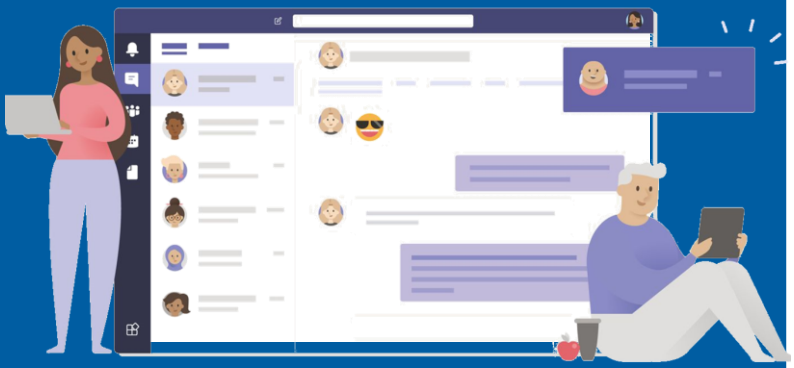
Training Guide

Step by step instructions on how to use Teams with quick tips

Microsoft Teams Learning Journey

Connect and collaborate with colleagues across the health and social care



New to Teams?

Have a go at messaging and calling colleagues

01

Contact colleagues in different wards or locations

02

Use group calls and chat for daily handover sessions

03

Send quick updates from your mobile with voice notes

Ready for more?

Schedule a meeting and collaborate on calls

04

Schedule an MDT meeting

05

Create and use Teams groups

06

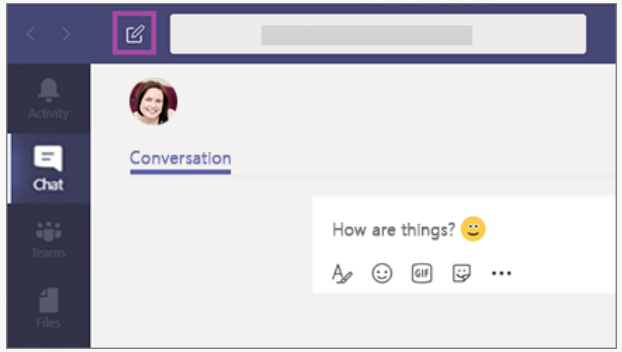
Collaborate on a shared document

INSTANT MESSAGE AND CALL COLLEAGUES

Messages can be sent as instantly and securely using Teams chat, so you can talk to colleagues in different wards or locations, ask questions or send quick updates with minimal disruption to your rounds.

Message a colleague

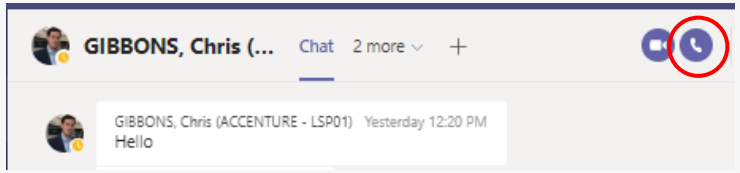
Steps for desktop and web users



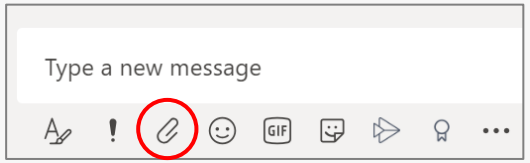
1. Select New chat at the top of the page
2. Enter in the name of the person you want to message
3. Type your message into the chat box and hit send!

Call a colleague

Steps for desktop and web users

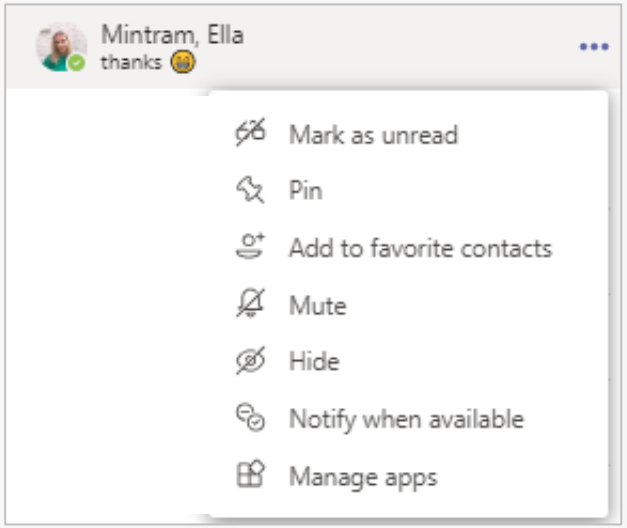


1. Select New chat at the top of the page
2. Enter in the name of the person you want to call
3. Click the phone icon on the top right of the page
4. Share content by selecting the paperclip icon below the text box



Quick Tips

Set notifications to see when a colleague is available on Teams so you know the best time to message or call them. Click the three dots next to a person's name and select 'Notify when available'.



