

U of T Terms of Use – Microsoft Office 365 Teams

INTRODUCTION

Teams is a chat-based collaborative workspace that brings together people, content and conversations. Office applications such as Word, Excel, PowerPoint, OneNote, and Skype for Business are connected to Teams. Information Technology Services (ITS) administers the Microsoft Office 365 services at the University of Toronto. This document provides the governance structure on the use of the Team service. Included here are the types of Team sites that can be created, roles, University policies and guidelines, and the effective use of Team to achieve user goals.

DESCRIPTION & PURPOSE

Purpose

The purpose of this document is to provide the Terms of Use for Office 365 Teams (herein referred to as “Teams”.), outlining the roles and responsibilities, policies and processes that guide and govern the management and operation of Teams.

Teams is a cloud-based workplace chat and collaboration service available through Microsoft Office 365. Teams is a relatively new service that is regularly updated with additional functionality. As such, this is a “living” document that will be reviewed and/or updated regularly by ITS, in conjunction with the functionality updates issued by Microsoft.

Scope

The scope of this document covers content generated while using all features within Teams, including but not limited to:

- Teams (this is different than SharePoint Online)
- OneNote
- Chat
- Group Email
- Calendar

Audience

This document applies to any U of T member who uses Teams, including faculty, staff, graduates, undergraduates, affiliates and IT consultants. This Terms of Use document also applies to external users (e.g. consultants and partners) that may have authorized access.

Note: Teams is a collaborative workspace where members have access to all the documents and conversations that are contained by the Team. Before adopting Teams for a specific use, consider whether the data require special protections that may be more suited to SharePoint Online or other more restrictive spaces with respect to access.

USE OF TEAMS AT THE UNIVERSITY OF TORONTO

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Recommendation to the Office 365 Advisory and Implementation Group (AIWG)
Governance of Teams & Groups: Office 365 Sub-Working Group
Contact Email for ITS O365 Teams Groups: e70077e8.utoronto.onmicrosoft.com@amer.teams.ms

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Teams is designed for dynamic interactions and collaboration between members. Conversations and content sharing can be formal or informal. Teams is not intended to be a permanent repository for content. When a Team is created, in most cases, an end-date will be assigned. Team Owners will be notified when the Team will expire. Owners can submit a request to renew their Team. For less temporal storage, Sharepoint Online or another departmental or Library storage facility may be appropriate.

Team Owners are expected to review their Team on a periodic basis to determine whether a Team should be archived or deleted. Owners should archive content and retain the files as per U of T's applicable retention practices.

TYPES OF TEAMS

Microsoft 365 for Education provides four types of Teams. Two types are being released at this time. These are described below.

Departmental Teams

Private Teams for central storage, collaboration spaces and workflow opportunities. One Site Collection may be created per University Division. A primary Teams Administrator and a secondary administrator will be designated within each Division. Requests to create additional Teams within the Division will be referred to the primary administrator for that Division.

Azure Active Directory security groups will govern the initial permissions for these Sites Teams, and these Sites Teams will use the /sites URL path.

Project Teams

These sites are created for those participating in the pilot phase at U of T. Team Project Teams can be used for collaborative projects or committees across departments.

TEAMS ACCESS

The Teams icon is available in the Office 365 waffle however, users cannot create or join teams. Users can access Teams by invitation only.

- Requests for new Departmental, Project or Academic sites will be processed in September 2018. Any questions regarding the creation of MS Teams can be sent to need.team@utoronto.ca. Once a Team is created the url name is permanent and cannot be changed.
- A Team is given 10GB default space
- A Team should have two designated Owners

ELIGIBILITY

Faculty and Staff with a U of T Office 365 account may request that a Team to be set up. Participation in a Team may be extended to anyone in the University community, including appropriate External users where there is an academic or administrative reason for inclusion.

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Note: The ability for external users to participate in a Team is dependent on the technology available. Currently (June 2018), Team participation is possible for individuals with an Office 365 account. Future product iterations suggest that Team membership may be extended beyond the current limitation.

TEAM APPROVAL

Team requests follow an approval process. Requestors will be notified within seven University business days of the request regarding Team creation.

Considerations into the Team approval process include but are not limited to:

- jurisdiction of the request
- overlap and/or conflict with similar technologies currently supported and in use at U of T
- duplicate requests
- appropriate use of the request with the Team (e.g., Teaching Dossiers, financial information)

TEAM ADMINISTRATION

Each Team will have a named primary Administrator as well as a secondary named Administrator. Administrators will be responsible for in any mandatory training and/or reading any supplementary training materials provided by ITS or designate. The primary administrator will be responsible for:

1. Assigning user permissions to the Team
2. Removing user permissions from the Team when access is no longer needed or warranted
3. Ensuring information stored in the Team conforms to the University's policies identified in this document

ROLES & RESPONSIBILITIES

Team Owners are responsible for:

- Reading, understanding and adhering to the Terms of Use (this document)
- Ensuring their Team(s) always have two active owners. If a current owner leaves the University, either current owner or a team member must ensure that a new Team owner has been appointed if the Team is still required. If the Team does not have at least one active owner the Team will be deleted
- Closing a Team or Channels within a Team when its continued operation is no longer necessary

Team Members are responsible for:

- Reading, understanding and adhering to the Terms of Use (this document)
- Using Teams responsibly and adding content in a manner that is consistent with respectful online etiquette

UNIVERSITY POLICIES

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Content posted in Teams must abide by all relevant University guidelines and policies. All users are required to adhere to the following University of Toronto policies and guidelines:

- [Appropriate Use of Information and Communication Technology](#)
- [FIPPA – General and Administrative Access and Privacy Practices](#)
- [Copyright and Fair Dealing Guidelines](#)
- [Social Media Polices and Guidelines: Cloud Based Technologies](#)
- [Policy on Information Security and the Protection of Digital Assets](#)
- [Policy on Information Technology](#)
- [University of Toronto File Plan](#)

ONGOING MONITORING AND TEAM DE-PROVISIONING

ITS will review all Teams in Office 365 on an ongoing basis for regular activity. A Team will be considered dormant after 12 months of user inactivity. After this time, ITS will contact the primary administrator to determine if the Team is still required.

