

Empowering Employees with Microsoft Teams and SharePoint



Session Purpose



Show how Teams was structured for bookkeeper collaboration



Explain how shared folders created consistency



Demonstrate why SharePoint landing pages were added



Share lessons learned

The Problem



- ❑ Document management inefficiencies
 - Information lived in many places
- ❑ Printed manuals → outdated guidance
 - Bookkeeper binder (27+ copies)
 - Principal binder (27+ copies)
- ❑ Multiple versions of forms → wrong/bad info
- ❑ Repetitive questions → lost time



Microsoft Teams

- The front-end collaboration tool where staff chat, meet, and work day-to-day

Microsoft SharePoint

- The back-end platform that stores and organizes the files and information used in Teams



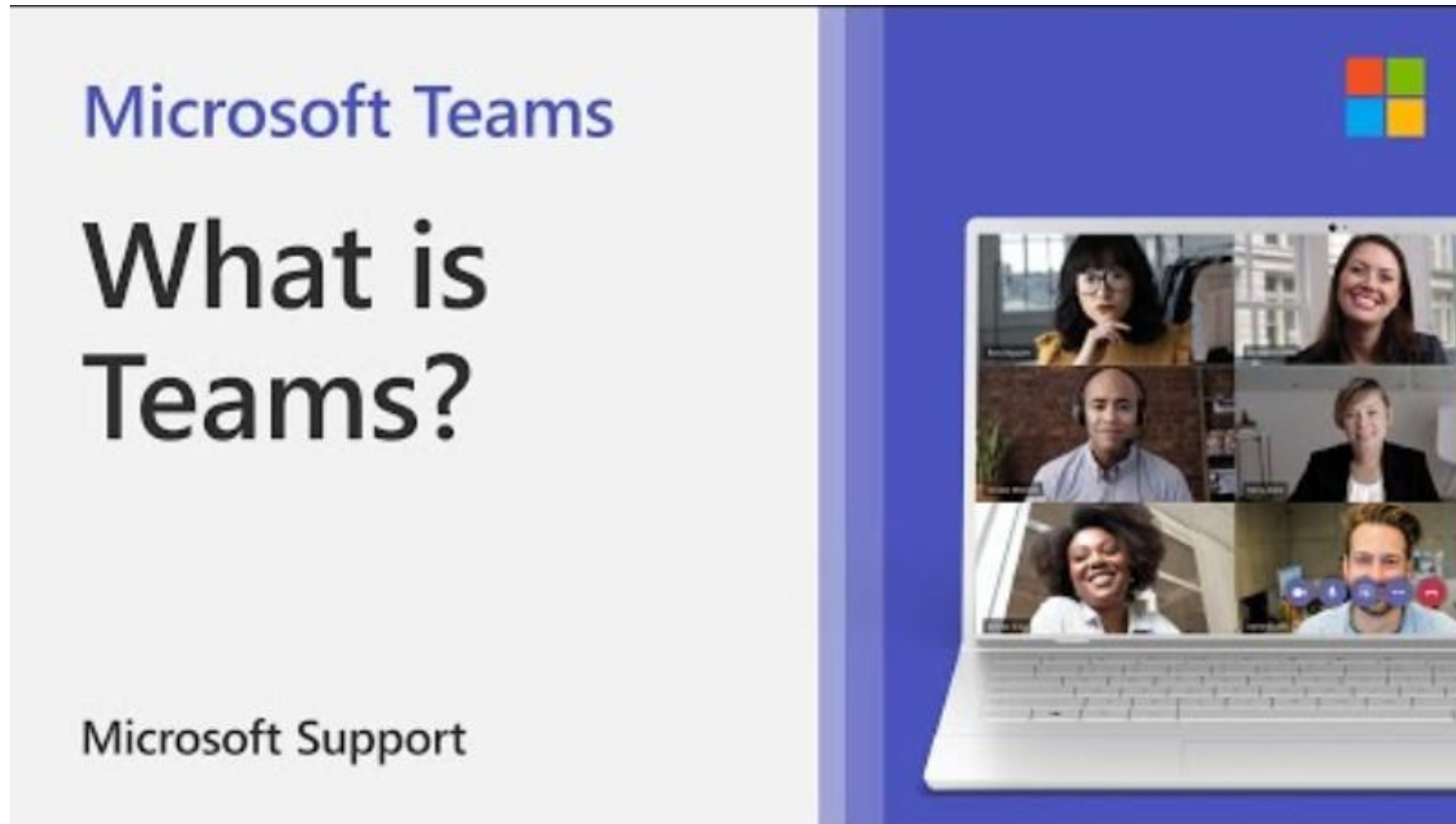
The Solution

- Online storage and access
- One authoritative location for forms
- Permissions aligned to roles
- Simple and sustainable structure



Create the Structure with Microsoft Teams

Teams Overview



Microsoft Teams

What is Teams?

Microsoft Support

The image shows a presentation slide for Microsoft Teams. The slide has a light blue background on the left and a dark blue background on the right. The text 'Microsoft Teams' is in a blue font, 'What is Teams?' is in a large black font, and 'Microsoft Support' is in a smaller black font. On the right side, there is a screenshot of a Microsoft Teams meeting. The meeting window shows