

Microsoft Teams Best Practices

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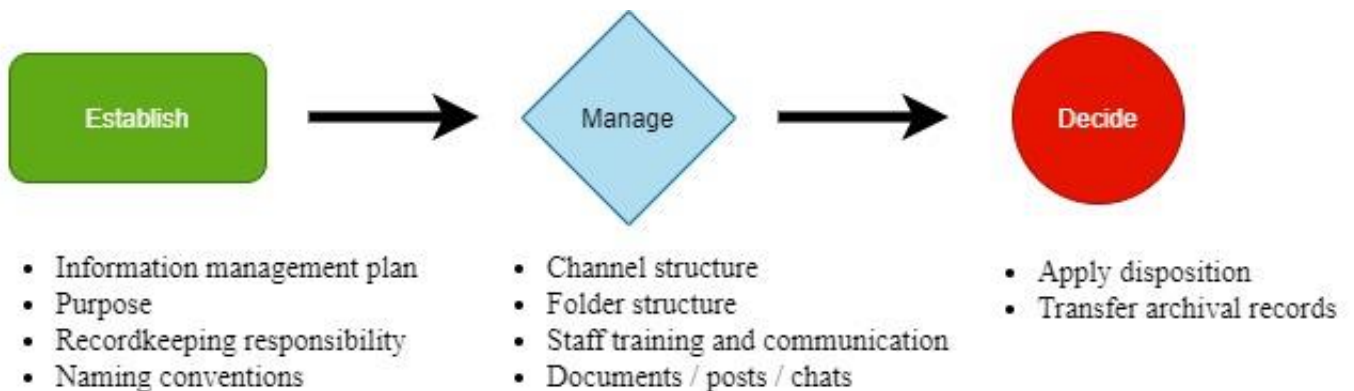
Introduction

MS Teams is a collaboration and communication tool available for use by departments and employees of UBC as part of Office 365. Messages exchanged through chats and posts, or files uploaded within channels may constitute University records. As such, they are subject to UBC's Records Management Policy and Retention and Disposition Schedules.

This document provides guidelines and strategies for collaboration in Teams while maintaining proper recordkeeping standards.

MS Teams Lifecycle

MS Teams is primarily a collaboration tool. The Teams site and the documents shared in that site exist within the following lifecycle:



Establishing a Teams Site

Key Points

- MS Teams sites should be established with **final disposition** of both the site and the content in mind. This includes **how long** information needs to be kept and **where** it will be stored. MS Teams is not typically considered official storage for university records.
- Create a **management plan** for your content within the Teams site and make sure this plan is communicated to your Teams membership.
- Facilitating **collaboration** should be the focus of a Teams' structure.
- All Teams members have permission to access and edit all content in the site. Teams administrators must be aware of who they are admitting into the site and the impact this has on their **information security**.

- Effective [naming conventions](#) will support collaborative workflows, improve discovery, and enhance recordkeeping.
- MS Teams does not create backups of files. There must be **long-term storage solutions** for archival documents and sensitive material. If you require backups of any content, contact UBC IT.

Initial Questions

- What is the **purpose** of this MS Teams site?
- How will we **structure** Channels?
- **Who** needs to be involved and does this conflict with regular access privileges?
- **How long** do we plan on using this site? For one project? Multiple projects? If a Teams' lifespan is indefinite, what is the plan for regular transfer of records?
- Who holds **primary responsibility** for managing records?
- Where is our **centralized unit repository** and how is it connected to the records created or uploaded in our Teams

Recommendations

- Document your information management plan.
 - Goal of the Teams site.
 - Teams membership.
 - Manage your Channels.
 - What are the [Channels](#) that will exist and their purpose? Be mindful of duplicating Channels
 - Identify any private Channels and their unique access (it is better not to have private Channels)
 - Establish a naming convention for every part of your Teams.
 - What is the criteria for using [chats](#)?
 - What will we do once the Teams site is no longer active?
 - What is our archiving plan for important institutional records?
- Instead of creating new Teams for every project or unit in your organization, consider creating Channels within a bigger Team.
- Establish effective naming conventions and [folder structures](#) for channels, documents, and message threads to ease file recovery. These should align with your regular recordkeeping practices.

