# Guide: Microsoft Teams: Adjust your notifications

Once you start using Microsoft Teams you'll find it sends you a lot of notifications. It can be easy to miss important activities amongst the noise. To get the most benefit, set up your notifications so they work for you.

You can configure your notifications at a general, channel, and conversation level.

Set up your notifications

1. Open the Teams application and select your **profile icon** in the top right-hand corner of the screen.

2. Select **Settings** from the drop-down menu.
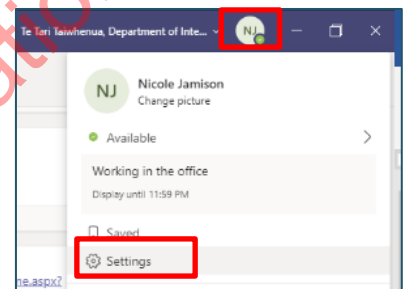
3. In the Settings menu, select **Notifications.** You are now able to adjust your notification settings within the Teams application by selecting one of the following options:

   - **Only show in feed** – notifications will appear within the Activity section.
   - **Banner** – notifications will pop up on your screen, when the Teams application is open on your device.
   - **Banner and feed** – notifications will pop up on your screen and appear within the Activity section.
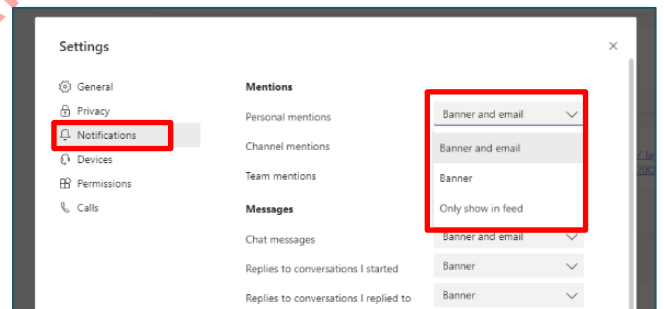
## To turn off notifications for specific conversations:

1. Within a channel, hover over the conversation post you would like to mute and select the **three dots**.

2. Select **Turn off notifications** to mute notifications for this post. This includes replies and reactions. **Note:** you will still receive notifications if someone directly mentions you.
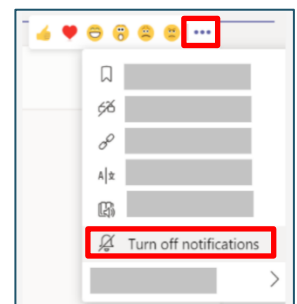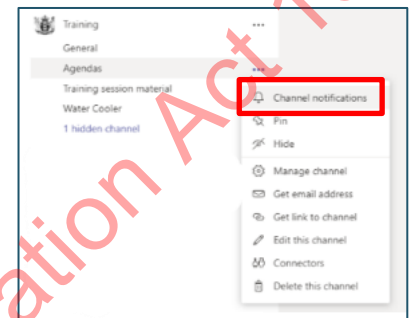
Choose your channel notifications

By default, channel notifications will appear as a Banner and feed when you are specifically mentioned in a post.

1. Within a Team, hover over the channel you would like to adjust the notification settings for and select the **three dots**.
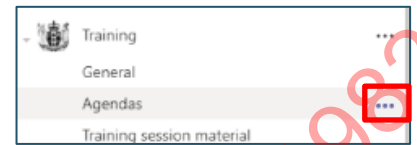
2. Select **Channel notifications**.

3. You are now able to adjust your notification settings within the channel by selecting one of the following options:

   - **Banner and feed** – notifications will pop up on your screen, and appear within the Activity section

   - **Only show in feed** – will have these notifications appear within the Activity section.

   - **Off** – you will not be notified for this action/activity.
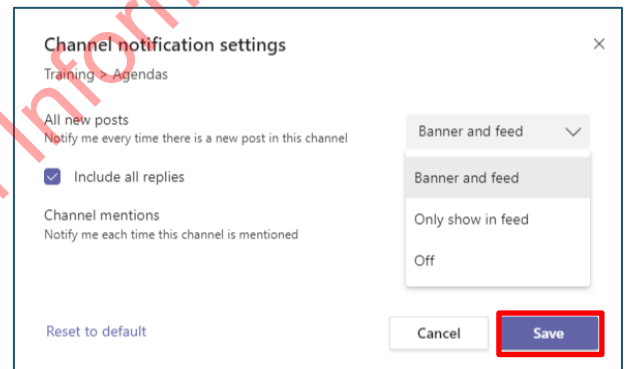
   Once you have made your adjustments, select **Save**.

1 Background

Any Teams meeting or call can be recorded for future viewing. The recording captures audio, video, and screen sharing activity, and you can share it securely across DIA.

Our recordings are set to never expire, however if you wish to change this, see <u>Manage the expiration of a meeting recording</u>.

2 Start recording

1. Start or join the meeting as normal

2. Go to the meeting controls and select **More > Recording and Transcribe > Start Recording**
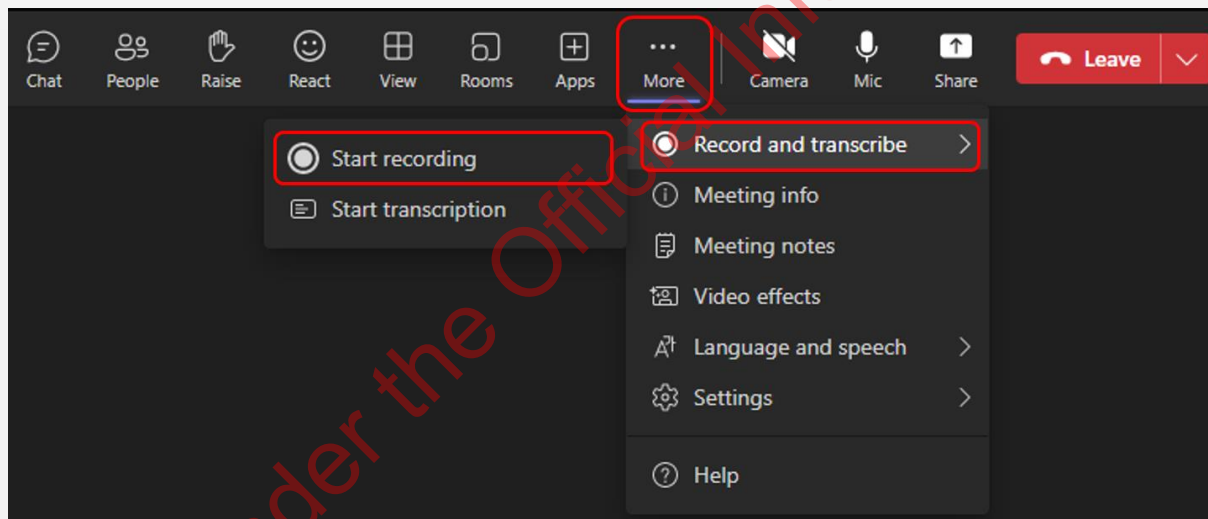
Once recording has started, you'll receive the below message and see the red record icon next to the meeting duration
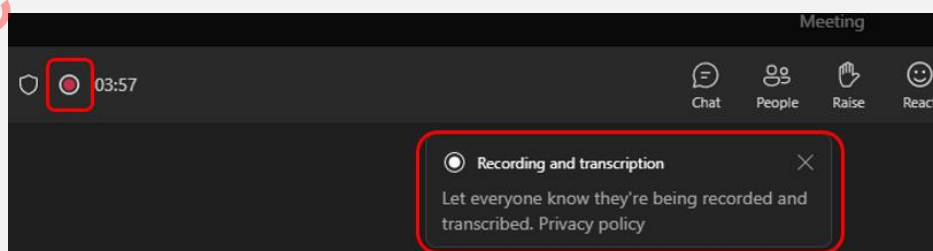
Notes:

- You can't make multiple recordings of the same meeting at the same time. If one person starts recording a meeting, that recording will be stored and available to all participants.

- Meeting participants have the option of viewing the transcription during the meeting. For details, see <u>view live transcription.</u>

❸ Stop recording

1. Go back to the meeting controls where you started the recording and select **More** > **Recording and Transcribe**

2. Choose one of the following:

   - **Stop recording**: Stops the recording and live transcription.
   - **Stop transcription**: Stops just the live transcription. The recording continues until you select **Stop recording**.

❹ Find recordings

Meeting Recordings are automatically available within the meeting chat or channel conversation (if you're meeting in a channel) when ready. Select **Chat** > "**Meeting name**" and you'll see the recording
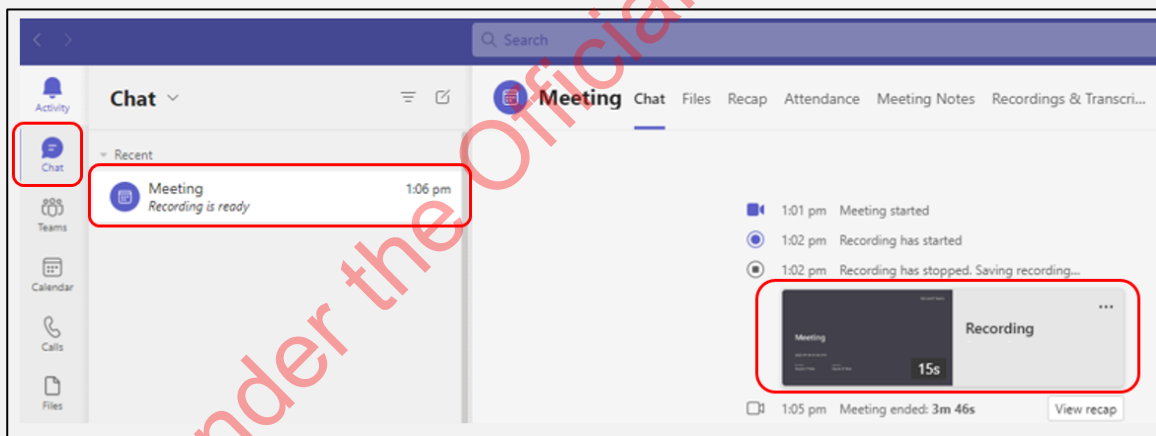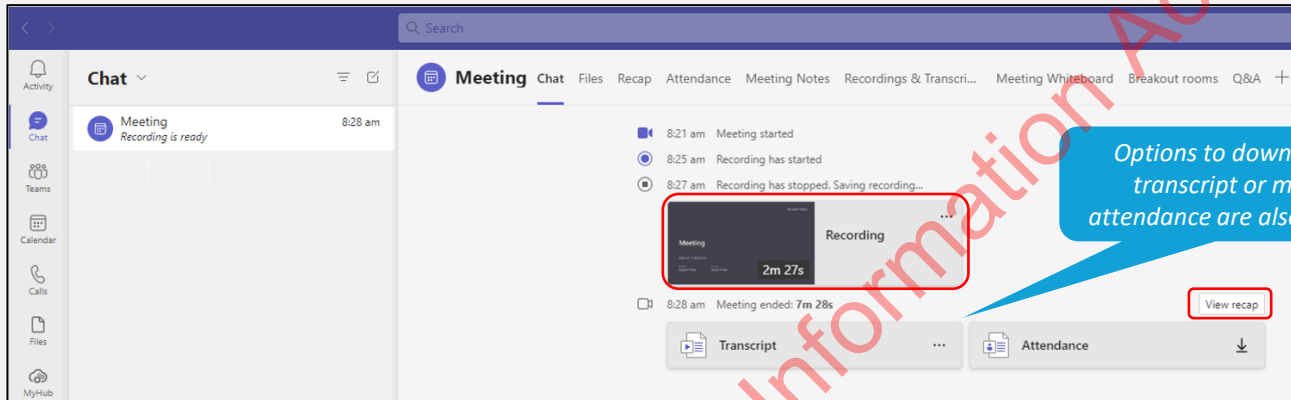

Notes:

- The chat link to view the meeting recording will be available to all meeting invitees.

- Depending on the length of the meeting, it may take a couple of minutes after completion for the recording to be ready to view.

- Recording continues even if the person who started the recording has left the meeting.

- The recording stops automatically once everyone leaves the meeting. If someone forgets to leave, the recording automatically ends after four hours.
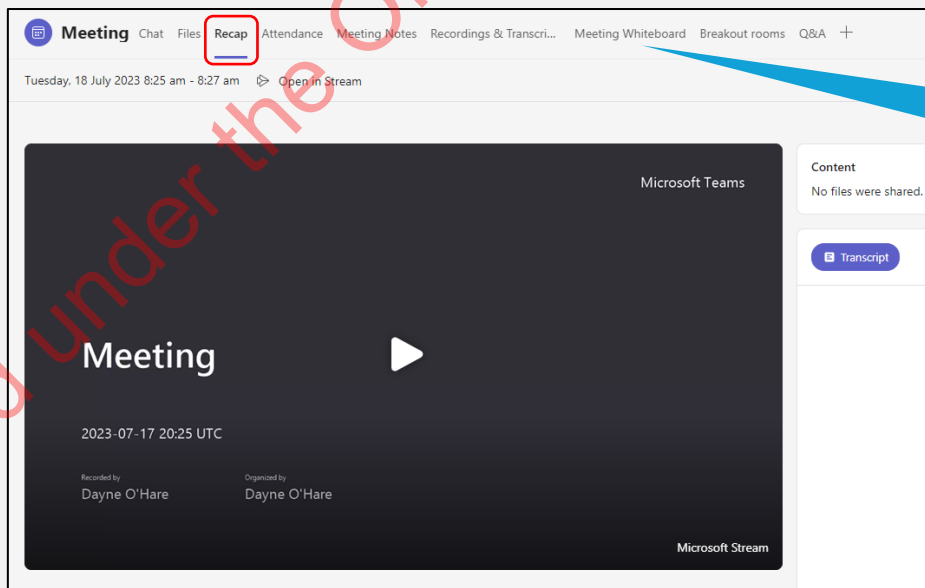
5 Viewing the recording

There are several ways to view the recording but the easiest is clicking directly on the recording (or the view recap button)

Options to download the transcript or meeting attendance are also available

This will open the Recap tab of the chat and you can view the recording here

Other relevant meeting tabs are available here alongside Recap

Notes:
- Meeting recordings won't capture whiteboards, annotations, shared notes or content shared in the stage view by apps, and also won't include videos or animations embedded in PowerPoint Live presentations.
- When you view a meeting recording, you'll see no more than four peoples' video streams at once.

6 Share a link to a meeting recording with others

The meeting recording link and access is automatically available to meeting attendees. However, you may wish to share the recording with DIA kaimahi who were not invited. There are several ways to do this, the below steps are preferred for ease of use.

Select > ●●● > **Open in Stream**
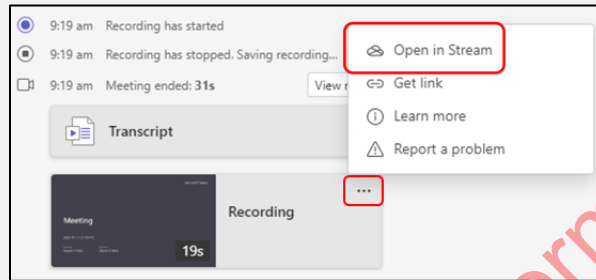
The recording opens in Stream. In here, click on the **Share** button to reveal a dropdown menu and select **Copy Link**
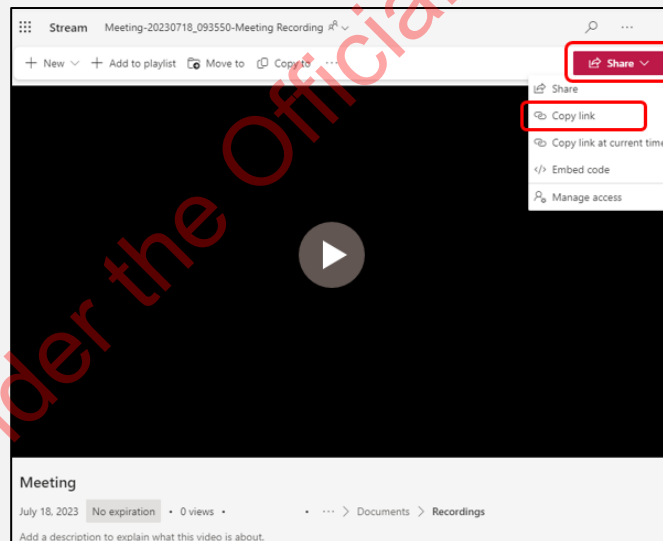
Paste the link where required (email etc.)

