

Microsoft Teams Etiquette



Every day Etiquette

For many users, MS Teams is a more consolidated way of working with other Team members compared to working with separate tools like email, file shares and phones.

It combines the features of Skype (chat and conferencing), SharePoint and OneDrive (file sharing and collaboration), OneNote (note-taking), Planner (everyday project management), Stream (video sharing), plus in-app tabs that bring other tools like MailChimp and more in one place. Access to all of this is available directly in the app. No jumping between windows, logins, or screens to access all your team's content.

This guide covers some everyday etiquette for using MS Teams. Following these guidelines should ensure you and your colleagues have a better Teams experience by keeping things clean, organised and productive.

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Acceptable use of MS Teams

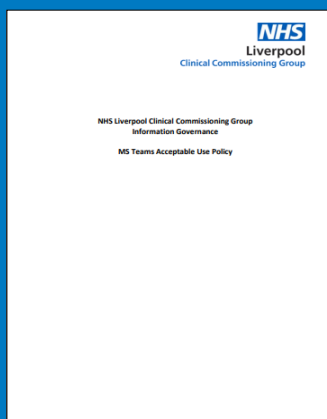
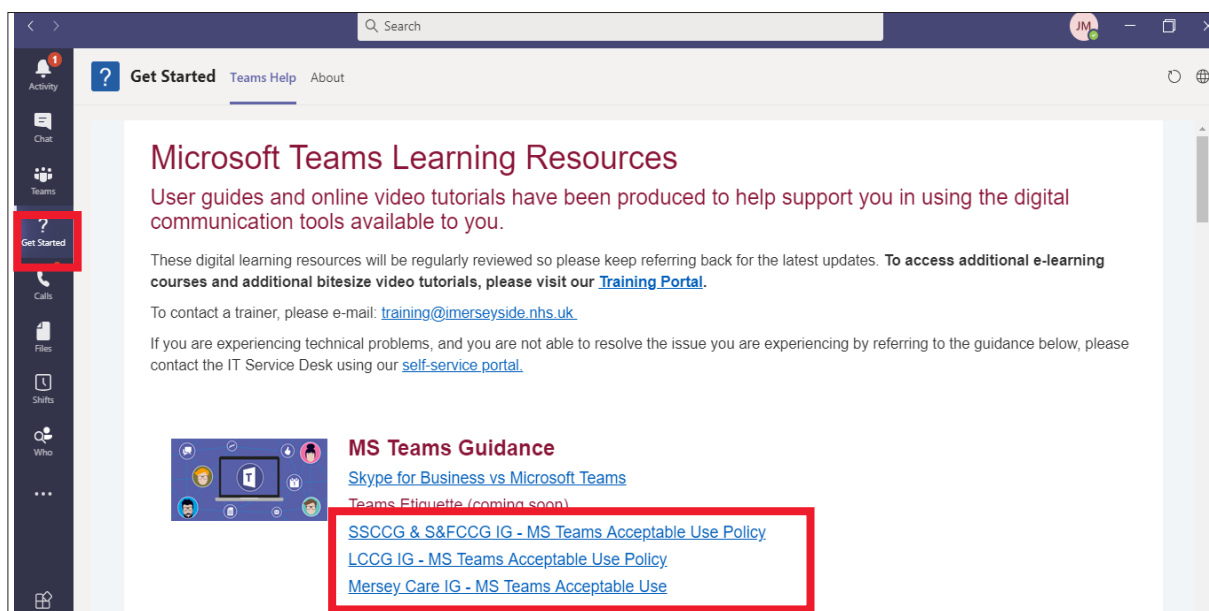
All staff using MS Teams must adhere to the Acceptable Use Security Standard relevant to your Trust.

Acceptable Use Guidance can be found by clicking on the **Get Started** icon in Teams or links below.

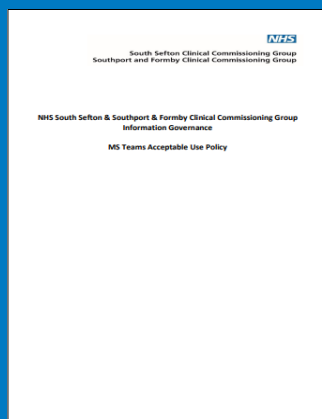
ACCEPTABLE USE



- To view the guidance for your Trust/CCG, click on **Get Started** → Select **MS Teams Guidance** and click on the **Acceptable Use Guidance** relevant to your Trust.



LCCG IG
MS Teams Acceptable Use Policy



SSCCG & S&FCCG IG
MS Teams Acceptable Use Policy



Mersey Care IG
MS Teams Acceptable Use Guidance

MS Teams Security Information

When access to information is authorised, it is important that confidentiality and integrity of the information is upheld, and to observe adequate protection of information according to organisation policies as well as legal statutory requirements.

