FINAL REPORT- ONLINE DOCUMENTATION SYSTEM

A Comprehensive report on building a fully automated online documentation system

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COMPANY NAME - ADAPTED ADVANTAGE
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Contents

Introduction

This

The guide provides detailed instructions for implementing a collaborative, Medicaid-compliant on-line documentation system using Microsoft Teams, SharePoint, and integrated tools. Designed for a team transitioning from paper-based methods, the system ensures secure, efficient, and user-friendly document management. It addresses collaborative access, compliance, usability, security, and integrates goal documents for three branches, with support for template updates and automated workflows.

Set Up Microsoft Teams and SharePoint for Document Collaboration

Create a Team and Channels in Microsoft Teams

- **Purpose**: Organize project communication and document access.
- **Steps**:
  1. Open Microsoft Teams and select **Teams** > **Create team**.
  2. Choose **From scratch**, name the team (e.g., "Project Documentation"), and set to **Private**.
  3. Create channels for document types (e.g., "Monthly Goals", "Progress Reports") or monthly reviews (e.g., "January 2025").
  4. Add team members during setup or later under **Manage team**.
- **Reference**: Create Teams and Channels

Set Up a Document Library in SharePoint

- **Purpose**: Mimic paper-based organization for intuitive file storage.
- **Steps**:
  1. In Teams, go to the channels **Files** tab and click **Open in SharePoint**.
  2. Create folders for each branch (e.g., "Branch A", "Branch B") and subfolders for document types (e.g., "Goals").
  3. Upload blank templates or configure automation (see Section 2.3).
- **Reference**: Create Document Libraries

Enable Version Control in SharePoint

- **Purpose**: Track changes and prevent overwriting.
- **Details**: Version control maintains edit history but does not prevent real-time overwrites. Limit to 10 concurrent editors.
- **Steps**:
  1. Go to the document library, click **Settings** > **Library settings**.
  2. Select **Versioning settings** and enable **Create major versions**.

3. View history via the documents **More options** > **Version history**.

- **Reference**: Enable Version History

Set Up Document Co-Authoring in Microsoft Word

- **Purpose**: Enable real-time collaboration.
- **Steps**:
  1. Open a document in Teams or SharePoint via **Files**.
  2. Click **Edit in Teams** or **Open in Desktop App**.
  3. Users with **Can Edit** permissions can join; their initials appear at the top.
  4. Changes are highlighted in real-time with visible cursors.
  5. Use **Comments** for suggestions.
- **Best Practices**: Assign sections, limit to 10 editors, check **Info** > **Version History**.
- **Reference**: Real-Time Collaboration

Create Medicaid-Compliant Document Templates

Design Medicaid-Compliant Templates in Microsoft Word

- **Purpose**: Match original formatting and support goal integration.
- **Steps**:
  1. Create templates in Word with sections for participant goals (one per branch).
  2. Add fields for goals, weekly steps, participant details, and signatures.
  3. Save in SharePoint under branch folders.
  4. Update templates as needed (e.g., address changes, span date updates).
- **Reference**: Create a Template

Add E-Signature Integration

- **Purpose**: Ensure legally binding signatures.
- **Status**: Completed (Adobe Sign/DocuSign integrated).
- **Steps**:
  1. Open document in Teams/OneDrive, select **Send for Signature**.
  2. Add fields and recipients, send, and track in **Progress** tab.
  3. Signed documents save to SharePoint/OneDrive.
- **Reference**: Adobe Sign Integration

Automate Monthly Document Creation

- **Purpose**: Streamline monthly document setup.
- **Steps**:
  1. Use Power Automate to create a monthly flow.
  2. Set a trigger for the first of each month.
  3. Copy template to a new document (e.g., “Goals_January_2025.docx”).
  4. Alternatively, copy templates manually in SharePoint.
- **Reference**: Create a Flow

Add Team Members and Manage Permissions

- **Note**: Managed by Katy.
- **Steps**:
  1. In Teams, go to **Manage team** > **Add member**.
  2. Enter names/emails, assign roles (**Owner** or **Member**).
  3. Set permissions under **Settings** > **Member permissions**.
  4. In SharePoint, share documents with **Can Edit** or **Can View**.

Enhance Security and Confidentiality

1.2 Enable Multi-Factor Authentication (MFA)

- **Purpose**: Restrict access to authorized users.
- **Steps**:
  1. In Microsoft 365 admin center, go to **Users** > **Active users**.
  2. Select users, click **Manage multifactor authentication**, and enable MFA.
- **Reference**: Set Up MFA

1.3 Additional Security Measures

- **Access Restrictions**: Limit folder/document access in SharePoint.
- **Data Encryption**: Microsoft 365 encrypts data at rest and in transit.
- **Audit Logs**: Enable auditing in Microsoft 365 Compliance Center.

Integrate Goal Documents and Web Forms

1.4 Integrate Goal Documents

- **Purpose**: Support three branch-specific goal documents.
- **Steps**:
  1. Upload goal documents to SharePoint under branch folders.
  2. Use as templates for monthly participant goals and weekly steps.
  3. Create new documents monthly (manually or via Power Automate).

1.5 Create Web Forms for Monthly Goals

- **Purpose**: Simplify goal tracking.
- **Steps**:
  1. In Microsoft Forms, create a "Monthly Goals" form.
  2. Add fields for participant details, goals, and steps.
  3. Share link via Teams; responses save to SharePoint Excel.
  4. Use Power Automate to populate Word templates.
- **Reference**: Create a Form

2 Test the System and Roll It Out

2.1 Run a Pilot Test

- **Purpose**: Ensure functionality.
- **Steps**:
  1. Test with 3-5 users across branches.
  2. Verify document access, co-authoring, forms, signatures, and MFA.

2.2 Collect Feedback and Make Adjustments

- **Steps**:
  1. Use Microsoft Forms for feedback.
  2. Adjust interfaces, permissions, or training based on input.

2.3 Train All Team Members

- **Steps**:
  1. Schedule training on Teams/SharePoint usage.
  2. Provide a quick-reference PDF in SharePoint.
  3. Offer support via a "Help Desk" channel.