a grid of six participants: a woman with glasses, a woman with long dark hair, a man with a headset, a woman with short brown hair, a woman with curly hair, and a man with a headset. The Microsoft logo is visible in the top right corner of the meeting window. The meeting is displayed on a laptop screen.

Teams Layout

The screenshot displays the Microsoft Teams interface. On the left, a sidebar contains navigation icons for Activity, Teams, Assignments, Calendar, and Apps. The main area shows the 'All teams' view with a 'Finance' team selected. A 'Channels List' is highlighted in a red box, listing 'General' and several other channels (A01 Admin, A01 Finance, A01 Risk, E01 Back Creek, E02 Bonsack, E03 Burlington, E04 Cave Spring, E05 Clearbrook, E06 Fort Lewis). The 'General' channel is active, showing a message from Susan Peterson at 7:37 PM that has been deleted. A 'Post in channel' button is visible at the bottom. On the right, a 'Channel Info' panel is open, showing the channel name 'Finance', a list of members (RS, CB, SH, SP, RB), and options for 'Find in channel', 'Manage channel', and 'Channel notifications'. A notification at the bottom of the panel states 'Unknown user was removed from the team.'

Channel Strategy



❑ General Channel

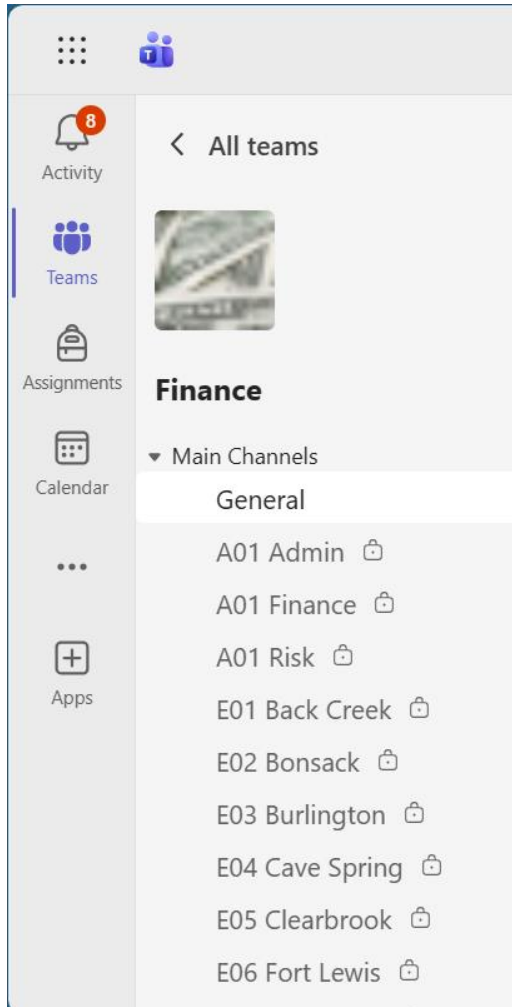
- Created by default and cannot be deleted
- Intended for organization wide information
- All members have access
- Cannot be made private or shared