- Digital Champions and team owners must ensure that Teams created for Trust/CCG purposes should be deleted by the owner when the related project or programme has been completed.
- Inactive Teams will be automatically deleted after 6 months of inactivity and **completely unrecoverable** from the recycle bin after another 30 days following their deletion. At that time, all data contained within the Team will be lost and cannot be recovered by NHS Informatics Merseyside or Microsoft.
- Documents shared via MS Teams that need to be kept after the project has ended must be saved in the relevant shared folder on the Trust's servers. Documents must be held according to the Trust's record retention periods.
- All Teams created by staff should use a name that clearly identifies the use or purpose of the Team and must not include anything inappropriate, offensive or hateful words, or any 'code' words that represent these things.
- MS Team sites are provided for use in relation to Trust/CCG activity to support discussions, projects, collaboration and communication.
- MS Team sites are provided to include members from across the organisation and external organisations. When creating Teams for use with external organisations, the group must be marked as Public.
- MS Teams is an Office 365 cloud service and therefore information contained within the Trust/CCG sites is stored in Microsoft Data Centres that meet UK and EU data protection and security standards.
- Chat-based collaboration is a useful tool when there is regular interaction and works best when there are multiple voices represented within the dialogue.



Staff guidance for using MS Teams

It is important that staff recognise that MS Teams is a Trust/CCG provided service and therefore staff must adhere to the guidance below or risk disciplinary action. Usage may differ to the way you engage with external collaborative or social media sites designed for personal use. Please adhere to the following:

Be transparent

Use your own name and photograph within your Office 365 profile. It is important that members are clear about who they are interacting with.

Be safe

MS Teams is designed to support secure networks, therefore, do not over disclose personal information and protect yourself against identity theft.

Safeguard data you share

If Personal Identifiable Information is to be shared in a Team, the Team owner is responsible for managing the members of that Team. Safeguarding all the data you share.

Only post to appropriate members

All MS Team channels and discussions are visible to all members of the MS Team site. Private messaging is available to send direct messages to selected members.

Be professional

Be polite and treat team members with respect. It is important that this is maintained throughout and even in instances when opinions differ. Be clear and avoid using ambiguous language which may be open to misinterpretation.

Keep it relevant

Make sure you clearly understand the purpose of your MS Teams site. Stay on topic and avoid sharing irrelevant content as this may frustrate other members. Stop the spam!

Safeguard all data

MS Teams provides a file storage location for files posted within conversations and channels. This provides a time limited repository and should not be used as a substitute for personal storage such as One Drive, staff personal drives or departmental files storage. The Trust/CCG and Microsoft cannot guarantee data previously saved to this location can be restored after the site is closed.

Be aware

When sharing images and videos - ensure that the sharing of images and videos does not breach image rights and copyrights. Seek permission from anyone included in personal photographs prior to sharing them.

Sharing information

Do not share information outside of your private teams - information shared within your private Team is for use by the Team members only and should not be shared outside without appropriate permission. No confidential, personal or sensitive information should be shared outside of your private teams.

Staff guidance for using MS Teams

Be alert

In most instances, there is no need to share confidential, personal or sensitive information via MS Teams and this should be discouraged within the MS Teams site. Where there is a need to share confidential information, this should be labelled as “Confidential” and appropriate permissions should have been sought from the data owner prior to sharing. The purpose of sharing the data should be transparent to the group and there should be a clear time frame set to ensure that this data is removed as soon as it is no longer needed. The sharing of confidential, personal and sensitive information increases the risk of data breaches and when breaches occur, this may result in disciplinary action taken against the individual sharing the data.

Use appropriate posts

The Trust/CCG reserves the right to remove inappropriate MS Team sites or posts. If you post inappropriately and later remove this post, this may still be accessed by the Trust/CCG. Typically, MS Team sites will have two nominated site owners who will monitor use and ensure inappropriate posts are removed.

Digital Champions for MS Teams



Your **Digital Champion** will be able to support you in the first instance if you have any queries or require help with MS Teams. If you require new tabs or short cuts to be created, then always speak to your Digital Champion first.

Keep your Digital Champion informed of any new starters or leavers so that the Team membership can be kept up to date and ensure all information is only shared with your Team members.

If you require another Channel to be created under your MS Team, please liaise with your Digital Champion first.