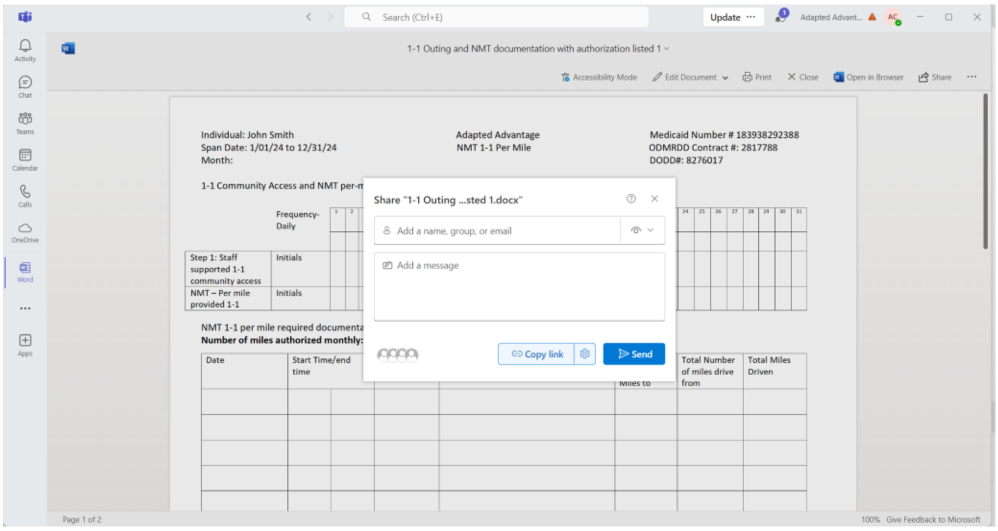
3 Outcome

The system delivers a **fully automated online documentation system** that:

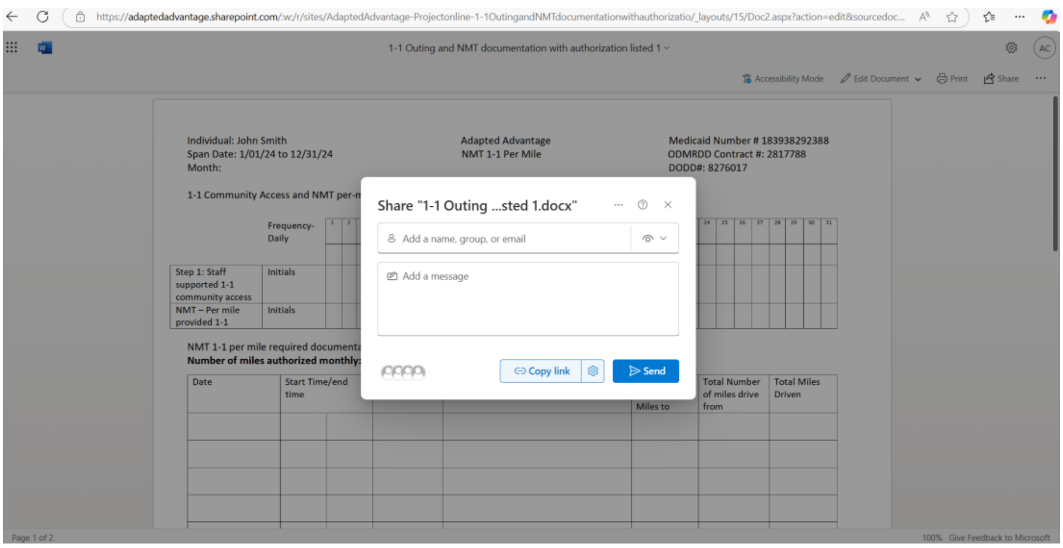
- Enables collaborative access with real-time co-authoring.
- Ensures Medicaid compliance via templates and e-signatures.
- Prioritizes usability with intuitive interfaces and forms.
- Maintains security with MFA and encryption.
- Supports flexibility for template updates and automation.

Below Images are for future references for the System Guide-

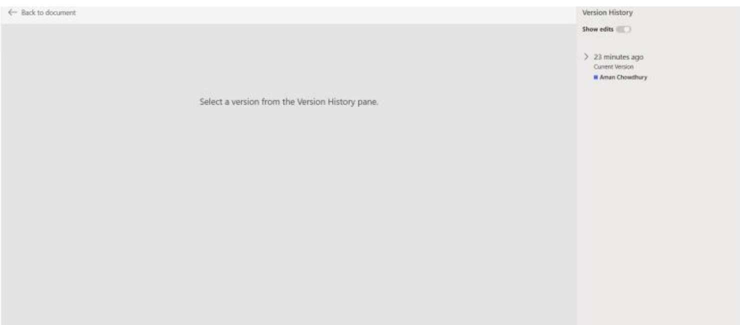
When you open the document in teams-



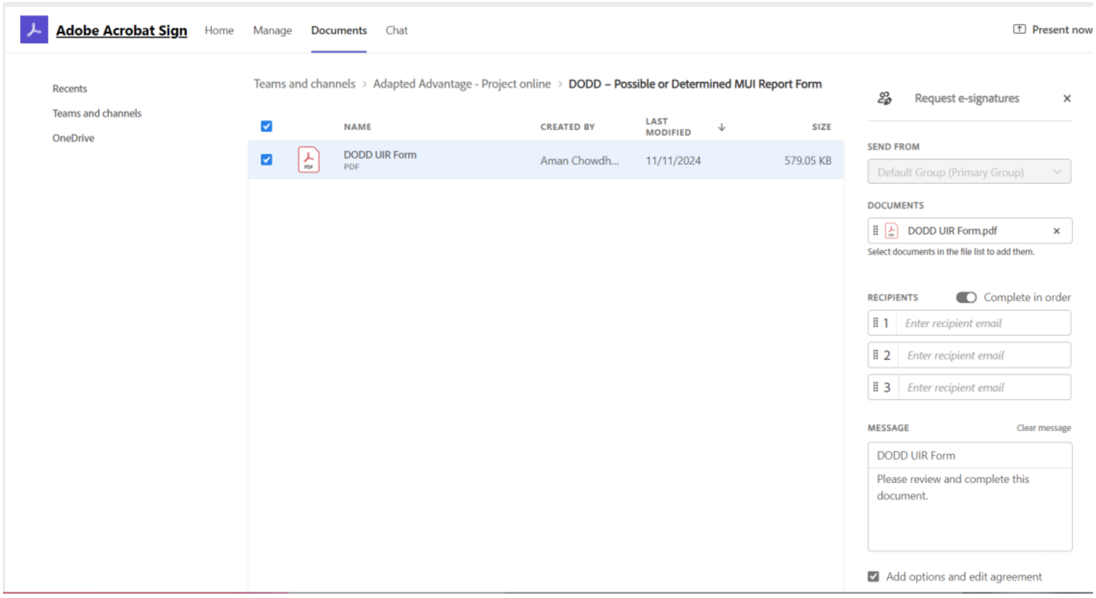
When you open the documents in share point –