Click here to amend the sharing settings prior to sending if required

Notes:
- The default share option gives access to anyone within DIA that has the link

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Recording a Teams meeting
Quick Reference Guide

Te Tari Taiwhenua Internal Affairs

See more guides and frequently asked questions for Teams:

1840 / Resources / Information Technology / Applications / Microsoft Teams

Te Tari Taiwhenua Internal Affairs

❶ Background

From 2 October 2023, our DIA Zoom licensing will change. Limitations will apply to any booked Zoom meeting (e.g. 40 minutes length). The below steps will explain how to update existing Zoom meeting invitations to Teams.
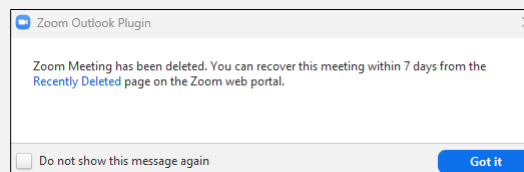
❷ Outlook

1. Locate the meeting within your Outlook calendar and open it

2. On the **Meeting** tab, go to the **Zoom** group

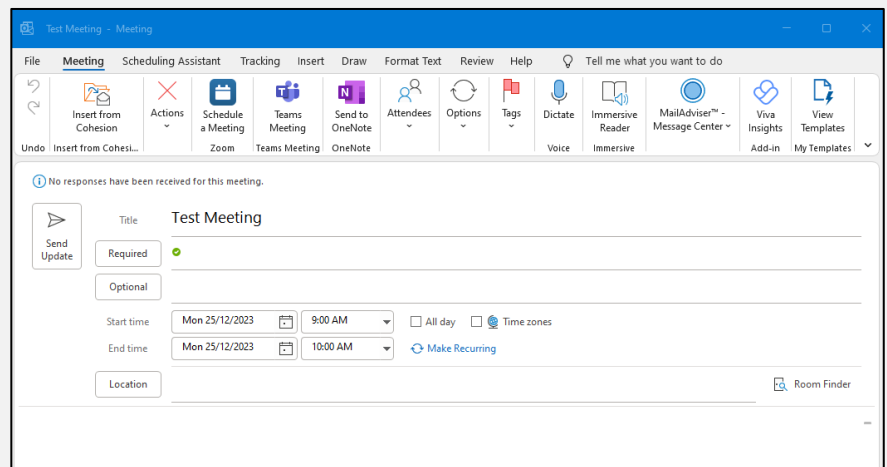3. Select **Cancel** (**not** "Cancel Meeting")

> You will also receive an email from Zoom saying your meeting is deleted
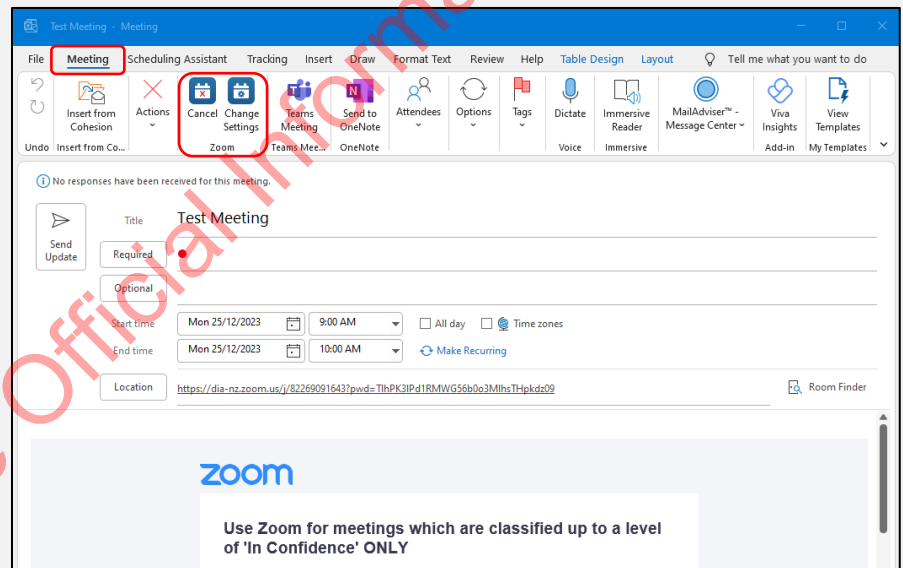
4. This popup will appear, select **Got it** (check the Do not show message again if you don't want that to appear again)

5. The meeting invite Zoom details will be removed, its now ready to be turned into a Teams meeting
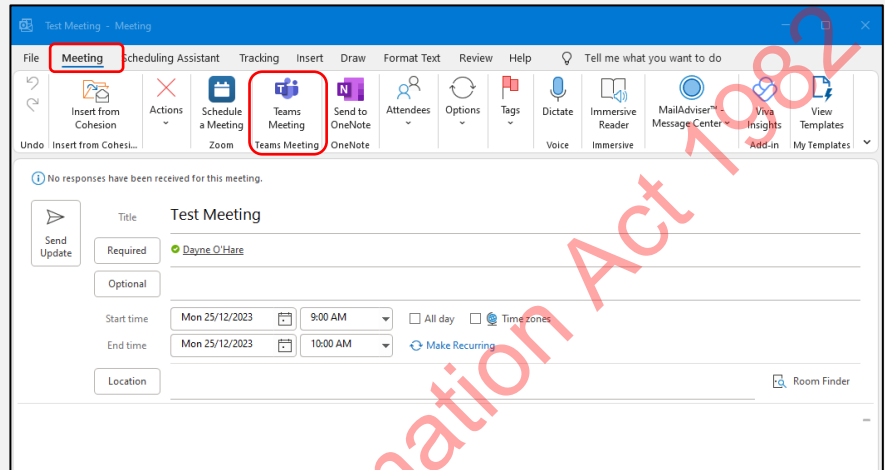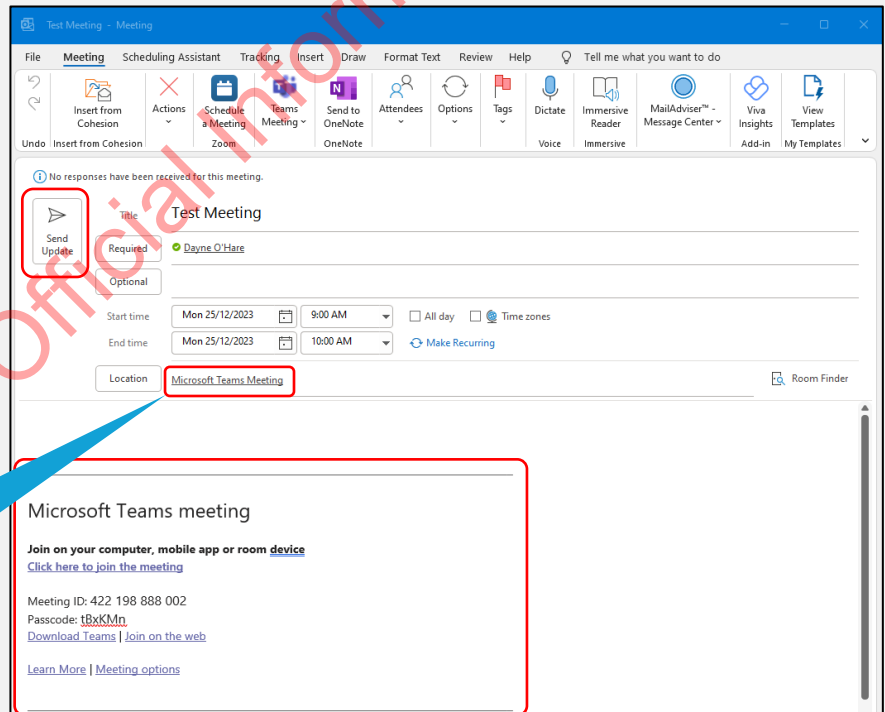
6. To add Teams to the meeting, on the **Meeting** tab, go to the **Teams Meeting** group

7. Select **Teams Meeting**

8. You'll see the Teams details have now been added to the invitation, select **Send Update** to send the updated invitation to attendees.

If there is a VC room in the invitation – the words "Microsoft Team Meeting" will not appear in the location field

Microsoft Teams meeting

Join on your computer, mobile app or room **device**
Click here to join the meeting

Meeting ID: 422 198 888 002
Passcode: tBxKMn
Download Teams | Join on the web

Learn More | Meeting options

See more guides and frequently asked questions for Teams:

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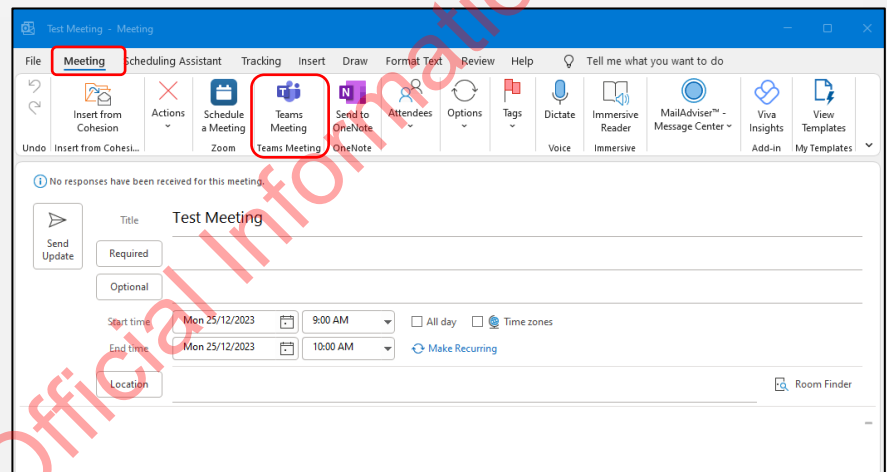*Released under the Official Information Act 1982*

1 Background

The below steps will explain how to book a Teams meeting.

2 Outlook

1. Go to new meeting in Outlook as normal

2. On the **Meeting** tab, go to the **Team Meeting** group

3. Select **Teams Meeting**

4. You'll see the Teams details have now been added to the invitation, select **Send** to send the invitation to attendees
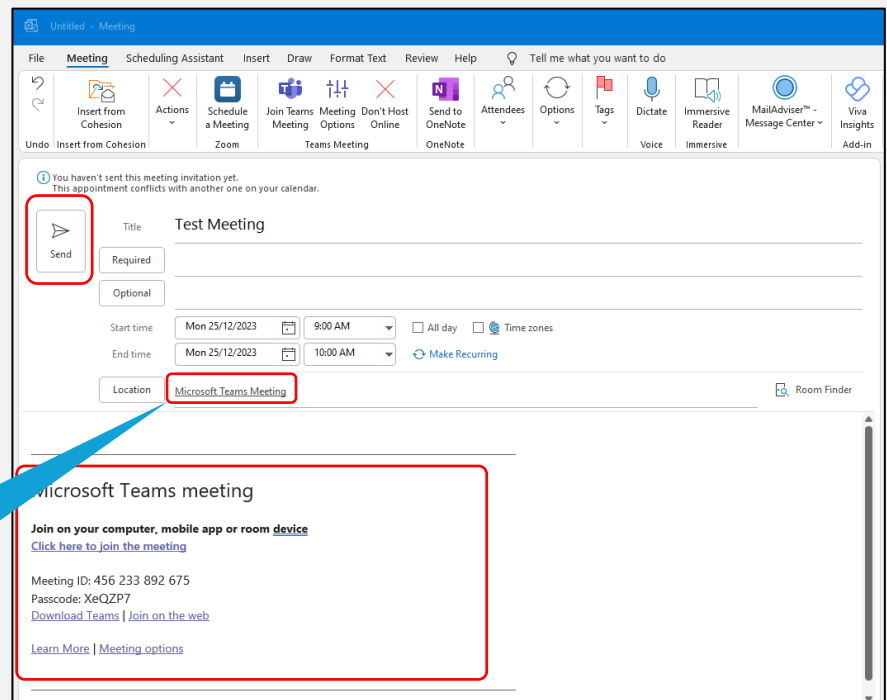
    If there is already a VC room in the invitation – the words "Microsoft Team Meeting" will not appear in the location field

See more guides and frequently asked questions for Teams:

1840 / Resources / Information Technology / Applications / Microsoft Teams

Share content in Teams meetings
Quick Reference Guide

Te Tari Taiwhenua Internal Affairs

❶ Background

Content sharing in a Teams meeting is integral to ensuring a productive and successful gathering. Several options exist for content sharing, and we'll explore the unique benefits of each and provide detailed instructions on how to utilise them effectively.

❷ Sharing options

1. Start or join the meeting as normal

2. Go to the meeting controls and select **Share content** ⬆️ (chose if you want to share computer audio)

3. Select what you want to share:

   a) **Screen** lets you show everything on your screen

   b) **Window** lets you share an open window like a specific app you have open.

   c) **Microsoft Whiteboard** lets you share a whiteboard where participants can sketch together

   d) **PowerPoint Live** lets you share a PowerPoint presentation
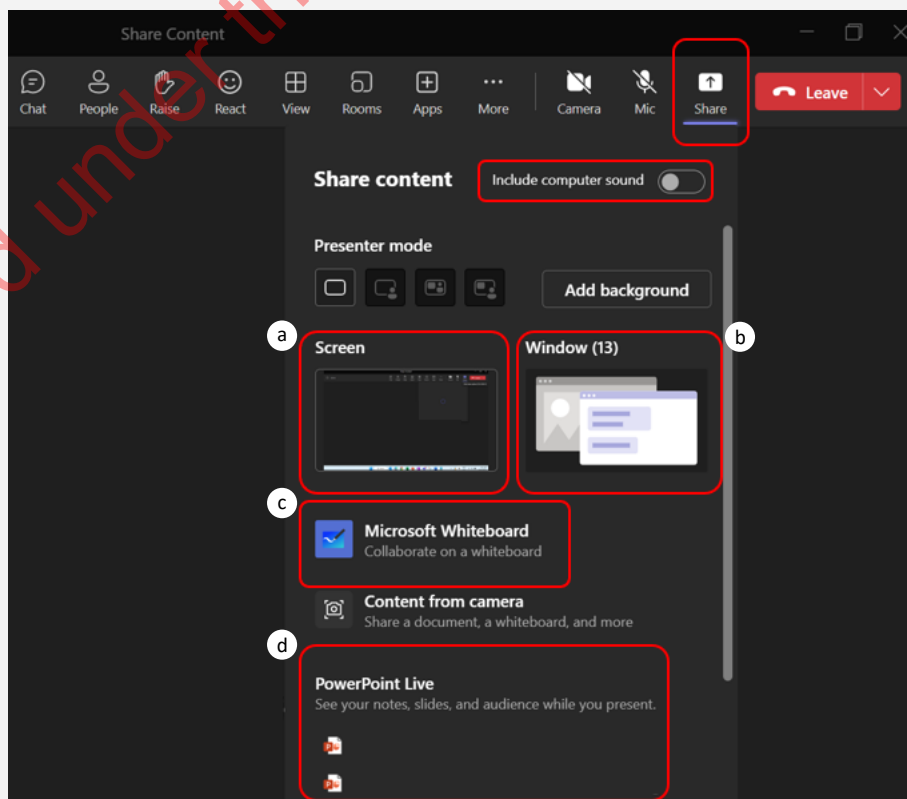
③ Sharing Screen

The sharing screen option lets you share everything that you have on that screen or monitor. This is the least private way of sharing content as everything that is on this monitor will be visible to meeting participants (e.g. documents you have open or open tabs in a browser). You will see the option to select a screen based on what monitors you have connected, in the example below there are three to choose from, the laptop screen or one of the two external monitors.

