

# MICROSOFT TEAMS

# A GUIDE TO USING MICROSOFT TEAMS WITHIN NHS



# MICROSOFT TEAMS

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# MICROSOFT TEAMS

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# MICROSOFT TEAMS

## SIGNING IN TO MICROSOFT TEAMS

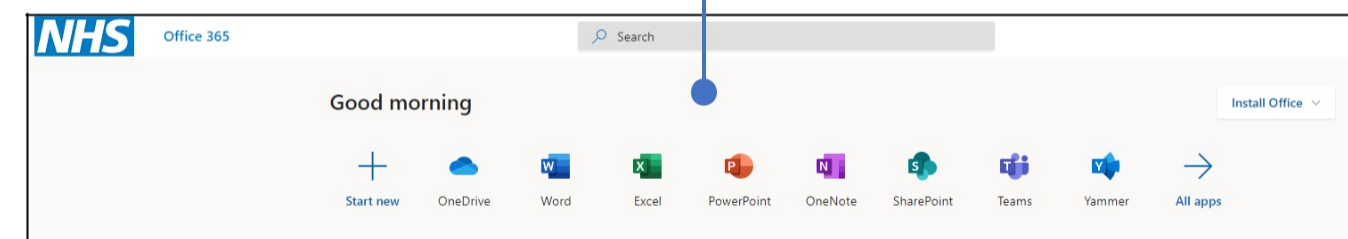
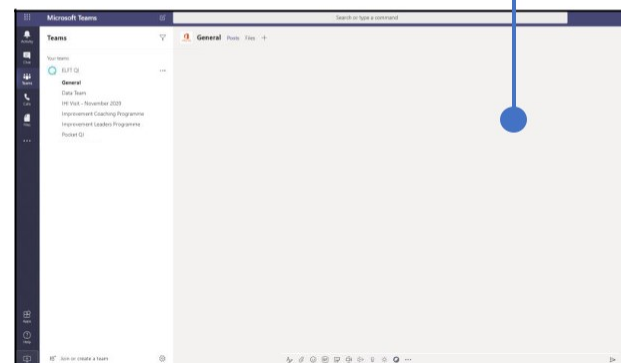
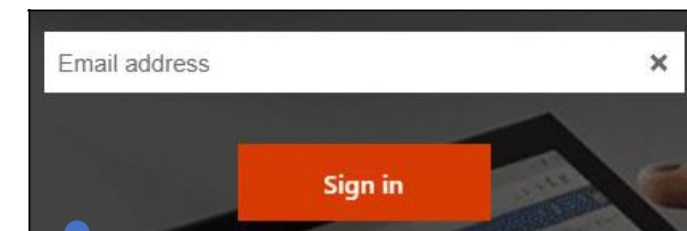
Microsoft Teams has been made available to all NHS staff by [NHS Digital](#). Please follow steps below to access the platform. Replace any email addresses with your own NHS email address i.e. **my.name@nhs.net**

### Through the web browser or Desktop link

1. Go to [Office.com](#)
2. Enter your NHS.net email address
3. You will be diverted to the NHS.net log in page. Enter you email and password
4. You will now be able to see a series of Office 365 apps
5. Click on “Teams”
6. The Microsoft Teams App will now open on the “Teams” tab where you will see all the teams you are linked to

#### **Please note:**

If this area is blank,  
it means you don't have  
a team set up yet.  
Please contact your  
**Manager** to instigate  
a Teams request  
with IT helpdesk. **PAGE 01**



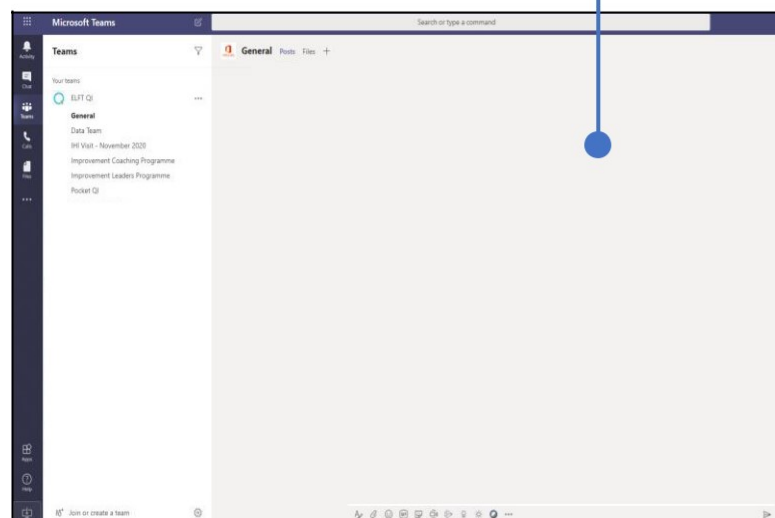
# MICROSOFT TEAMS

## SIGNING IN TO MICROSOFT TEAMS

### Through the app

1. Download the [Microsoft Teams App](#) for free without needing IT
2. Once the app launched, enter your NHS.net email address
3. You will be diverted to the NHS.net log in page. Enter you email and password
4. The Microsoft Teams App will now open on the “Teams” tab where you will see all the teams you are linked to

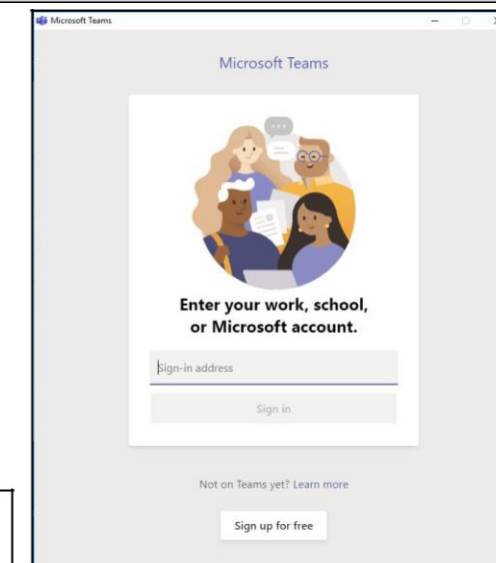
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a Teams request  
with IT helpdesk.



Teams on your desktop. It's just better.

Download Teams

More options



# MICROSOFT TEAMS

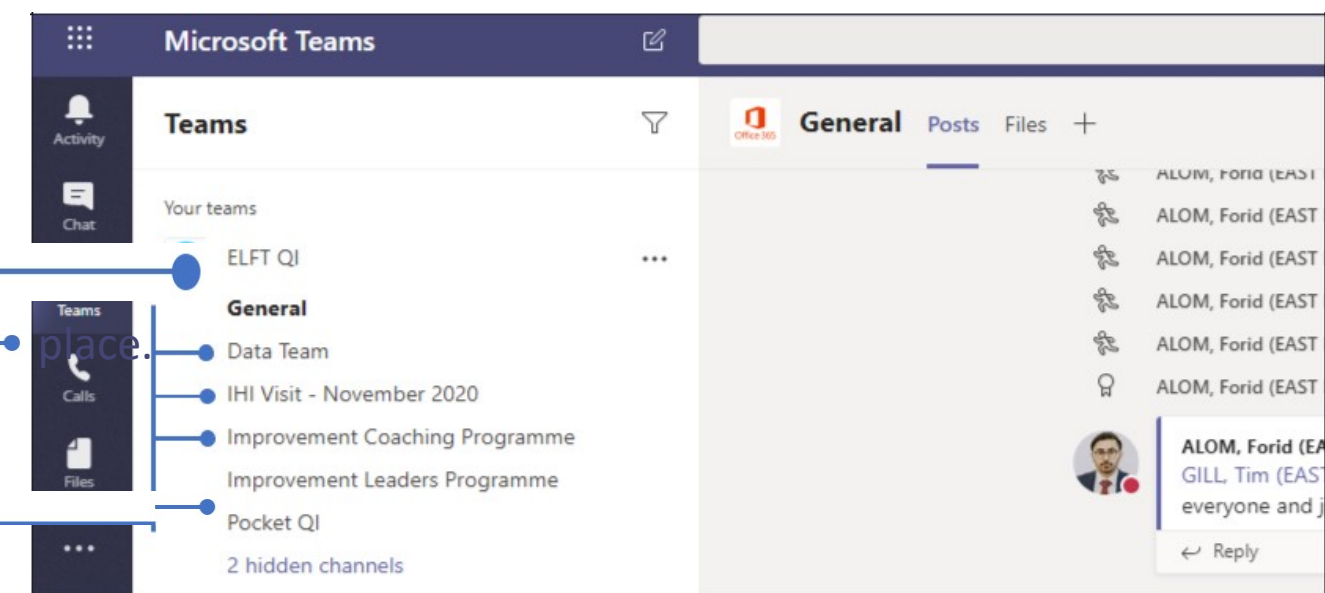
## SIGNING IN TO MICROSOFT TEAMS

### Picking a team and a channel

When you open the app, it will default to the “Teams” area. Click on the team or channel you want to work on.