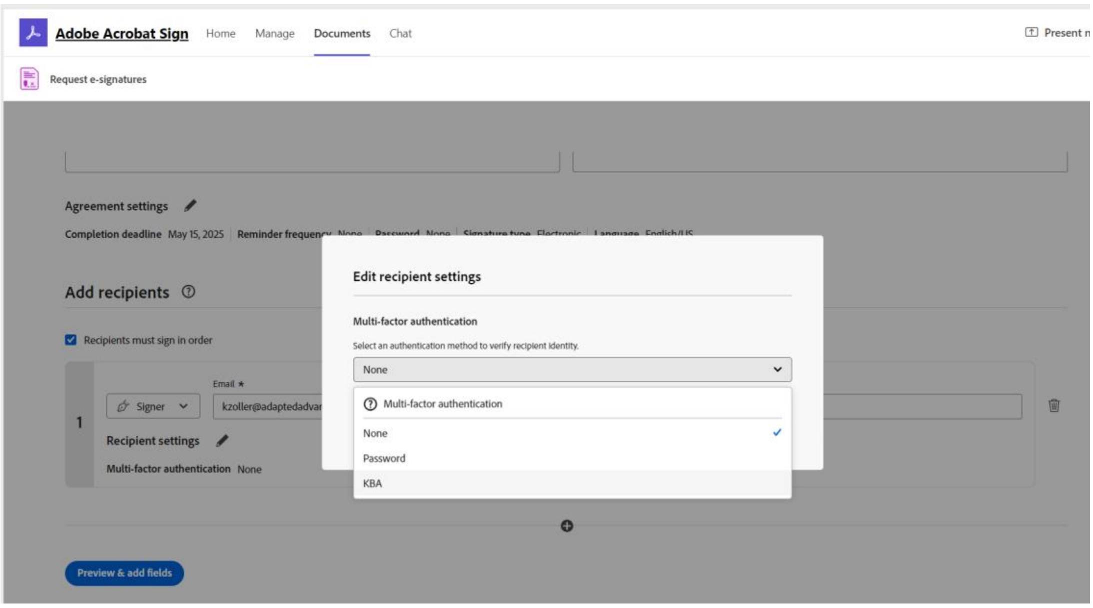
Select **Info** > **Version History** to see previous versions, allowing users to review and restore earlier versions if necessary.

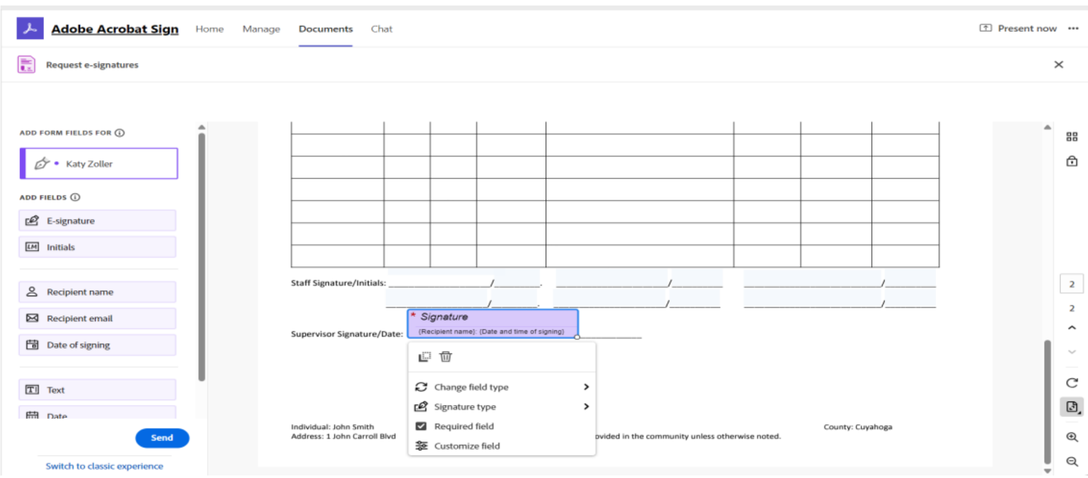


Requesting e-sign –

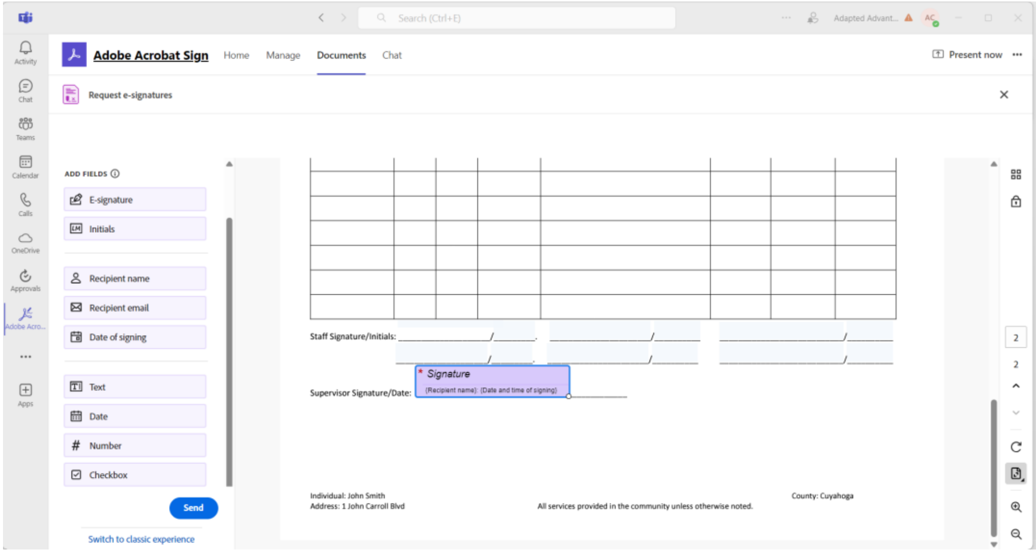


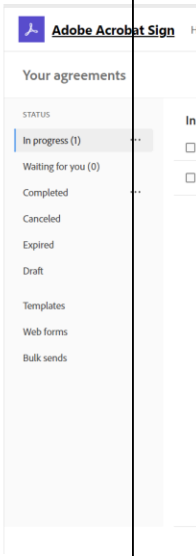
Setting up a multi-factor Authentication for signature –