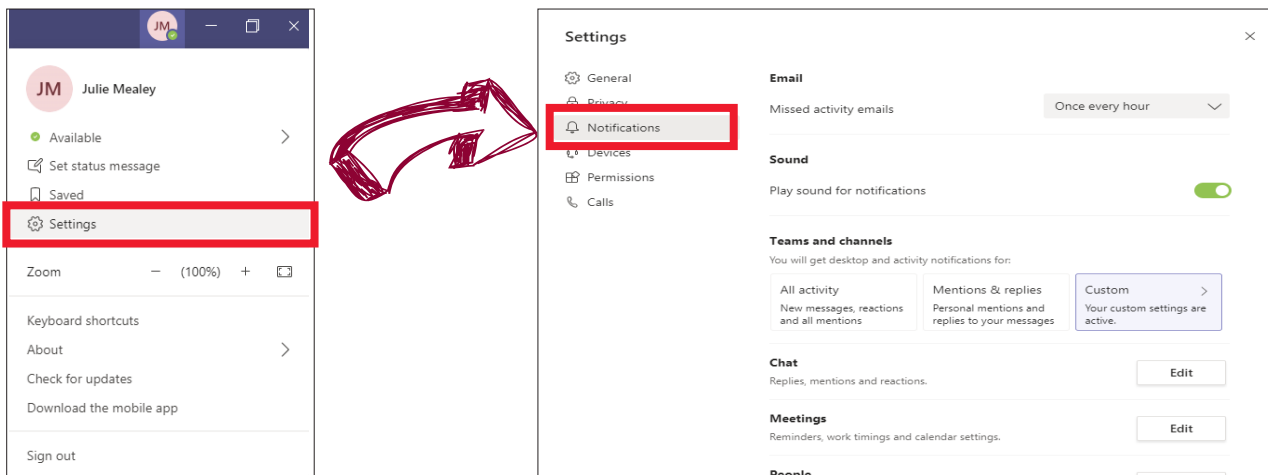
General

Below are some hints and tips to help you enhance your overall MS Teams experience.



Configure your notifications

If you would like to change the number notifications you are receiving in MS Teams, you can configure this within **Settings** → click on **Notifications arrow** and set accordingly.



Only create new MS Teams when you must

Make sure there is not a Team already created that meets your requirements. Make sure you speak to your Digital Champion before creating a new MS Team to ensure it is right to create it, often a new Channel will suffice. When creating a new Team you have the option to use additional applications but you do not have to use everything that comes as part of a new Team.

Don't over-invite people to your MS Teams

Make sure you have the right people in your MS Team and notify your Digital Champion if people leave to ensure access is correct.

Make your out-of-office response MS Team-friendly

Your Outlook out-of-office response displays in MS Teams as well. Instead of saying "Thank you for your email" rephrase to "Thank you for your message":

If you are a Digital Champion and own a MS Team - review membership regularly

Stay up to date by adding and removing members of your MS Team. Add in an appropriate photograph of your Team for the profile. Also consider settings and what tabs would be useful for all team members. For example, a Wiki page, containing useful information such as key contacts, may save your team time.