A team is a collection of people, conversations, files and tools – all in once place.

A channel is a discussion in a team, dedicated to a department, project or topic.



Please note:

If this area is blank, it means you don't have a team set up yet. Please contact your Manager to instigate a Teams request with IT helpdesk.

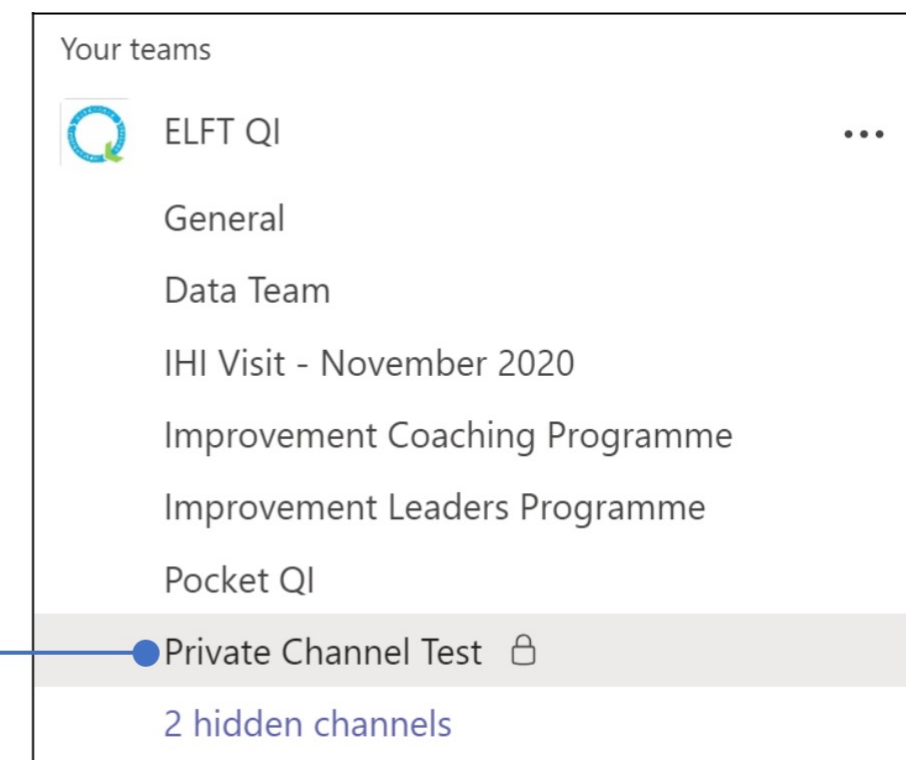
# MICROSOFT TEAMS

## SIGNING IN TO MICROSOFT TEAMS

### Creating a private channel

You can also have a private channel where access is restricted to certain team members. These can be created by the team owners and the channel will have a padlock appear next to it.

Channels can have their own set of owners and has its own SharePoint site create for storing of documents. Only those who are part of this private channel will be able to access the files shared within the channel



# MICROSOFT TEAMS

## TEAMS AND CHANNELS

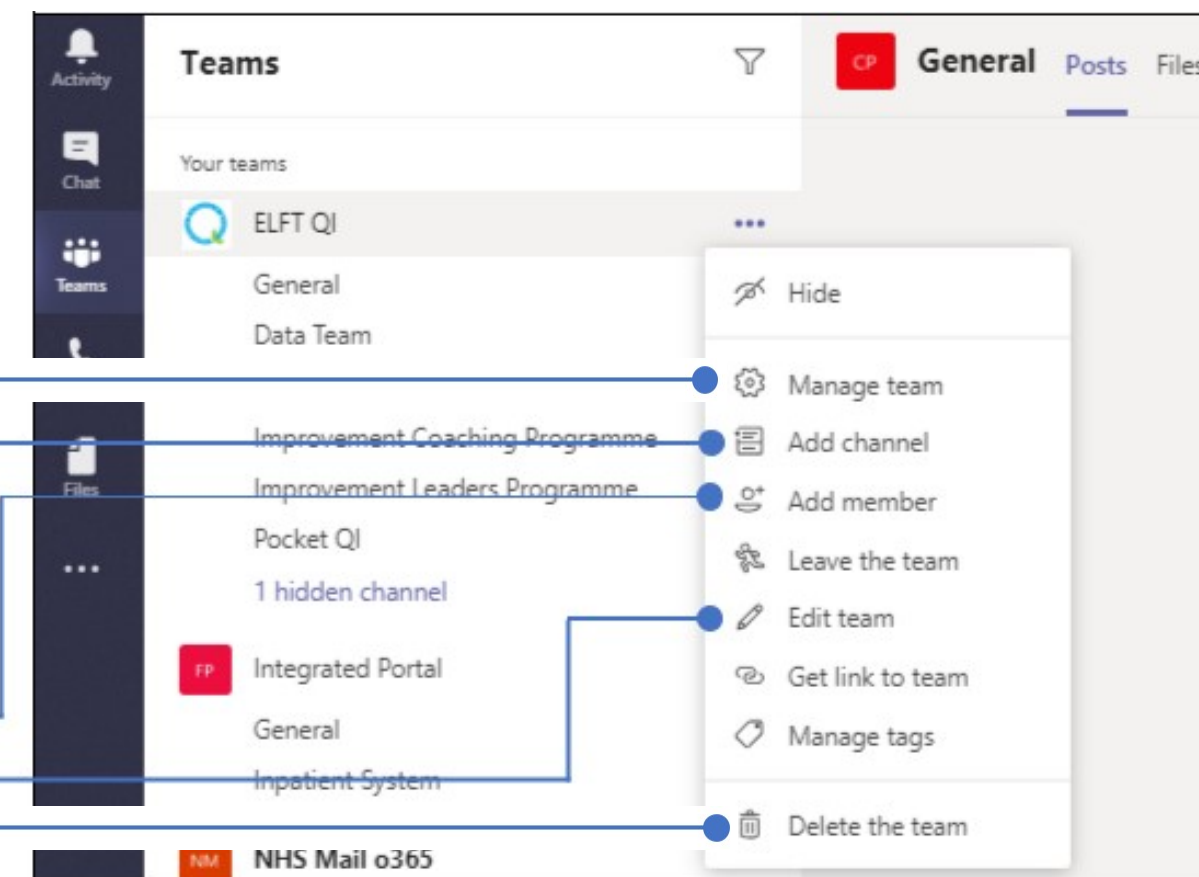
### Managing a team

Teams can have up to 10 owners.

If you are an **owner** of a team, you have administrative rights to the team.

Owners can:

- Manage team settings:
  - Enable / Disable @Mentioning
  - Allowing GIFs, stickers, memes, and moderation settings
- Add a channel
- Add new members and other owners
- Rename the Team
- Delete the Team



**Please note:** Once you add someone to the team, they will be able to access all the channels (apart from any private channels that exist).



# MICROSOFT TEAMS

## SHARE FILES AND CHAT

### Starting a new conversation

1. Click on “Teams”, then select your team and channel
2. In the compose box, type out your message and then click send

Tip: To get someone’s attention, type @, then their name (or pick them from the list that appears). Type @team to message everyone in a team or @channel to notify everyone who favourited that channel.

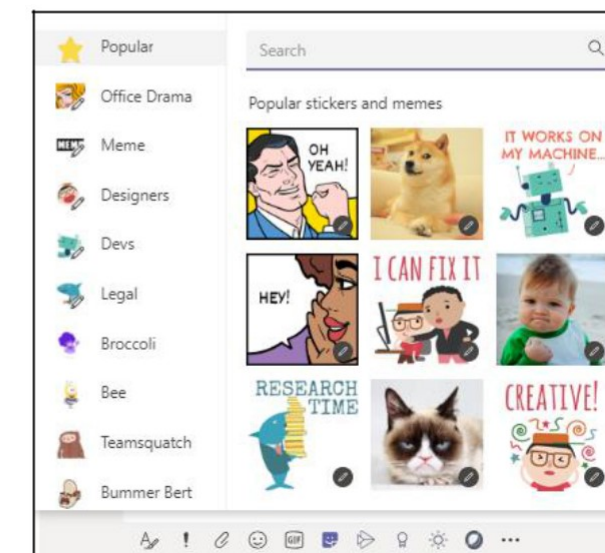


### Reply to a conversation

1. Locate the conversation you want to reply to
2. Click “Reply”, add your message and click send

### Using Emojis, memes and gifs

1. Click on “Teams”, choose a team and a channel
2. Click “Sticker” underneath your compose box
3. Select a sticker, meme or whatever you choose, enter a caption and click “Done”