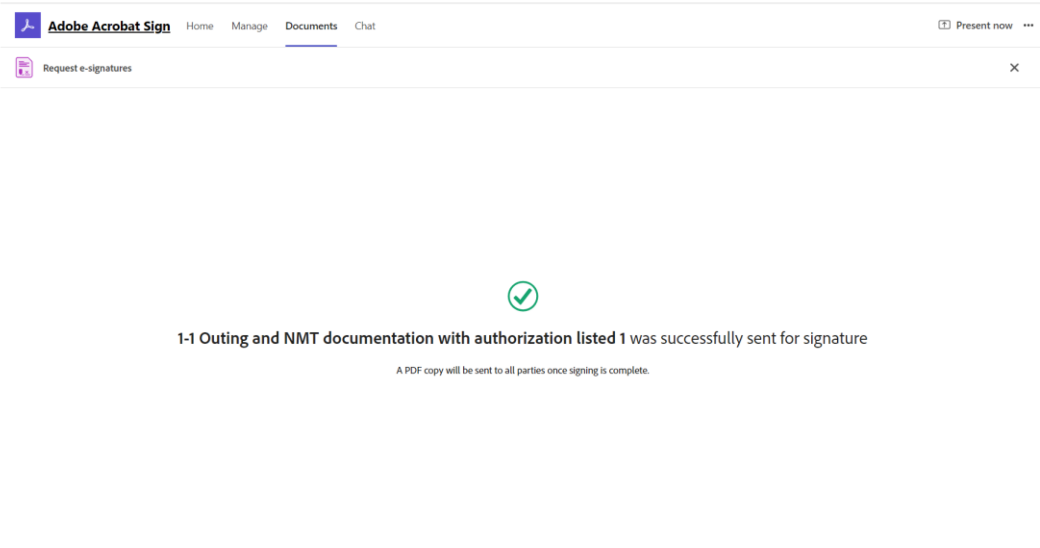




You can Add all the fields as required by you and send for the signature –

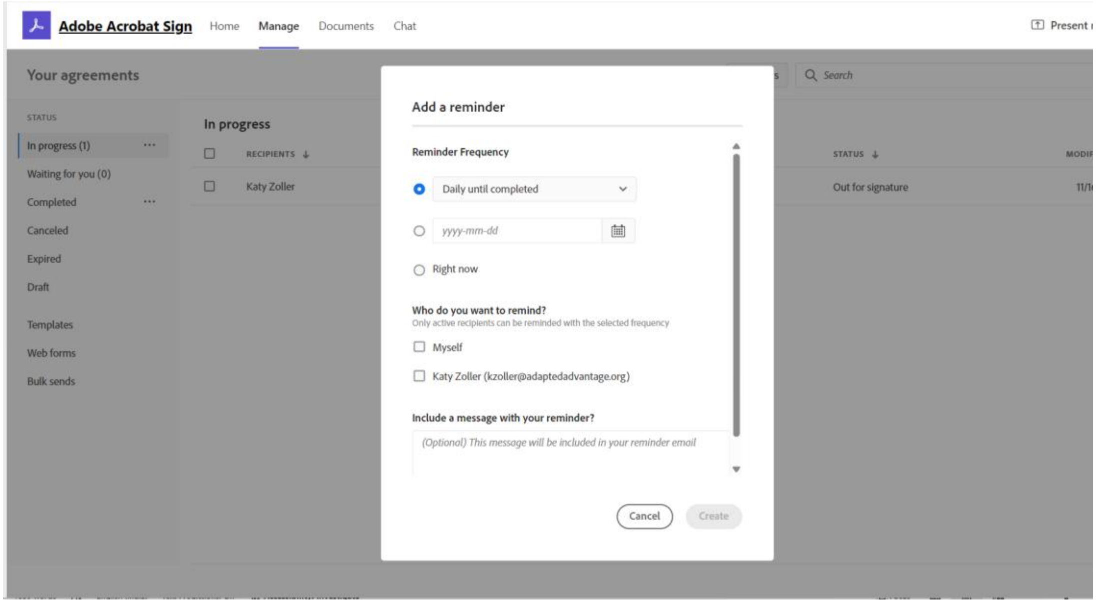




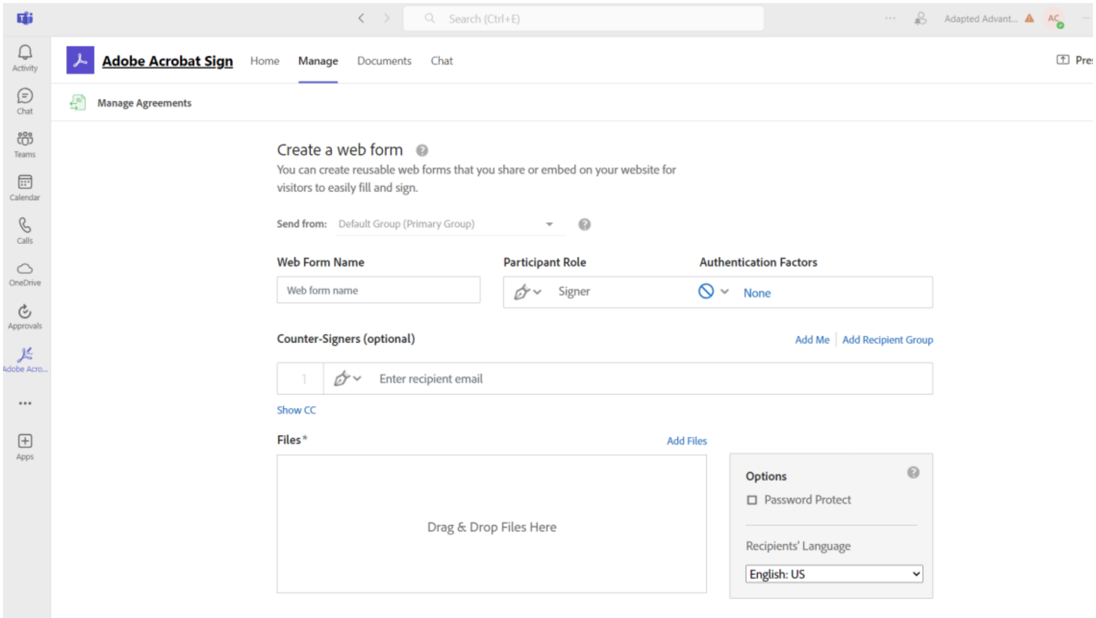


Once you send the approval for signature it will appear in the progress tab. Where you can add a remainder, notes.