❑ Additional Channels

- Aligned by functional work or organization
- Channels drive security and access
- New Channels automatically populate a folder for document storage



Roanoke County Schools Channels



Teams Channel	Teams Members	Teams Maintained By	SharePoint Folder	SharePoint Webpage
General	All Employees	Active Directory		Staff Resources Event Calendar
Admin	All Admin	Finance Admin		Memos & Presentations
Finance	Finance Team	Finance Admin	Finance Files	Finance Links
Risk	Risk Team	Risk Admin	Risk Files	
Schools	Finance Team Principal Bookkeeper	Finance Admin	Bank Recs Pcard Stmts Audit Files	

Folder Structure Philosophy



- Standardized across channels (schools)
- Consistent structure year to year
- Limited folder depth
- Note – limited characters... watch lengthy names of folders or files
- Limited number of folders to control order
- Clear separation of current and archived materials

Working with Files and Folders



The screenshot displays the Microsoft Teams interface for a channel named "E01 Back Creek". The left sidebar shows the "Main Channels" list with "E01 Back Creek" highlighted. The top navigation bar includes a search bar and a "Files" tab. The main content area shows a list of files and folders. A red box highlights the "New" button, which has opened a dropdown menu with options: Folder, Word document, Excel workbook, PowerPoint presentation, OneNote notebook, Visio drawing, Clipchamp video, Link, Edit New menu, and Add Template. Another red box highlights the "Upload" button, which has opened a dropdown menu with options: Files, Folder, and Template. A third red box highlights the "All Documents" view selector, which has opened a dropdown menu with options: List, Compact list, Autofit height, Tiles, All Documents (checked), Create new view, Save view, Save view as..., Reset view, Edit current view, Rename view, Format current view, and Add or remove fields. A red arrow points from the "E01 Back Creek" channel name in the sidebar to the "New" button in the file list.



Roanoke County Schools Folder Model

Finance Channel >

A01 Finance

Name	
Accounting	★
Audit	★
Banking	★
Budget	★
Debt	★
General	★
Payroll	★
Policies	★
Purchasing	★
Reports	★
Retirement Plans	★
Revenue	★
Technology	★
Training	★

School Channel >

E01 Back Creek

Name	
_archive	
2021	
2022	
2023	
2024	
2025	
2026	
st-12-Tax	

E01 Back Creek > 2026

Name	
Allotments	
Audit	
Bank Reconciliations	
Wells Fargo P-Cards	

Where Files Live



- Files uploaded in Teams channels
- Automatically stored in SharePoint
- Access controlled by Team membership
- Files stored once and shared many times
- Built in version control

Communicate with Microsoft SharePoint

SharePoint

RCPS Staff Resources Central Office Instruction Get Help

Finance

+ New Page details Preview Analytics

All Staff Resources

- Accounting and Budget
- Budget and Financial Reports
- Grants (Under Construction)
- Payroll and HR
- PD and Travel
- Field Trips
- Collecting Money
- Fundraising and Smart Snacks
- Ticket Taking
- Purchasing
- Insurance, Student Accidents, and Property Damage
- Worker's Compensation

Upcoming Due Dates

+ Add event

- DEC 30 JAN 6 Wells Fargo Reconciling Period for December Tue, Dec 30, All day
- DEC 31 Payday Wed, Dec 31, All day

Restricted Pages

- Finance Team Only
- Finance Memos
- Finance Meetings
- Principal Training

Links for Help

- IT Helpdesk
- D365 Help for Tech Issues
- Warehouse Work Request

Disclaimer: This page is maintained by the Finance Department to provide common resources to all employees. We try our best to update all links and documents, however, if you find something does not work or is outdated, please reach out to Susan Peterson.