# MICROSOFT TEAMS

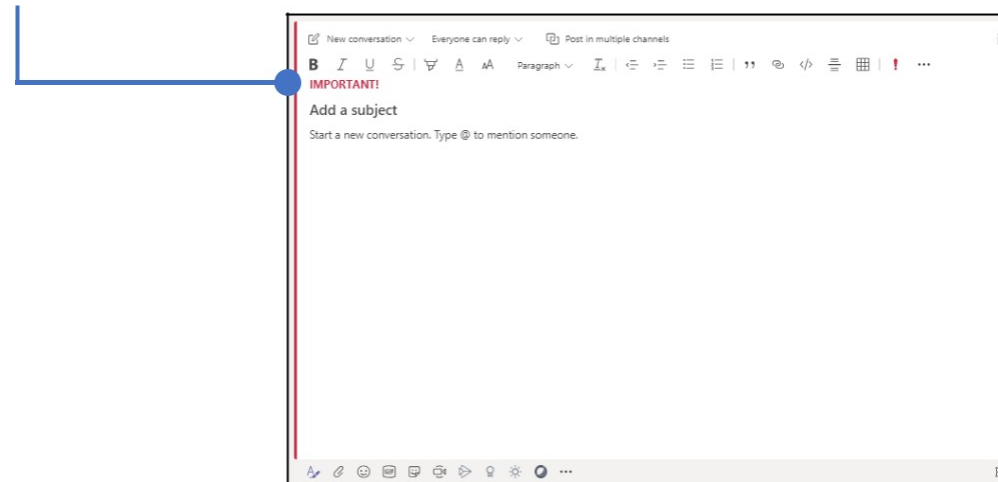
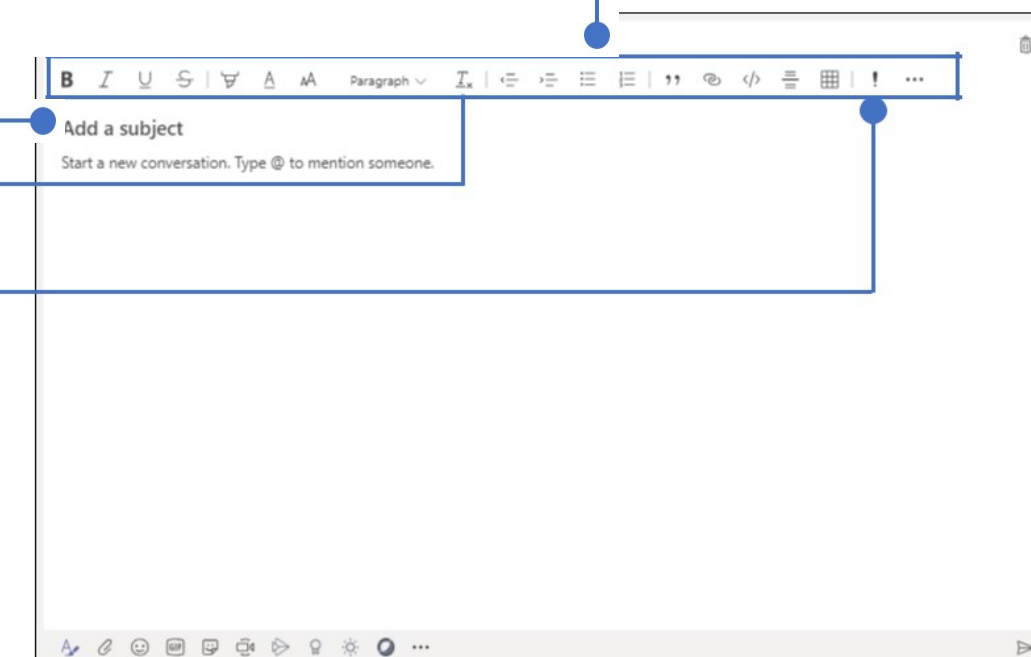
## SHARE FILES AND CHAT

### Format messages

When typing a message, you have the option to use format to have all the standard formatting options you would have in Microsoft Word.

Click on the “Format” button to open up the extended message box.

- You can now add a subject title to your message
- Format the text to change the look, add bullet points, hyperlinks and tables
- You also have the option to mark a message as important to get your team members attention



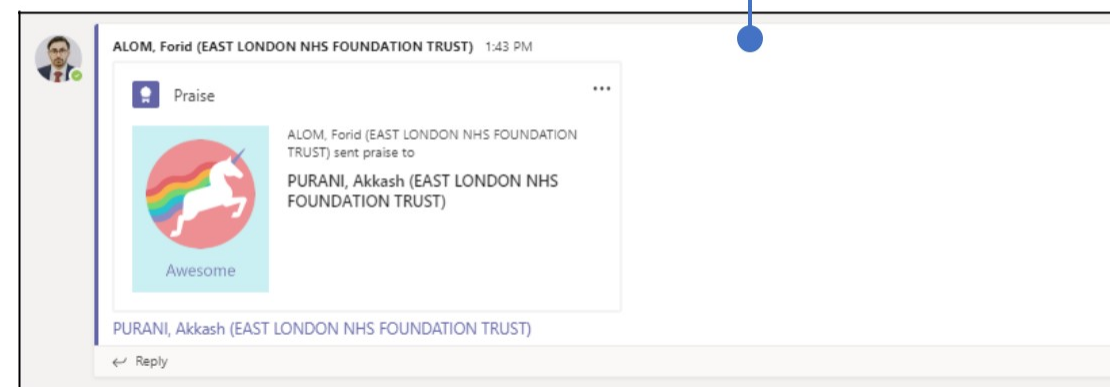
# MICROSOFT TEAMS

## SHARE FILES AND CHAT

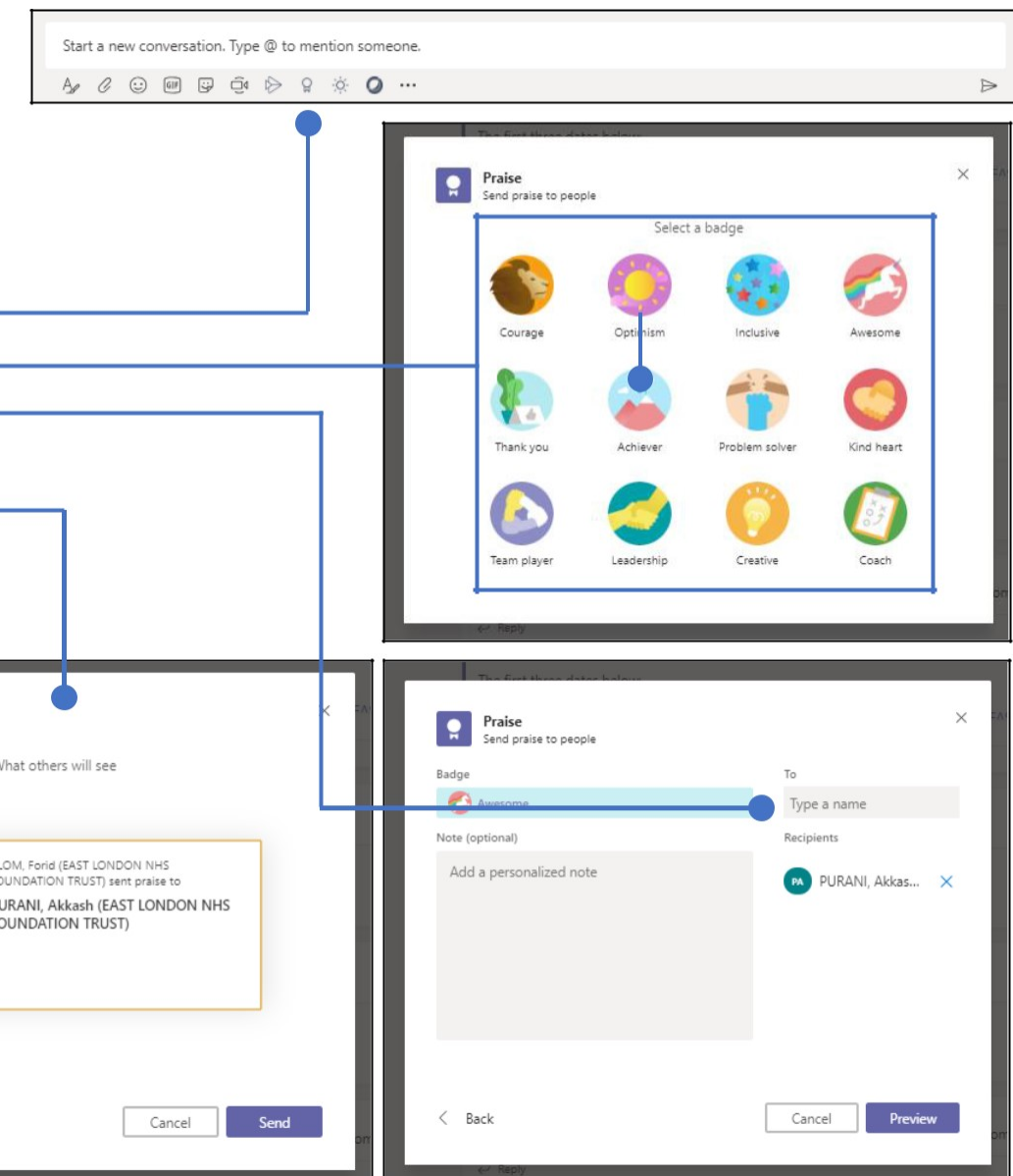
### Praise colleagues

The praise feature in Microsoft Teams is a great way to recognise your colleagues and their efforts.