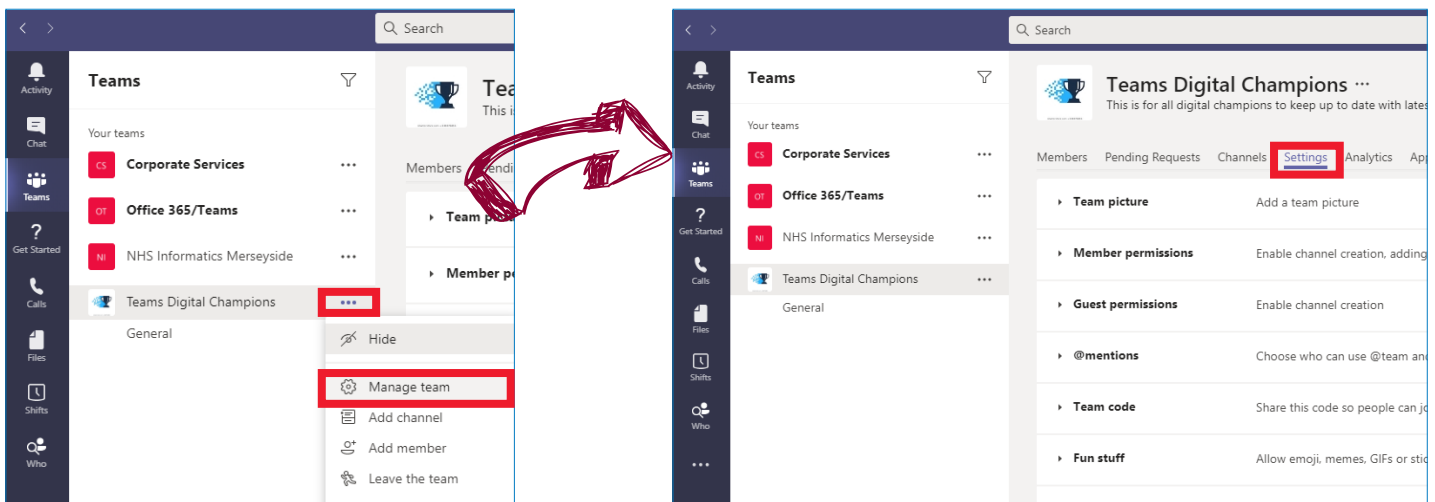


Reactions are meant for sentiment

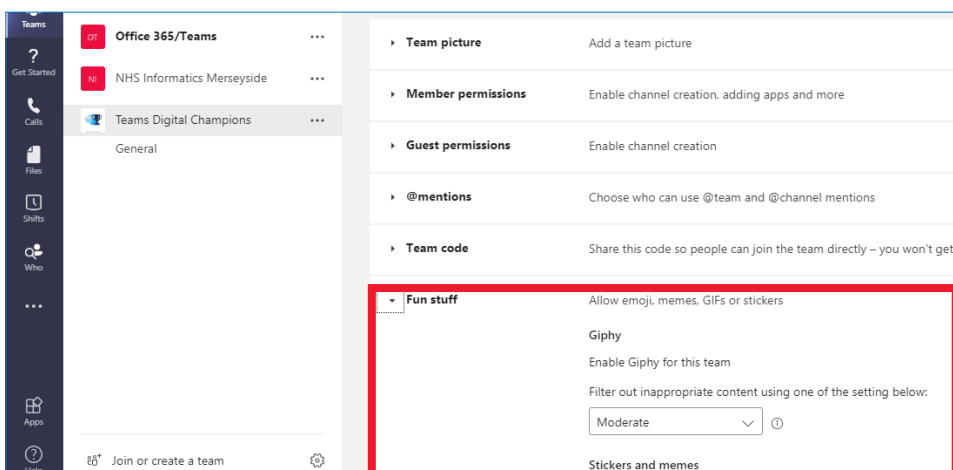


The **thumbs-up** is good for acknowledging messages which can help keep work on task. Please be careful when using other emojis as they can be misinterpreted. If you are going to use emojis like **love**, **laugh**, **wow**, **sad** and **anger**, then please only use in private messages and not in public channels. If emojis are being over used, you can quite easily change the settings.

- Click on the **ellipses (3 dots)** to the right of the MS Team name → **Manage Team** → **Settings**



- Expand **Fun Stuff** and update settings as required.



Chat

Chat in MS Teams is similar to using iMessage, WhatsApp or Android Messenger. Here are some ways to help you keep things organised, easy to follow and tidy.



@mention individuals to get their attention and a response

@mention-ing is the equivalent to placing someone into the To or CC field of an email and the MS Team member will receive notification they have been mentioned. Do not overuse @mentioning.

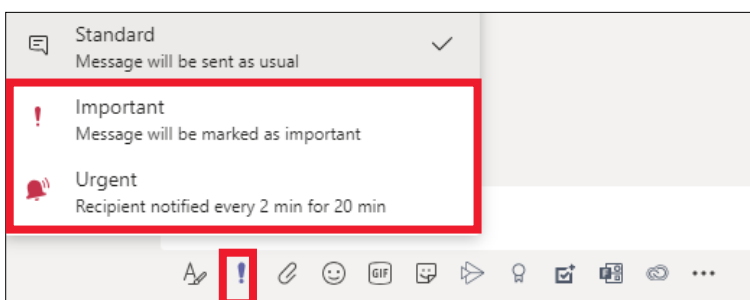
Don't @mention a MS Team or Channel unless you really need to

If you **@mention** the MS Team, all members will be notified. Try and only use when necessary to avoid lots of notifications.

Using urgency in conversations

Do not expect an immediate response even if you **@mention** somebody in a conversation. Expect the response time to be similar to that of sending an email. Use the **!** button to mark a message as important or urgent.

- Click on the **!** when typing a new message → **Choose Important or Urgent**



- Please be aware if you choose urgent, the recipient is notified every 2 minutes for 20 minutes so only use when extremely urgent.



Use subject lines when starting new conversations

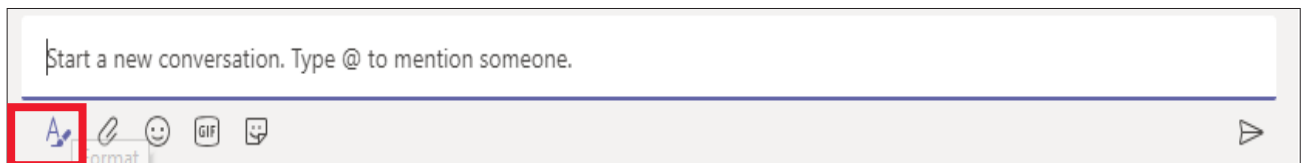
Subject lines make conversations easier to find. Remember you would not send an email without a subject so try and use the same concept in Chat.



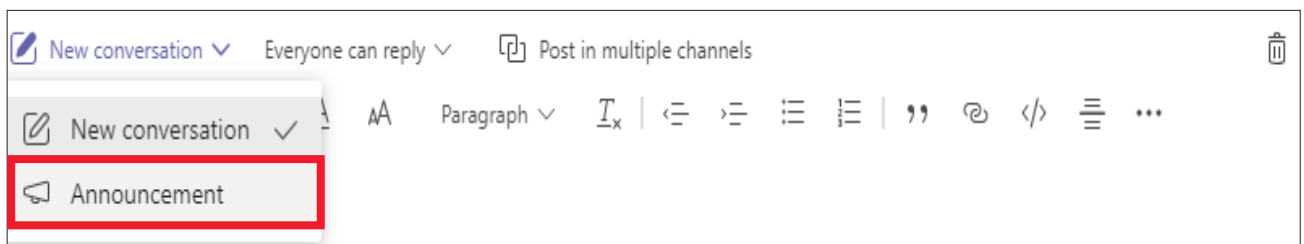
Use announcements appropriately

Announcement message types have an image banner with large text. Do not over use announcements in your MS Team as they take up a lot of space and too many will dilute their importance.