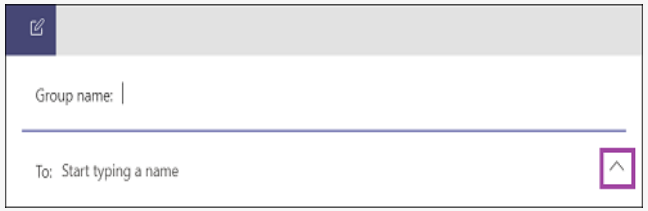
GROUP CALLS AND CONVERSATIONS

Group calls connect staff and colleagues across wards, in one virtual place for daily meetings and handover sessions at the end of shifts. Use the chat box to attach your notes or pictures of rotas you want to share.

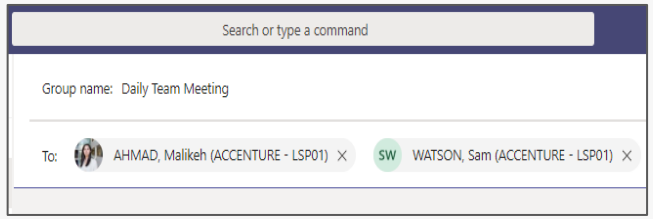
Start a group chat

Steps for desktop and web users

1. Select New chat at the top of the page
2. Select the down arrow to the far right of the **To** field and add a group name



3. Type in the names of the people you want to add in the **To** field

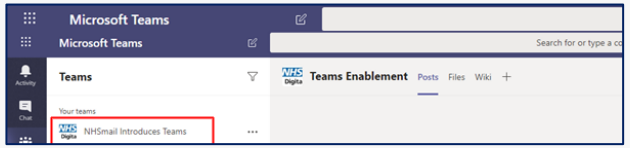


4. Send a message to the new group!

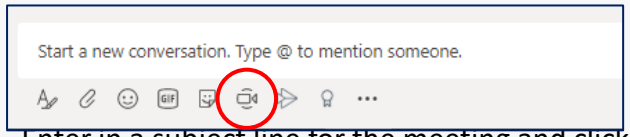
Start a group call

Steps for desktop and web users

1. Select the team you want to start a meeting with



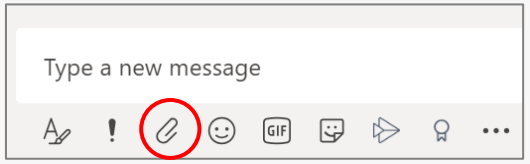
2. Select the 'Meet Now' icon at the bottom of the page to start your call



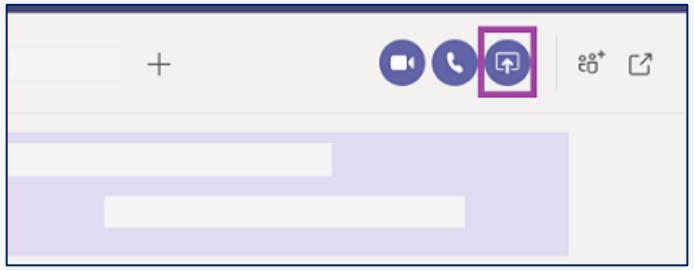
3. Enter in a subject line for the meeting and click 'Meet now'. You are now in the group call!

Quick Tips

Attach documents and pictures using the paperclip icon below the text box.