SharePoint Overview



What is
SharePoint?



Why SharePoint?



- ❑ Document management and organization platform
- ❑ Central location for storing and structuring information
- ❑ Searchable and easy to maintain
- ❑ Integrated with Microsoft Teams
- ❑ Teams works well for collaboration
- ❑ Not ideal for reference or guidance
- ❑ Staff needed a clear, read-only source
- ❑ Reduced confusion and repeated questions

Role of SharePoint



- Serves as the reference hub
- Provides consistent, stable guidance
- Organizes information by topic
- Reduces time spent searching

Design Approach



- ❑ Simple and visually clean
- ❑ Minimal clicks to key resources
- ❑ Plain language
- ❑ Built for easy internal maintenance

Dashboard

- Upcoming Due Dates
- Pages Open & Restricted
- Links for Help

Pages

- Policies
- Admin Regs
- Forms
- Guidance
- Training



Finance

+ New Page details Preview Analytics

All Staff Resources



Accounting and Budget



Budget and Financial Reports



Grants (Under Construction)



Payroll and HR



PD and Travel



Field Trips

Upcoming Due Dates

+ Add event

DEC 30
JAN 6

Wells Fargo Reconciling Period for D
Tue, Dec 30, All day

DEC
31

Payday
Wed, Dec 31, All day

Restricted Pages



Finance Team Only



Finance Memos



Finance Meetings

PD and Travel

Policies and Procedures

4.11 Expense Reimbursements

4.11AR Expense Reimbursements


5.27AR Custodial Personnel


5.47 Professional Staff Development

9.19cAR Use of School Board-Owned Vehicles



Vehicle Information

 Transportation Approved Drivers


 DMV Authorization Form


 HR.2-334-26-Mileage Jan 2026 *NEW*

Professional Development

The PD forms have been removed from this page because the process has changed. Leave requests should now be submitted through Laserfiche using the designated request form. This change applies only to the request and approval process for professional leave.

 [HR Staff Development Link](#)


 [HR Laserfiche Link](#)


 [Coach Mileage Payment Process](#)


****Updated Mileage Rate****

The federal mileage reimbursement rate effective January 1, 2026 is 72.5¢ per mile. Reimbursement forms on this webpage have been updated to reflect the new rate. Please ensure you use the current version when submitting your request.

In-Town Mileage Reimbursement

 [HR.2-309-26-B35-Mileage Jan 2026 *NEW*](#)

 [HR.2-309-26-B35-Mileage Jan 2026 *NEW*](#)

 HR.2-309-26-B35-Mileage Jan 2026 *NEW*

Reminder about Employee Reimbursements


All employee reimbursements must still be completed using the forms below, printed, and submitted with the required supporting documentation.


Employees must submit requests within 30 days of the date of travel or purchase. Requests submitted after 30 days may not be eligible for reimbursement.

Reminder About Meals

Per policy 4.11AR, please print and attach the applicable GSA per diem rate to your expense report.

Out-of-Town Reimbursement

 [HR.2-310-26 Travel Reimbursement Jan 2026 *NEW*](#)

 [HR.2-310-26 Travel Reimbursement Jan 2026 *NEW*](#)