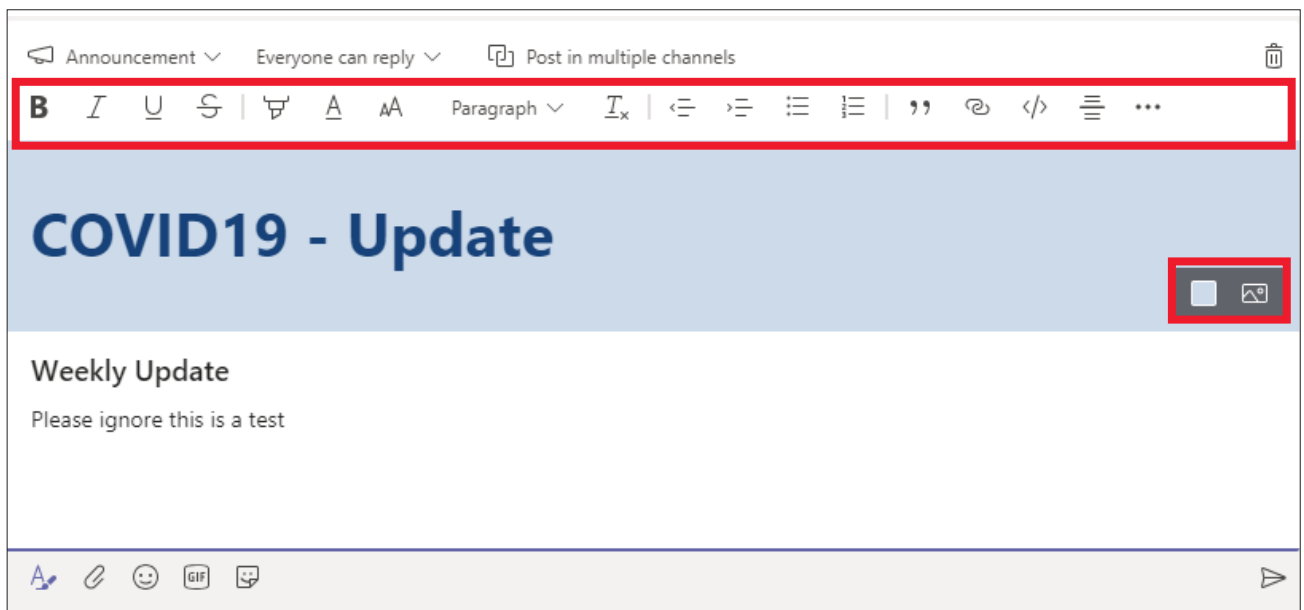
- To send an Announcement message, click on the  that appears under the conversation line



- Click on Announcement



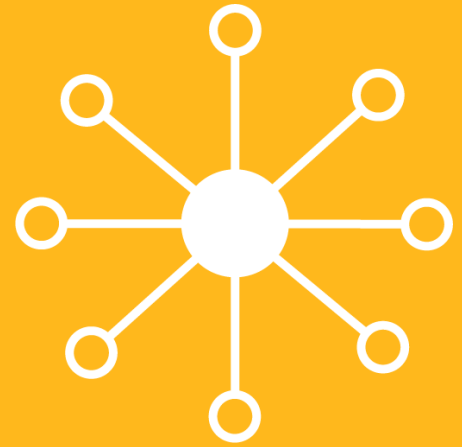
- You are now presented with the title banner. You can change the background and also format the text as required.



Channels

Channels in MS Teams are like folders on a shared drive. It is a way to separate topics that your Team is dealing with. For example a Team in Estates may have the following Channels: **General (default), Strategic Estates, Health & Safety, Fire Wardens, Buildings & Contracts.**

Each Channel gets its own folder and files, further keeping the Channel topics separate and organised.



Do not rename a Channel

Renaming Channels could cause the Channel to lose connection with the site that it belongs to in the background. If you need to rename a Channel, notify your MS Team ahead of time and contact IT Service Desk if the channel needs to be re-linked.

Do not create lots of Channels

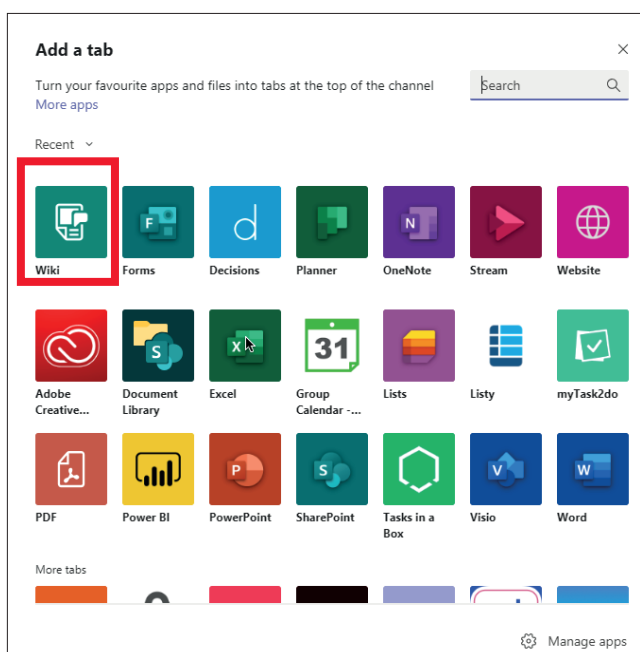
Keep Channel listing simple to start. You will not need as many Channels as you think. Plan how many Channels you are going to create beforehand. Only create Channels if you really need them as too many Channels will only confuse team members.