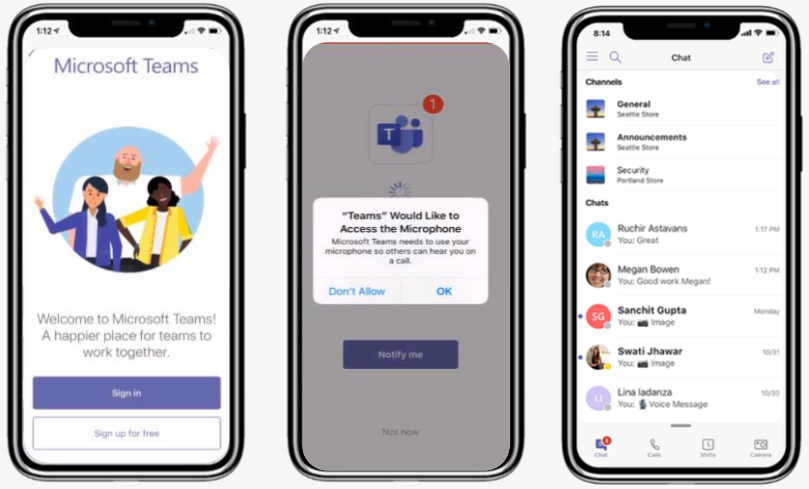
You can share your screen on the call to present or talk through rotas and other updates. Select the screen sharing icon below, found on the top right of the conversation page. You can select whether you want to share your full desktop or one of the open windows only.



USE THE MOBILE APP TO SEND QUICK UPDATES USING VOICE NOTES

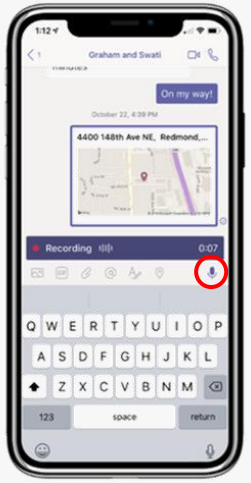
You can use voice notes to send messages on the go, sharing snippets of information quickly where phone calls might not be necessary or you don't have a pager to hand!

Download the Teams mobile app



1. Find the Microsoft Teams app in the App/Play store and download
2. Sign in with your **NHS.net email address**
3. Enable your microphone when prompted by selecting 'OK'
4. You'll then be directed to your Teams home page

Send a voice note

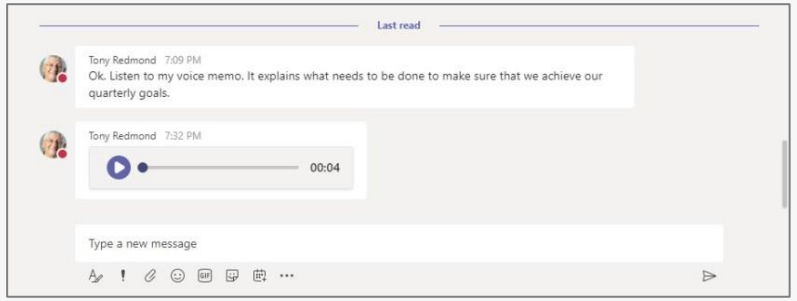


1. Select the person or group you want to message
2. Hold down the microphone icon on the keypad
3. Record your message
4. Release the mic and press send

Quick Tips

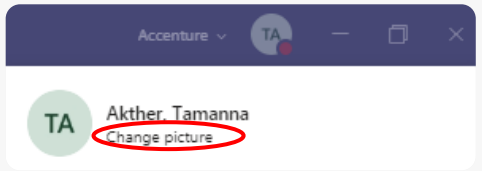
You can use voice notes to share actions from a team meeting or assign tasks to colleagues without having to type up meeting notes!

You can listen to voice notes sent from mobile on desktop and web versions of Teams.

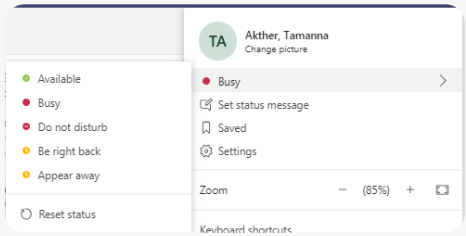


QUICK TIPS TO MAKE THE MOST OF CALLS AND CHATS

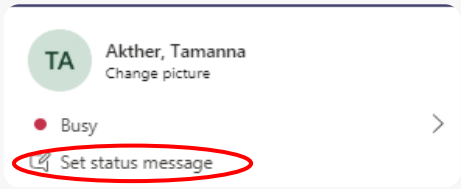
Upload a profile picture



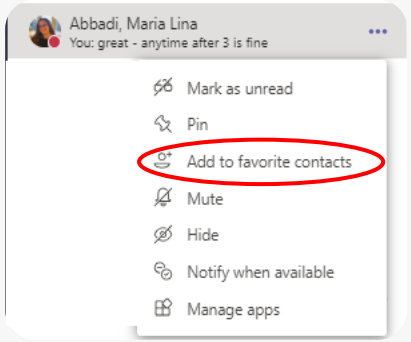
Select your status appropriately (e.g. *Busy* when in meetings)



