



MICROSOFT TEAMS USER GUIDANCE

Doc. ID: IT-MAN-001

Version: 2.0

Effective Date: 10-Apr-2020

Owner: Director, Partnerships and IT Governance

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1. TERMS, ACRONYMS AND REFERENCES

For more information regarding Teams, please see the [Microsoft Teams Video Training](#) and/or [Teams](#).

Please find referenced IMS Standard Operating Procedures (SOPs), Work Practice (WPs), Forms, and Guidance Documents within the [IMS Library](#). HR documents (Policies, Forms, GDs and Templates) can be found on the [IMS Human Resource Page](#).

Refer to the [MMS Global Glossary](#) for terms and acronyms.

- QA-SOP-001 Project Document Management
- QA-SOP-004 Record Control and Archiving
- AM-GD-002 Archiving Project Files Guidance Document
- BO-WP-002 Project Launch and Close Process

2. MS TEAMS APPLICATION ACCESS

2.1 TEAMS DESKTOP AND MOBILE ACCESS

2.1.1 Sign on to Teams - Desktop

Click [here](#) to access the instructions on how to sign into the Teams Desktop. These instructions also cover how to sign into Teams via a browser.

- If you experience difficulties logging into Teams, please submit a ticket by sending an email to support@mms Holdings.com.

2.1.2 Sign into Teams – Mobile

Click [here](#) to access the instructions to sign into the Teams mobile app, the instructions are similar to the desktop app instructions.

- You might be asked for additional verification, such as a code from Authenticator, when you sign in.
- The first time Teams is used on a device, a message stating "Help us keep your device secure" will appear. Click "Enroll now." Please refer to the [Intune MDM Setup Guide](#) if you have not already setup MDM on your phone.



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3. MICROSOFT TEAMS FOR COMMUNICATIONS

3.1 CHAT

Please use the following link for [instructions](#)

3.2 MEETINGS AND CALLS

Link to meeting [instructions](#)

4. MICROSOFT TEAMS FOR COLLABORATION

4.1 WHEN TO USE MS TEAMS FOR COLLABORATION

MS Teams is an easy-to-use collaboration tool for groups of colleagues that need a central location to store and collaborate on strategy and non-project related documents and deliverables*. MS Teams offers the following capabilities (the list below is not a comprehensive list):

- The ability to set up Teams groups by Service Line or functional area
- Collaboration on non-project related document creation
- Links to important internal sites/SPO lists/trackers
- Links to important external sites (i.e., regulatory agencies)
- The ability to create a Team Wiki which explains purpose, mission and goals of the group
- The creation of separate “channels” within the team for specific, individual projects or initiatives
- The facilitation of team chats

***Note: all client project-related documents and deliverables must be stored in MDOC as defined in QA-SOP-001 Project Document Management.**