1. Click on the “Praise” button
2. Select a badge you’d like to use
3. Enter the name(s) of the people you want to praise
4. Click preview
5. Click “send” to post it on the channel



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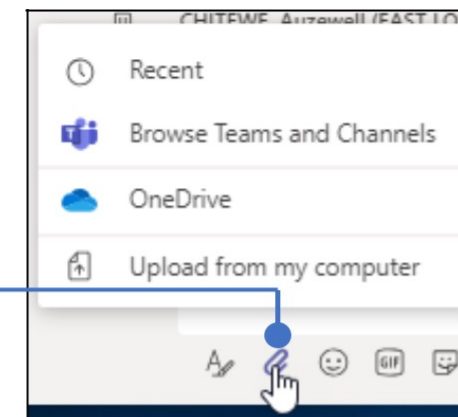
# MICROSOFT TEAMS

## SHARE FILES AND CHAT

### Sharing a file

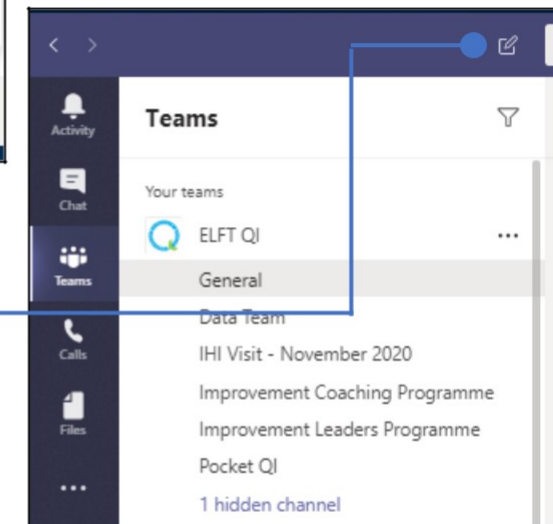
1. In the channel conversation, click on “Choose file”, under the message compose box
2. Select a file, click “Open”, and then click “Send”

All the files you post in a channel are viewable in the Files tab



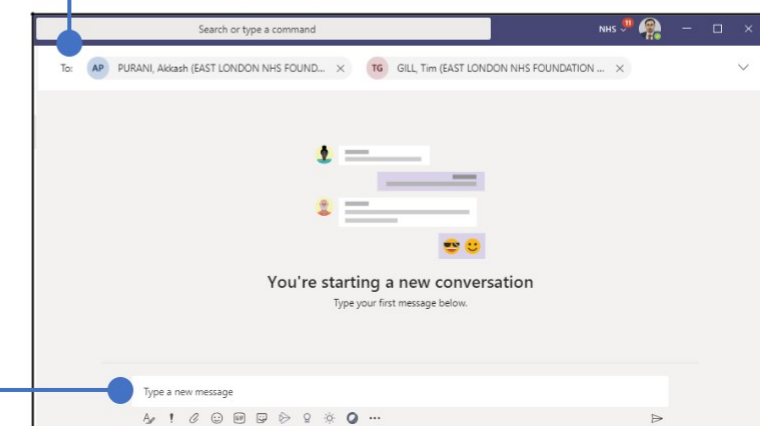
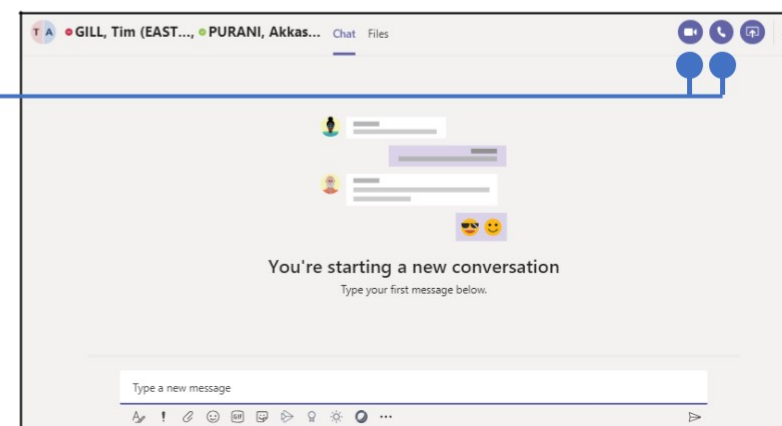
### Start a conversation with a person or a select group

1. Click “New Chat” at the top of the application
2. In the To prompt, type the name of the person or the people you want to begin chatting with
3. In the compose box, type your message and then click “Send”
4. If you want to meet with the group, click the telephone or video icon to start an instant meeting



**Please note:** If your chat has more than 20 people, you will not be able to use the telephone or video call feature (it will be greyed out). You will need to schedule a meeting through the outlook option highlighted in [page 11](#)

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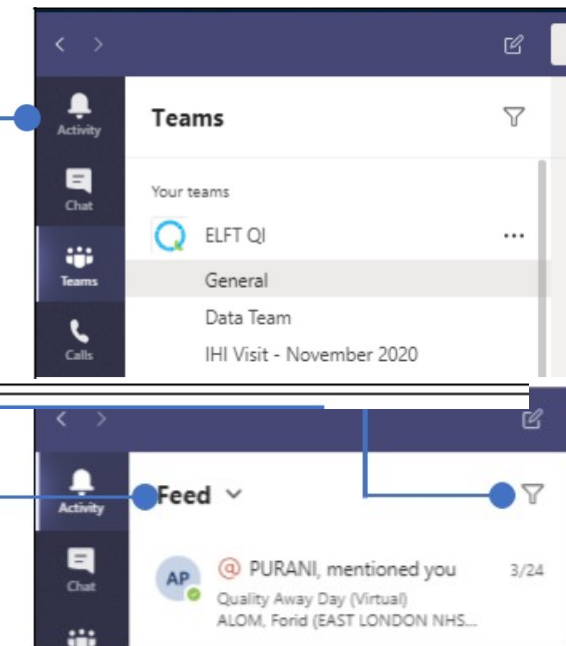


# MICROSOFT TEAMS

## COLLABORATE IN MICROSOFT TEAMS

### Notifications

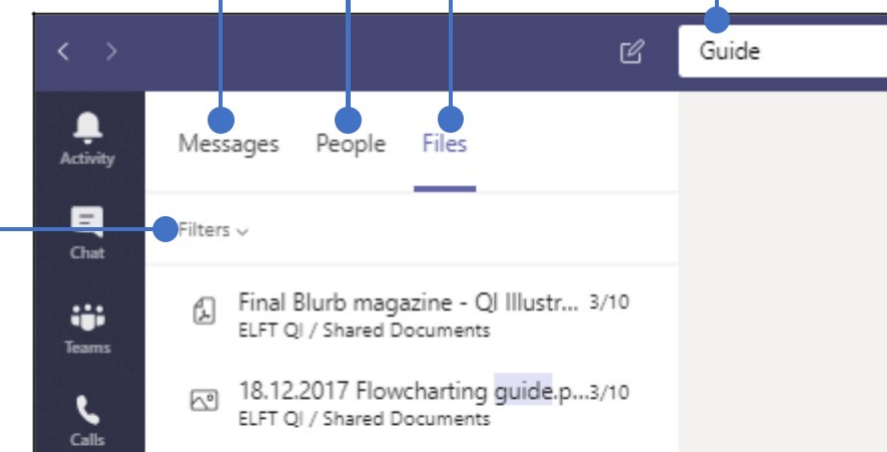
1. Click on the “Activity button”
  2. The feed shows you all your notification and everything that’s happened lately in the channels you follow
- Click “Filter” to show only certain types of notifications, like @mentions or likes
  - Click “Feed” > My Activity to see a list of everything you’ve been doing lately in teams



### Search for messages, people or files

1. Type a phrase or keyword into the box at the top of the app and press enter
2. Select the Message, People, or Files tab
3. Select an item in the search results