 HR.2-310-26 Travel Reimbursement Jan 2026 *NEW*

Teams and SharePoint Work Together



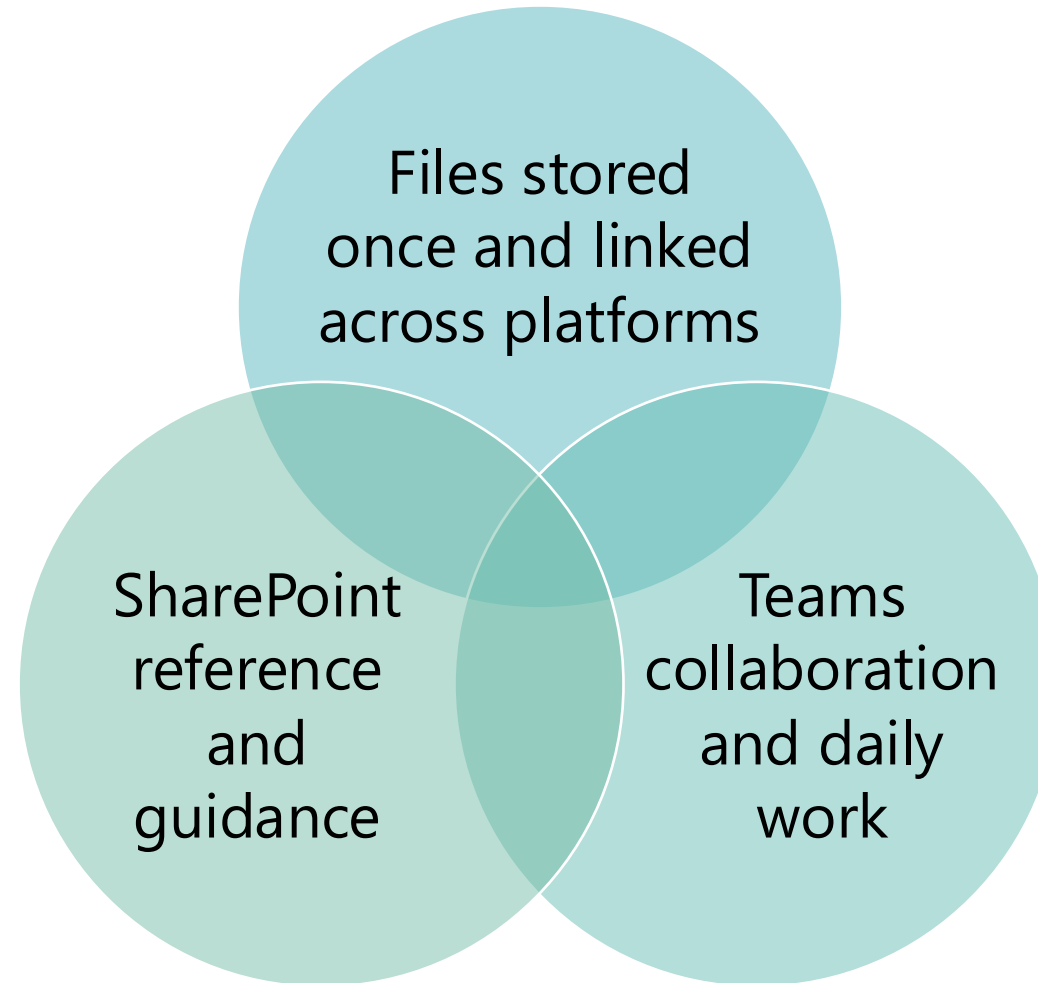
SharePoint Content

- Policies and procedures
- Forms and standard documents
- Deadlines and reminders
- Training resources
- Key contacts and links

Teams Content

- Draft documents
- Working files or spreadsheets
- School-specific documents
- Editable content

How Teams and SharePoint Work Together



Lessons Learned



Simple structure is better

Over organizing creates confusion

Naming conventions matter

Maintenance must be planned

Start earlier

Learn back-end sooner

Train other departments

What I Would Do Differently



Scalability and Sustainability



Supports staff turnover

Minimal annual maintenance

Adapts to new initiatives

Expandable beyond Finance

Key Takeaways for Finance Leaders

- ❑ Structure drives communication
- ❑ Consistency builds trust
- ❑ Finance can lead enterprise organization





Susan Peterson
Director of Finance
Roanoke County Public Schools
speterson@rcps.us