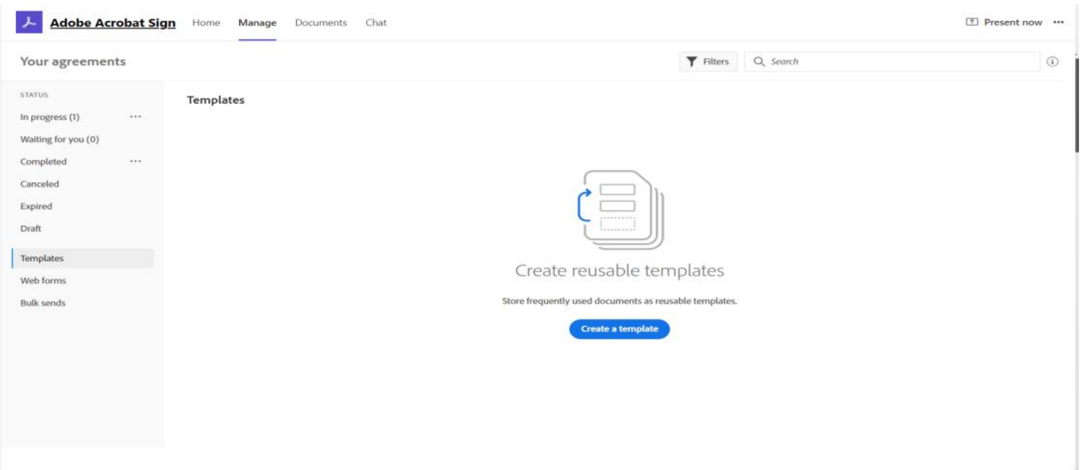
Adding a reminder



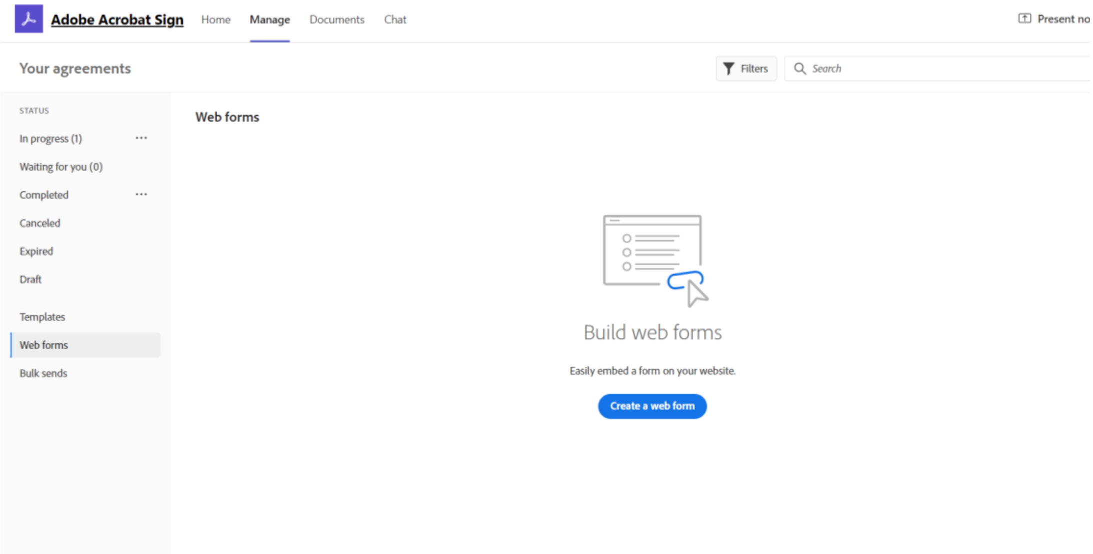
We can create a web form –



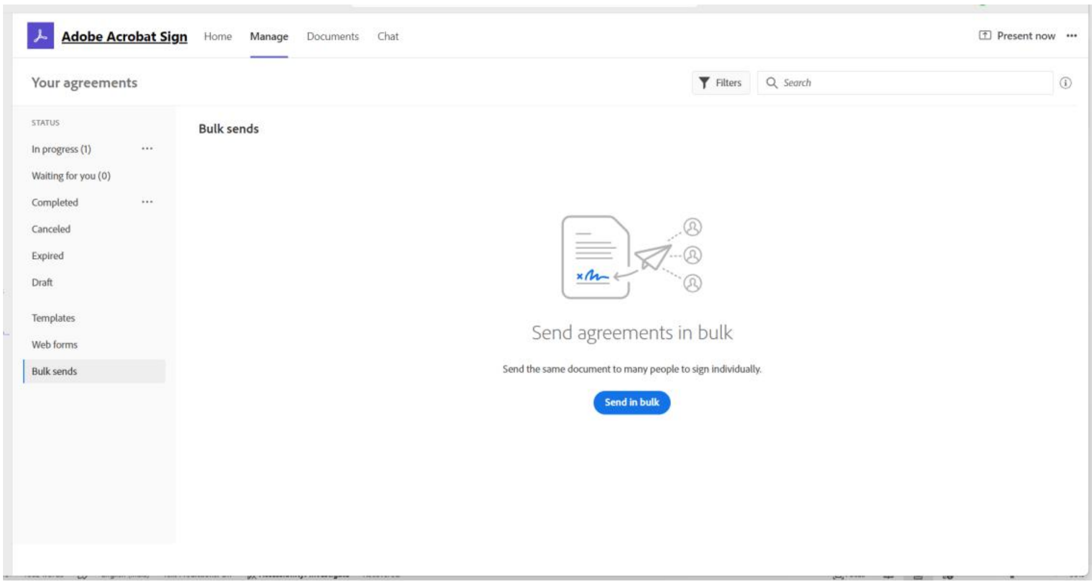
Create a reusable template –