- Or you can click on “Filter” to refine your search



# MICROSOFT TEAMS

## COLLABORATE IN MICROSOFT TEAMS

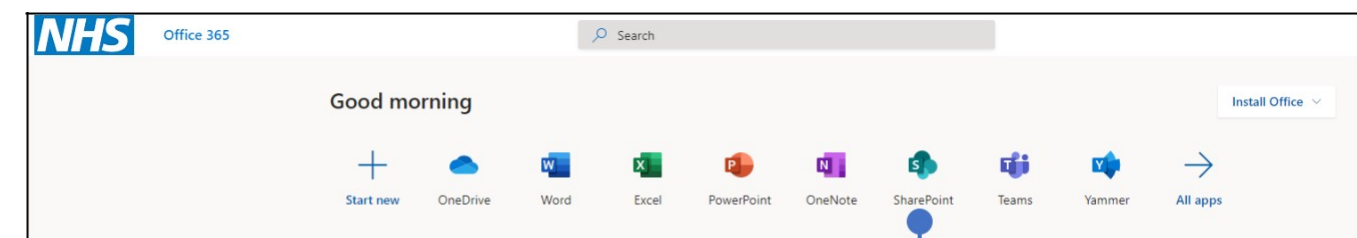
### Accessing your team's SharePoint

When a team is created on Microsoft Teams, a SharePoint site is created automatically which stores all your documents.

There are two ways to access your SharePoint site.

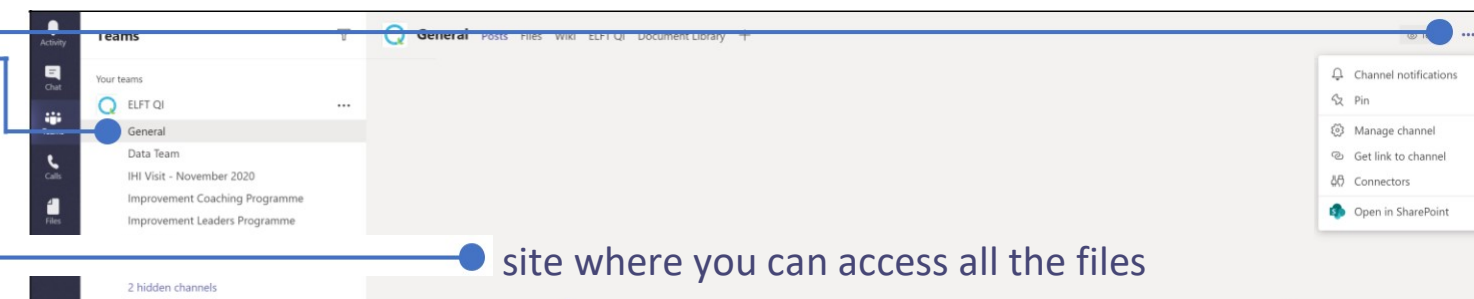
#### Option 1 –

1. Go to [office.com](https://office.com) and log in using your NHS.net credentials.
2. Click on the SharePoint app where you will be able to find your team



#### Option 2 –

1. Click on a channel within your team
2. Click on the more option button
3. Click "Open in SharePoint"
4. You will now be taken to your team's SharePoint



site where you can access all the files

# MICROSOFT TEAMS

## COLLABORATE IN MICROSOFT TEAMS

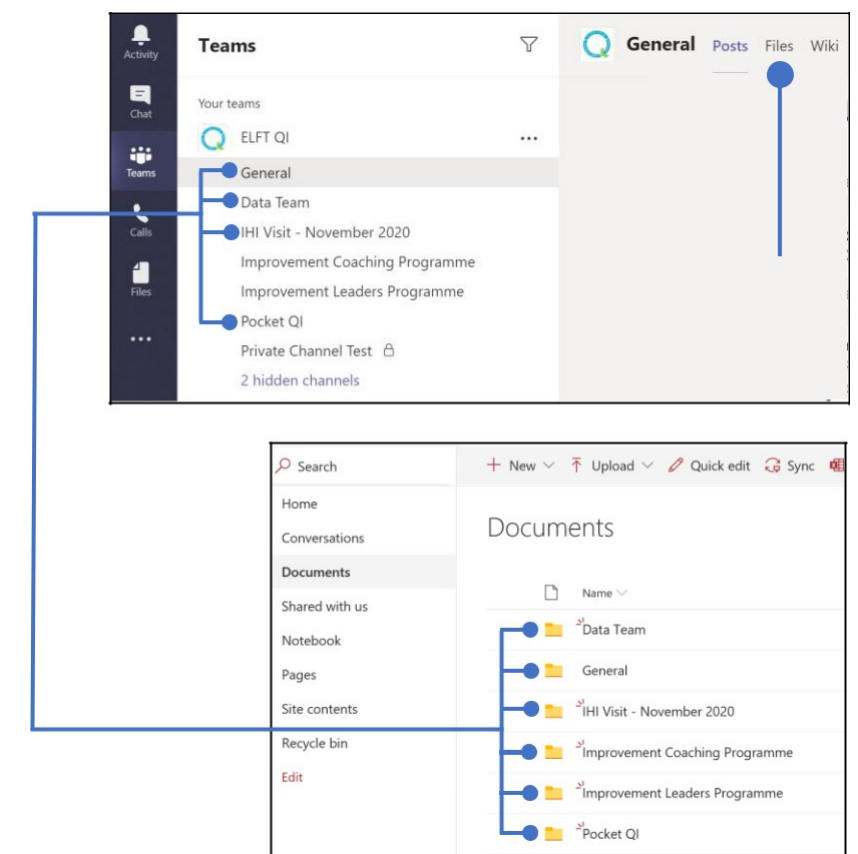
### Managing your team's Files

When you create a channel within your team in Microsoft Teams, a folder is **automatically** created in your Files folder. Any files you share in the ➔ channel can be accessed by the “File” button in the channel.

In terms of best practice, we recommend you do not remove files from a channel folder to another folder unless agreed with the team. This will stop confusion in finding files that have already been shared.

Download (copy back) any key files to your departmental shared drive when done.

**Note: Storing of patient identifiable information in MS Teams, SharePoint or One drive should be avoided. They can be used for virtual meetings so they are accessible to discuss during the calls via screen sharing but then removed from the application and stored on the normal file structures on Tatoonine.**



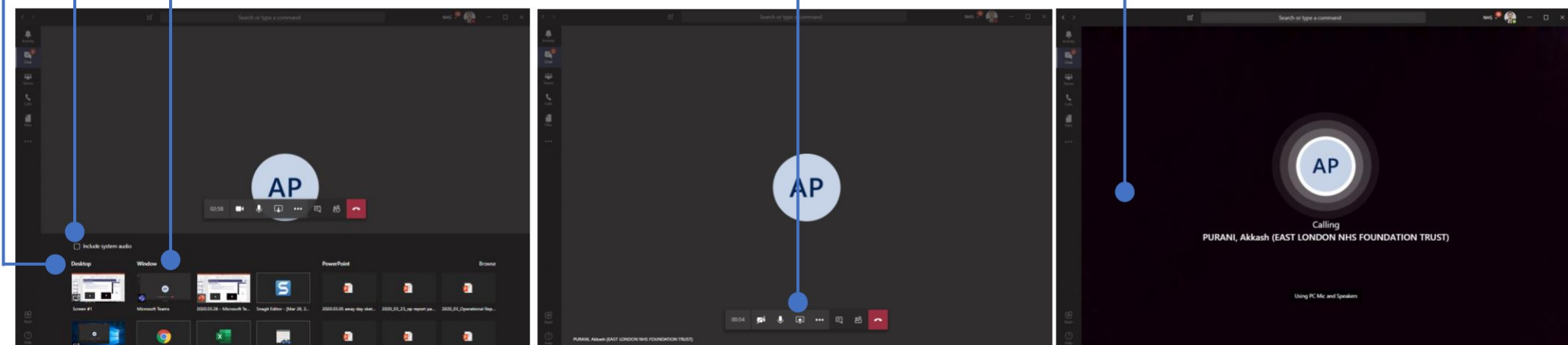
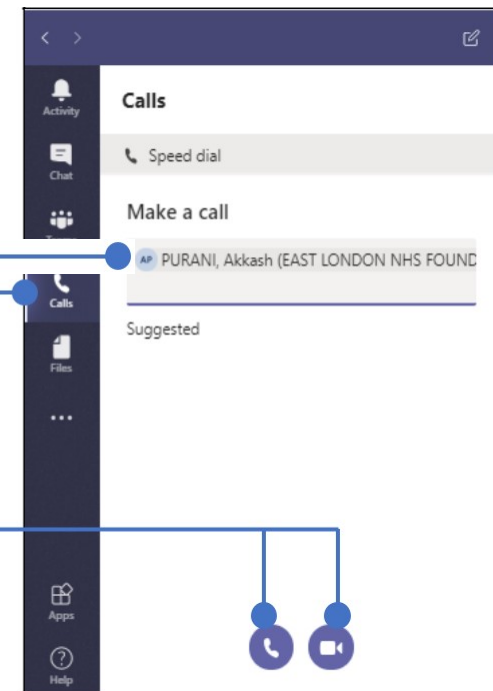