Select which **screen** you wish to share
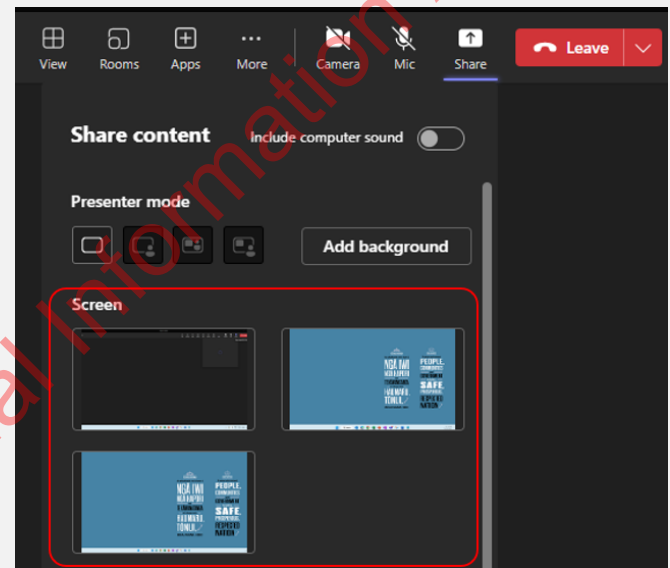
Once selected, a red outline will appear on the outside of the screen. This ensures you know which screen you have shared.
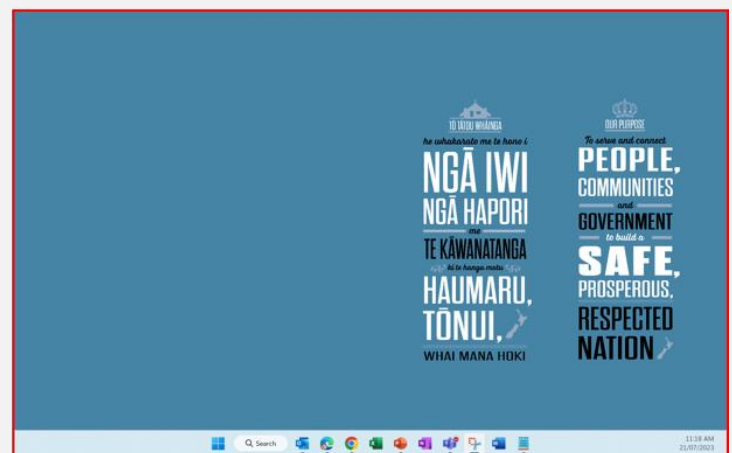
To stop sharing your screen, select **Stop sharing** from the menu (or leave the meeting)
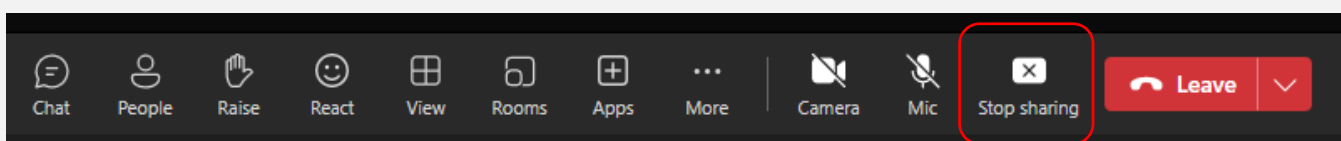
4 Sharing Window

The sharing window option lets you share a particular window you have open. This ensures privacy when sharing as it doesn't matter what sits in front or behind this window as this is all that will be visible to meeting attendees.

Select **Window -** a list of all your open windows appears, chose the one you wish to share.

Once shared, the window will have a red border around it to ensure you know which window you have shared
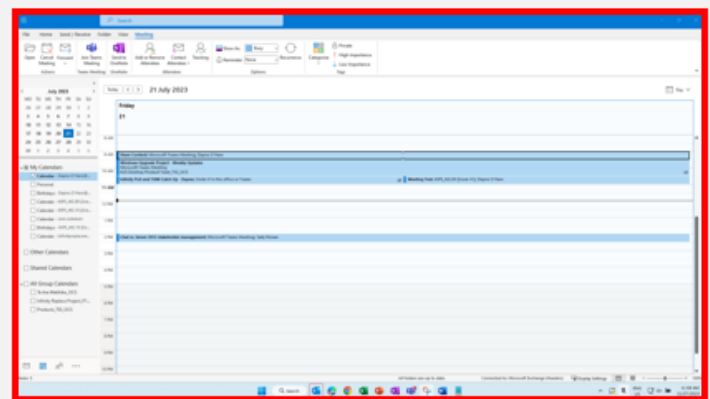
To stop sharing your screen, select **Stop sharing** from the menu (or leave the meeting)
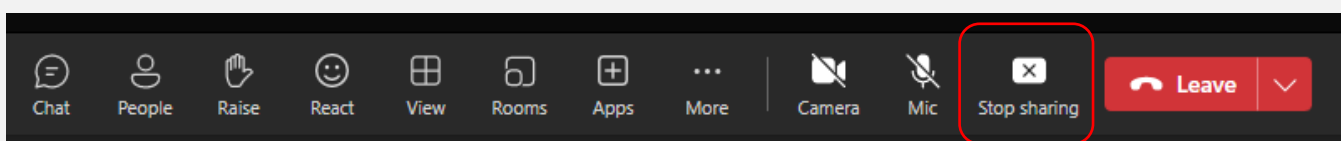
⑤ Sharing Whiteboard

You can share a new whiteboard with all participants in a Teams meeting. You can also choose an existing whiteboard to share in a Teams meeting, this makes it easy to prepare a whiteboard ahead of time or continue working on it outside of Teams
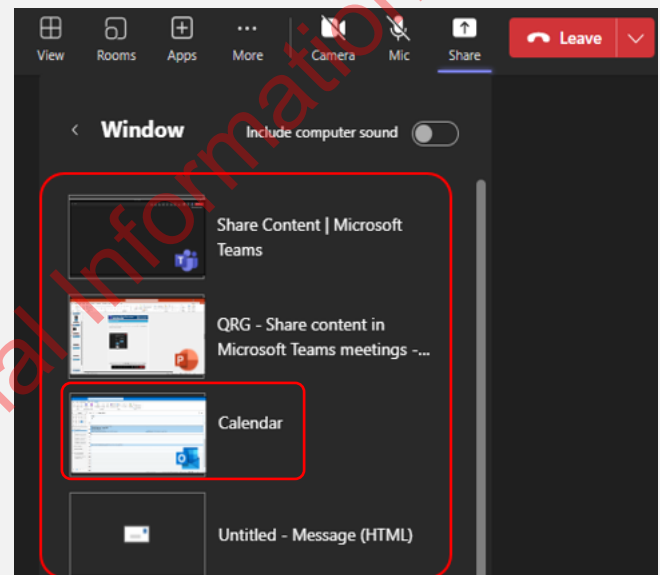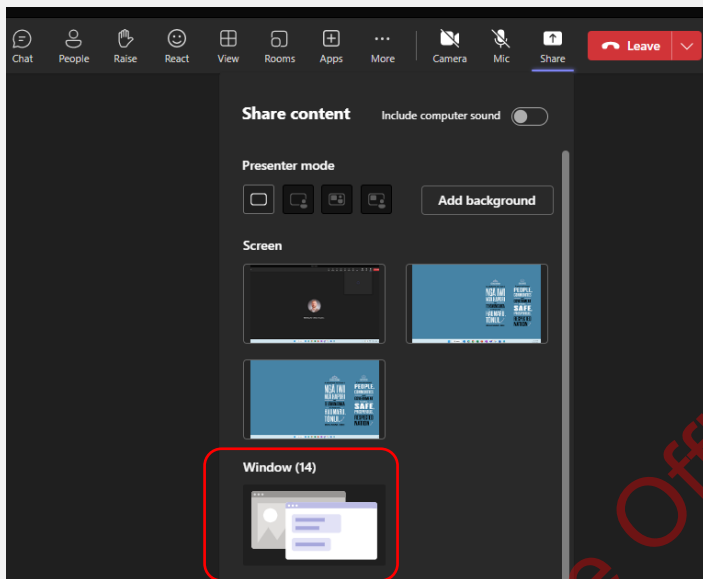
Select **Microsoft Whiteboard**
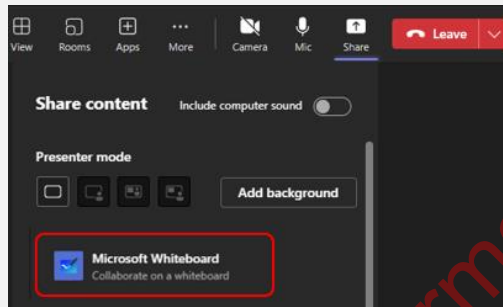
Select **either New Whiteboard** or an **existing Whiteboard** you have prepared earlier
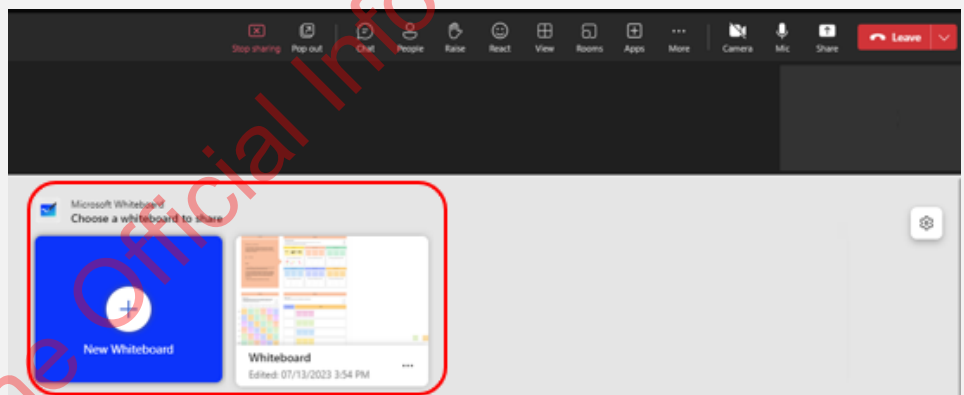
A Whiteboard opens and all meeting invitees can collaborate in real time. For more information on using Microsoft Whiteboard go to [Use Whiteboard in a Teams meeting - Microsoft Support](#)

To stop sharing your screen, select **Stop sharing** from the menu (or leave the meeting)

6 Sharing PowerPoint live

PowerPoint Live in Teams gives both the presenter and audience an inclusive and engaging experience, combining the best parts of presenting in PowerPoint with the connection and collaboration of a Microsoft Teams meeting. When you're the presenter, you have a unique view that lets you control your presentation while staying engaged with your audience, seeing people's video, raised hands, reactions, and chat as needed.
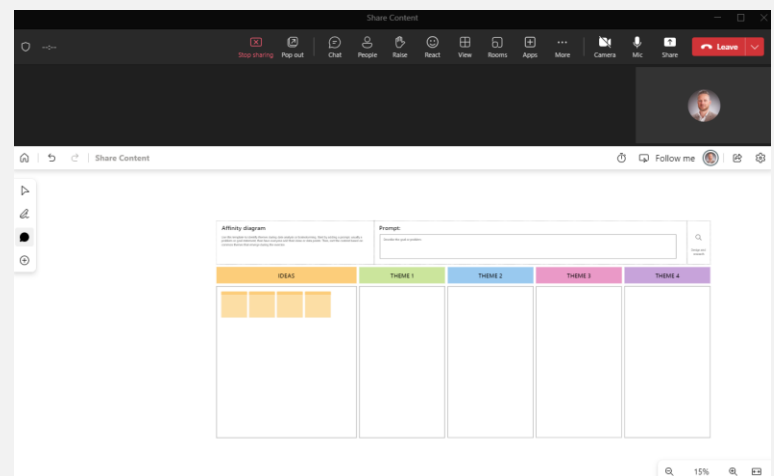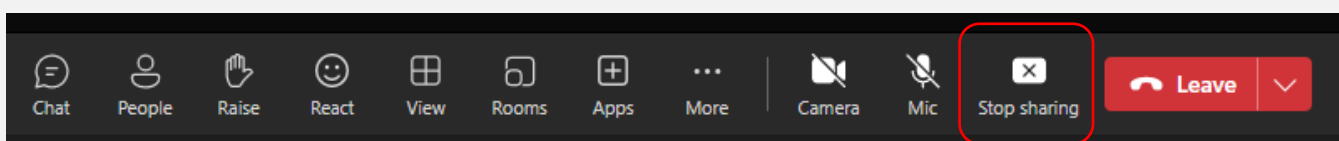
And if you're an audience member, you can interact with the presentation and personalize your viewing experience with captions, high contrast slides, and slides translated into your native language.

Scroll down the sharing options to the bottom. Under **PowerPoint Live** select the file you wish to share. If the file isn't listed there, you can browse to it using the other options
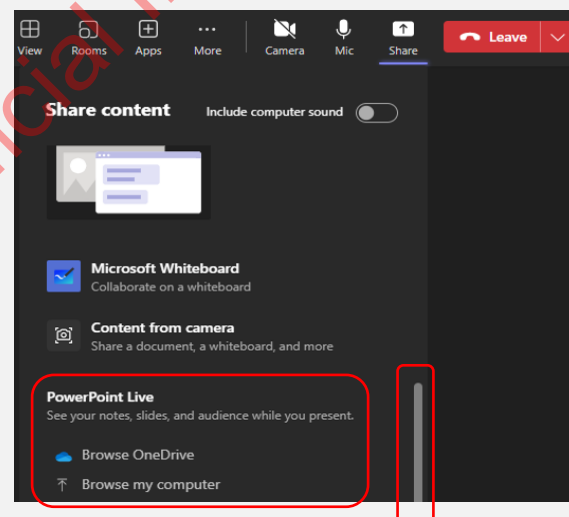
Notes:

- Meetings recordings won't capture any videos, animations, or annotation marks in the PowerPoint Live session.

- When you share from Teams, the PowerPoint Live section lists the most recent files you've opened or edited in your team SharePoint site or your OneDrive. If you select one of these files to present, all meeting participants will be able to view the slides during the meeting. Their access permissions to the file outside of the meeting won't change.

- If you select **Browse my computer** and choose to present a PowerPoint file that hasn't been uploaded to Teams before, it will get uploaded as part of the meeting. If you're presenting in a channel meeting, the file is uploaded to the Files tab in the channel, where all team members will have access to it. If you're presenting in a private meeting, the file is uploaded to your OneDrive, where only the meeting participants will be able to access it.
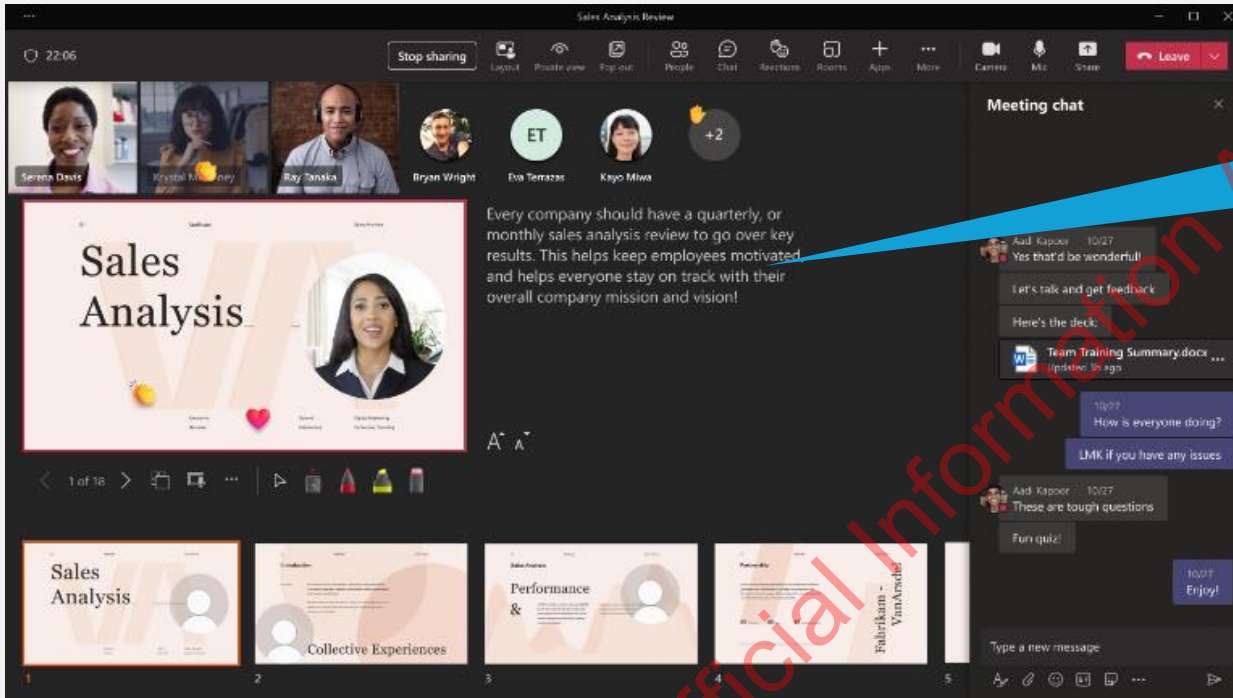
Presenter view

Slide notes are not visible to meeting attendees

As an *audience* member, you're able to personalise your experience without affecting anyone else. You can use the **navigation arrows** to move around to different slides (unless the presenter has locked this), to go back and check on information you may have missed or go forward to preview upcoming slides.

You can always get back to where your presenter is by selecting **Sync to Presenter.**
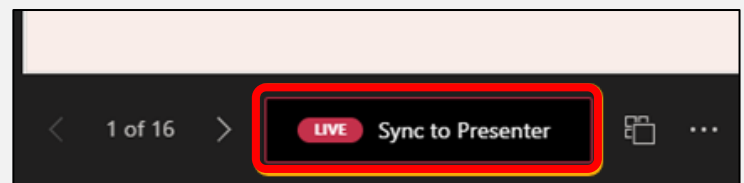
For more information on using PowerPoint Live go to [Present from PowerPoint Live in Microsoft Teams - Microsoft Support](#)

To stop sharing your screen, select **Stop sharing** from the menu (or leave the meeting)
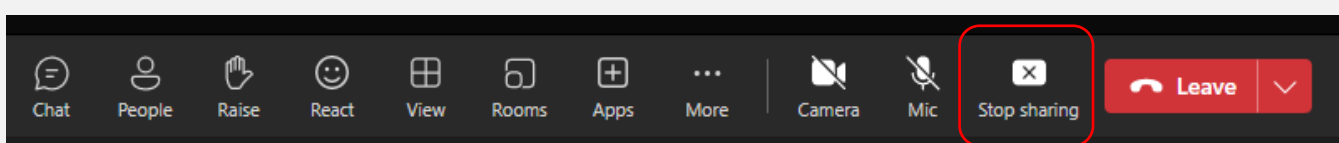
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❶ Background

Microsoft Teams webinars provide the tools to schedule webinar events, manage attendee registration, run an interactive presentation, and analyse attendee data for effective follow-up.

