

Mockup: Made-Up-Organization Transfer of Information (TOI) Training Process

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Overview

This Made-Up-Organization (MUO) document outlines the Transfer of Information (TOI) process to present and upload a TOI to the MUO SharePoint website.

Timeslots

TOI sessions are a recurring weekly event hosted as a webinar on **Thursdays at 12 pm PST**.

Sessions are scheduled for one hour in total, with two slots available per session (two 30-minute slots).

Timeslots must be requested and approved in advance. Refer to the step-by-step process below for more information.

Step-by-Step Process

This section outlines the overall process for TOI's from requesting a slot to uploading your presentation material to the MUO SharePoint website.

Step 1 – Request a TOI Slot

To begin the process of hosting a TOI session, you will first need to request a TOI [timeslot](#). This slot space has been sent out to the entirety of MUO as a recurring event.

Check the TOI Schedule on the TOI SharePoint page [[link to SharePoint page](#)] to see if there are any available TOI sessions slots on the date of your choice. Be sure that you give at *least* one-week lead time notice for your TOI session.

To request a TOI slot, you need to fill out the Thursday TOI Session Request Form [[link to form](#)]. On this form, you will be asked for the following information:

- **Requester** – Name of the person submitting the request (for contact purposes)
- **Presenter(s)** – List all the presenters that will be presenting during your TOI timeslot
- **TOI Session Topic** – Provide the topic that your TOI timeslot will be on
- **Requested Date** – Select the date that you would like to host your TOI session on.

Step 2 – TOI Slot Updated with Session Information

After you have submitted the request form for your TOI slot, the TOI scheduler will add the information provided in the previous step on the TOI calendar.

Additionally, your TOI session information will be placed on the TOI SharePoint page. This allows users to view the schedule in advance.

Step 3 – Create and Upload Presentation Material

Prior to your TOI session, you need to create any presentation material that you will need during your TOI. Presentation material includes PowerPoint slides or any documents that you will be displaying.

Once your presentation material has been created, you need to upload this material to the TOI Documentation page of the TOI SharePoint site [link to SharePoint page]. It is recommended that you wait to upload the final version of your presentation to the SharePoint site to prevent having to re-upload multiple versions.

Utilize the steps below in order to upload information onto the TOI Documentation SharePoint page *if you are uploading one file*:

1. Navigate to the **TOI Presentation Materials** folder on the **TOI Documentation page** [link to SharePoint Page].
2. Click **Upload > Files**.
3. Navigate to the location where you saved the file on your computer, click on the file, and then click **Upload**. Your file will appear in the folder.
 - **Note:** Save your document to the folder with the following: “Name of your TOI Session Topic”-“Name of Uploader”- “Date of the TOI Session” (Example: This Is My TOI-Elizabeth Cabrera-10.29.2024). If you need to rename the file, click Show Actions (three dots) next to your file name and click the **Rename** option.
4. Click **Show Actions** (three dots) next to your file name
5. Click **Copy Link**. Send this link to the TOI scheduler so they can add this link to your TOI timeslot information.

Utilize the steps below to upload information onto the TOI Documentation SharePoint page *if you are uploading multiple files*:

1. Navigate to the “TOI Presentation Materials” folder on the TOI Documentation page [link to SharePoint Page].
2. Click **New > Folder** to create a folder for your TOI session. After creating your folder (see the note below on the naming system of your file), the folder will appear on the list.
 - **Note:** The name of your folder needs to be the “Name of your TOI Session Topic: Date of the TOI Session” ((Example: This Is My TOI: 10-29-2024).
3. Open the folder you created.
4. Click **Upload > Files**.
5. Navigate to the location where you saved the files on your computer, click on the files, and then click **Upload**. Your files will appear in the folder.
6. Repeat steps 4-5 as needed for any additional files that need to be uploaded.
 - **Note:** You can also Shift-Click all the files you want to upload if they are all located in the same folder on your computer.
7. Navigate back to the **TOI Presentation Materials** folder.
8. Click **Show Actions** (three dots) next to the folder you created.
9. Click **Copy Link**. Send this link to the TOI scheduler so they can add this link to your TOI timeslot information.

Step 4 – Perform TOI

At the time of your TOI session, the presenters and hosts will join the TOI session event **5 minutes** prior to the start of the session. This will allow presenters and hosts time to solidify any final details before other team members join.

Step 5 – Recording Information

The TOI Schedule will be updated by the TOI scheduler with the information from the TOI session for all to view once the recording has been processed.

The following information will be added for each TOI (two separate entries if two TOI's are scheduled for one session):

- Presenter(s)
- TOI Topic
- Date of TOI session
- Recording Link
- Recording Password
- Link to Presentation Material

Responsibilities per Role

This section outlines the various roles in the TOI process, and the responsibilities of everyone involved.

Note that several of these roles can overlap with one another and therefore can be done by a single individual.

TOI Role	Description	Responsibilities
Requester	Requests the TOI session	<ul style="list-style-type: none">• Submits the request for the TOI session through the Thursday TOI Request Form• Provides the required information to the Scheduler
Scheduler / Host	Schedules and hosts the TOI session (webinar)	<ul style="list-style-type: none">• Sets up the TOI webinar• Updates information provided by the Requester for the designated TOI session• Hosts the TOI session• Starts the recording at the beginning of the session• Updates the TOI SharePoint site with all information from Step 5
Presenter	Presents the information for the TOI	<ul style="list-style-type: none">• Presents the information for the TOI• Creates and uploads the presentation material to the TOI Documentation SharePoint site
Audience	Attends the TOI	<ul style="list-style-type: none">• Participates in the TOI session

		<ul style="list-style-type: none">• Ask questions as appropriate
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