A Team will be deleted under the following scenarios:

1. By request from the corresponding department head
2. Violation of the Terms of Use – ITS reserves the right to block, restrict or remove any sites found in violation
3. After 12 months of inactivity, which is defined by the content not being accessed (read or modified) or no chat activity after 12 months*

*Before a Team is deleted due to inactivity, the following process will occur:

After 9 months of inactivity, the Team owner(s) will be sent an initial email detailing this policy along with a warning that the Team will be automatically removed in three months' time. A specific removal date will be indicated in the email. Team owners can keep the Team by responding to the email.

The Team will be removed on the date specified in the email, and an email will be sent to the Team owner(s).

DATA RETENTION & REMOVAL

Regularly reviewing data and information stored on Teams is vital to ensuring that storage space is used optimally, and helps the University avoid risks associated with unmaintained content.

Team owners should review the data and information stored on Teams to determine if it can be considered a '[University Record](#)', in which case it should be managed in accordance with the '[University of Toronto Archives and Records Management Services](#)' (UTARMS) guidelines and practices. UTARMS provides further guidance and tools for determining records retention and disposition. Purging data and

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information within Teams will help to reduce redundant, inactive, or transitory content. All University offices are responsible for disposing of inactive records in accordance with [University policy](#).

NAMING POLICIES & CONVENTIONS

With the broad applicability and adoption of Teams for communications and collaboration, a lot of Teams will be created for use at U of T. In order to ensure that Team names are not duplicated, and that they are appropriate for use, a nomenclature for creating Team names will be followed. There will also be "reserved" words and terms that are carefully controlled to ensure that institution-centric roles and entities are not applied to ineligible groups. For example, "Provost" may not be used by any Team outside of the Provost's office.

Teams must first be identified by divisional and departmental organisational unit indicators. The remainder of the name will provide a short descriptor of the Team.

There are 3 attributes to consider when provisioning the underlying Office 365 group for a Team:

- DisplayName – the name visible in the Teams Interface
- PrimarySMTPAddress – the email address referenced when communicating with the Team via email. Only visible to end users when not using an Exchange email client - Outlook/OWA
- Alias – a short form for referencing the group. Only visible as a portion of the SharePoint site URL for the Team

Our naming

Naming Convention: Team names will follow the following nomenclature

[Level 1] [Level 2] [Level 3]

Level 1: Division/Faculty/College/School/Administrative

Level 2: Department/Institute/Centre/Program

Level 3: Team Program/Purpose/Topic

Policy =

[Division/Faculty/College/School/Administrative] [Department/Institute/Centre/Program] [Team Program/Purpose/Topic]

Example:

Level 1 = Human Resources and Equity (HRE)

Level 2 = Integrated HR

Level 3 = Policy Development and Interpretation

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Using the policy formula above, the result gives us the following name:

HRE-IntegratedHR-PolicyDevelopmentInterpretation

QUOTA

New sites are given 10 GB of space. Team Owners will receive a notification by email when the site is nearing its limit.

BACKUPS & RESTORES

In cases where a Team has been deleted and needs to be recovered, the only recourse is for ITS to submit a request to Microsoft. After September 2018, requests to recover a Team can be sent need.team@utoronto.ca. Request for Team reactivation must be submitted within 25 days of deletion. Team administrators should understand that such requests may incur costs, for which the administrator (or their department) are fully responsible.

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THIRD-PARTY APP REQUESTS

While in the process of implementing Office 365's core services, resources will be focused on implementing these services. There is interest in adding some third-party apps to the overall service, we will be limited in our ability to investigate the security and compatibility of these apps at this time.

SUPPORT

ITS is responsible for providing support for the Office 365 core services.

For all intents and purposes in this document:

- ITS refers to the service owner and administrator of Teams. ITS staff are subject to the same Terms of Use.
- Team Owner refers to users who have elevated privileges for their Team. Team owners can add and remove members, edit or delete a Team, add channels, remove threads, and change the Team picture.
- Team Member refers to users who have been granted access to a Team.

ITS is responsible for:

- Configuring and securing the system.

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- Developing and maintaining any processes associated with the maintenance, monitoring security and provisioning of the system.
- Developing, updating and publishing the governance for Teams, which includes this Terms of Use document.
- Enable/Disabling features.
- Reviewing requests for installing third party apps, and determining whether these may be installed.
- Removing third-party add-ins if they are found to adversely affect the Office 365 tenant.
- Providing, delivering or developing training and/or training material for the standard use of Teams.

ITS is NOT responsible for:

- Supporting, designing, developing and maintaining solutions with Teams.
- Managing, creating, editing, deleting, monitoring or maintaining content within Teams, including Chat.
- Managing and delegating end-user permissions setting within Teams.
- Enrolling Team members on behalf of Site Team Owners. All (de-) enrollments should be managed by the Team Owners.

REFERENCES:

With special thanks and acknowledgement to:

University of Guelph for the use of their Terms.

<https://www.uoguelph.ca/ccs/services/office365/teams/termsofuse>

University of Baltimore: http://www.ubalt.edu/about-ub/offices-and-services/technology-services/about-ots/policies/sites_policy.cfm