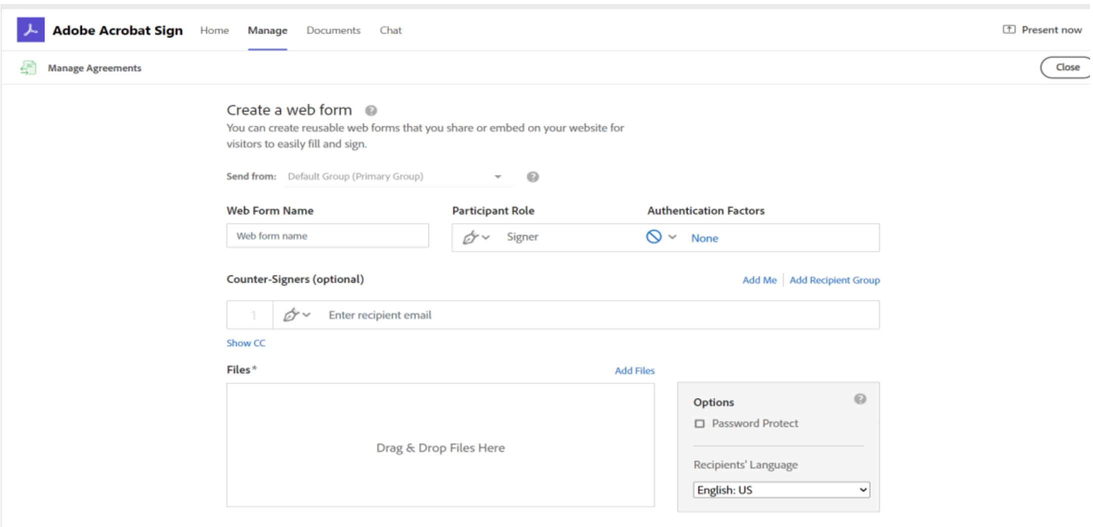
Create reusable forms and store them on a website: -



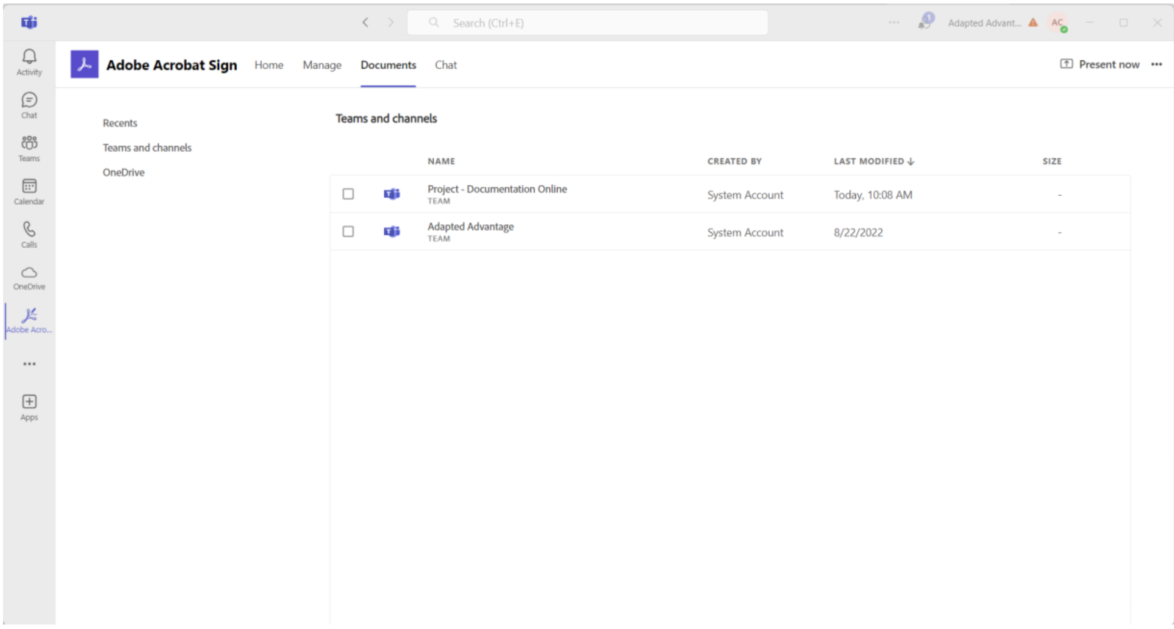
Send the same document to sign to as many people as possible to sign individually –