Naming Conventions

Naming conventions are important for tracking progress and revision history of a document. Before starting a Teams, establish naming conventions to help track departments and/or projects, as well as final versions of documents. This will streamline the process of retaining final versions and discarding drafts.

Since MS Teams is primarily a collaborative working tool, it is important to have a way to track ongoing changes to documents with multiple editors.

Note

With versioning history in Teams and SharePoint, it is unnecessary to create and upload several copies of a file as it goes through its revision stages. However, we recommend you **update the file name** so that any individual working with or seeing the file will understand its status.

Please see the UBC [Electronic Records Naming Conventions](#) for more details.

Storage

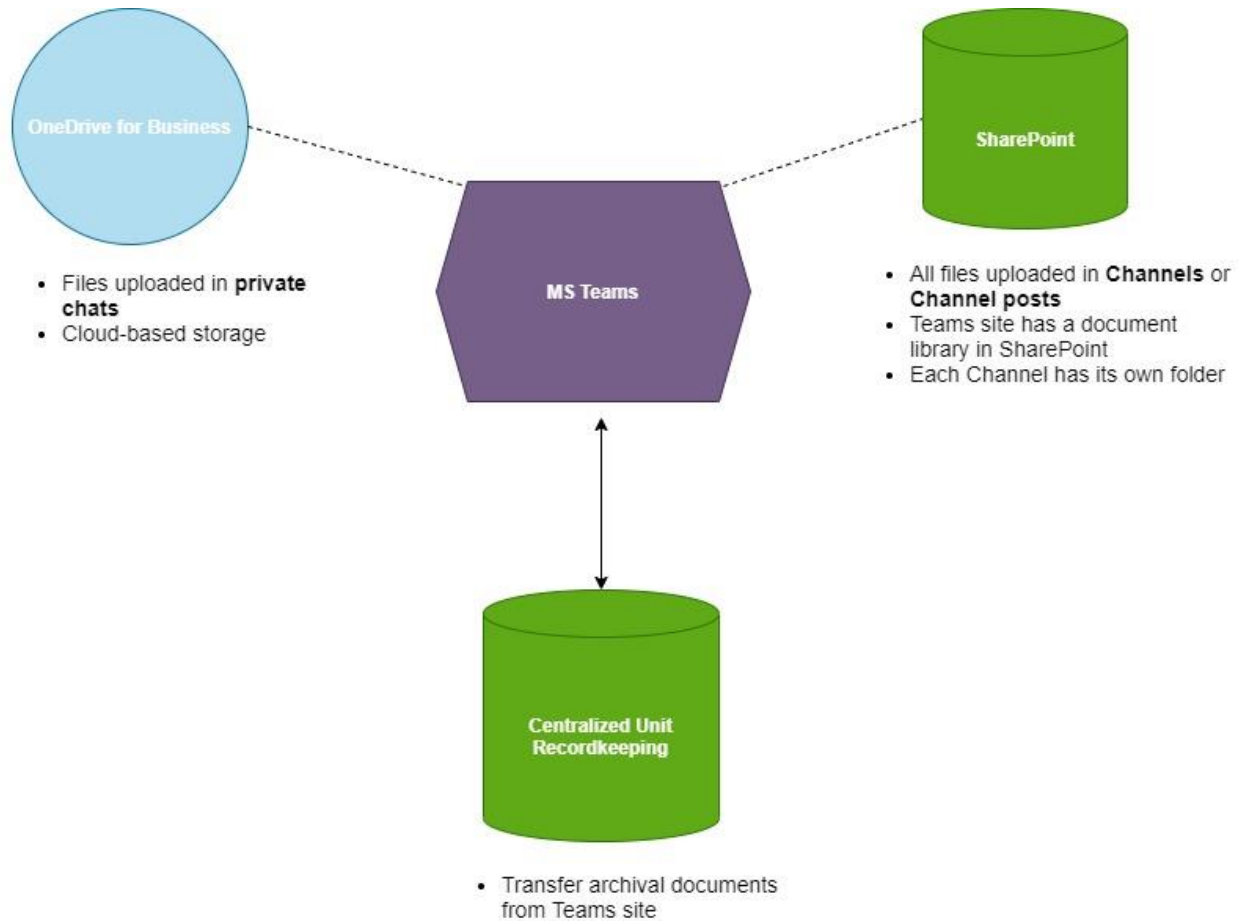
When you establish your Teams site, one of the most important things you need to decide is the location of your long-term storage.