How webinars are different from ordinary meetings

Typically, meetings are collaborative and conversational between participants: discussing plans, sharing materials, assigning or accepting tasks, and more.

Webinars, on the other hand, are more structured. Participants have clear roles: one or several experts (presenters) share their ideas or provide training to an audience (attendees). By default, audio and video permissions are turned off for attendees.

❷ Webinar features

Registration

Utilise registration settings like capacity limits, manual registration approval, and event waitlists to ensure your webinar runs smoothly even before the event. Create a custom form with questions for potential attendees to learn more about your audience beforehand. Gain an overview of your event registration via attendee status.

Branded themes

Organise a custom event for attendees by adding brand images, banners, and colour themes.

Presenter bios

Give your attendees more background information about your event's presenters by including photos and bios.

Webinar reports

Gain insights before and after your event with webinar reports.

Before the Webinar starts, you can how many people have viewed the registration site, registered, or cancelled their registration. After the Webinar ends, you can view details about how many people attended, and how much time each attendee spent in the Webinar.

❸ Create a Webinar

1. Select **Calendar** from the lefthand side menu within Teams
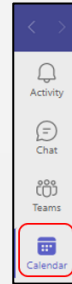
2. Select the arrow next to **New meeting** and select **Webinar**
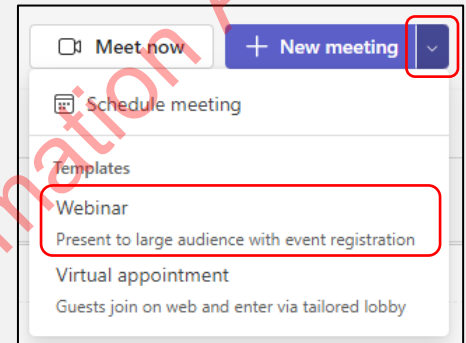
> *Webinar co-organisers can help manage events by editing registration forms, customising the event theme, and much more. Co-organisers can modify the event in many except they can't change the webinar's Details section (date, time, etc.). Up to 10 co-organisers from within DIA can be added*

3. On the **New webinar** page, enter the title and date of the webinar, its start and end times, and a description. You can also add **presenters** and **co-organisers** to the event

> *To allow others to present content during the webinar, list them on the invite. Presenters don't need to register. They'll join the webinar in the same way that they join a regular meeting.*
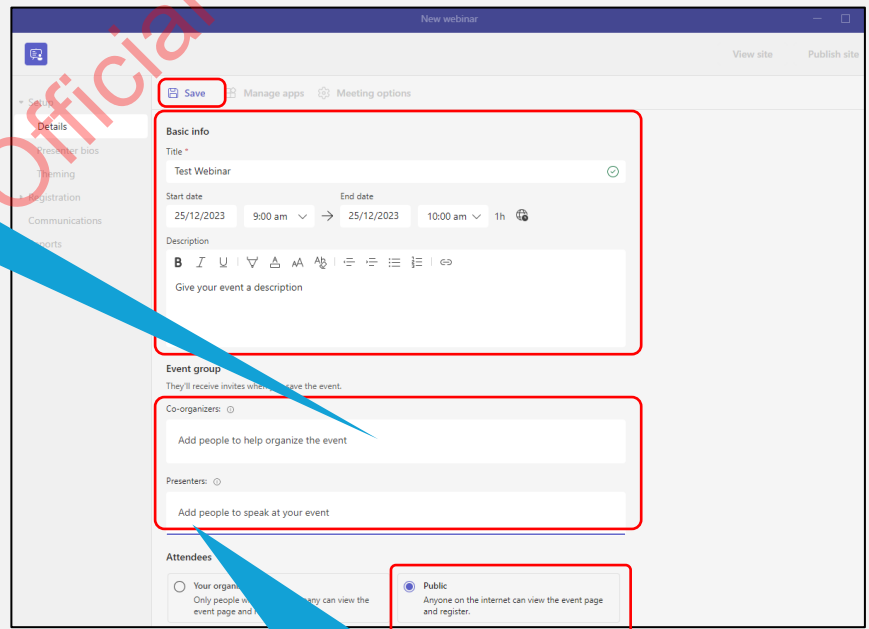
4. Select **Save** to move onto registration (invites will be sent to attendees automatically.

Note: By default, the webinar will be **Public** which means its open to anyone in and outside of DIA to register.

You can change it from **Public** to **Your organisation**, which will make the event page and registration available only to people within DIA.

④ Customise a Webinar

5. The options for the **Webinar** will now be available to customise

Test Webinar

- Setup
  - Details
  - Presenter bios
  - Theming
- Registration
- Communications
- Reports
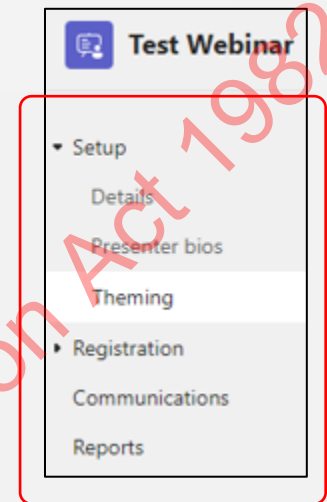
Presenter bios lets you give attendees more information about webinar presenters by adding presenter bios and photos.

Theming lets you personalise your event site by uploading a **banner image** or **logo** and choosing a **colour theme**.

Registration lets you set the **configuration** for the **capacity** of the Webinar (max 1000) and customise the **form** for registrants. You'll also be able to view the **Attendee Status** of registrants here.

Communications lets you set the **time** of attendee emails and **preview** what they look like.

Reports is where you'll see data once the Webinar has ended

6. Select **View draft** to see how the event page will look to potential attendees, then select **Publish site** and confirm.

| View draft | Publish site | ... |
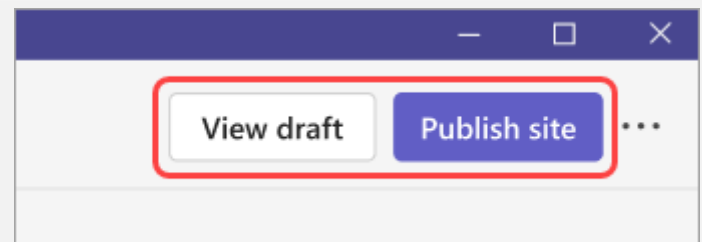
7. After you publish the site, share the link to the live site that attendees will see when they register.

5 Webinar - before and during tips

Before the webinar

Organisers:
- Schedule the webinar well in advance, usually by several weeks.
- Decide whether the event will be public or private. Public events are open for anyone with the link to register. Private events are only accessible by internal organisation members.
- Prepare a registration form that each potential attendee must fill out before receiving the webinar join info. The form can be used to gather useful info for post-webinar contacts, measuring training effectiveness, and more.
- Publish and share the event. Once the webinar details are saved and published, invitations will be sent automatically to presenters and potential attendees. After this step, organisers can also share the live registration link via social media, email, etc.
- View registration insights before the event.

Attendees:
- View event details and the event page.
- Receive an email containing webinar info and the link to join it.

Note: People can join webinars on iOS and Android mobile and tablet devices, as well as on their computers.

During the webinar

- Attendees who are external to the organiser's tenant will select the Join link and wait in the event lobby until an organiser or presenter lets them into the webinar.
- In a public (open registration) webinar, attendees won't be able to share content because their audio and video will be turned off by default.
- The presenter controls audience participation. Polls may be used during the webinar to engage the audience and provide info for the presenter.

See more guides and frequently asked questions for Teams:

1840 / Resources / Information Technology / Applications / Microsoft Teams

❶ Background

In all but the smallest meetings, it can be difficult to have open discussions and a meaningful exchange of ideas. With breakout rooms, people gather in small groups for lively conversation and brainstorming sessions.

Note: Only meeting organisers on the desktop versions of Teams can create and manage breakout rooms. Organisers or presenters must first join the meeting to create or manage breakout rooms.

❷ Create breakout rooms during a meeting

1. Start the Teams meeting as normal

2. In the meeting controls, select **Rooms**
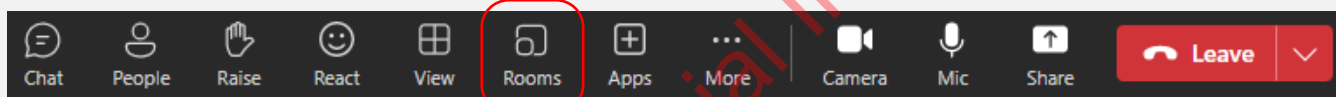
3. Do the following:

   a) Choose the number of rooms you want (up to 50).

   b) Choose whether you want Teams to evenly assign people to rooms (Automatically) or assign people yourself (Manually – instructions on how to do this follow).

4. Select **Create Rooms**

Create breakout rooms ✕

Choose the number of rooms you want to create.

2 ⌄

Assign participants
You can asssign people to rooms, or let Teams assign people for you.

Automatically
We'll assign people to rooms for you.

Manually
Choose the people you want in each room.

Create rooms
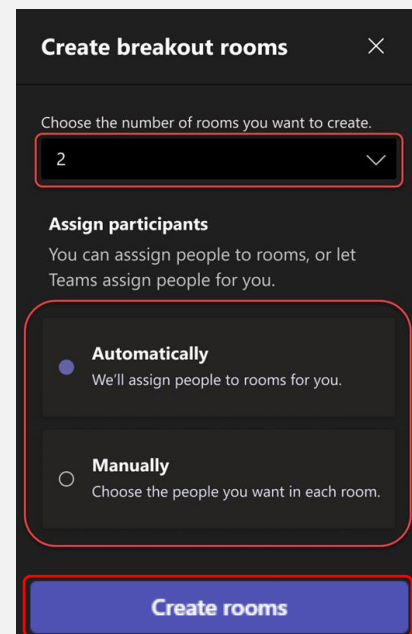
③ Assign people manually during a meeting

1. In the meeting controls, select **Rooms**
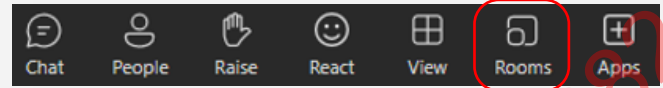
2. Select **Assign participants**.

3. From this window, sort people to see who's been assigned where by selecting the down arrow next to **Name** or **Room**.
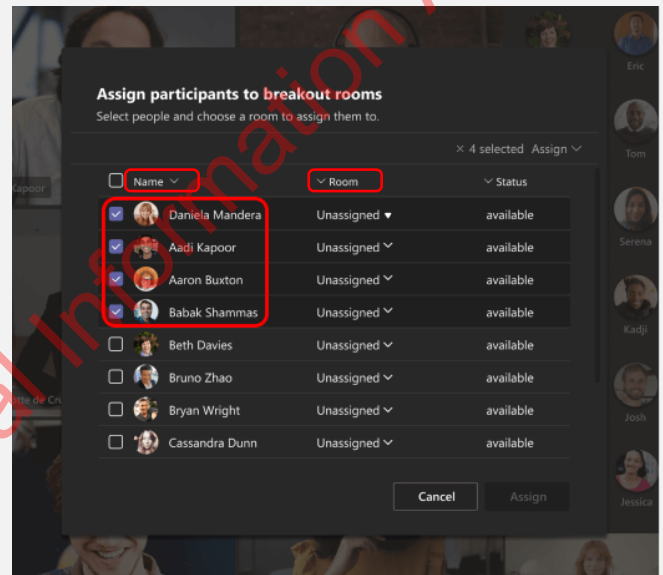
4. Choose the people you want in a room by selecting the checkboxes next to their names.

5. Select the down arrow next to Assign and choose a room for them.
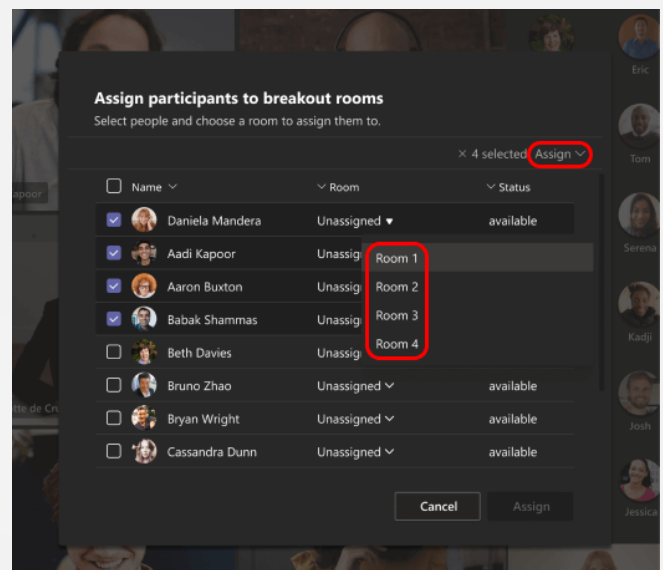
6. Repeat the previous steps until everyone in the meeting is assigned to a room. When you're done, select **Confirm**

If someone joins the meeting late, select **Assign participants** again to assign them to a room..

Check out the Microsoft support page here for additional breakout room option such appointing breakout room managers, shuffling participants or setting time limits for breakout sessions.

See more guides and frequently asked questions for Teams:

*1840 / Resources / Information Technology / Applications / Microsoft Teams*

Guide: Microsoft Teams: Working with externals

Accepting Teams invitations from external parties

1. You'll receive an e-mail invitation from the external person to join their Team. Select **Accept invitation**.
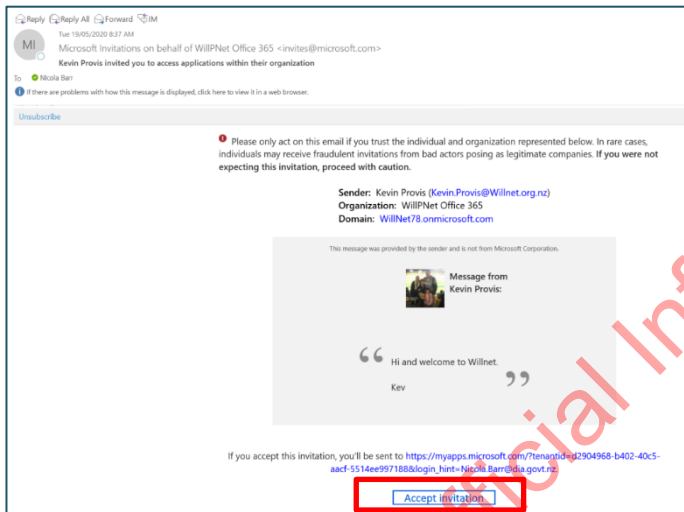
2. A Microsoft web page will load, select **Accept**.
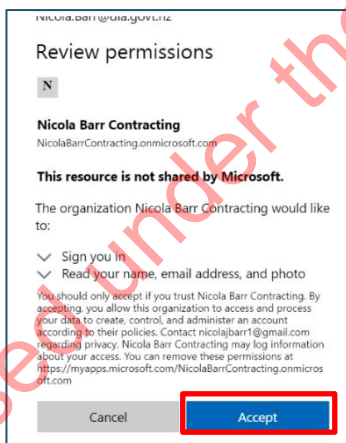
3. Depending on the external Team set up, you may experience one of the below options:

    a. A Microsoft Applications screen will load on your internet browser. Open the **Teams application** on your device and follow the instructions for **Switching organisational profiles** below.
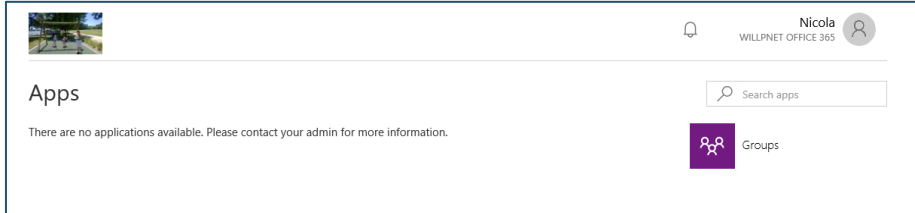
    b. A prompt window screen will appear on your Teams application asking if you would like to switch to the external Team. Select **Yes**. You are now in the external Team.
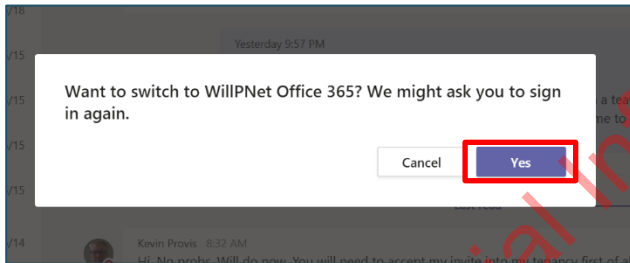
Note: you will notice you are in the external Team by the name that appears next to your profile icon.
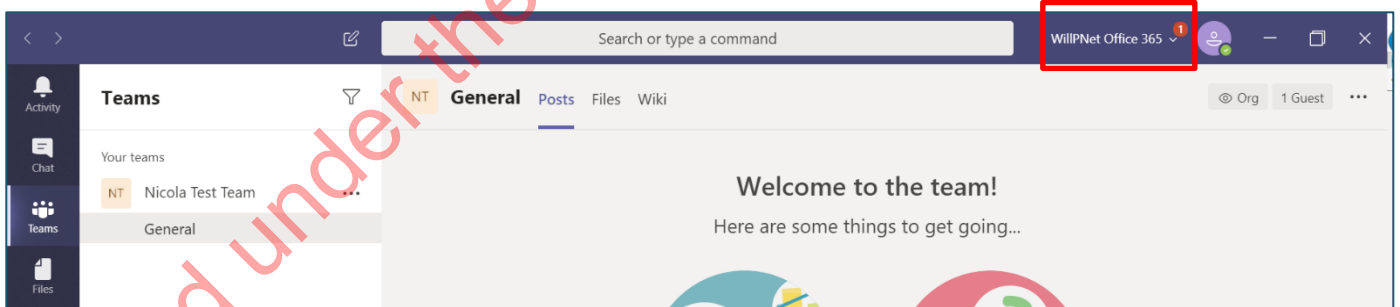
Switching organisational profiles