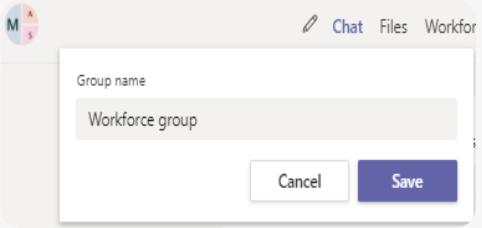
Update your status to reflect a frequently asked question (i.e. working hours, locations etc.)



Favourite a contact to find chats quickly

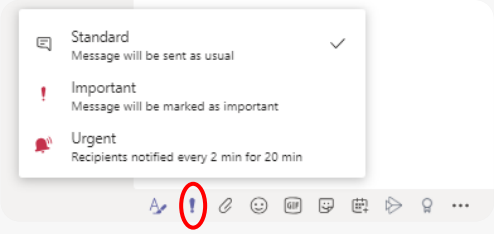


Name a group chat to reflects it's purpose and remove confusion

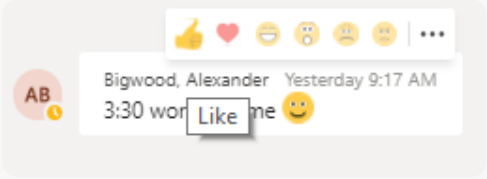


In group chats, use the @ to directly address someone

Use the "!" to flag an important message



Use the "like" button to acknowledge a message quickly



SCHEDULE A MEETING WITH MDTS

Video calls help multiple practitioners (up to 250 call participants) be in the same place at the same time. MDTs can discuss care plans and guidelines, collaborating quickly and simply.

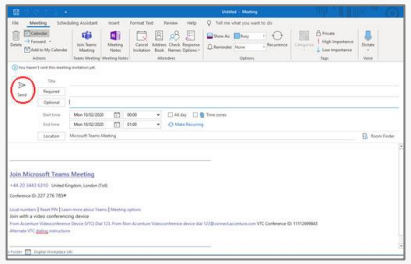
Schedule a meeting

Steps for desktop users

1. Open the outlook desktop app and select the calendar icon

2. Select 'New Teams Meeting' on the top of the page

3. Type in the names of the people you want to add in the **To** field

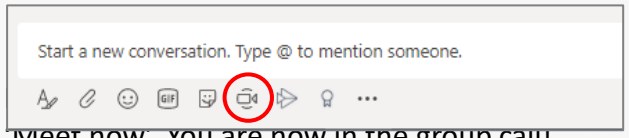


Schedule a meeting

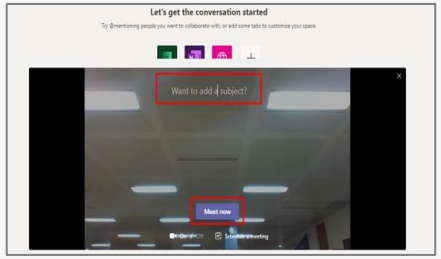
Steps for web users

1. Send an email invitation or group message to the team you would like to schedule a call with

2. At the time of the call, select the group chat and click 'meet now' below the text box

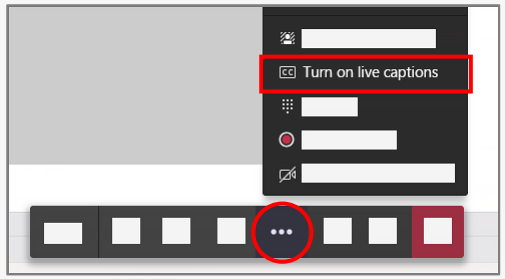
1. 

'Meet now'. You are now in the group call!



Quick Tips

Add subtitles to the call by selecting the three dots on the tool bar and select live captions



Someone missing from the meeting?

You can manually add more people into the call if by selecting the 'Add people' icon on the top of the page. Type in an email address and press 'add'.

CREATE A TEAMS GROUP FOR TEAMS AND DEPARTMENTS

A Teams group gives you the flexibility to organise different teams and projects, while keeping everyone in one place. Make announcements and share rotas, guidance and policy documents for everyone to see.