At the creation of an MS Teams site, an associated SharePoint document library is created which acts as storage for all folders and documents uploaded through Teams. The structure in the SharePoint library will mirror that of your Teams site.

We strongly recommend transferring archival records or other important records to another central location when collaboration is complete. This will be beneficial for a variety of reasons, including considerations of storage space, discovery of materials within your unit, and as a secure backup in the case where a Teams site becomes inactive or is deleted.

Contact the Records Management Office or UBC IT for more information.

See the diagram below for a simplified look at the structure of MS Teams storage.



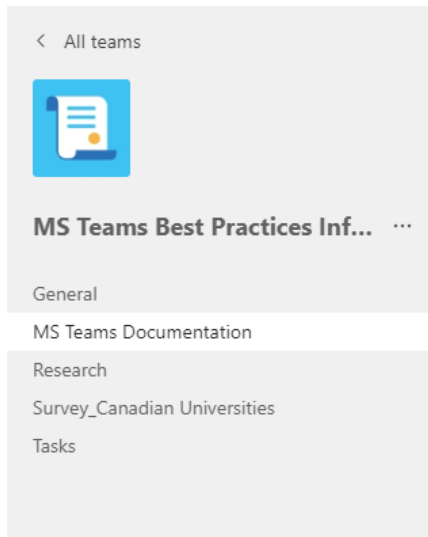
Need help?

Contact the Records Management Office at recordsmanagement@ubc.ca, and be sure to check out the information under the "Get Started" tab at the top left corner of your Teams site.

Teams Management

Channels

A [Channel](#) is MS Teams' primary method of communication and organization within a site. Channels are a good way to effectively classify, discuss, and analyze content created or uploaded in Teams. They should be used for better organization and workflow. Here are a few ways Channels are beneficial for information management:



- Channels which are thoughtfully named and are action-based will work as filters for communication and information.

- When handling **financial, third party, or personal information** that only select individuals can have access to, you can utilize a private channel to filter access and communication.

Note: Channels are otherwise open by default, and are meant for everyone who has access to the Teams to see and collaborate.

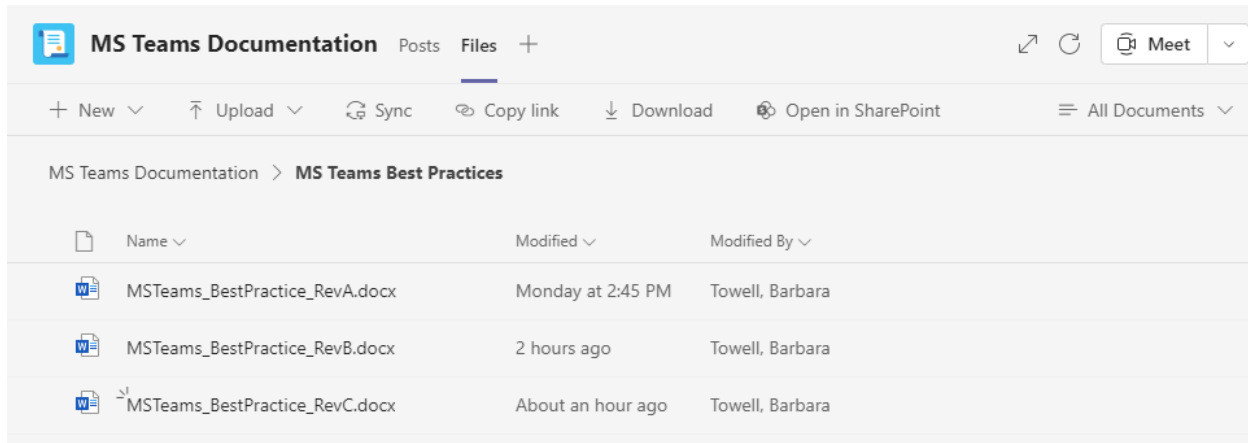
An example of a project-based Team, creating Channels based on activities.