# MICROSOFT TEAMS

## MEETING IN MICROSOFT TEAMS

### Start a meeting within an individual

1. Click on “Calls”
2. Type the individuals name in the “Make a call” box
3. Once you’ve selected the individual, the telephone and video call buttons will turn blue.
4. Click on preferred option and you will make the call
5. Teams will start calling the individual
6. Once they answer, you will be able to have a video conference
7. To share your screen, please the Share button
8. Select if you want to share your Desktop or Window. If you want to share a video, make sure you tick the “Include system audio” box





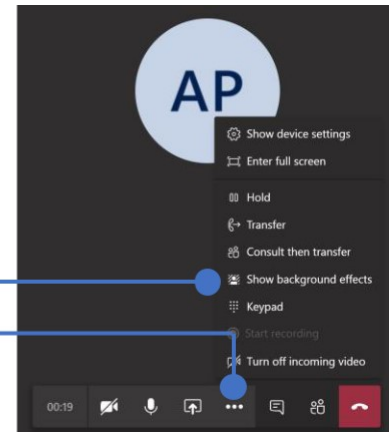
# MICROSOFT TEAMS

## MEETING IN MICROSOFT TEAMS

### Background Effects

When on video call, you can use the background effects feature to block out your background environment.

1. Click on “More options”
2. Click “Show background effects”
3. Choose an option from the list and click apply
4. Your background will now change to the selected image.



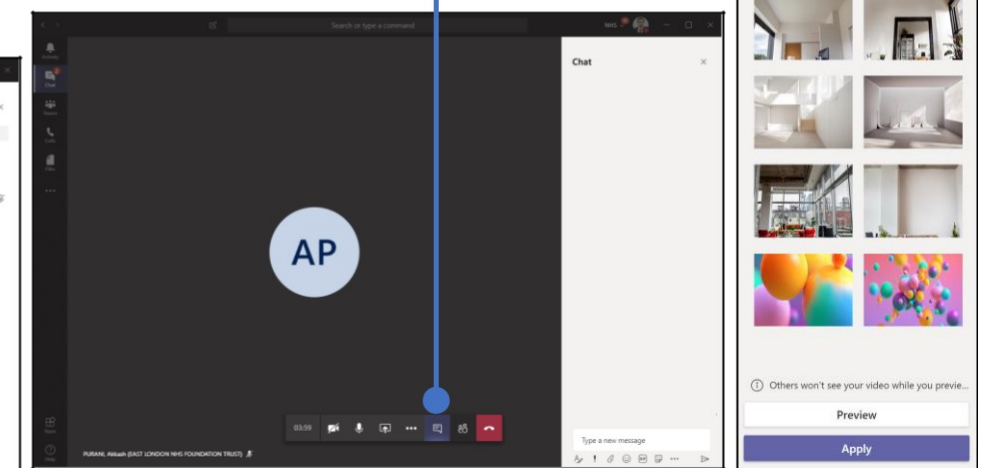
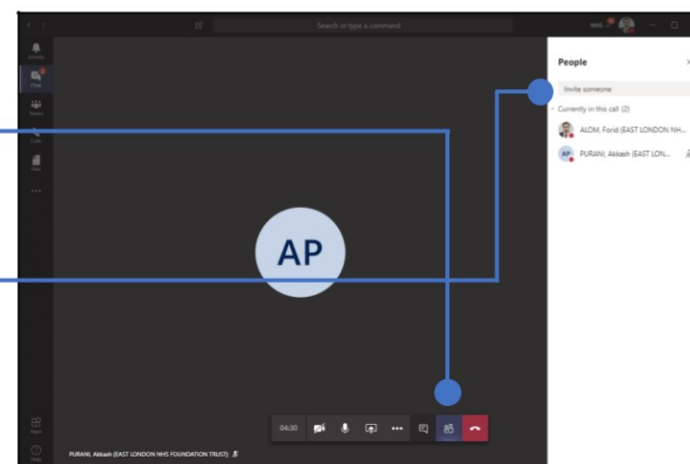
### Conversations

To have conversations with participants, click “Show Conversation”

### Participants

To view participants, click “Show Participants”.

Use the Invite Someone option to add more people to the call.

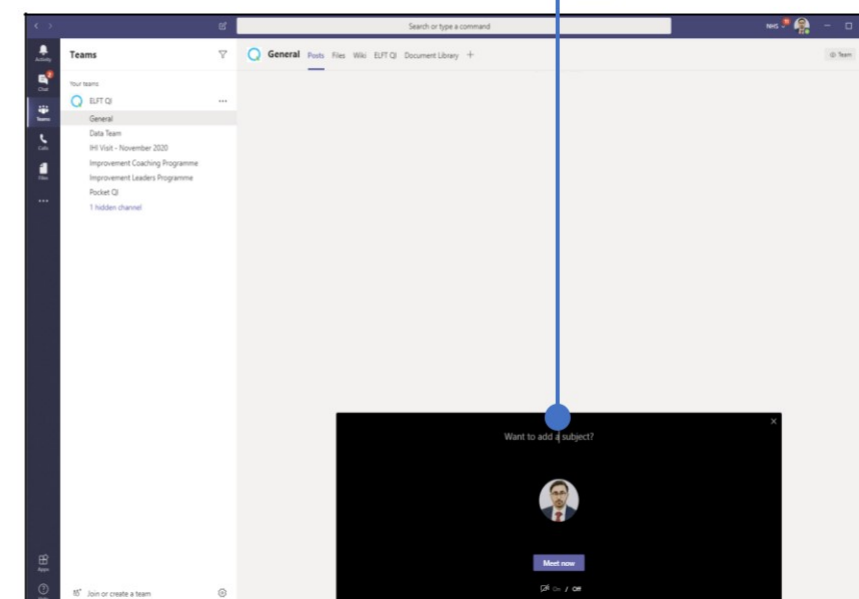
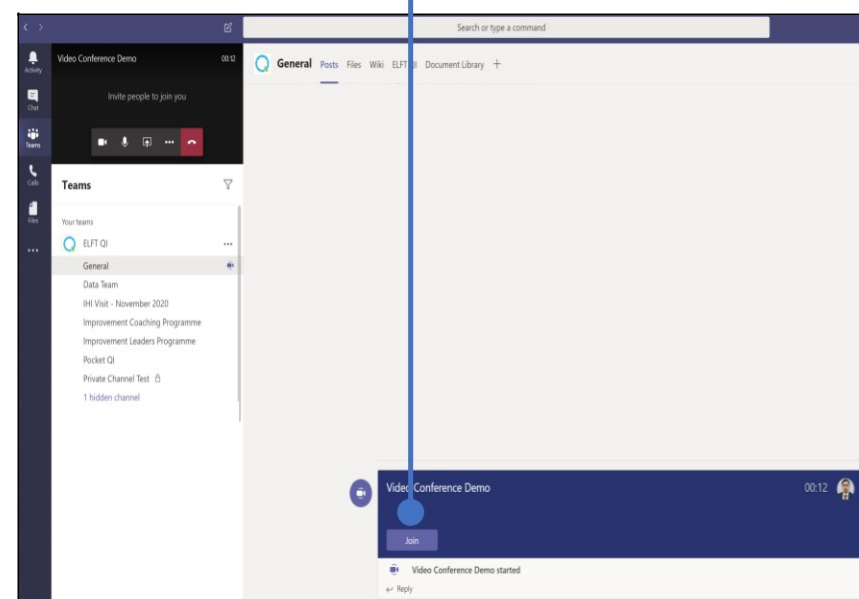
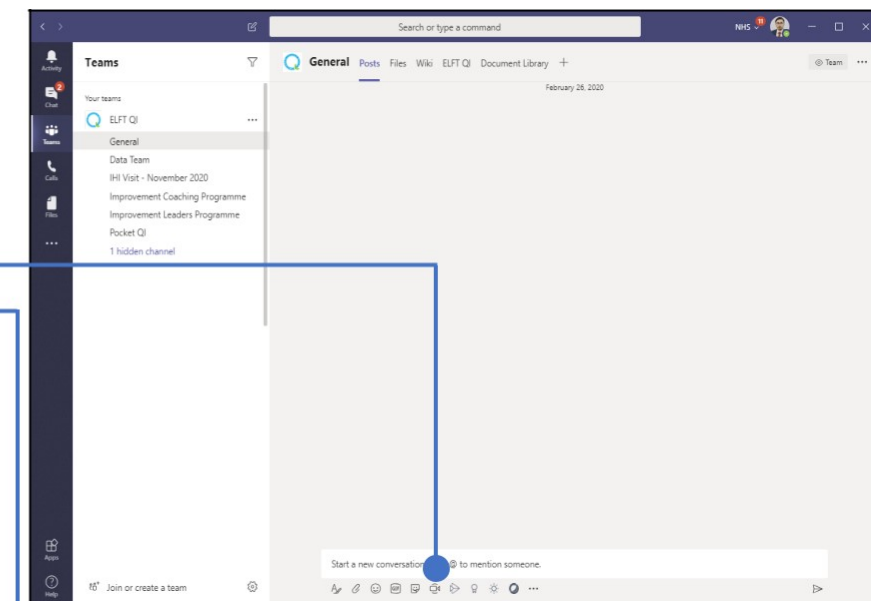