General Channel

Each Team has a General channel by default. Keep the General channel for announcements and topics not fit for other channels.

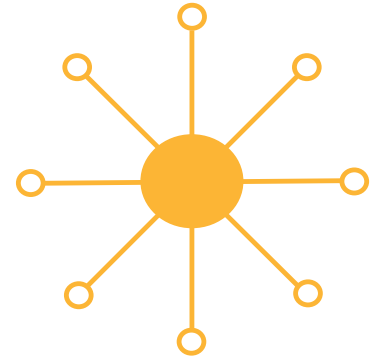
Add a Wiki to store useful information

Add in a Wiki App as a new tab post a Team/Channel description, expectations, useful contacts. Rename the Wiki to About so members are aware what the wiki page is used for.



@mention new members

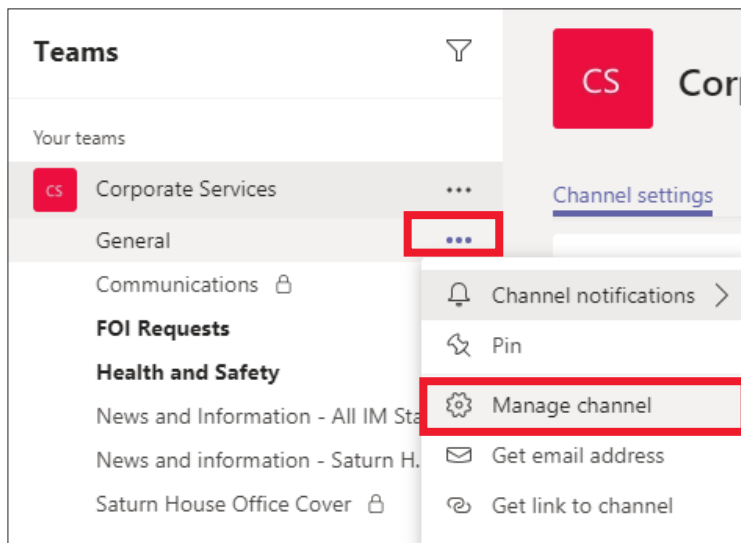
New Channels may not be followed by everyone automatically.
@mentioning a new member sends a notification to them.



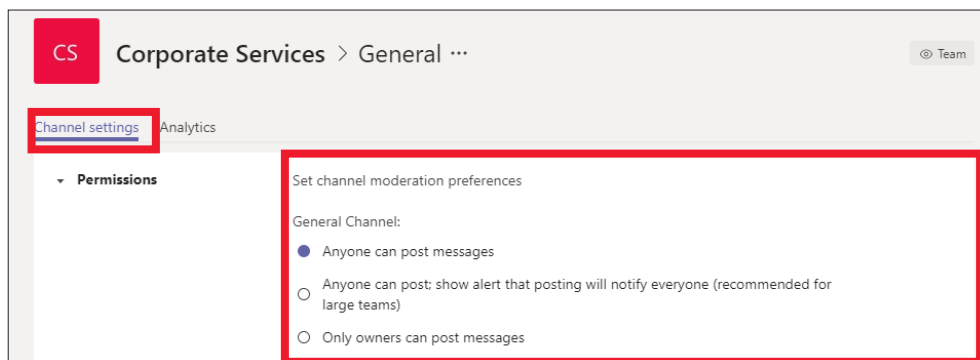
Use Channel moderation to restrict who can start conversations in any channel

You can prevent members from starting conversations while still allowing them to reply. It is useful for an announcements Channel where only assigned individuals can post articles.

- Click on the **ellipses (3 dots)** to the right of the Channel name → **Manage channel**



- The **Channel Settings** enables you to set moderation preferences to restrict who posts on the **channel**



Private Channels

Private Channels are permission protected Channels where confidential conversations can take place and files can be stored. It is likely that in a large MS Team, private channels will be required to reduce notifications to members that are not part of a project or work stream. Private Channels can be identified by a padlock located next to the Channel name.

It is worth noting that if you create a Channel as a private channel then it cannot be changed to a Public channel.



Private Channels have their own owners

The owner of the parent MS Team is not necessarily the owner of the private channel. MS Team owners that are not Private Channel owners are only able to see the name and the description for the Private Channel.

Members are always a subset of the parent MS Team members

You can only add people to the Private Channel that belong to the Team. If you need to add members to your Channel that are not visible then they need to be added to the MS Team first.