1. To switch between organisations, select the **drop-down arrow** at the top-right corner of your Teams application, next to your profile icon. A drop-down list will appear to show the different organisations you are linked to.
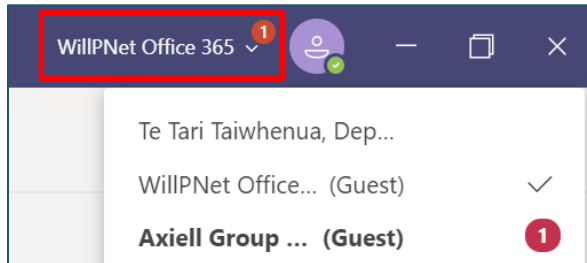
2. Select the name of the organisation you wish to switch to. Te Tari Taiwhenua, Department of Internal Affairs is your default profile. **Note:** You may be asked to enter your password as you switch between profiles.

Accepting an external Team meeting appointment

You can accept meeting invitations from externals for a Teams meeting.

1. Open the calendar invitation within Outlook and select **Join Microsoft Teams Meeting**.
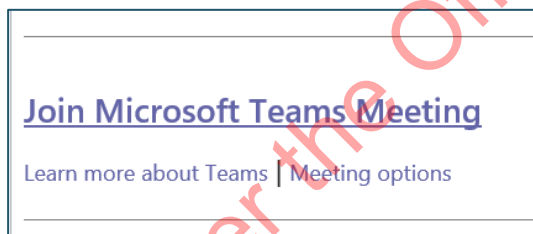
2. This will open the meeting within the Microsoft Teams application.

① Background

Meeting options are a group of settings that enable, limit, or turn off certain capabilities during a Teams meeting. Organisers can update meeting options that can change how participants engage and interact during a meeting.

② Change meeting options from Outlook

1. Make a meeting a Teams meeting as normal

2. In the **Meeting** tab, **Teams Meeting group**, select **Meeting Options** (in either the toolbar or below the meeting ID information within the email as pictured)

Opens a pop up window

Opens the options in a web browser

❸ Meeting options and what they mean

Who can bypass the lobby?

Decide who gets into meetings directly and who should wait to be let in by using the lobby. If you use the lobby, you (and anyone else allowed to admit people) will see a list of people in the lobby. From there you can choose to admit or deny them.

People dialling in can bypass the lobby

Turn the People dialling in can bypass the lobby toggle on to allow anyone joining your meeting by phone to enter without waiting in the lobby.

Announce when people dialling in join or leave.

Turn the Announce when people dialling in join or leave toggle on to receive alerts when people calling in by phone join or leave your meeting.

Choose co-organisers

After you invite people to your meeting, add co-organisers to give them most organiser capabilities. Add co-organisers for more help managing the meeting, lobby, and breakout rooms.

Who can present

Designate presenters before and during your meeting to keep your meeting focused and on-track.

Allow mic for attendees

Turn the Allow mic for attendees toggle on or off to change attendee mic permissions. Use this setting to manage attendee discussion during a meeting.

Allow camera for attendees

Turn the Allow camera for attendees toggle on or off to change attendee camera permissions. Turn this setting off to keep focus on shared content and presenters during a meeting and encourage attendee participation.

Record automatically

Turn the Record automatically toggle on to record your meeting as soon as it starts. Apply this setting to make sure all your meeting is recorded until you stop recording or the meeting ends.

Meeting chat

Change this setting to let attendees chat anytime, during a meeting only, or not at all.

Q&A

Enable Q&A to allow attendees to ask questions, post replies, and post anonymously during a meeting. Q&A can be unmoderated or moderated by meeting co-organisers.

Use Q&A to make large events more interactive and engaging for attendees. Receive and respond to people's questions in real-time.

Allow reactions

By default, attendees can send live reactions during a meeting to express how they feel about what's being shared. Turn off the Allow reactions toggle in larger meetings to limit distractions or keep the meeting recording free from reaction pop-ups.

❸ Meeting options and what they mean - continued

Provide CART Captions

Turn on the Provide CART Captions toggle to use Communication access real-time translation (CART) captions during a meeting. CART captions are generated by a trained CART captioner who listens and translates speech into text instantly. Use CART captions to provide accurately translated captions and make your meeting more accessible and inclusive.

Enable language interpretation

Turn on the Enable language interpretation toggle to add a professional interpreter to your meeting who can instantly translate the speaker's language into another in real-time.

Allow attendance report

Attendance reports contain meeting attendance details, including how long attendees stayed, and how long your meeting lasted, and more.

Turn on the Allow attendance report toggle to generate, view, and download attendance reports.

❹ Saving and updating

3. When you are satisfied with the setting, select **Save** and close the window

Note: If you need to get back to these settings, open the meeting invite and select **Meeting Options** (in either the toolbar or below the meeting ID information)

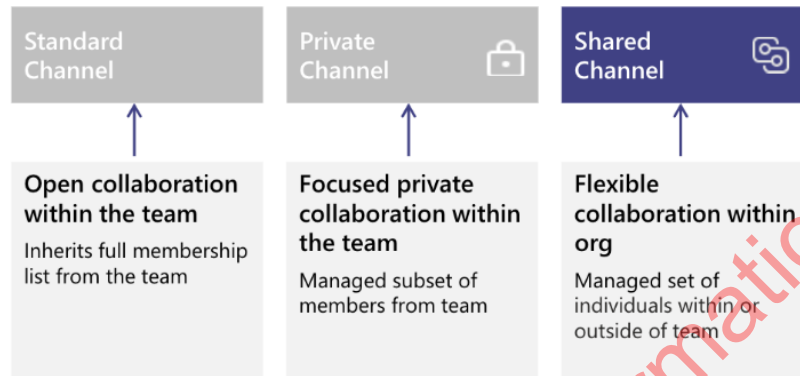*See more guides and frequently asked questions for Teams:*

1840 / Resources / Information Technology / Applications / Microsoft Teams

Te Tari Taiwhenua
Internal Affairs

Microsoft Teams – Using Shared channels

Shared channels (identified by 🔗 next to their name in a Team's list of channels) were introduced to Microsoft Teams in 2022. Shared channels can be used to collaborate with selected DIA people (or whole other Teams) who are not in the Team or with a subset of the full Team membership.

Standard Channel	Private Channel 🔒	Shared Channel 🔗
↑	↑	↑
Open collaboration within the team	**Focused private collaboration within the team**	**Flexible collaboration within org**
Inherits full membership list from the team	Managed subset of members from team	Managed set of individuals within or outside of team

As a Team Owner, use Shared channels when:

- You want to invite DIA colleagues to collaborate within a Team without making them part of the whole Team. Examples:
    - You want to restrict access to certain Team content to a subset of the Team's membership. (While this can be done using private chat, a Shared channel allows for a channel posts on specific topics.)
    - DIA staff (individuals or membership of a whole Team) outside of your Team only need to be involved with a particular piece of work and you don't want them to have full access to the Team.
    - You want to share a channel with multiple DIA teams so that they can all work together in the same space, without needing to be members of your Team.

External collaboration

External users **cannot** be members of a Shared Channel because:

- Microsoft does not allow Guest users to be given access to a Shared channel; and
- DIA currently only allows external sharing via Guest user accounts in the DIA Azure Active Directory (or with users belonging to federated organisations if collaborating using Teams chat).

External collaboration Teams can use Private channels in a similar way to collaborate with Guest users BUT a Private channel can only provide access to a subset of the Team's membership – i.e. members of a Private channel must also be members of the wider Team. If that is not appropriate, then a separate Team is needed. (External collaboration Teams are currently considered on a case-by-case basis due the current ICT Security certificate.)

User experience

Only Shared channel owners and members (including any full Teams it has been shared with) can see and participate in it.

A Shared channel member who is not a member of the whole Team only gets to see the Team name and Shared channel name in the Microsoft Teams application.

Team owners who are not members of a Shared channel will be able to see its name in their Team's list of channels but won't be able to see the content or the conversations and member list.

Team members who are not members of a Shared channel won't see the channel at all.

When new members are added, they can see all conversations (even old conversations) in that Shared channel.

Limitations

- A limited set of apps can be added to a Shared channel; for example, you can't add Channel Calendar, Tasks by Planner or Forms.
- A maximum of 200 Shared channels can be added to a Team.
- Guest users cannot be members of a Shared channel (see above).
- When a Shared channel is created, it's linked to the parent Team and can't be moved to a different Team. Additionally, Shared channels can't be converted to standard channels and vice versa.

What happens in the background

A Shared channel creates a new SharePoint site for that channel, so that files are segregated from the parent Team and are only accessible to the Shared channel members. Unlike a full MS Team, an M365 group and mailbox are not created.

Ownership

Only a Team owner can set up a Shared channel and the creator becomes the Shared channel's default owner. Team owners don't have to be Channel owners but *unless there is a good reason for Team Owners not to be Share channel owners, they should also be Shared channel owners for information governance purposes.*

Only a Shared channel owner can directly add or remove people from it. A Shared channel owner can add anyone from DIA to a Shared channel.

Team owners can see the names of all Shared channels in their Team but can't see the files in a Shared channel or the conversations and member list of a Shared channel unless they are members of that Shared channel.

A Shared channel owner can't be removed through Teams if they are the last owner of one or more Shared channels.

If the last Shared channel owner leaves DIA or if they are removed from the Microsoft 365 group associated with the Team, a member of the Shared channel is automatically promoted to be the Shared channel owner. If there are no members to promote, the Shared channel will remain ownerless and a Microsoft Teams admin will have to manually assign a Channel owner.

We advise that all Team owners should be owners of all Shared channels in their Team, unless there is a good reason not to include them, as they should have oversight of all channels in the Team to ensure information and access to it is being managed appropriately.

Creating a Shared channel

1. Team owners can add new Shared channels. In the Microsoft Teams application, click on the ellipsis to the right of the Team name and select **Add channel**:
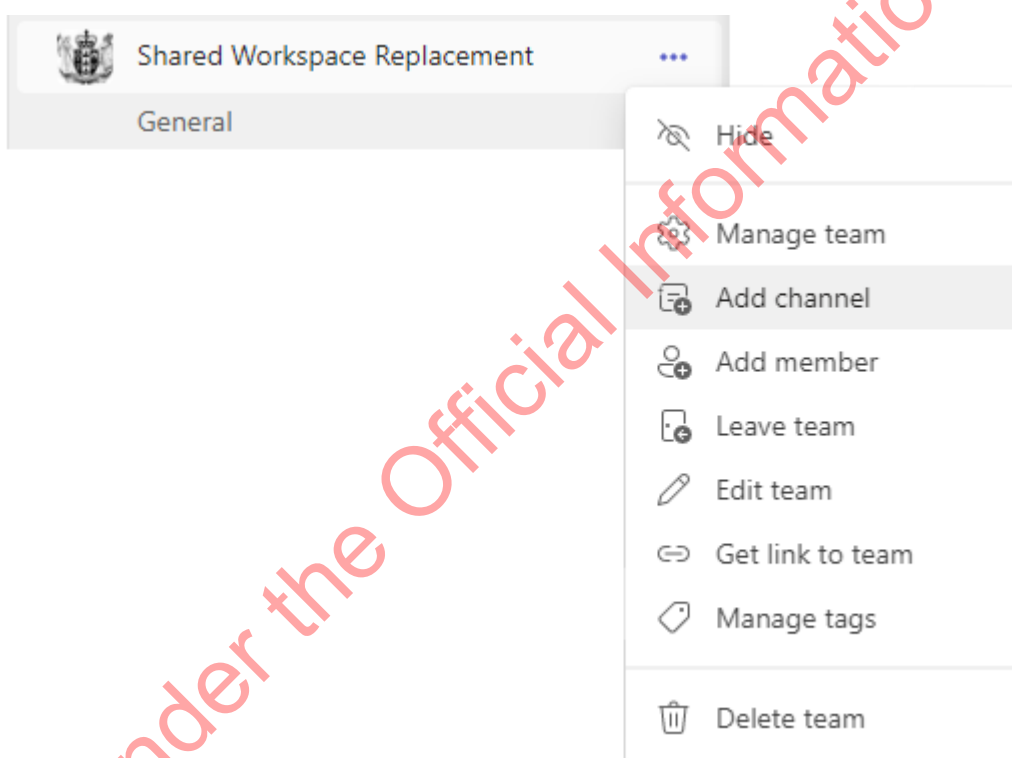
2. The default channel is a standard channel. Click on the down arrow under the default Privacy option and select **Shared**:

Note: The information ('i') above notes that Guest users can't be added to a Shared channel. (Although 'other orgs' are mentioned, this type of external sharing (Azure AD B2B direct connect) is not enabled at DIA – see 'External collaboration' above.)

3. Choose whether all Team members can access the new channel. If you accept the default sharing setting, all Team members except Guest users (i.e. external members) will be able to access the channel:

Uncheck this box to choose which specific Team members can access the channel.

4. Click on **Create**.

5. If you have unchecked the 'Share this channel with everyone on the team' checkbox, you will be asked if you want to add other people the channel:

If you skip this step, you will be the only member of the channel (as Channel owner).

Sharing the channel

There are three options for sharing the channel with others: With People, With a team, With a Team you own

You can add additional members by clicking on the ellipsis to the right of the channel name and selecting a sharing option:
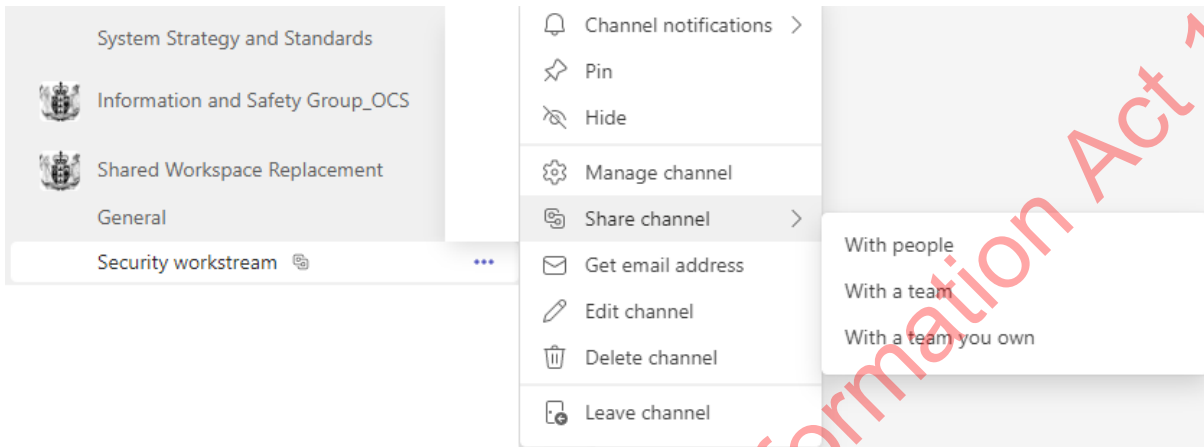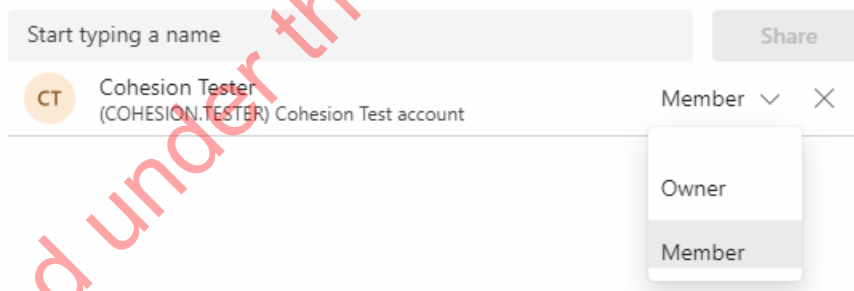

1. **Share with people**

   a. Select *… Share channel > With people.*

   b. Select the person or people you want to share with, their membership status (i.e. Owner or Member – the default is Member), and click on **Close**.