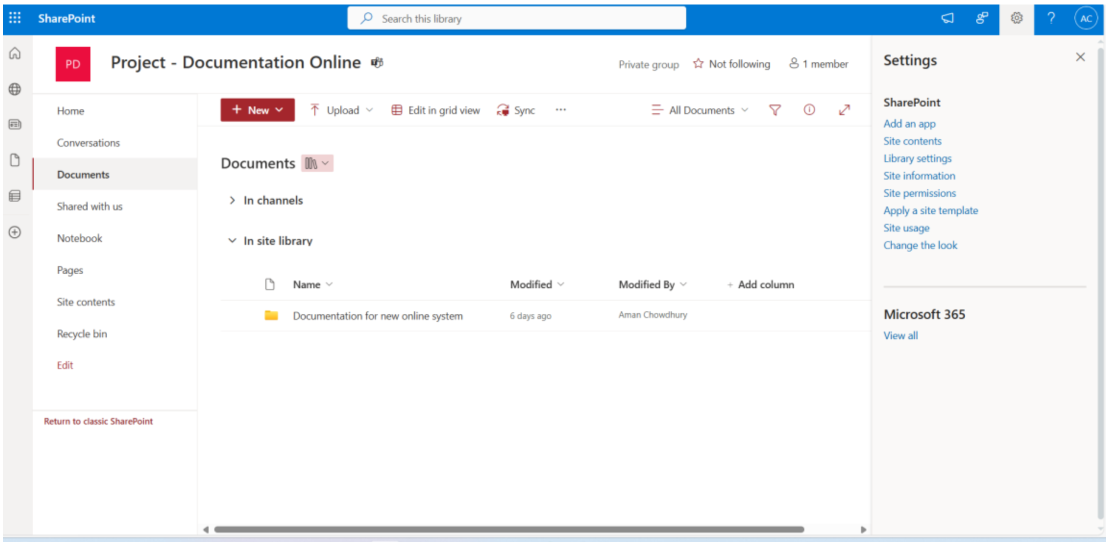
Creating a web form for monthly goals-



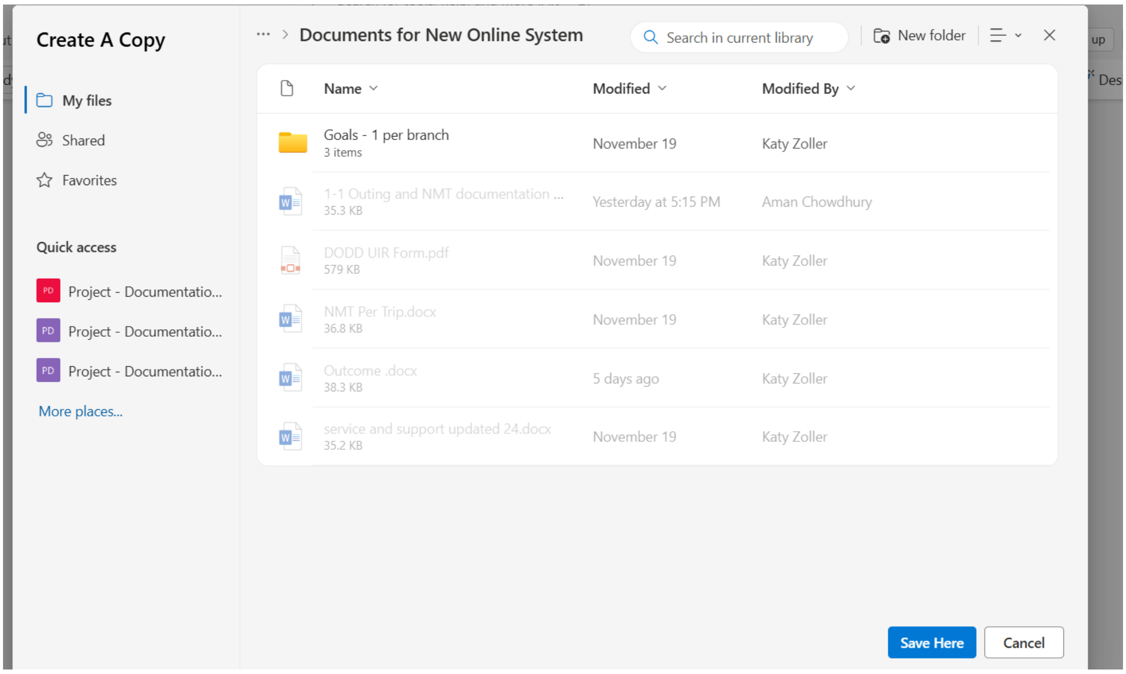
Now when you want to send the documents for signature you can choose the document from one drive or you can choose it from teams and channels.