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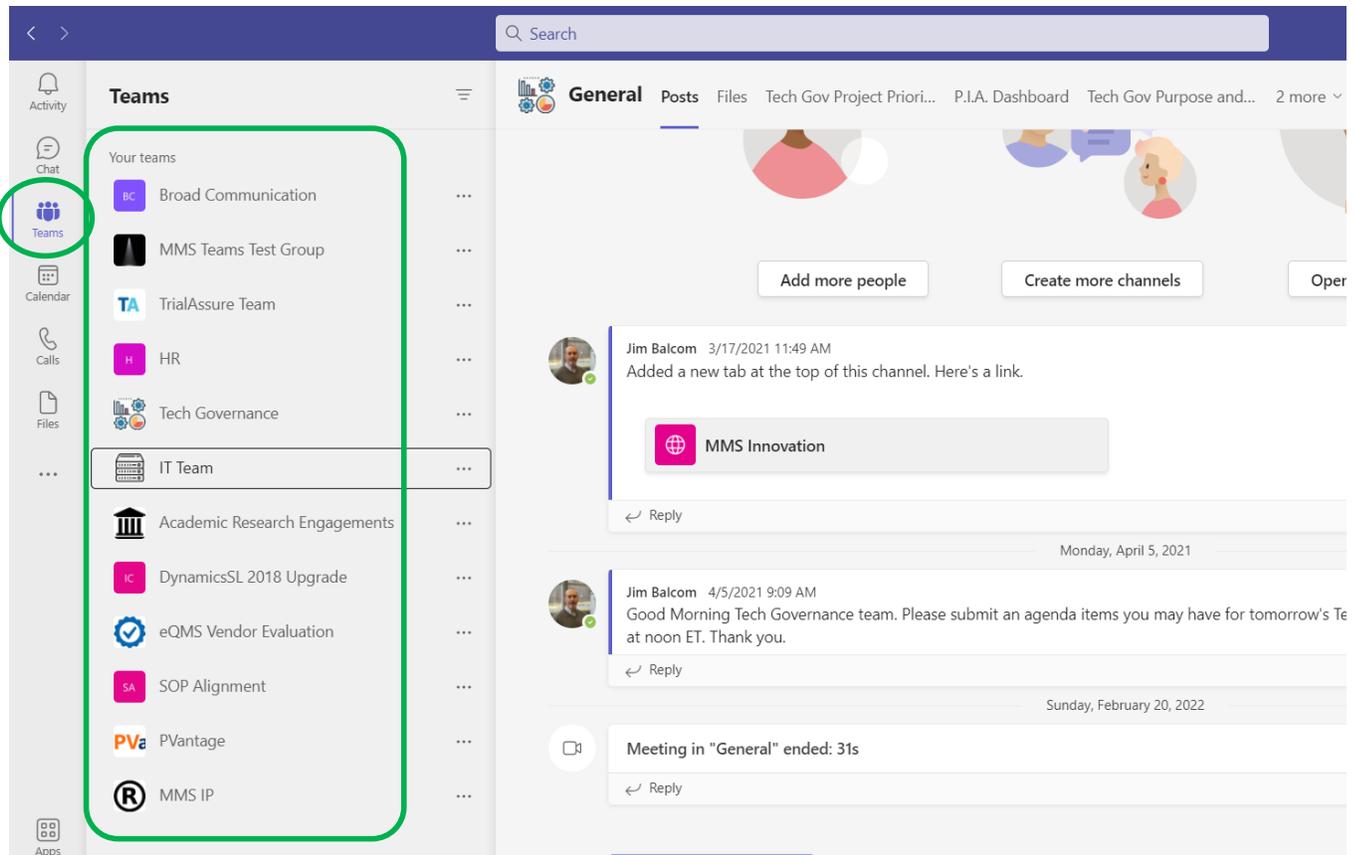
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4.2 ACCESSING TEAMS THAT YOU ARE A MEMBER OF

To access the Teams that you are member of, click on the Teams icon in the upper left corner of the Teams application:



4.3 MS TEAMS COLLABORATION FOR TEAM OWNERS

4.3.1 Creating your Team

To set up a team in MS Teams, submit an IT Ticket by sending an email to support@mms Holdings.com asking IT to create the team. Please include the name of the team and the name of the team owner(s) in the support ticket.



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4.3.2 Customizing your Team

Definition: "Owner". The team Owner is the person who will have admin control over the team. This person can add or remove members from the team and has rights to create Channels.

Adding a Team Picture (Optional)

You can customize your team picture. To learn how, follow the instructions provided in this link: [Change your team picture \(microsoft.com\)](https://microsoft.com)

Adding Channels to Your Team

By default, every Team has a "General" Channel. This is a good place for announcements or information that the entire team needs to see.

Definition: A "Channel" is a space under the team to communicate about a specific topic, project or initiative that is related to this team.

Additional Channels can be added to your team for special projects, sub teams, issues your team is working on, etc. For more information on how to add a channel to your team, click on this link: [Create a standard or private channel in Teams \(microsoft.com\)](https://microsoft.com)

Adding Tabs to Your Team

Tabs are located at the top of each Channel to the right of your team's name and team picture. Each Channel includes the following default tabs:

Posts: used to communicate with members of that team. Use the @ sign to call out specific individuals.

Files: this is where you'd store and collaborate on documents and other files within your team. These files are stored on SharePoint but not within our MDOC environment. Please remember that if your Teams site will be decommissioned (for instance, after the project for which the Teams site was created has been completed), all documentation will need to be migrated to our MDOC environment. This is relevant for all non-project related documents as they should remain in MDOC in the project folder.

Wiki: the Wiki is a great place to state definitions of the project, definitions of terms, links to important websites, create a RACI, external resource contact information, etc.