Creating a Team

Steps for desktop and web users

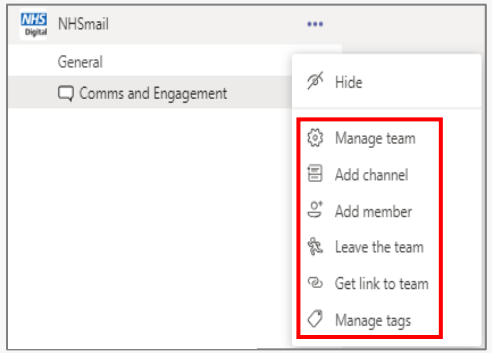
1. To create a Teams group for you and your colleagues, you will need to contact your Local Administrator.
2. Send your LA:
   - Names and emails of people you would like to add to the group
   - The name of the person who will own the group
   - The group name
   - A short description of the group
3. You will be notified by email once your group has been set up. An owner can then add or remove members, change the group name and add more owners to the group.
4. In a Team, only owners can add/remove members.

Managing a Teams group

Steps for desktop and web users

By default, every team gets a **General** channel, which is a good place for announcements and information the whole team needs. To add another channel:

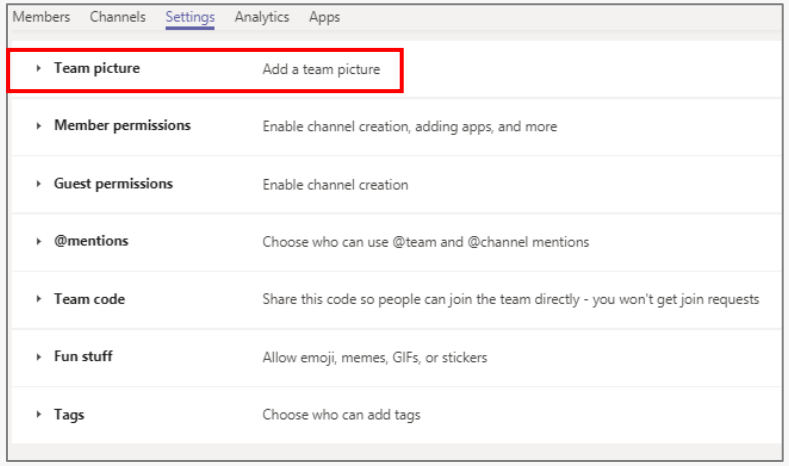
1. Select Add channel
2. Enter a name and description - you can build channels around a projects, teams etc
3. Select Automatically favourite this channel for the whole team to make it automatically visible in everyone's channel list
4. Select Add



Quick Tips

Add a picture to your Team to make it easy to spot and relevant to you team

Select Settings > Team picture



It is good practice to have at least 2 owners in one team.

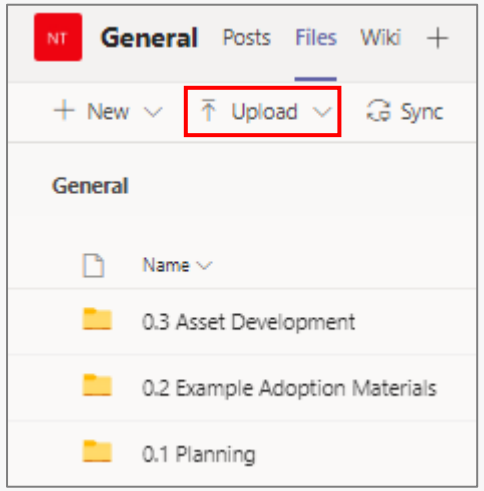
COLLABORATE ON A SHARED DOCUMENT

Share a document and work on it with multiple people at once. MDTs can collaborate on care plans and staff can edit and amend daily notes, shift rotas, or patient summaries.