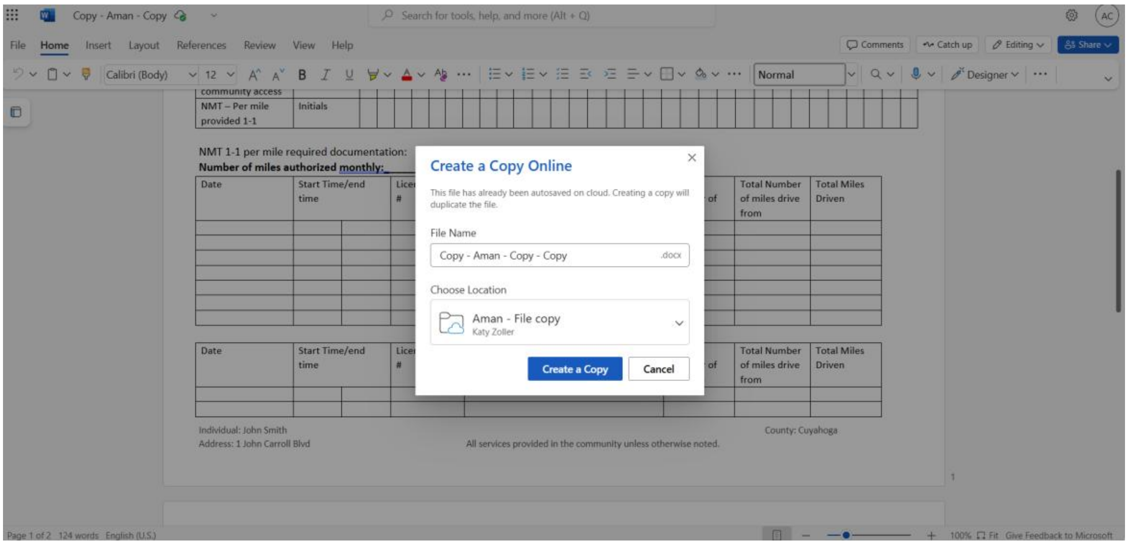


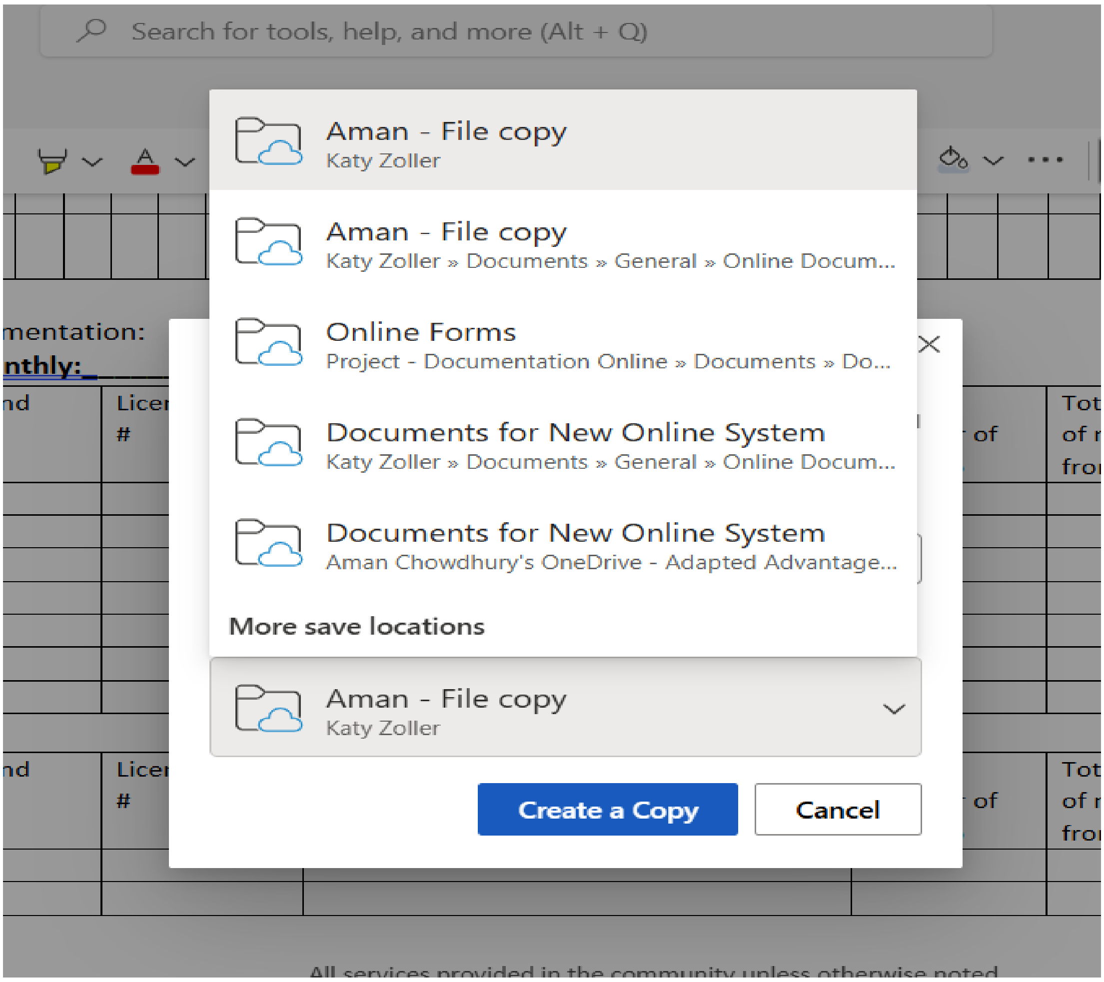
Version History – Each time you edit a new version will be created.



Each time a employee edits the form or fills the form they can download the form and save it in a folder which can be uploaded in OneDrive. Or you can create a copy online in which you are working on.







Search for tools, help, and more (Alt + Q)
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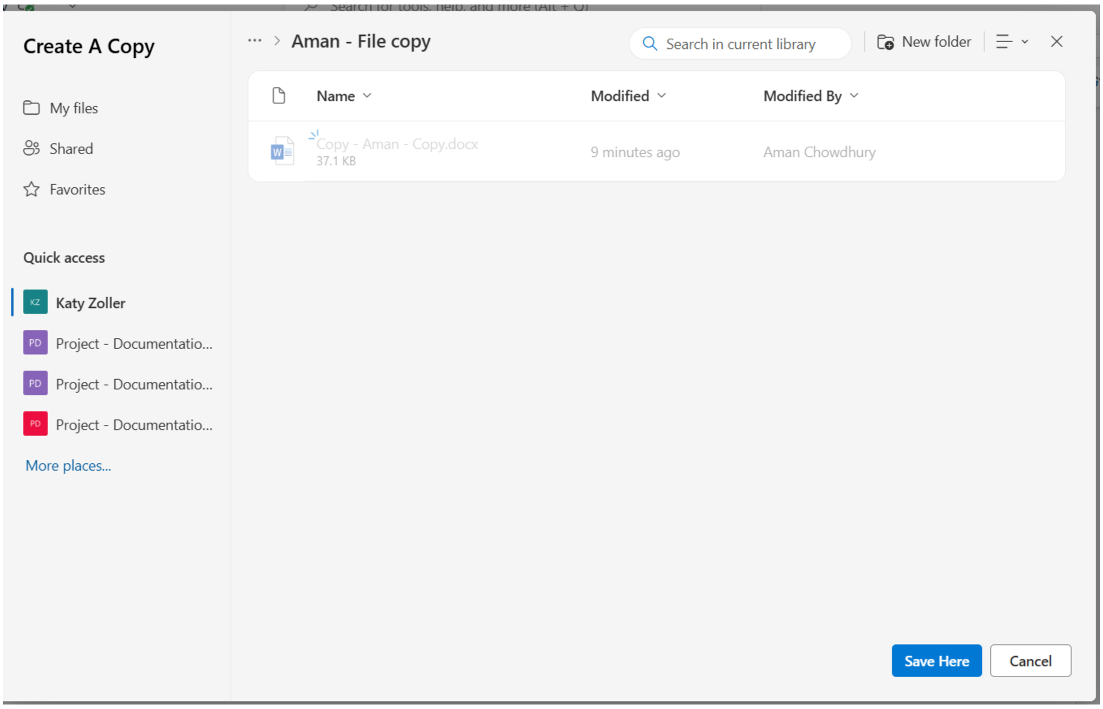

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Katy Zoller
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Project - Documentatio...
Project - Documentatio...
More places...
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New folder
Name
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37.1 KB
9 minutes ago
Aman Chowdhury
Save Here
Cancel

Once you start editing the file you can save the file – Files -> Create a copy -> create a copy online -> choose the file name -> move save location and create a folder in one drive and then save them. Once you save the file you can continue working on that file next time you restart again. You can check the history of that file who has previously worked on it. And once the work is completed you can send the file for the signature.