2. **With a team** (not available with mobile Teams app)

   Care needs to be taken if sharing a Shared channel with another Team because you don't choose the Team by name but by the name of the Team owner. You should discuss this with the Team owner first as they may own more than one Team or the person you select might not be the owner of the Team you want to share the channel with. (The Owner you select will be sent an invitation to accept the sharing. While you will be able to approved the Team(s) they select, it is better to have the conversation first and have a clear understanding of the purpose of sharing the channel.)

   a. Select *… Share channel > With a team.*

b. Select the name of the Team owner, and click on **Send invite**. Note that you can invite multiple Team owners in the same transaction:
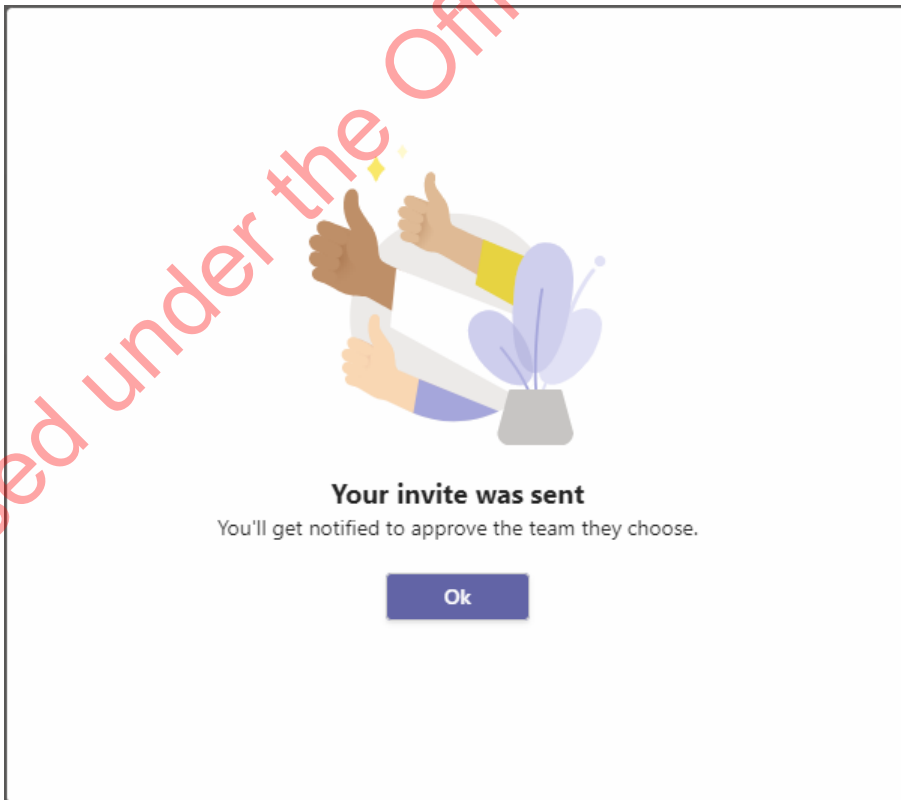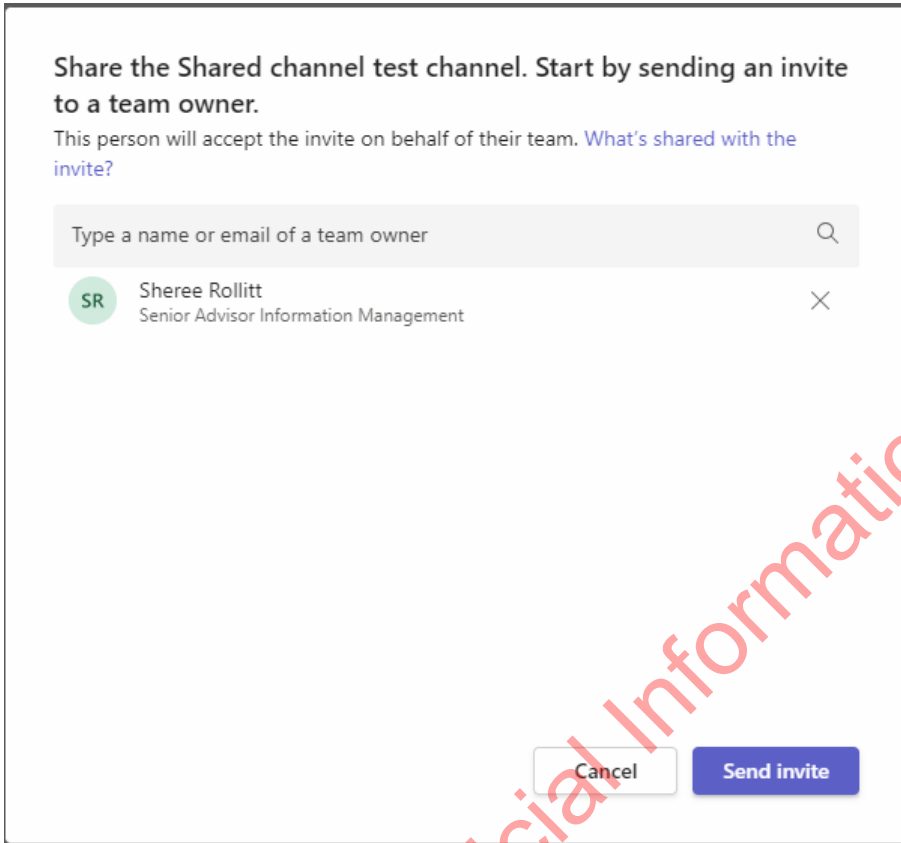

The recipient Team owner has 14 days to accept the sharing invitation – you can check your invitations from the Shared channel (Manage Channel):
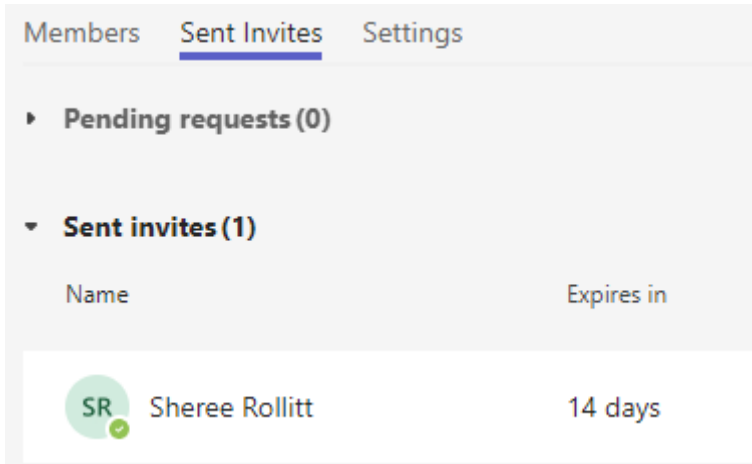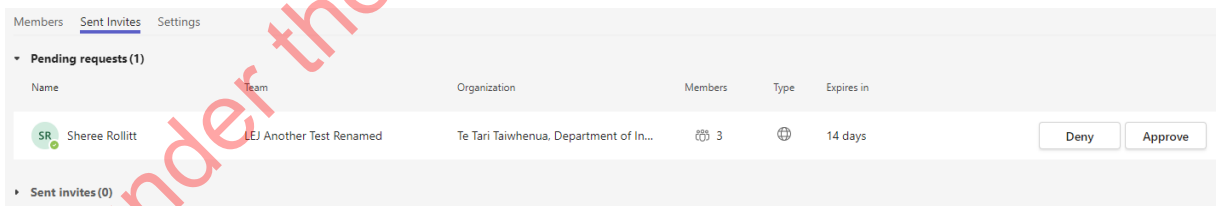
c. Approve the acceptance – this is where you ensure that the sharing it with the right team.

When the Team owner accepts the invitation, you will receive and email and see an alert in your Teams feed that the acceptance needs approval.
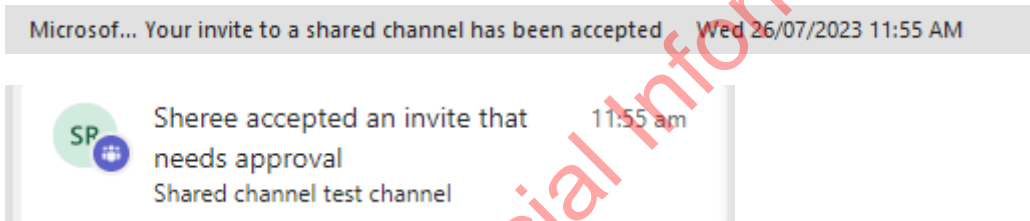
Follow the link (in your feed or via the email) and check the **Sent Invites**. (You can also access this via Manage channel.):

This is where you check that the Team owner you invited has selected the Team that you expect, which should be an appropriate Team to add the Shared channel to. If in doubt, talk to the owner about their Team and who:

The Team they selected shows and allows you to click on **Approve** (or Deny) sharing with it.

If approved, the Shared channel will show in the channel list of that the Team that it has been shared with and Team members have normal access to it, as if it were a normal channel.

In the home Team location of the Shared channel, the fact that it has been shared with another Team shows in the Members tab (Manage Channel):

The person who received the invitation may be owners of more than one team

3. **With a team you own**

   a. Select *… Share channel > With a team you own.*

   b. Select the required Team from the teams you own, and click on **Done**.

How to apply for a Microsoft Team

All requests for a new Microsoft Team must be done via the Cloud Governance tool - **MyHub**. This allows us to run the request through the appropriate approval processes and automate the building of the team.

Accessing the Cloud Governance tool (MyHub)
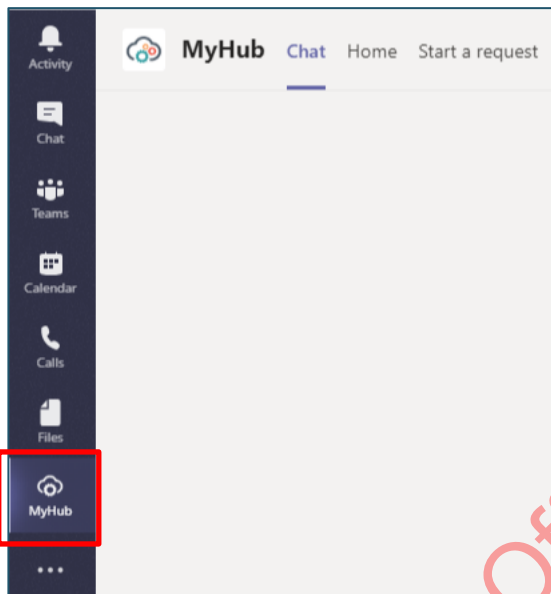
The MyHub app can be accessed within the Teams application. This app can be found on the left-hand panel and is our recommended way to request a team.

Cloud Governance can also be accessed via the Cloud Governance portal in the browser.

Creating a request for an Internal Collaboration Team

Starting from MyHub

1. Check that a team with a similar purpose does not already exist by selecting the **Join or create a Team** page in the Teams application, at the bottom of the Teams tab.

2. If a Team does not already exist, select the **MyHub** tab and select **Home** and **Start a request.**

   Note: you may be prompted to sign in with Office 365. If the Home tab is not loading in MyHub, click on Chat or Teams in the left-hand navigation pane of Teams and then back to MyHub. Home should then load successfully.

3. Under the **Microsoft Teams** category, select the **Internal Collaboration Team** tile.
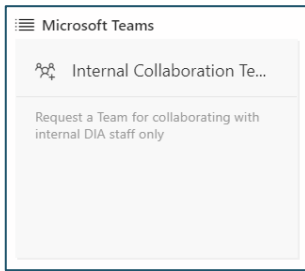
4. Continue steps found below in the **Fill in the application form** section.

Starting from the Cloud Governance Portal

1. Check that a team with a similar purpose does not already exist by selecting the **Join or create a Team** page in the Teams application, at the bottom of the Teams tab.
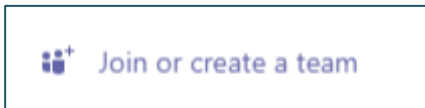
2. If a team does not already exist, open an internet browser to access the Cloud Governance portal.

3. Select **Internal Collaboration Team** under Quick Requests on the left-hand navigation.
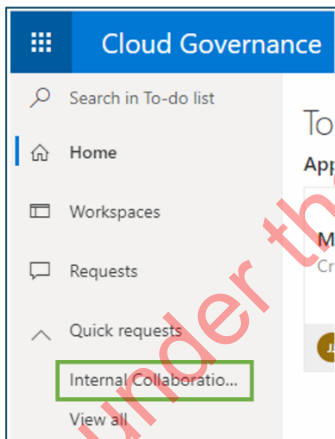
5. Continue steps found below in the **Fill in the application form** section.

Fill in the application form

These steps apply whether you started in MyHub or the Cloud Governance Portal.

Step 1. Request Information

1. Decide whether you want to create a Team from scratch, or from an existing Team. If you have an existing Team you may want to replicate the Channel structure for another Team.

2. Decide whether the Team should be Public or Private. Teams should be Open (Public) by default, like Cohesion, but if you have a legitimate need for the Team to be Private, then select Private.

   a. **Public means that any DIA staff member can join the Team**. When this happens, a notification is posted to the General channel. Team Owners can remove people from the Team if they needed.

   b. **Private means that the DIA staff must be added to the Team by the Team Owner/s**. Team Members can also ask to invite someone to the Team. In this scenario, the Team Owner/s receive a notification, and are given a choice whether to add the person or not.

3. Click **Next.**

Step 2. Basic Settings

4. Enter the name of the **Primary Team Owner**. This person will be ultimately responsible for the Team. This field will default to you as the Requestor – however you can change it if needed by clicking on the **x** at the end of the name.

   To enter a new name, start typing – the tool will suggest people, you just need to pick the right one from the dropdown.

5. Do the same for the **Secondary Team Owner** – this person will be fall back if the Primary Team Contact is unavailable.

   The Primary and Secondary Team Owners will be added to the Team as Owners. They will then be able to add more Owners as needed. We recommend no more than 5 Owners in total, to help maintain control over the structure and use of the Team.

6. Enter the names of the Team Members. You do not need to add the Primary and Secondary Team Contacts in this field.

7. Choose whether to hide the names of the Team Members from people who are not already Members. This may be necessary for Private Teams where you may not wish people to know who is working on a specific thing.

8. Click **Next.**

Step 3. Advanced settings

This section collects information about your intended use of Microsoft Teams. Please put in as much information as you can, to inform your Manager and the Information and Data team when they approve your request.

1. Select the **DIA Branch** that most closely applies to your Team, using the luggage tags to the right-hand side of the field

    a. If your Team is for a project or programme, then enter the branch that owns the project or programme

    b. If the Team covers multiple branches, pick one to *host* the Team, and enter the other/s into the **Additional Comments** field at the bottom of the form

2. Select the **DIA Business Group** that most closely applies to your Team, using the luggage tags again. Please do not pick an entry below the Business Group level (level 2 of the term set)

    a. If your Team is for a project or programme, then enter the Business Group that owns the project or programme

    b. If the Team covers multiple Business Groups, pick one to *host* the Team, and enter the other/s into the **Additional Comments** field at the bottom of the form
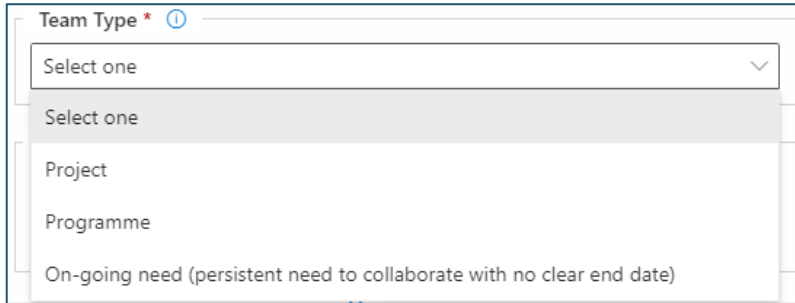
3. Select a **Team Type** – there are three to choose from:

   a. Project

   b. Programme

   c. On-going need persistent need to collaborate with no clear end date)

4. Provide a brief description of how you will use Teams in the **How will you use Teams** field, including the information you expect to go into the Team.