Upload a document to a channel

Steps for desktop and web users

1. Select the channel in the Teams group you want to share a document
2. Select Upload on the top of the page and find the file or folder on your computer you would like to share



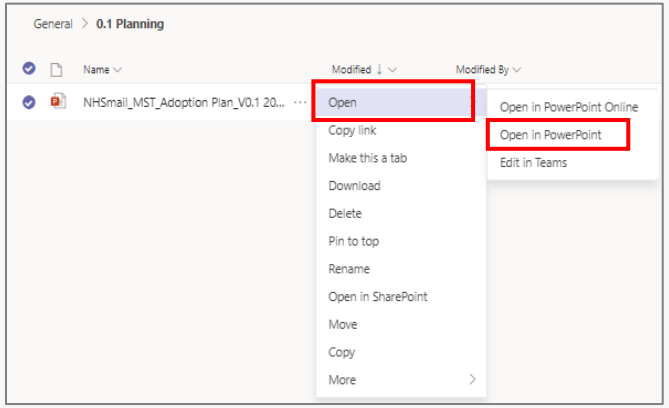
Edit a shared document

Steps for editing in your browser

1. Find the file you would like to edit
2. Click on the file. This will open the document in your browser for you to edit

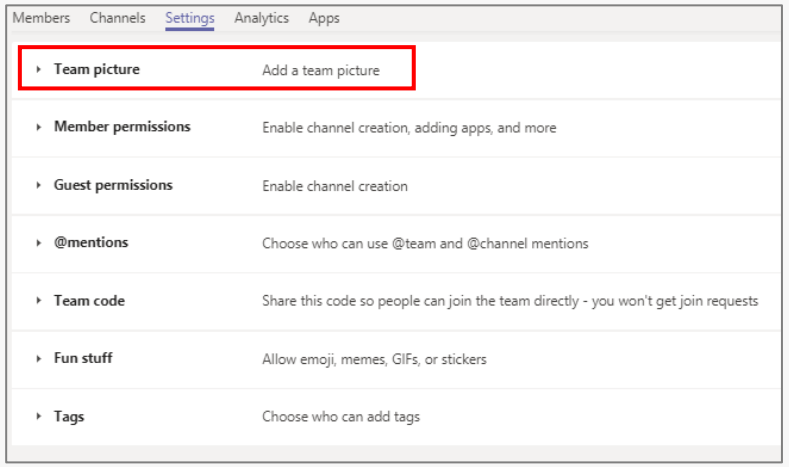
Steps for editing on your desktop

1. Find the file you would like to edit
2. Click on the three dots next to the file, then select Open and choose the right program to work on the document



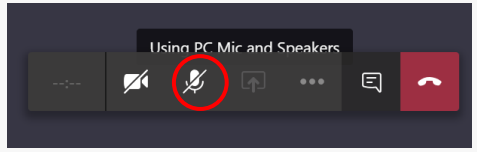
Quick Tips

Add a picture to your Team to make it easy to spot and relevant to you team click on the three dots next to a Team, select Manage Team, and on the settings tab you will find the Team picture option

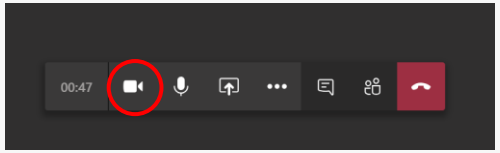


QUICK TIPS TO MAKE THE MOST OF TEAMS COLLABORATION

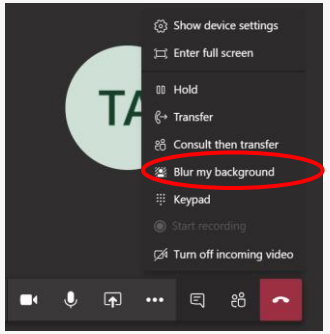
Mute yourself when on call to minimise distractions



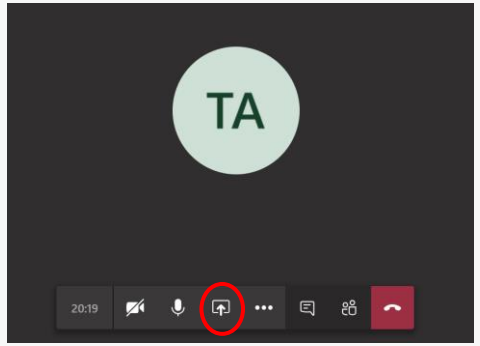
For proximity and engagement in a meeting, turn on the camera



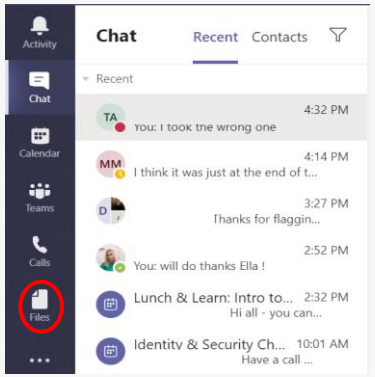
When using the camera, blur the background to increase focus and add privacy



