and their associated site collections.

By default, a deleted Microsoft 365 group is retained for 30 days. This 30-day period is called "soft-delete" because you can restore the group.

### Install the AzureADPreview module

1. Open Windows PowerShell as an admin.
2. If you have an earlier version of the AzureADPreview module installed or the AzureAD module installed, uninstall it by running one of the following:

```
PowerShellCopy  
Uninstall-Module AzureADPreview  
PowerShellCopy  
Uninstall-Module AzureAD
```

3. Install the latest version of the AzureADPreview module by running the following:

```
PowerShellCopy  
Install-Module AzureADPreview
```

### Restore the deleted Microsoft 365 group

1. Connect to Azure AD by running the following:

```
PowerShellCopy  
Connect-AzureAD
```

When you're prompted, sign in using your admin account and password.

2. Run the following to display a list of all soft-deleted Microsoft 365 groups that are still within the 30-day retention period. Use the **-All \$True** parameter if you have a lot of groups.

```
PowerShellCopy  
Get-AzureADMSDeletedGroup
```

3. Find the group that you want to restore, and then make a note of the Id.
4. Run the following to restore the group, where [Id] is the group Id.

```
PowerShellCopy  
Restore-AzureADMSDeletedDirectoryObject -Id \[Id\]
```

5. Run the following to verify the group was successfully restored, where [Id] is the group Id.

```
PowerShellCopy  
Get-AzureADGroup -ObjectId \[Id\]
```

It can take up to 24 hours for the restore process to complete, after which the team and content associated with the team, including tabs and channels, is displayed in Teams.