External guests can be part of the Private Channel

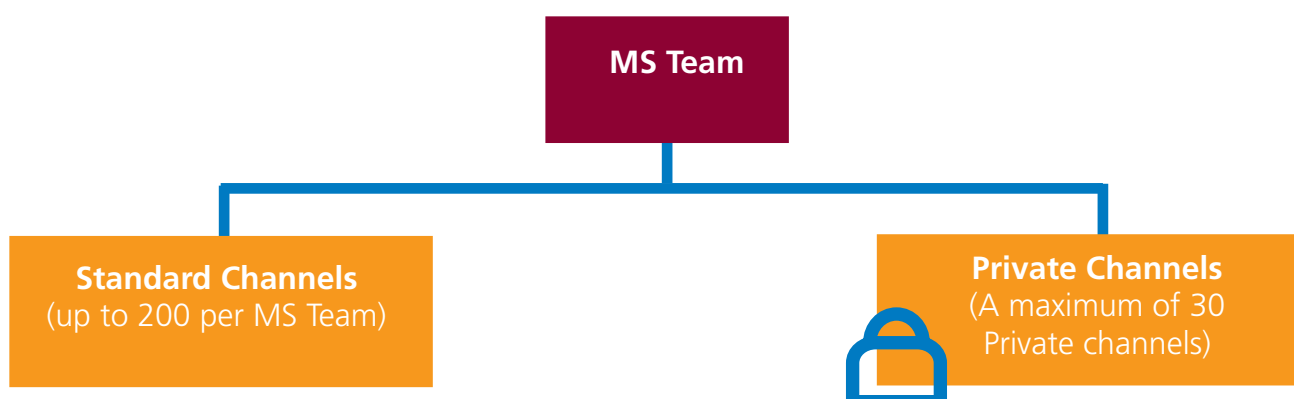
Remember that external guests need to be a member of the parent MS Team first, so always check with the MS Team owner and members before adding any external members.

Private Channel files

Files stored in a Private Channel are stored in a sub site under the MS Parent Team.

Channel Limits

Each MS Team can have a maximum of **30 private channels** and each private channel can have a maximum of 250 members. The 30 private channel limit is in addition to the **200 standard channel** limit per team.



Private Chats

MS Teams and Channels are good for Team discussions, but you can also **Private Chat** with someone in MS Teams.

Private Chat is similar to any other instant messenger app like Skype or WhatsApp.



Use private chat for high-priority questions or to chat to colleagues

Use private chat the way you would any other instant messaging service.

Pay attention to your colleagues availability status

You will be able to see the status of your colleagues as follows:

● Available ● Away ● Busy / Do not disturb

Do not assume you have privacy

Chats can be audited by the IT administrators. Do not say anything in chat that you would not say to someone in person.

Adding participants to a private chat

When adding a participant to a private chat, this allows them to see prior discussions in the chat. Before adding anyone in to an existing private chat, be sure about whether you want them to see what has been previously discussed.

Try to avoid creating multiple chat groups

If you already have a chat group with three people and you create a new chat group with the same three people, there will be two different chat groups with the same individuals in two conversations. This can get confusing so try to avoid it unless necessary.

Name private chat groups

It is easier to name a private chat group as either the topic or a group specific name. This allows the chat to be filtered and found more easily.

Do not have too many members in a private chat

If you have a lot of people in a private chat, it could justify creating a new MS Team or Channel.

Files

MS Teams is an excellent place to work on files alone or simultaneously with your colleagues.

Files are stored in a SharePoint site, this is generated in the background when the MS Team is created. Even though it looks like MS Teams, you are really using SharePoint.



Keep files under 100 GB in size.

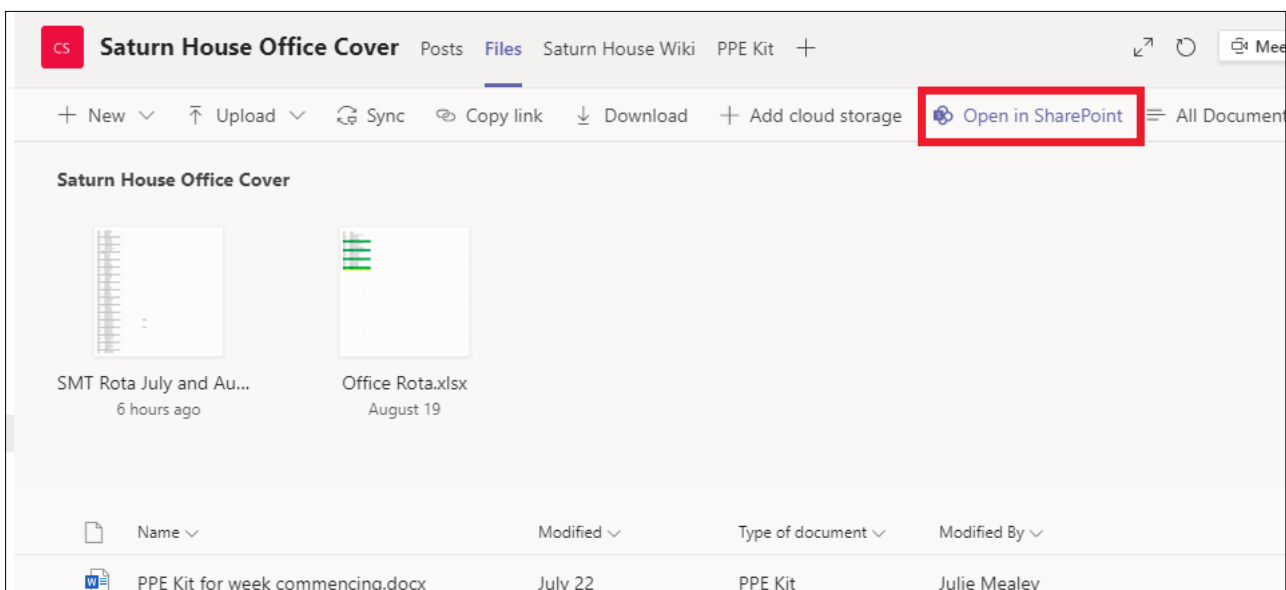
This is the limit for all files in MS Teams.