   It is important that each Team has a clear defined purpose, so that users know what the Team is and is not to be used for, and so the information can be managed appropriately. **It is not enough to just provide us with the name of your team.** Provide us with information on some of the following:

   a. How do you intend to use Teams?

   b. What features of Teams are you looking to take advantage of?

   c. What benefits will Teams bring to your team/project/programme?
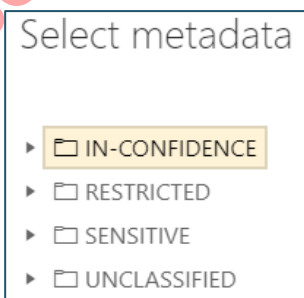
   This information is used by the Approvers. Not providing us with adequate information will delay the approval decision for your team.

5. Select the **Highest Security Classification** that will apply to content stored/discussed within the Team, using the luggage tags to the right-hand side of the field. See 1840 for guidance.

   Please note: The Security Classifications do not display in the expected order. Please pay close attention when making your selection.

6. **Will there be personal information stored/discussed within the Team?** Select Yes or No on the dropdown as appropriate. See 1840 for guidance

Will there be personal information stored/discussed within the Team? * (i)

[Select one   ∨]

7. If you entered Yes to the question above, provide a brief description of the personal information into the **What sort of personal information will be stored/discussed within the Team?** field. If you answered No to the question above, move on to the next question.

    What sort of personal information will be stored/discussed within the (i)
    Team?

    [   ]

8. **Teams is hosted in Australia. Do you see this being an issue for the information you intend to discuss/store in this space?** Some DIA content may not be appropriate to be stored in Australia. Select Yes or No on the dropdown as appropriate.

    Teams is hosted in Australia. Do you see this being an issue for the information you intend to store/discuss in this space? *

    [Select one   ∨]

9. **Teams should be open (public) by default. If you chose "Private" in Step 1, and have a legitimate reason for doing so, please indicate that reason here.** It is important that DIA staff have access to the information they need to do their jobs, however we recognise that some information needs a higher level of protection. Please be honest about your reasoning here.

    Teams should be open (public) by default. If you chose Private in Step 1, and (i)
    have a legitimate reason for doing so, please indicate that reason here

    [   ]

10. **Have you talked to your Team about using Teams?** Teams will only add value if everyone is on board with using it. Talk to your team about using Teams before you request one – they may have questions or concerns or may not have capacity to learn a new tool at this time. Select Yes or No from the dropdown as appropriate.

    Have you talked to your team about using Teams? * (i)

    [Select one   ∨]

11. Enter any **Additional Comments** you may have, or notes for the Approvers to consider

Additional Comments

[ ]

12. Enter a **Team Name**. Try to be descriptive

    Please note: Information and Data will add a suffix to the end of the name to comply with our naming convention e.g. "ABC Team_IS_OCS". Please do not change the name once your Team is provisioned.

    Team name *

    [ ]

13. Enter a short **Team description**. This will be displayed on the Team Management pane and will appear in the emails sent to users when they are added to the Team. It can be the same information as you entered in the Team Purpose field above.

    This information is for users of your Team.

    Team description

    [ ]

14. Select **Submit**

    Cancel   Back   **Submit**

Approvals

Your request will be sent to your Manager for approval. Your Manager should have an oversight of how Teams is being used in their area. They can edit information entered by you into the request. They can also reassign the request if they believe there is someone more appropriate to approve the request.

Once a Manager has approved the request, it is sent to the Information and Data team for approval. They may seek clarification on the information entered in the form.

If you are a General Manager or Deputy Chief Executive and you want to request a Team, ask your Executive Assistant to submit the request. The request will then be sent to you for approval.

Next steps

Request status

You can view all your requests, and their status, from the **Requests** page in MyHub:
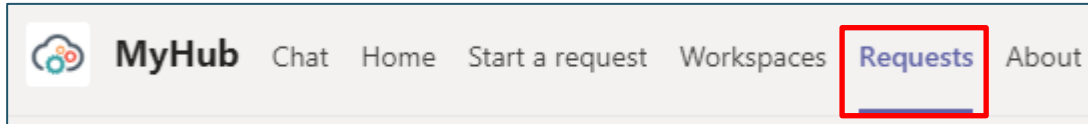
Your most recent request will be at the top of the list, and you can see who it is assigned to, and its status:

Summary ∨	Service ∨	Modified ↓ ∨	Assigned to ∨	Status ∨
Internal Collaboration Team Reques...	Internal Collaboration Team Request	2020-05-10 23:24:36	Fiona Staples	● Waiting for approval
Microsoft Team for Internal Collabo...	Internal Collaboration Team Request	2020-05-08 09:03:46	Information and Data_IS_OCS	● Waiting for approval
Microsoft Team for Internal Collabo...	Internal Collaboration Team Request	2020-05-06 21:30:03		● Cancelled
Microsoft Team for Internal Collabo...	Internal Collaboration Team Request	2020-05-06 00:13:07		● Completed

Team Provisioning

When your request is approved or rejected, you will receive an email from **AvePoint Cloud Governance Team**.

If the request is approved, the Team will be provisioned, and the nominated Primary Team Contact will receive an email once it is ready for use. The Primary and Secondary Team Contacts and any Team Members outlined in the form will be added to the Team and notified.

As the requestor, you will also receive an email telling you the approval process has completed.

Guide: Microsoft Teams: Overview

What is Microsoft Teams?

MS Teams is a hub for collaboration. It enables you to chat, collaborate and work in an organised fashion via 'Channels'.

Be mindful

- Always use Cohesion links to share files. Do not upload documents to Teams.
- Zoom is the recommended application for video and audio calls.
- Any information posted on Teams, including within the Chat function, is an official record. All information is managed under the Public Records Act 2005 and is discoverable under the Official Information Act 1982.
- Teams is open by default. Be mindful of what you post.

Let's run through the jargon!

Team – a collection of people and content that connect for a specific purpose, e.g. a project.

Channel – each Team is broken down into Channels. A Channel is its own topic of conversation or work. For example, the Northwind Traders Team has a wide range of Channels for specific work.
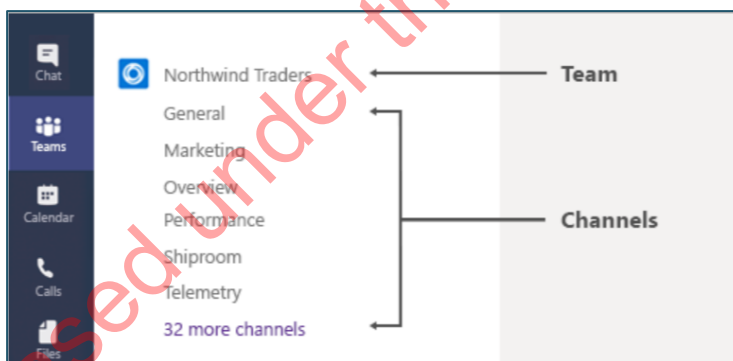
Chat – Think of this like instant messages in Skype for Business or other messaging applications. This is where you can have a private conversation with someone else (or a group of people).

Newsfeed – a homepage on each Channel, allowing you to stay on top of conversations and activities.

Post – a message within your channel. This could be a conversation or a link to a new document.

Cohesion reference:

Planner – a visual board to keep your team organised. You can assign tasks and keep track of progress in one handy place.

Tab – within each Channel you can add a Tab(s). This can be a link to your favourite Cohesion documents, apps and services; for easy access!

Roles

Team Owner	- Edit Team name/description - Request Team Deletion - Add channels - Edit channel name/description - Delete standard channel - Add members - Add apps - Add a tab
Team Member	- Join public Teams - Leave Team - Add channel - Edit channel name/description - Delete channel - Request to add members
Team Guest	Collaborate on content

Guide: Microsoft Teams: Getting Started

Start a new chat
Launch a new one on one or group chat

Search throughout Teams
Search for contacts, Teams or Channels using the Search bar

Tabs
All tabs display across the top of each Channel

View your Teams
Your Teams and Channels display in this list

Move around Teams
Access your Activity Feed, Chat, your Teams, Calendar and More! This side panel is always visible no matter where you are in Teams

Manage your Team*
Click on the … to add or remove members, create new channels, or get a link to your Team
only available for Owners

Manage your profile
Change your picture and settings

Reply
Send a direct response to a conversation to create an ongoing thread

Join a Team
Search for a Team across the department

Compose a message
Type and format your message, you can add images, GIFs and emojis
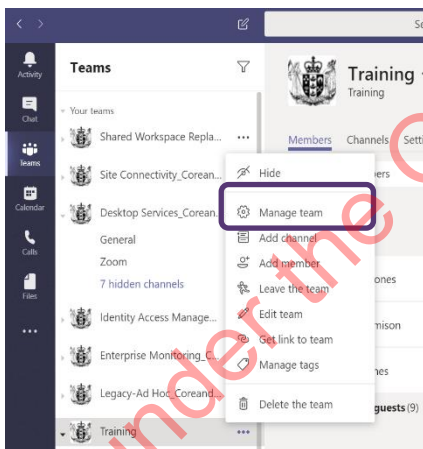
Guide: Microsoft Teams: Add members to your Team

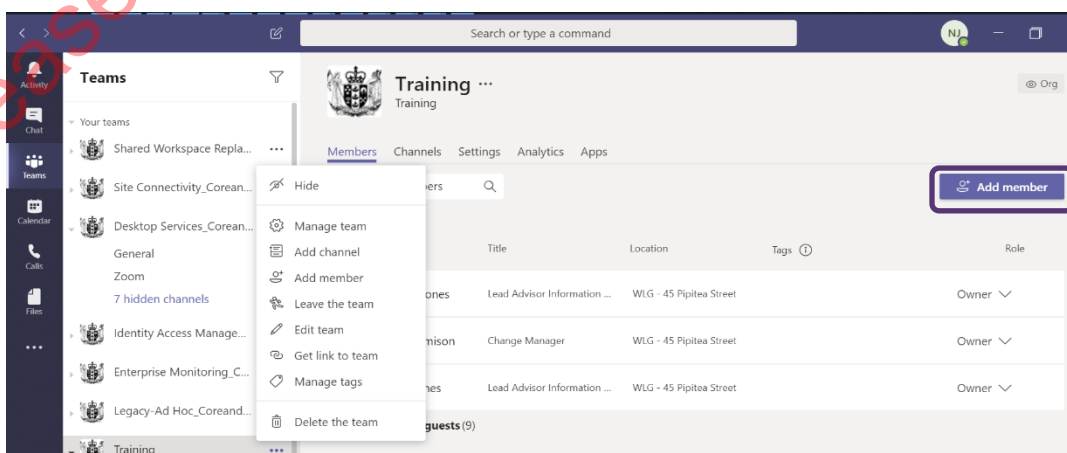Only Team Owners can complete the below steps to add a new member(s) to your Team.

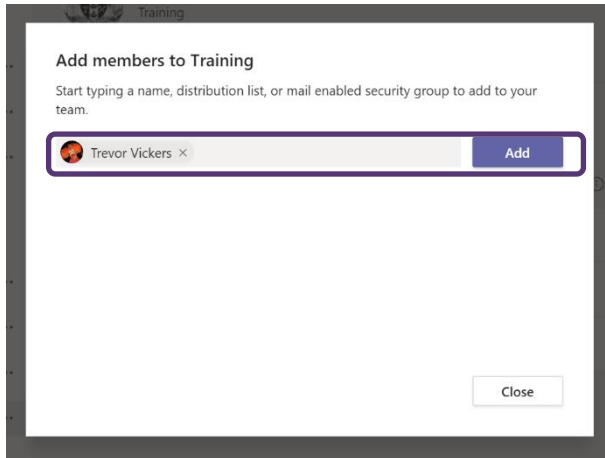1. Click on the three dots next to the Team name
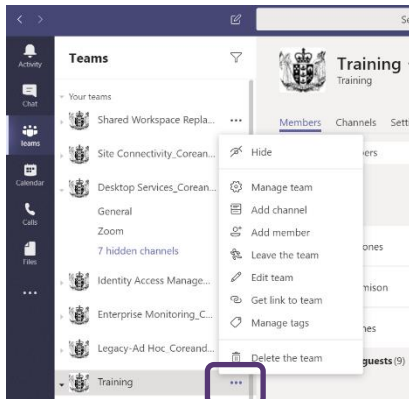
2. Select **Manage team**

3. This page shows you the members and guests within your Team. Select **Add member.**

4. Search for the member(s) you would like to add to your Team, select **Add.**

5. This member will now appear under the Members and guests list.

Guide: Microsoft Teams: Add a new channel

Creation of channels within a Team is restricted to Team Owners. This is to help ensure channels created make sense and work for everyone within the Team.

Note: A Channel is visible to all members within the Team.

1. Click on the three dots next to the Team name

2. Select **Add channel.**

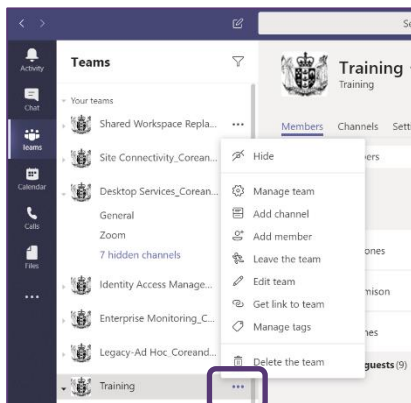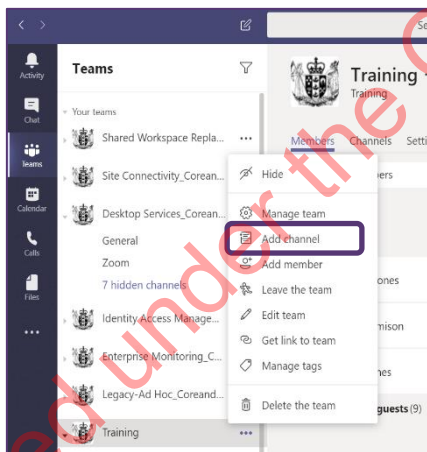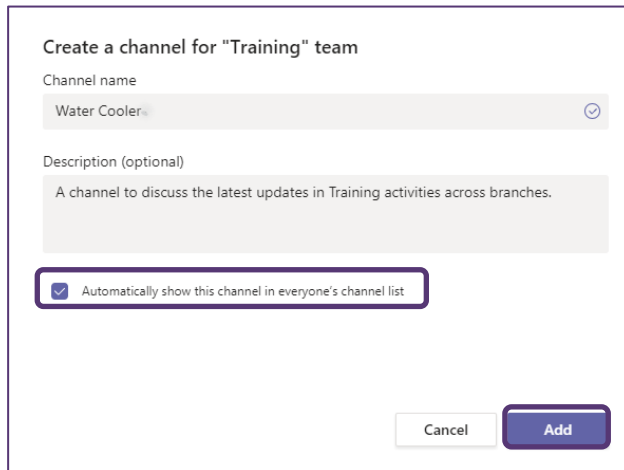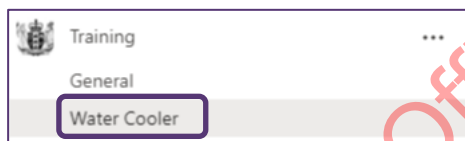3. You are now able to create a new channel - please use a meaningful Channel name along with a helpful description. The description appears for Owners in the Manage Team area. When ready select **Add.**

> **Top tip!** Tick "Automatically show this channel in everyone's channel list" so it is easy to find.

Create a channel for "Training" team

Channel name

Water Cooler

Description (optional)

A channel to discuss the latest updates in Training activities across branches.

☑ Automatically show this channel in everyone's channel list

Cancel   Add

4. The new Channel will now appear in the list of Channels under the Team name.

Training   ...

General

Water Cooler

Note: all Channels are set up with the following default tabs

- **Posts** - this is where all participants can create conversations and connect in this Channel.
- **Files** – this is a document repository for the Channel. As Teams is not ready for DIA's documents yet, please continue to use Cohesion, and share Cohesion links within Teams.
- **Wiki** – this is a wiki you can use this for notes, FAQs, and much more.