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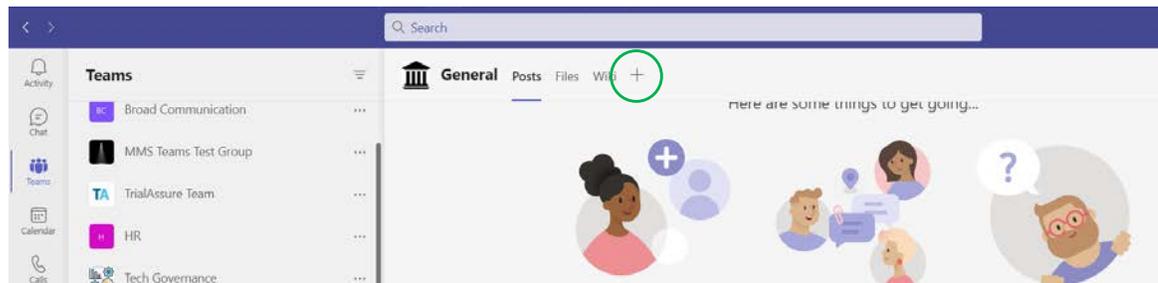
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Other Tabs can be added by clicking on the "+" sign:



Tabs can contain a variety of different Apps or links to websites, SPO libraries, folders or documents. Examples of what you could add to a Tab would be:

SharePoint Library, Folder, or List: You can add a tab to the top of your team that links to a specific SharePoint Library, Folder or list. To learn how, click on this link to follow the instructions: [Add an SPO page, list, or document library as a tab in Teams](#)

When added as a tab, this is a direct link to the library, folder or list. It does not move the library, folder or document out of the MDOC. This function just provides ease of access to these resources.

Other Apps that could be added to your team as a tab include (but not limited to):

Channel calendar: allows you to set up a calendar specific to this team as a whole or each individual Channel. When you add an appointment to this calendar, it automatically adds it to your Outlook calendar.

Website: adding a Website to your team allows you to link directly to a website that will be referenced frequently during your team collaboration.

Lists: allows you to create your own list or choose from available templates.

OneNote: create a team OneNote file.

Milestones: enables your team to create and track project milestones.

PowerBI: allows your team to connect to MS PowerBI dashboards/report already created by MMS. In order to access PowerBI, each person will need to have a license.



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Adding and removing team members

Once the team has been created by IT and you've customized it to meet the needs of the team, you can invite colleagues to join your team. To add members to your team, follow these instructions: [Add members to a team in Teams \(microsoft.com\)](#)

4.3.3 Deleting a Team

When an MS Teams team is no longer utilized, it should be deleted *. In order to delete a team, submit an IT ticket by sending an email to support@mms Holdings.com requesting this action must be submitted. QA-SOP-004 Record Control and Archiving and AM-GD-002 Archiving Project Files Guidance Document should be referenced before a team is deleted.

* Teams should not be repurposed or renamed.

4.4 CUSTOMIZING YOUR TEAM – FOR TEAM MEMBERS

4.4.1 Channel Notifications

Notifications are handled at the individual level meaning that an Owner cannot change the notifications for other people. Each person can choose the notification settings that work for them for each channel. To learn more about how to set notifications, click on this link: [Customize channel notifications in Teams \(microsoft.com\)](#)

4.4.2 Show, Hide or Pin a Channel to the top of your Teams

You can customize your Teams Channels by determining which Teams you want to show, hide or pin to the top of your list of Teams within the application. To learn how to perform these actions, follow these instructions: [Show, hide, or pin a team or channel in Teams \(microsoft.com\)](#)



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5. KNOWN ISSUES AND LIMITATIONS FOR VIRTUAL DESKTOP USERS

The following link provides information on known issues and limitations or features that are not supported for Virtual Desktop users: [Known Issues and Limitations](#)

6. APPENDIX A - CHECKLISTS

Checklist for Team owners - creating and customizing your team:

<input type="checkbox"/>	Create your team by submitting a request to support@mms Holdings.com	Page 4
<input type="checkbox"/>	Add a customized picture or logo to represent your team (optional)	5
<input type="checkbox"/>	Add Channels to your Team (Optional)	5
<input type="checkbox"/>	Add Tabs to your Team (Optional)	5
<input type="checkbox"/>	Adding and removing team members	7

Checklist for Team members - customizing your team:

<input type="checkbox"/>	Customize your Channel notifications	Page 7
<input type="checkbox"/>	Show, Hide or Pin a Channel to the top of your Teams	7

7. AMENDMENT RECORD

Version	Date	Description of Changes
1.0	10-April-2020	New Document Release
2.0	27-October-2022	Revised information regarding MS Teams access and added instructions for using MS Teams for collaboration