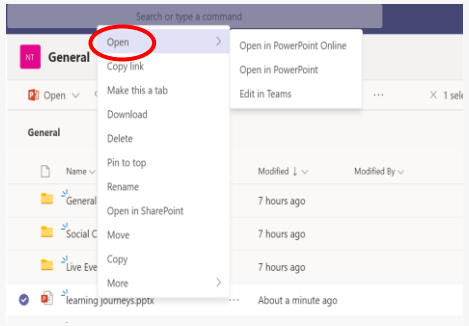
Anybody on the call can share their screen, not just the organiser



Access all your shared files via the files folder easily

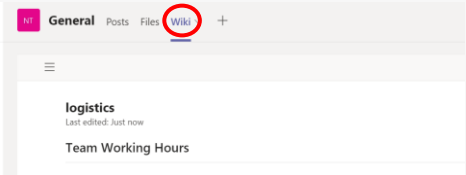


Collaborate live with colleagues by working online

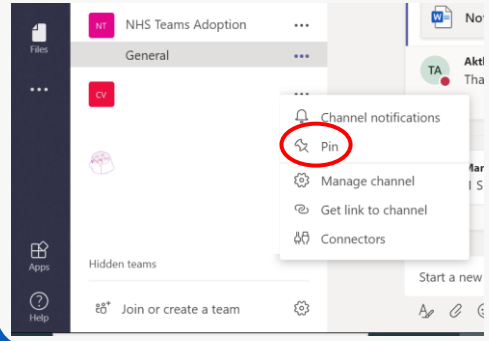


HINTS AND TIPS TO GET THE MOST OUT OF TEAMS

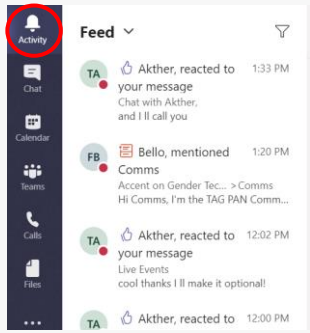
Use the Wiki tab to not down information your team needs to be aware of at all times (i.e. best practices for the channel, list key contacts, working hours…)



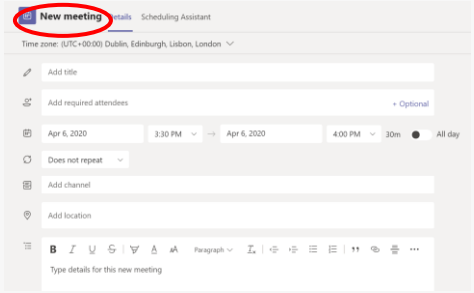
Pin the most important channels to access them quickly



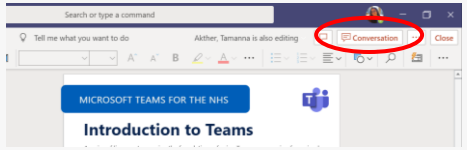
To easily keep in the loop with the replies to your messages, or your mentions "@", use the Activity tab



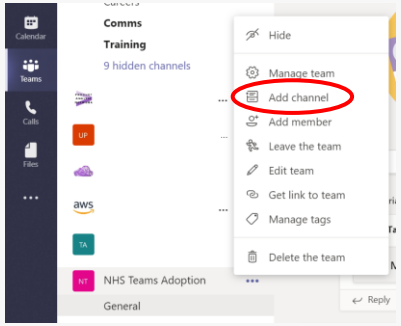
If you need to hold an open meeting in your team's channel, you can quickly do so by selecting new meeting > channels while scheduling your meeting



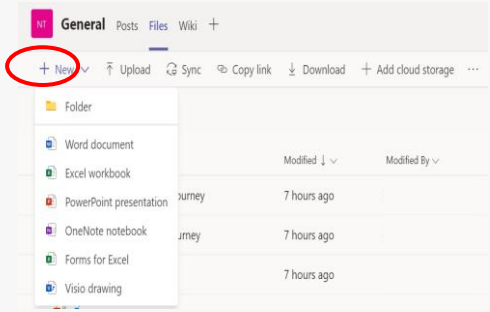
When collaborating on a document, use the comments tab to flag important things to colleagues



Organise your team collaboration with colleagues by creating channels for specific topics



Create folders and documents directly in your team files to ease collaboration



When collaborating on documents, use the "@" to mention a colleague and get their attention faster