Released under the Official Information Act 1982

How to turn on your presence/availability in Teams

1. Before you begin, **close all Office applications** that you have open, such as Outlook and Word.

2. Open the **Teams** application.
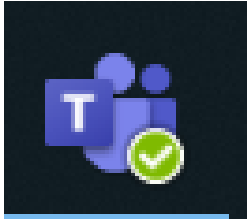
3. Click on your **profile icon** at the top right-hand corner of the screen.
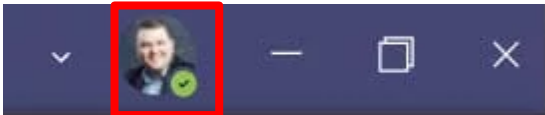
4. From the drop-down menu, select **Settings**.
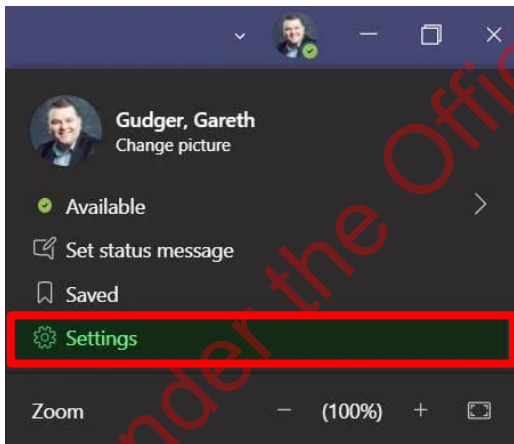
5. Within the **Settings** window, select the **General** tab.
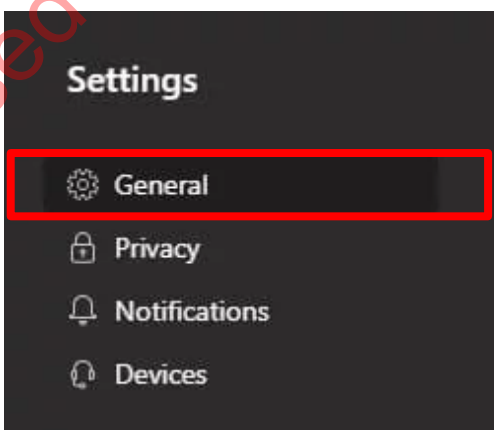
6. Tick **Register Teams as the chat app for Office.**
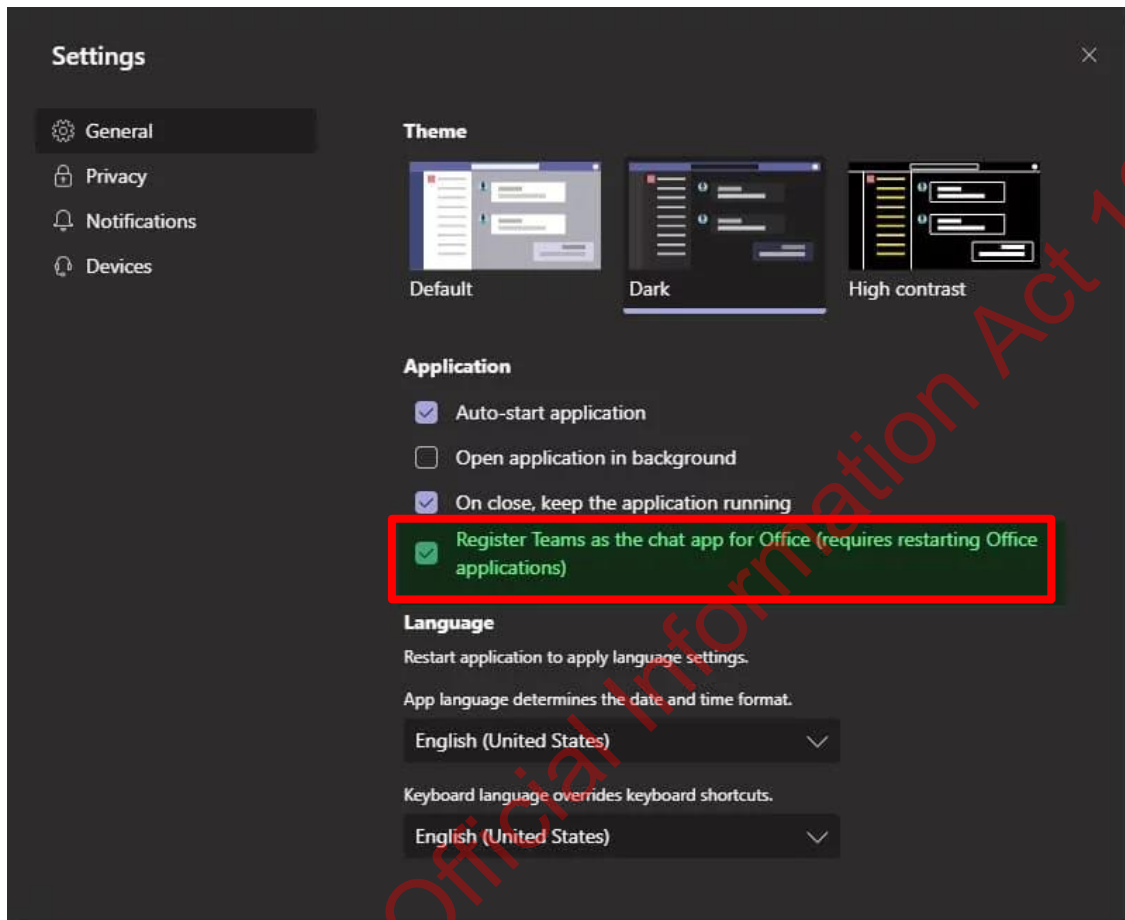
7. **Close, and re-open** the Teams application for your availability to be visible.

Guide: Adding Planner in Teams

Team Owners can add a Planner tab into your teams' channel. If you are a member of the team you won't be able to add new tabs.

Checking to see if you're an Owner or Member of a team

1. Within the Teams application, select the **ellipsis (three dots)** next to the team name (it's the one with the symbol on the left-hand side).

   Training   •••
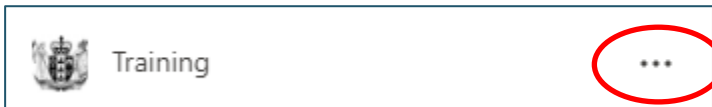
2. Select **Manage team**, from here you can search your name to see if you're an owner or member.

   Training

   General
   Agendas
   Dunedin Team Space
   Quick reference guide material
   Training session material
   Water Cooler

   ABC Team_IS_OCS

   •••
   Hide
   Manage team
   Add channel
   Add member
   Leave the team
   Edit team
   Get link to team
   Manage tags
   Delete the team
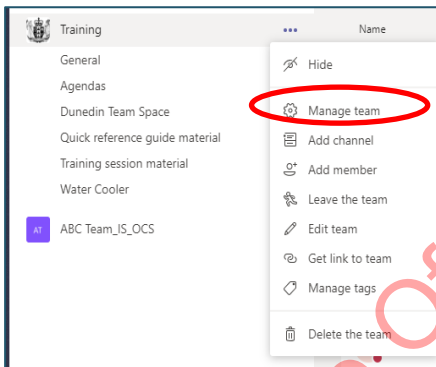
3. Within the **Members** tab, click on the arrow next to **Owners** to expand the list and view who are Owners.

   Training ···
   Training

   Members   Channels   Settings   Analytics   Apps

   Search for members
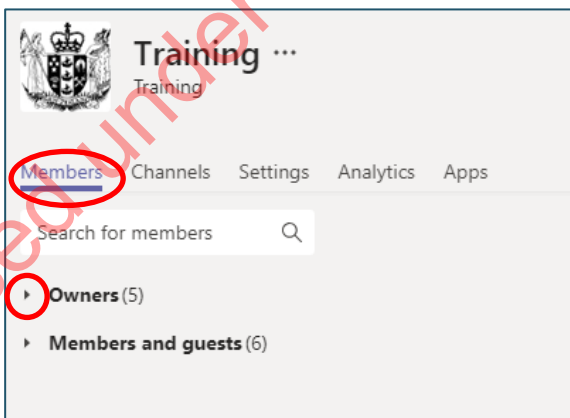
   ▶ **Owners** (5)
   ▶ **Members and guests** (6)

Owners only: Adding a Planner to your team

1. Open **the channel** that you want to add planner to and select the **+ icon** to add a new tab.
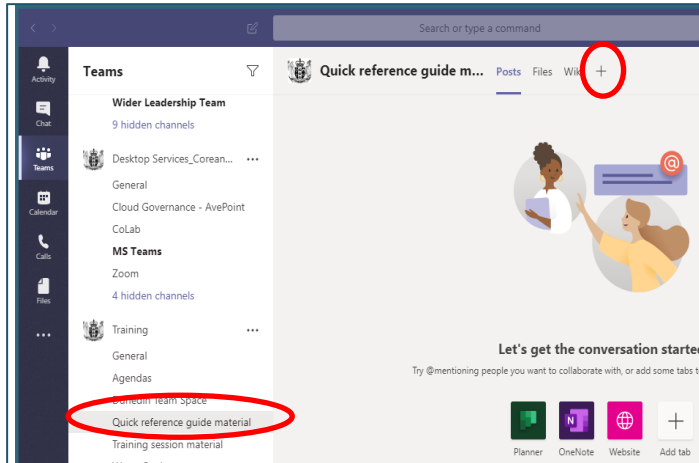
2. Select **Planner**, if you can't see it in the list then type Planner into the search box.
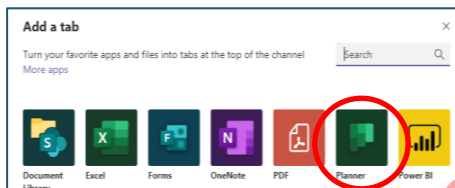
3. Create a **new Planner board** or use **an existing plan** (this will replicate a plan that you have in another tab). Select **Save** to create the board as a tab.

Guide: Microsoft Teams: Chat

Te Tari Taiwhenua Internal Affairs

View your Chats
Your chat conversations appear in this list

Start a new chat
Launch a new one on one or group chat

Search throughout Teams
Search for contacts, Teams or Channels using the Search bar

Can be used to call, video or share screen with members of this Chat group

Move around Teams
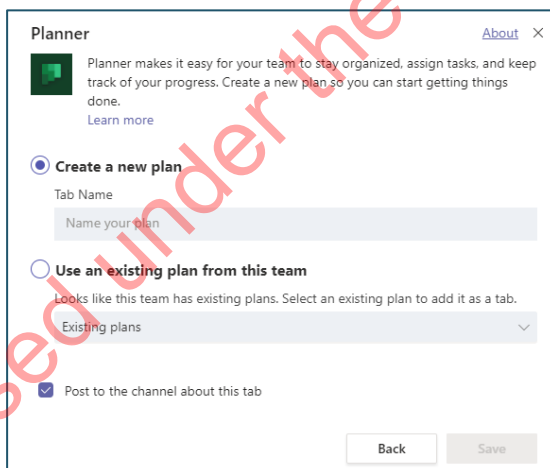Access your Activity Feed, your Teams, Calendar and More! This side panel is always visible no matter where you are in Teams

Search through your Chats
Use the filter icon to search for a keyword in your chats

Include links
Send a links directly to your Cohesion document(s) in Chat

Chat with more than One
Use the + button to add more participants to this chat group

Include links
Post links directly to your Cohesion document(s) in Chat and in your Teams conversations. Do not send files/documents within Teams.

Compose a message
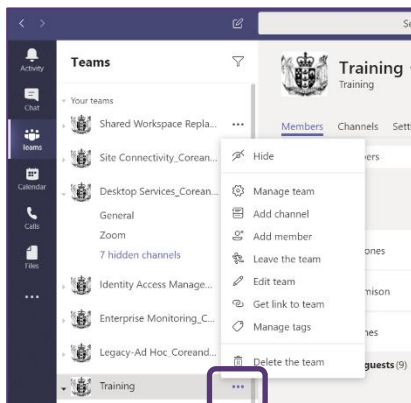Type and format your message, you can add images, GIFs and emojis

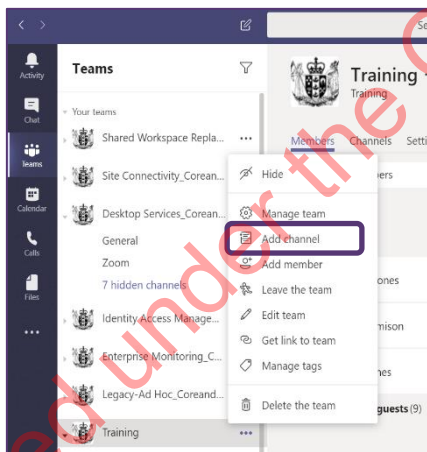# Guide: Microsoft Teams: Add a new channel

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> **Top tip!** Tick "Automatically show this channel in everyone's channel list" so it is easy to find.

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Description (optional)

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☑ Automatically show this channel in everyone's channel list

Cancel   Add

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Training   ...
General
Water Cooler

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- **Wiki** – this is a wiki you can use this for notes, FAQs, and much more.

PRIVACY GUIDE: Microsoft Teams

When sharing personal information through Teams, please consider the questions below:

Can I share documents containing personal information through Teams? Teams is a collaborative tool ideal for instant messaging or calling a work colleague. It is not recommended to share documents via Teams, including documents containing personal information, such as citizenship files and passport images. Teams is not currently certified for file storage, and it is recommended to save documents in Cohesion. You can share Cohesion document links in Teams if necessary.

Should I share other personal information through Teams? Sharing personal identifiable information via Teams is allowed when collaborating internally to manage a work incident faster, such as sharing a customer name, DOB, or registration number with a colleague to locate a citizenship application. **Please, always confirm people in the Team you are sharing information are authorised to have access to the personal data you are disclosing in the chat or post.** Please, refer to the Privacy Policy, the Information Management Policy and the Security Classification Policy for guidance regarding sharing, saving and protecting information through DIA systems.

What is the security classification? Ensure all information shared by you in Teams has a security classification **no higher than RESTRICTED**.

Is the Team shared externally? Personal information should not be shared in external collaboration Teams where DIA Guest Users (external users) are members of the Team.

Who has access to the Team (or the shared channel)? As mentioned above, please be sure that everybody in the Team is authorised to have access to the information you are sharing.

Should this subject be discussed in Teams? While Teams is a good tool to communicate quickly, ongoing, or extensive conversations that include personal information about other staff or customers, these discussions should not be saved in Teams. The Outlook email system will offer you a way to communicate about a topic, retaining context, in just one email trail (which is especially helpful for responding to OIAs and Privacy Act Requests). This record of the discussion can then be saved in Cohesion. Click on the following link if you want to know more about how and when you need to save an email in Cohesion | DIA Intranet

Is personal information stored in Teams? Yes, Teams is just another system where information is saved. Thus, remember that what you write and share via Teams is subject not only to the Privacy Act but to Public Records Act and Official Information Act. Information disclosed in Teams, including chats and posts, are retained and are discoverable.

Am I exposing any personal information when video conferencing? Remember to turn off your notifications prior to sharing your screen. The alerts from Teams, Outlook and other applications can accidentally leak personal information. If screen sharing, it's advisable to close your Outlook mailbox and close documents and images that can expose confidential data.

What are the general security risks of using Teams?

When you use Teams, be aware of the following security risks:

- Information that you share with people outside DIA is immediately and irrevocably beyond DIA's control the moment it is received.

- Malware and virus protection on files in Teams is aggressive; if a file in Teams is suspected to be malicious, all interaction with it will be prevented. A Service Desk request will need to be made to remediate the file.

- The SharePoint Online sites associated with Teams have not been accredited to store DIA documents. Files intentionally or unintentionally uploaded to SharePoint Online, e.g., files uploaded to SharePoint Online via the "Files" tab in Teams channels, are not protected by accredited security controls.

Remember: *only use explicitly authorised devices to access your Teams environment. Authorised devices are DIA provided and managed phones, laptops, and desktops as well as personal iphones where the user has agreed to have their device managed by DIA. Please get in touch with Security if you have any questions about device authentication via DIA-ITOperationalSec@dia.govt.nz.*

If you have any specific concerns not covered in this guide, please, contact us via privacy@dia.govt.nz.

Guide: Opening Microsoft Teams on your device

1. On the bottom right-hand corner of your screen, **select the magnifying glass icon** and type in **'Teams'.**

2. You will see the **Microsoft Teams application** appear. Click on it to open.

   Note: If the icon doesn't appear please restart your computer and wait 10 minutes and restart from step 1. If you cannot see the application, please log a ticket with ICT Service Desk.
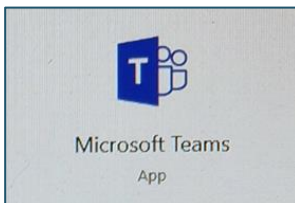
3. Once you've opened the application, it's a good idea to **pin it to your task bar**. Right click the Microsoft Teams icon and select **pin to taskbar**.
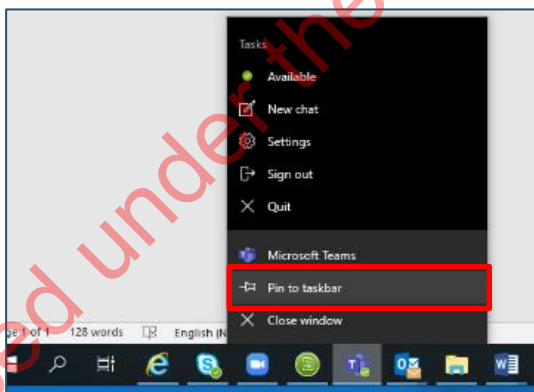
Check out the 1840 page for more information on how to use Teams.