Tips

- Structure Channels to encourage targeted, goal-based content.
- Include Channel descriptions to clarify their purpose.
- Educate your Teams on the proper use of Channels and Channel Posts.
- Secure your Channel when handling financial, third party, and personal information.
- Develop a procedure for closing Channels. When a Channel is deleted, the files within remain on SharePoint and must be transferred to their appropriate location.
- Do not change the names of your Channels. This will cause recovery issues with the file on the back end of Teams and SharePoint. If a name needs to be changed, create a new Channel and migrate all of the files over to the new one before deleting the original Channel.

Uploading Files / File Structure

Files can be uploaded to specific Channels or shared in Channel posts and private messages. Make sure you maintain a consistent filing system with clear criteria for when and where to upload documents for ease of use and access. It is important to structure your site beforehand to avoid confusion as to where information is located.



The screenshot shows the MS Teams interface for a channel named "MS Teams Documentation". The "Files" tab is selected. The file list is organized by task, with a naming convention to track document status. The files listed are:

Name	Modified	Modified By
MSTeams_BestPractice_RevA.docx	Monday at 2:45 PM	Towell, Barbara
MSTeams_BestPractice_RevB.docx	2 hours ago	Towell, Barbara
MSTeams_BestPractice_RevC.docx	About an hour ago	Towell, Barbara

Files organized by task, with naming convention to track document status.

Documents developed and finalized within Teams should be moved to an centralized records repository when they are complete, such as a shared drive or other central recordkeeping platform. Move only the final record, drafts can be destroyed as transitory once the final record is complete.

Tips

- Remember the purpose of your Teams, do not set up directories which are out of scope of your MS Teams site.
- Avoid duplicating documents; Teams exists for collaborative editing.
- Keep it simple. Avoid nested folder structures of more than two levels.

Note

Teams administrators should be familiar with how files are stored behind the MS Teams interface. Files uploaded within Channels (to the general Teams site) are stored in the associated SharePoint. Files shared within private chat messages, however, are stored in the individual's OneDrive account.

Each of these spaces can be accessed through Teams.

Contact UBC IT for any questions regarding file storage.

Chats / Private Messages

Chats should not be used for formal decision-making. If it is anticipated that a chat will involve work decisions, move to another approved method instead, or ensure that business decisions are properly captured and that all of the correct members of a team or channel have access to those conversations.

Be careful when sharing files within chats. As mentioned above, these are stored in the individual's OneDrive account, and therefore not accessible to all members of the Teams. When a Teams site closes, there should be a review of remaining chat activity in order to ensure that records are not lost in a personal OneDrive account.

Chats, or instant messages, are **transitory information**, and are destroyed 90 days from their creation. See our [Instant Messaging Schedule](#) for more details.

Channel Posts

A post is a way to have discussions with your Teams within specific Channels. This is a space for group conversations, meetings, and collaborative work. You can think of Posts as being similar to an email thread.

As was the case with private chats, we recommend avoiding formal decision-making through Channel posts. However, if business is conducted through a post, make sure to save the thread and retain it appropriately.