Limit folder structure to three levels

This is best practice, but there is also a character limit to the folder path length.

View files directly in SharePoint if you prefer

From the Files tab, you have the option to **Open in Sharepoint** to view your files from here.



Meeting and calls

Please follow these guidelines to ensure you and your colleagues have a better MS Teams experience by keeping things clean, organised and productive (yet still fun and enjoyable). As with all meetings, make sure you have an Agenda to keep the meeting organised.



Join promptly

Always 'Join' MS Team meetings 5-10 minutes before the meeting start.



Microphones

Avoid clicking pens, shuffling paper or eating whilst on a call. Stay on 'Mute' when you are not talking to reduce background noise in the meeting.



Backgrounds

On MS Team calls, you should only use the blur background if you want to hide your background. Try to limit the use of images and stock backgrounds



Visual distractions

Use video only when presenting, in small meetings or a 1-1 with staff members.

If you have to use video, avoid any distractions or movement on the call.



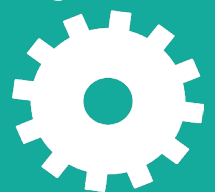
Use 'Chat'

Consider, especially for large meetings, asking your questions in the chat window or by using the 'hands up' option to ask questions to avoid talking over each other.



Test equipment

Test and be familiar with the equipment before the call. Perform a sound check before your meeting.



Recording Meetings

If you have been given access to record MS Team meetings, ensure that you have the approval of everybody on the call before recording meetings.



Headphones

It is always recommended to use headphones with a microphone attached to get the best quality sound for your meeting.



Don't shout

Just speak at a normal level. Try and avoid over shouting. Wait until convenient to speak and try and avoid all speaking at once.



Who to contact for help?

IT Training Service



training@imerseyside.nhs.uk

To ensure you and your team get the most benefit from the extended functionality within MS Teams, divisional service leads and line managers will identify MS Teams Digital Champions. If you are interested in becoming a Digital Champion, please speak to your divisional lead or line manager.

Book your MS Teams Training

Teams Champion - A course tailored to the requirements of the MS Teams Digital Champion role including how to set-up, customise and manage Teams and Channels for your service area. Please only attend this training if you have been identified as an MS Teams Digital Champion. Only those identified as Digital Champions should attend this training.

Teams Member - A course designed to help you get started with MS Teams. Learn about the features available to support internal communications and meetings.

To book training, please contact the IT Training Service with your preferred date by emailing:

training@imerseyside.nhs.uk

IT Service Desk



We are proud to be one of only two healthcare organisations globally to achieve four-star certification from the Service Desk Institute (SDI). If you require any help with Teams, then please Contact your IT Service Desk.

For IT problems or service requests of a non-urgent nature, you can save time by logging your requests online using our **Self Service Portal** and Live Chat facility. Click on the icon on your computer desktop or visit: <http://selfservice>

Get started



Additional support can be found by accessing the **Get Started** icon on the left navigation pane in teams.

You will find user guides, quick reference guides, recordings of training sessions and bitesized videos to support you and your colleagues to develop knowledge and skills in the use of Teams.



Microsoft Teams Learning Resources
User guides and online video tutorials have been produced to help you get started with the communication tools available to you.

These digital learning resources will be regularly reviewed so please keep referring back for courses and additional bitesize video tutorials, please visit our [Training Portal](#).

To contact a trainer, please e-mail: training@imerseyside.nhs.uk.

If you are experiencing technical problems, and you are not able to resolve the issue you are contact the IT Service Desk using our [self-service portal](#).

Teams User Guides
[Multi-factor Authentication for Android Devices ORG](#)
[Multi-factor Authentication for IOS Devices ORG](#)
[Configure Microsoft Teams ORG](#)
[Create and Manage Teams and Channels ORG](#)
[Add a Tab to a Channel in Teams ORG](#)
[Unlink, Move and Share Files ORG](#)