# MICROSOFT TEAMS

## MEETING IN MICROSOFT TEAMS

### Start a meeting with a team

1. Click on “Teams”, go to the relevant Team and then Channel
2. Under the compose bar, click on the “Meet Now” button
3. You will be given the option to add a subject
4. Click “Meet Now” and you will start a video conference meeting
5. If you go to the channel now, you will see a message saying the meeting is running with an option to join (in our example, we called the meeting “Video Conference Demo”).
6. All the team members can now join the meeting through this method



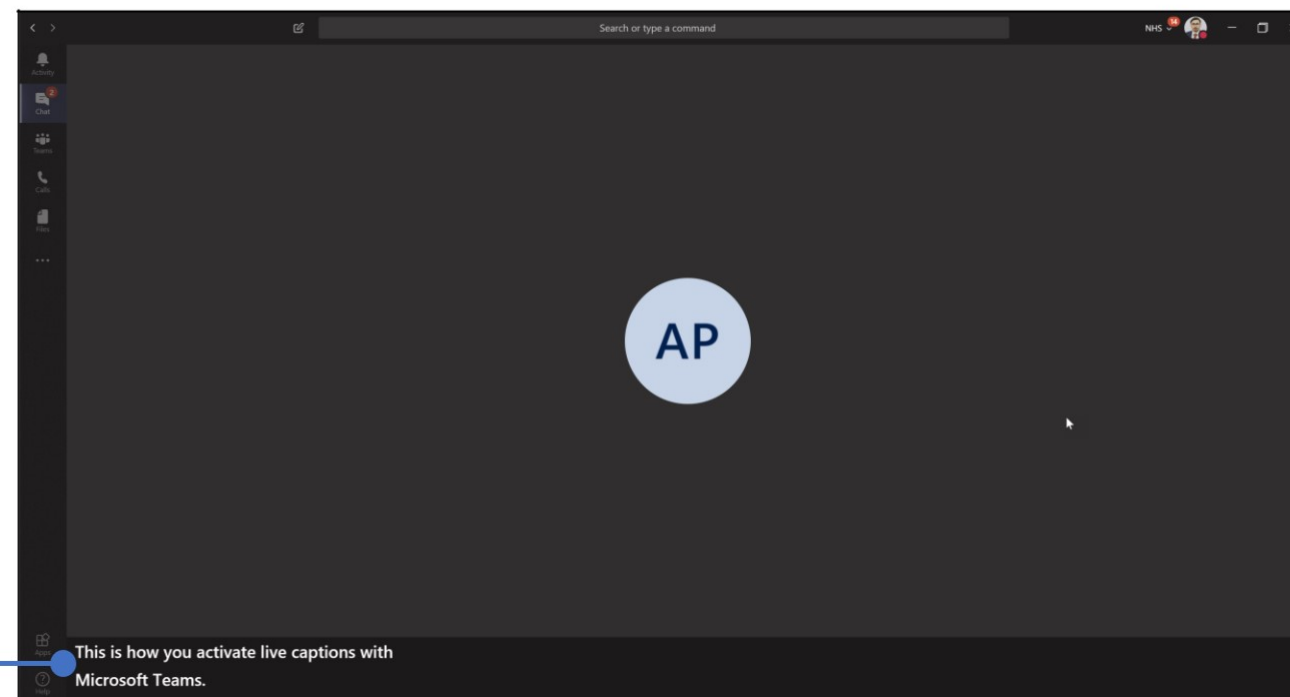
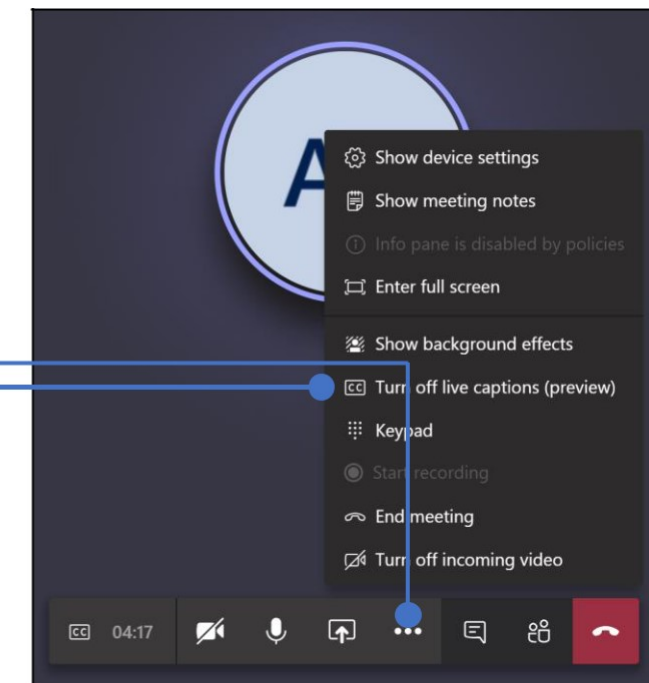
# MICROSOFT TEAMS

## MEETING IN MICROSOFT TEAMS

### Activate Live Captions

During meetings, you have the option to turn on “Live Captions” . This will then provide captions throughout your meeting.

1. Click on “More options” and then “Turn on live captions”.
2. You will see a black bar pop up at the bottom.
3. The software will now pick up audio and translate it into captions for you to view.



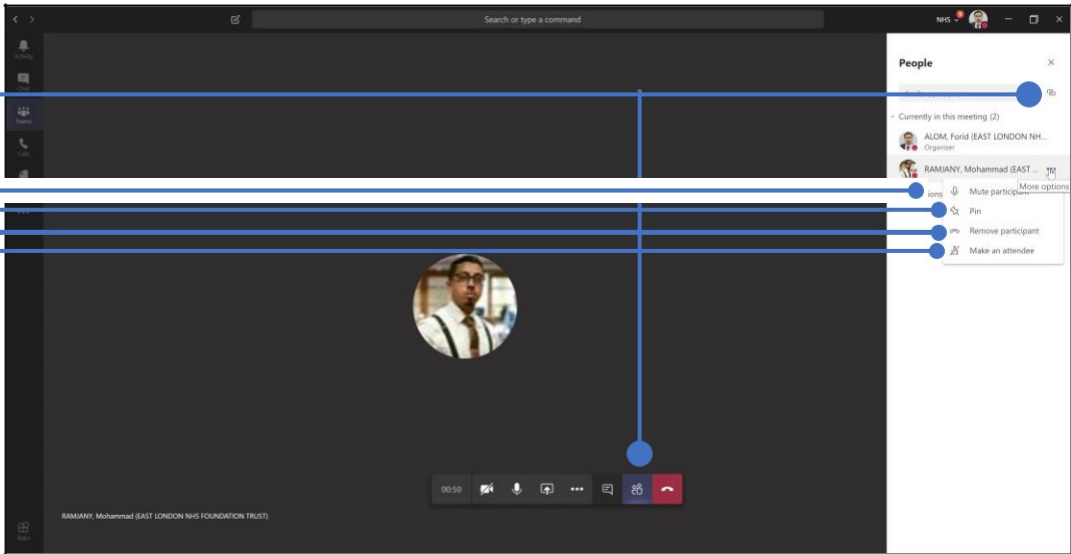
# MICROSOFT TEAMS

## MEETING IN MICROSOFT TEAMS

### Controlling a team meeting

1. Click on “Show Participants” and then you will be able to copy the meeting invite link and share with others to join
2. Once individuals have joined the call, you can manage them by clicking on “Show participants”.
  - You can mute individuals by clicking “Mute participants”
  - You can pin them to the screen (Microsoft Teams defaults to showing the last 4 people who have spoken most recently)
  - You can remove individuals by clicking “Remove Participants”
  - You can switch individuals between Presenters and Attendees. The table below explains the difference.