Tips

- **Title your posts.** This will make it easier to search through if you need to recover any information.
- Using [tags](#) is a way to target messages to specific groups of people within your team.

Tags

Tags are a tool to connect with a subset of people in a Teams. They are used in Channel posts to communicate with people based on certain attributes. Tags can be used in a variety of ways depending on your Teams' purpose. Examples of ways to categorize using tags include:

- Working groups or committees
- Organizational functions
- Project phases

Retention Policies / Retention Labels

Retention and disposition requirements will depend upon the purpose of your Teams site and the type of records you expect to produce. Always refer to the [UBC Records Retention Schedules](#) and see our [Guideline: Archival Records](#) for a better idea of what types of records you produce.

The UBC Records Management Office (RMO) is developing a group of standard retention policies which can be assigned to your Channels and files within MS Teams. Contact the RMO for information how these policies work, and for help with setting them up in your site (email records.management@ubc.ca).

Tips

- Get in the habit of doing routine disposition checks, perhaps once every week or once every two weeks, during which you delete files you no longer need and save those that you do need to keep in a secure location.
- Create Channels with a known conclusion in mind; this makes it easier to set aside a specific date for capturing and transferring records.

Staff Training and Communication

Share expectations and guidelines with Teams members as part of their invitation to join the Teams. Any new members should receive basic training on appropriate MS Teams practices.

What Staff Need to Know

- The overall outline of the Teams, i.e. how Channels are created and structured, as well as the structure of document folders within the Channels.
- What naming conventions to use.

- Which Channels and folders to upload files
- Which situations to communicate via the chat function
- What constitutes a university record
- Who is responsible for transferring records from the Teams site to a central location

Closing a Team

Initial Questions

- What is our plan for records when we close the Teams site?
- What is our established **centralized location** for transferring records?
- **When** will records be moved from Teams to a central location?
- What is our **responsibility** in keeping records?
- Are we able to locate and transfer the relevant information and materials from the Teams site to an official repository?

Deleting a Team and Channels

When a Teams or a Channel is no longer active, we recommend transferring all records and deleting the Teams or Channel once their purpose has been served.

When a Channel is deleted, any files shared within are still located on the SharePoint site connected to the Teams. Make sure to go and delete all documents from that location which are not meant to be retained as records.

A deleted Channel can be restored for a limited time by Teams owners if necessary.

Inactive Teams

Sites that have been inactive for 2 years will be subject to review and possible destruction. Teams administrators will be notified prior to destruction of the site, so that any remaining documents or conversations can be reviewed and potentially transferred to long-term storage. The UBC Records Management Office will be available to help with records review.

Transferring Records Out of MS Teams

Relevant records must be transferred prior to the deletion of a Teams site. Examples of records to transfer include:

- Contracts
- Committee minutes
- Final reports
- Project deliverables (final versions)
- Policies
- Records documenting commitments
- Important events

Further Information

For any questions or clarification, please contact the Records Management Office at records.management@ubc.ca, or visit our website at [Policies, Guidelines, Best Practices and Standards | University Records Management Office \(ubc.ca\)](#)

Visit the UBC “Get Started” Training Portal located in the top left corner of your Teams site for guides on how to use MS Teams.

Contact UBC IT Service Center at 604-822-2008 for any technical issues.

Glossary

Channel	Channels are what make up a Teams site. They are used to organize conversations, file sharing, and meetings pertaining to specific topics, departments, activities, or projects.
Chat	A chat is a private conversation that is separate from the overall Teams environment. This is comparable to instant messaging.
Naming convention	A way to format names of documents in a consistent and efficient manner to facilitate workflow.
Post	A post is a way to have discussions with your Teams within specific Channels. This is a space for group conversations, meetings, and collaborative work.
Tag	A way to connect with a subset of people in a Teams site. Can be assigned to categorize people based on specific attributes.
Transitory information	Records or data of temporary usefulness needed only for a limited time in order to complete a routine action or prepare a final record. This includes chats, posts, and draft documents.