

## Agency Microsoft Teams Guidelines

Version	Date	What's Changed
v.1	March 20, 2020	First Release

### Team Creation vs. Using a Channel

To maintain a cohesive and concise list of teams, please consider whether you need a new Team or just a Channel (sub-group) within a Team. Channels can be created by groups of individuals or topics if you need to have more targeted communications. As an example, the DCR team could have 1 Team for their entire group and then set up a Channel for the Fundraising unit, another Channel for the Communications unit, and another Channel for the entire Team. Membership permissions for each Channel can be added on an individual basis. This will ensure that your Teams are manageable and efficient and save you a lot of work in trying to manage numerous teams.

Before you make a new Team make sure that a Team for your group doesn't already exist!

### Team Naming Conventions

To facilitate structure and the ability to easily find and maintain Teams there needs to be a naming convention for Teams. The naming convention for the Agency is "service title-program title".

Service	Abbreviation
Catholic Charities (Irwin)	CC
Children Family and Community	CFCS
CSO Office	CSO
Comm Outreach & Disability	CODS
Central Region	CR
Immigration and Settlement	ISS

Here are some examples of naming conventions for teams.

CC-HR A Team for the Human Resources group.

CC-IT A Team for the Information Technology group.

CC-Cabinet A Team for the Cabinet group.

CFCS-CDS A Team for the CDS group within CFCS.

### Team Ownership

Please ensure that there are two owners of a Team so that there is more than one person who has full access to all the functions of the Team.

## **File Sharing and Collaborating**

You can host files online within the Team, as it will allow others to collaborate with you in real time. When editing a hosted document avoid deleting other people's work. Be mindful of who is in the Team or Channel and that they will have access to the files within the team. Privacy is an important consideration.

Note: When you upload and then edit documents in Teams, Teams becomes the only place the document is stored unless you download a copy and save it to your drives.

## **Custom Apps or Bots**

At this time, do not add custom apps or bots to your Team without first speaking with Kirsten Anderson, Director of IT. We are primarily turning this on right now as a communications tool and a method to facilitate working from home during the COVID pandemic. The IT HelpDesk is not currently able to support this functionality and we need to assess security for any apps or bots we bring into our environment. We will review when we do a full roll out of Teams. Adding custom apps or bots requires the approval of the Chief Administrative Officer (CAO).

## **Chat Etiquette**

Please keep in mind the size of the groups you are communicating with when using a group chat. Irresponsible usage of group chats will lead to people getting an overwhelming amount of chat requests and notifications. Although private and group chats are less structured than email, please maintain a general sense of professionalism in your communication. Do not @mention an entire team or channel. This will cause then entire group to get a notification and should only be used in an emergency.

## **Calls**

To contribute to a call, you will need a microphone or a device with a webcam. Try to join calls from an area that has low background noise. If you are video calling from home be mindful of your surroundings, especially from a confidentiality perspective. Double check the group you are about to call to not bug people who do not need to be in the call. Crosstalk is a common problem in online calls due to the slight lag. Let others finish their thoughts before interjecting.