Microsoft Teams
Your 60-second primer

What is Microsoft Teams?
Teams is Microsoft’s collaboration hub. It brings together conversation, chat, calls, shared documents, meetings and more - so groups can work easily and openly.
You can connect and collaborate with Teams at anytime and from anywhere.

What can I do in Teams?
- Find and join public and private collaboration spaces
- Chat, call, and meet - including video conference
- Set up communication channels by topic for more organised discussion

What problems does Teams solve?
- No hunting for dial-in numbers or running to make a meeting: join from any device
- Minimise ‘hallway chatter’ and confusing email threads through open, organised conversations
- Review documents on the go, straight from your device

How do I use Teams?
- Download Microsoft Teams app to your computer and smart device
- Coming soon: you’ll also be able to to Teams securely from any browser, using Multi-Factor Authentication

Look out for more Teams functionality coming soon, including calendar and scheduling meetings
Microsoft Teams: your app home screen

**Teams**
- **Manage your profile**
  Add your picture, change your availability.
- **Search for anything**
  Look up people, mentions, key words

**Chat**
- Contact one or more colleagues over instant messaging

**Your Teams**
- Click to view activity and shared materials in the Teams you’ve joined

**Activity**
- See the latest activity in Teams – mentions, replies, and notifications.

**Teams & channels**
- Click on a team to see the conversations and shared files for that team, such as different streams in a project.

**Good to know**

A Team is a group of people with a common purpose: a department, a project, a shared interest, or location

**Channels** allow you to organise communication within a Team: huddle announcements, rounds, training, compliance

**Need to know**

You can use Teams to discuss patient identifiable data – but Teams is not part of the patient record, so any decisions reached in Teams must be recorded elsewhere.

You can use Teams to discuss patient identifiable data – but Teams is not part of the patient record, so any decisions reached in Teams must be recorded elsewhere.
# Microsoft Teams: five steps to get started

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• On a Windows computer, click Start</td>
<td>• On your chosen smart device, make sure you’re on a WiFi connection</td>
<td>• Click on Activity at the bottom of your Teams app or upper left of your Teams browser homepage</td>
<td>• To share something openly with a Team, click on Teams, and find the team and channel you want</td>
<td>• All you need to join a Teams meeting is:</td>
</tr>
<tr>
<td>• Then search for and select Microsoft Teams</td>
<td>• Go to your device’s app store and search for Microsoft Teams</td>
<td>• You’ll see a feed of all the latest updates, such as:</td>
<td>• Start a new thread or Reply to an existing post, pressing Send when ready</td>
<td>- A link for the meeting</td>
</tr>
<tr>
<td></td>
<td>• Enter your work email address, and usual password</td>
<td>- new and updated posts in channels</td>
<td>• Messages sent this way can be seen by everyone in the Team, even people who join later on</td>
<td>- Any device with an internet connection</td>
</tr>
<tr>
<td></td>
<td>• Versions of the official Microsoft Teams app are available for Android, Apple, and Windows devices</td>
<td>- @ mentions of you</td>
<td>• For direct 1:1 or small group chat, use the Chat option, selecting New Chat to start</td>
<td>• Depending on your device, you’ll receive a notification for the meeting (calendar reminder; channel pop-up; on-screen banner etc.)</td>
</tr>
<tr>
<td></td>
<td>• Download the app and log in, using your work email</td>
<td>- new people added to your Teams</td>
<td></td>
<td>• The notification will contain the meeting link – which you need to click</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• If you spot a red circle next to Activity, it means:</td>
<td></td>
<td>• If you’re not signed in, you may be asked to sign in first – or you may be able to join as a guest, depending on meeting settings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- you have been mentioned</td>
<td></td>
<td>• All you need to join a Teams meeting is:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- you’ve received a reply to a message of yours</td>
<td></td>
<td>- Any device with an internet connection</td>
</tr>
</tbody>
</table>

**Coming soon:** the ability to schedule meetings in Teams
Microsoft Teams: Teams and channels basics

Teams

- A Team is a group of people with a common purpose: a department, a project, a shared interest, or location.
- You will be added to relevant Teams – and can search for others of interest.
- If there’s not an existing Team that meets your needs, your Digital Change Coordinator will create a new Team for you, ensuring there’s no duplication with an existing team, that the Team’s name is logical and unique, and there are Team owners in place.
- Teams can be:
  - Public (open to everyone in CVUHB) – collaborating on a topic of wide interest, e.g. carbon reduction initiatives
  - Private (participants need invitations or permission to join) – collaborating on sensitive or confidential projects

Communicating in a Team

- To get someone’s attention, type @ and their name (e.g. @dylanthomas), selecting the right person from the pop-up menu. This will send them a notification – and they can click on this to respond directly. (Avoid using @mentions too often – it’s like adding someone to the ‘To’ field in email)
- To contact everyone in a Team, post a message in the Team’s General channel.

Channels

Each Team can have one or more Channels. Channels allow you to organise communication by topics.

All Teams have a General channel by default – but you can add channels with the More options (...) button.

For instance, a Carbon Reduction Taskforce Team might have a channel for each location (UHW, UHL etc.), and also for activities (recycling, energy, green travel).

Conversations in a channel are organised by date, and then threaded (e.g. replies to a post appear under that post).

Channel conversations are visible to everyone in the Team, including people who join later.

What can we discuss in a Team?

You can discuss patient identifiable data – but must record any decisions on the patient record as Teams is not part of the patient record.

Who can we add to a Team?

In this phase, you can only connect with others in CVUHB. In the future, you’ll be able to use Teams to connect with others in NHS Wales and trusted partner organisations, such as local councils.