| Capability  | Organiser | Presenter | Attendee |
|---|-----------|-----------|----------|
| Speak and share video                                   | ✓         | ✓         | ✓        |
| Participate in meeting chat                             | ✓         | ✓         | ✓        |
| Share content   | ✓         | ✓         |          |
| Privately view a PowerPoint file shared by someone else | ✓         | ✓         | ✓        |
| Take control of someone else's PowerPoint presentation  | ✓         | ✓         |          |
| Mute other participants                                 | ✓         | ✓         |          |
| Remove participants                                     | ✓         | ✓         |          |
| Admit people from the lobby                             | ✓         | ✓         |          |
| Change the roles of other participants                  | ✓         | ✓         |          |
| Start or stop recording                                 | ✓         | ✓         |          |



# MICROSOFT TEAMS

## MEETING IN MICROSOFT TEAMS

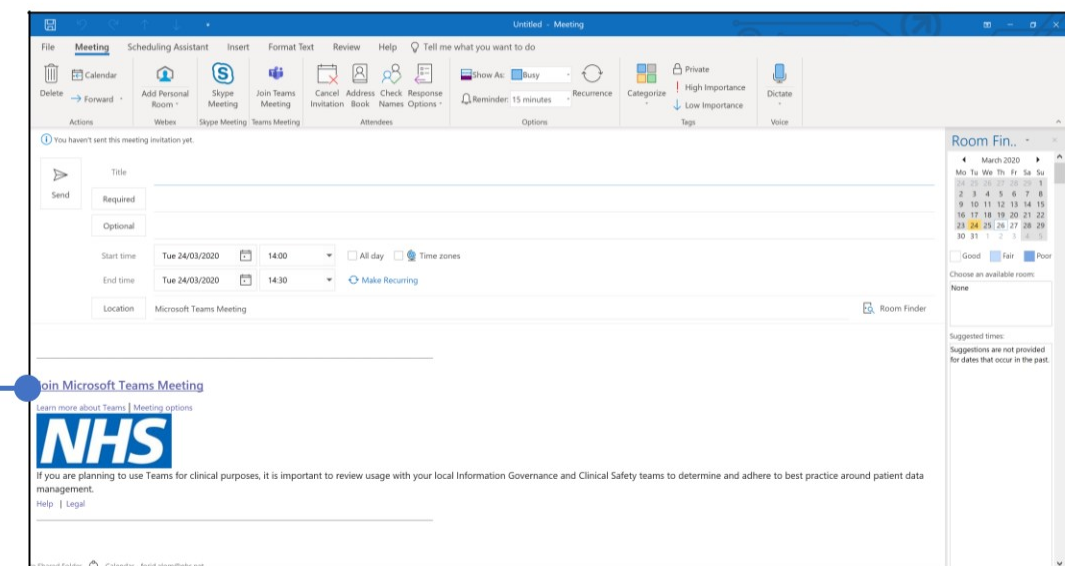
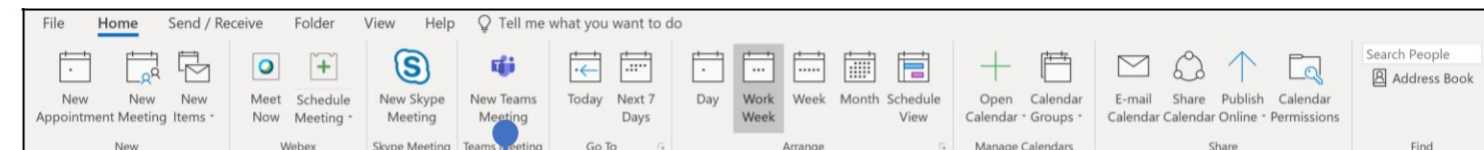
### Schedule a meeting

To schedule a meeting, you will need to use the Microsoft Teams Add-in in Outlook

1. Go to your outlook calendar
2. Click on the “New Teams Meeting” button
3. This will create a new calendar invite with the Microsoft Teams meeting details.
4. Complete the calendar entry and send out to all relevant stakeholders

You can have up to 250 people join a call through this way. They won’t need a Microsoft Teams account as they can join through the Web Browser as a guest.

**Please note:** If you don’t have this add-in, you will need to contact IT.



# MICROSOFT TEAMS

## MEETING IN MICROSOFT TEAMS

### Schedule a meeting

Once a meeting is scheduled, you can assign roles before it starts.

1. Click on “Meeting Options”
2. This will open a new web page, with a few choices

### Who can bypass the lobby?

Anyone outside this setting will need to be “accepted” to join the meeting. Once they join the meeting, the presenters will be able to “accept” or “decline” them.

### Who can present?

The table below explains the differences between the four options.

| Who can present           | What happens  |
|---------------------------|---|
| Everyone                  | Anyone who has access to the meeting link will join the meeting as a presenter.                           |
| People in my organisation | Only people in your organisation will be presenters. External participants will join as attendees.        |
| Specific people           | Only people you choose from the list of invites will be presenters. Everyone else will join as attendees. |
| Only me                   | Only the organiser will be a presenter. All other participants will join as attendees.                    |

**Please note:**

You will need to send your meeting invite directly to anyone you want to select as a presenter.  
You won’t be able to select someone from a different organisation as a presenter.

ⓘ No responses have been received for this meeting. This appointment is next to another one on your calendar.

➤  
Send Update

Title

Microsoft Teams Demo - Assigning roles

Required

●

 PURANIL Akkash (EAST LONDON NHS FOUNDATION TRUST) 

●

 RAMJANY, Mohammad (EAST LONDON NHS FOUNDATION TRUST)

Optional

Start time

Mon 30/03/2020 15:00

☐ All day ☐ Time zones

End time

Mon 30/03/2020 15:30

[Make Recurring](#)


Location

Microsoft Teams Meeting 

Room Finder


Join Microsoft Teams Meeting

[Learn more about Teams](#) | [Meeting options](#)



If you are planning to use Teams for clinical purposes, it is important to review usage with your local Information Governance and Clinical Safety teams to determine and adhere to best practice around patient data management.

[Help](#) | [Legal](#)



Microsoft Teams Demo - Assigning roles

📅 March 30, 2020 3:00 PM - 3:30 PM

👤 ALOM, Forid (EAST LONDON NHS FOUNDATION TRUST)

Meeting options

Who can bypass the lobby?

People in my organization ▼

Who can present?

Everyone ▼

Save

# MICROSOFT TEAMS

## Frequently Asked Questions

### **Is Microsoft Teams Secure?**

Microsoft Teams is encrypted and data all resides on UK shores. NHSx have confirmed that Office 365 (including Teams) is safe to use. Patient identifiable information can be stored on the platform temporarily but should be entered into the relevant clinical system as soon as possible.

### **Do I need IT to install the Microsoft Teams app?**

No - you can install this without needing IT credentials.

### **Can I create a Team?**

Unfortunately, only the Trust's Local Office Administrators can set up teams. Please get in touch with IT and this will be actioned as soon as possible.

### **What are the limits on a Team?**

A team can have up to 100 owners and 5000 team members.  
A team can have up to 200 channels (included deleted channels).

### **How many people can I have on a Microsoft Teams Call?**

You can have up to 20 participants on a meeting started via the "[Chat](#)" or "[Calls](#)" option

You can have up to 250 participants on a meeting started through the "[Meet Now](#)" option or scheduled through [Outlook](#).

### **Can I call external telephone numbers from Teams?**

Teams cannot be used for outbound dialling to external telephone numbers. You can only use it to make audio and video calls with other NHSmail users with access to Teams.

### **Can I invite an external guest to join a Teams meeting?**

Yes – you can invite external participants to your meetings as guests. They will be asked to enter their username before joining the lobby (waiting area) for your session.

### **Why can't I see my calendar in Teams?**

The Teams calendar option is not currently available in NHSmail.

### **What will happen after the 3 month free period?**

An announcement will be made by NHS Digital over the coming weeks on continuity plans after the 3-month window has expired.



# MICROSOFT TEAMS

## USEFUL LINKS

### RUH eLearning

<https://elearning.ruh.nhs.uk/Millennium/eLearning/MSTeams/index.html>

**Note: not all features of the Microsoft guides are enabled by NHS England/RUH**

### How to guides and videos by NHS Digital and Accenture

<https://support.nhs.net/>

- Intro to Teams
- Intro to Chat and Calls
- Intro to Meet

<https://support.nhs.net/knowledge-base/intro-to-teams/>  
<https://support.nhs.net/knowledge-base/start-chats-and-calls/> <https://support.nhs.net/knowledge-base/meet-now/>

### How to guides by Microsoft

<https://docs.microsoft.com/en-us/microsoftteams/enduser-training>

### Virtual Working Resources

<https://qi.elft.nhs.uk/collection/virtual-working/#>