

MS Teams
Usage guidelines

Microsoft Teams Usage Guidelines

Microsoft Teams is a shared workspace that aims to encourage collaboration and communication within any team or project.

Accessing a Teams Meeting

Access via desktop app

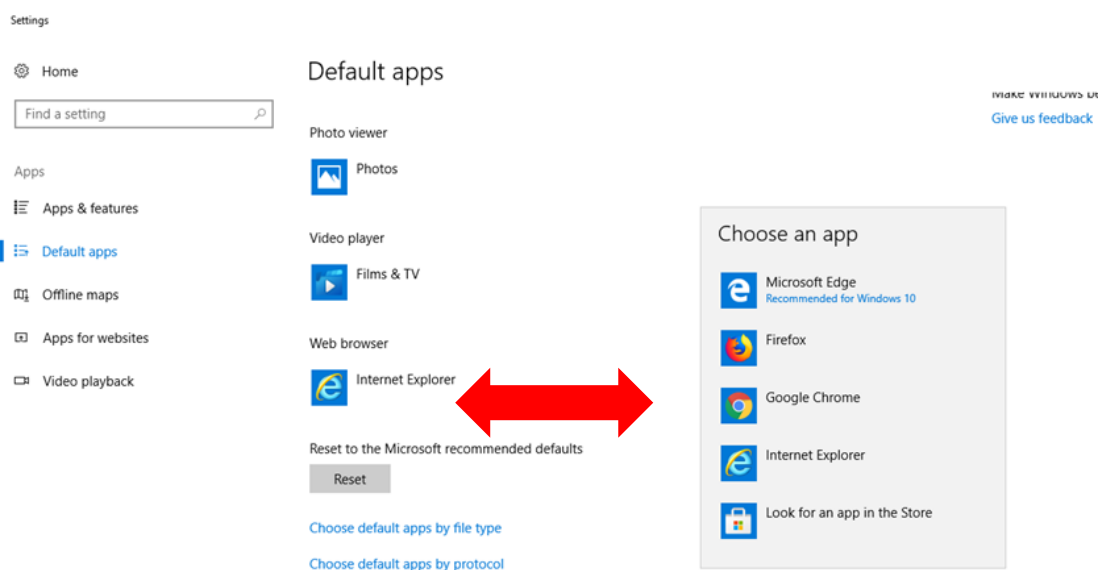
If you have HSE Teams licence, and you haven't already done so, download the MS Teams desktop app to your device and log in with your HSE network username (normally firstnamesurname) and password. Choose the 'desktop app' option when joining a meeting as certain features e.g. breakout rooms will only work via the desktop app.

Access via browser

If colleagues or service users do not have a HSE MS Teams licence, they can still attend meetings by clicking on the meeting link sent to them via email. These attendees will access the meeting via the browser.

MS Teams works best with a Google Chrome or Microsoft Edge browser; download either one if you don't already have it. MS Teams will not work well with Internet Explorer. To check what browser is currently being used and/or to change it:

- Enter 'default apps' in the 'search bar' at bottom left of your screen
- Scroll down to 'Web browser'. If the web browser is Internet Explorer, as seen below, right-click on the Internet Explorer icon and select Google Chrome or Microsoft Edge instead of Internet Explorer.





Attending a Teams Meeting

- Join a meeting at least 3 minutes before the appointed time; this will allow you to adjust your audio and video settings etc. See our [‘Tech Troubleshooting Guide’](#) for more details.
- You can turn on live captions and read subtitles in real-time (via meeting toolbar). This is a useful feature for those who are hard of hearing, have different levels of language proficiency, or are connecting from a loud location.
- Stay on ‘mute’ when not speaking yourself; use the ‘hand up’ icon or meeting chat to indicate that you have a query.

Chairing a Teams meeting; the Organiser

- Use the Teams desktop app; the app generally allows a better meeting experience and certain features e.g. breakout rooms are *only* accessible via the desktop app.
- Before you send the invitation, use the ‘Meeting Options’ to decide who can present, whether/how you want meeting chat enabled, whether attendees need to wait in the lobby etc. You can also access ‘Meeting Options’ via the toolbar once the meeting has started e.g. you can re-designate an attendee as a presenter if you wish to allow them share document.
- If you are running a large/critical meeting, send a copy of your presentation to a trusted colleague who will also attend the meeting and designate this person as a ‘presenter’.
- Encourage a culture of ‘cameras on’ for smaller meetings where possible - this enables better communication, especially for new team members.
- When sharing content, zoom in (Ctrl +). This helps your attendees see what you’re showing, which is usually smaller on their end.
- The Organiser can choose ‘Gallery View’, ‘Large Gallery View’ or ‘Together Mode’ (lecture theatre style) as preferred in ‘More Options’ in the meeting toolbar. For more information see [here](#)
- The organiser (only) can use the ‘Attendee list’ feature to download a list of meeting participants; it must be done during the meeting. To download the meeting attendance report during the meeting, click the **Show participants** icon and then select **Download attendee** list. For more information on the organiser v presenter roles see [here](#)
- Note: the maximum number of attendees in a meeting is 300.

Creating a team

- Only create new Teams when you need to; it may be more appropriate to create a channel - see *‘Channels’ below*.
- If you are an owner of a Team, consider which members are necessary, and what channels are needed. Update the membership regularly to ensure it correctly reflects the actual team.

Naming your team

Given the size and diverse functions of the organisation, the HSE does not currently prescribe how team owners should name teams. However, the below convention may be a helpful one to adapt:

[Function]- [Programme Name]-[Descriptive Name]-[Region]

- Function = Broad Organisational Function Name
- Programme Name= Programme or project name (depending on scale)
- Descriptive Name= Clear description
- Region (if relevant) or 'national project' for example

Examples

1. **HR- Accounting Reform- Payroll Project-CHO 9**
2. **Health Promotion- Smoking Cessation- Schools Project- national**
3. **Procurement- Legislation- 2021 Directive- northwest**

Channels

- A channel is a focused private collaboration space within the team. Use channels for major elements of a programme of work only e.g. 'Clinical Research', 'Budget', 'Membership'. It may be appropriate to establish a channel within an existing team rather a new team e.g. a 'Recruitment' project channel within a 'HR' programme team.
 - By default, any member can create a channel but this can be managed by the team owner in Teams Settings; it may useful to restrict new channel creation to team owners for example.
 - Remember that all Team members can see all content in the Team — unless you create a Private channel. If you need certain information or documents restricted to certain team members only, set up a private channel.
 - Private channel have their own owners who can add members and guests to that private channel
 - Only existing members and guests in the team can be added to a private channel
 - Only members of the private channel can view private channel content
- For more information on setting up private channels see [here](#)

Messaging and files

- Use Teams messaging as your internal project collaboration tool with colleagues; use email for more formal, external communication.
- One of the major advantages of Teams is the ability to co-edit documents, so send links to documents rather than the documents themselves. This will ensure that that the recipient sees the most recently edited version.
- Once edited, when another team member opens it, the document will note '*while you were away, new changes were made by X team member*'



Conversations + Chat

- @mention individuals to get their attention and a response.
- 'Reply' is very close to 'new thread'; ensure that you click the right button!
- Take note of your colleagues' availability status e.g. green for online, red for busy etc.
- Be aware that when you add a participant to a chat he/she will see the prior discussion in that chat.

See [here](#) for more information and resources on using MS Teams.