Trinity Health

Everyday Etiquette in Microsoft Teams

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Microsoft Teams is a chat-based workspace app; meant to facilitate ongoing collaboration and communication in a team, project, organization, or group of people. Teams provides single-point access to conversations, files, notes, and tasks.

Teams combines the features of Skype (chat/conferencing), SharePoint, OneDrive (file sharing & collaboration), OneNote (note-taking), Planner (project management), Stream (video sharing), plus (future) in-app integrations. No more jumping between windows, logins, or screens to access all your content.

For many users, Teams is a "breath of fresh air" compared to working with multiple (separate) tools like email, file shares, and phones. Like any new tool, the (how-to) best practices are still developing. However, the Teams community has quickly learned the guidelines that help everyone make the most of Teams.

This guide covers some everyday etiquette in Microsoft Teams. This Everyday Etiquette guide is tailored to provide colleagues the best Teams experience; by keeping things clean, organized, productive, and fun!

Files

Teams is an excellent place to work on files simultaneously with colleagues. Files live in a SharePoint site dedicated to the Team created. Each Microsoft Team is connected to a SharePoint site on the back end.

- **Keep files under 15 GB in size.**
  That's the limit!

- **Limit three folder levels deep.**
  There is also a character limit to the folder path length.

- **Sync files for offline access.**
  Use OneDrive for Business, built directly into
 Windows Explorer, MacOS Finder.
  Work on files offline when WiFi is not accessible.

- **View your files directly in SharePoint if you prefer.**
  In the Teams File tab, click Open in SharePoint to access the files directly, with all the SharePoint features available.

- **Yes, files and folders can have their own permissions.**
  You can share files/folders from SharePoint; but file-level permissions can be difficult to manage.
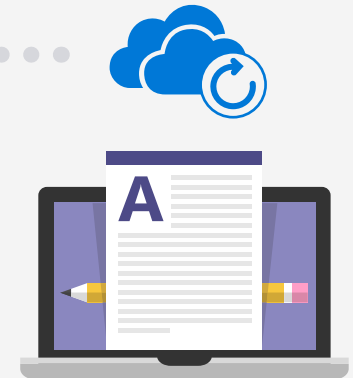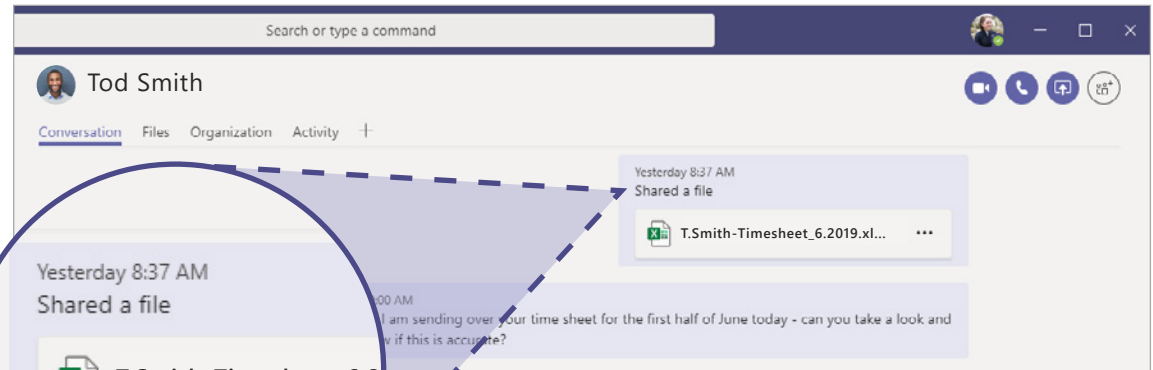
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- **Move files from one Team or Channel to another, using the Move button in Teams (or SharePoint).**
  This ensures you won't lose version history of the file(s). If you perform a simple drag-and-drop move, the file in the new location is considered a completely new copy of the original, with the original being deleted.

- **Where you upload your files matters.**
  If you upload a file into the Files tab in a Teams Channel, the file saves to SharePoint. If you upload a file into a private chat, the file is saved in the uploader's OneDrive for Business and shared automatically with those in the private chat.

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General

Below are some tips to enhance your overall Teams experience.

- **Download the Teams app.** • • • • • • • • • • • • • • • • • • •
  Colleagues receive full video and screen-sharing support, built-in notifications, and many other features.

- **Configure notifications.**
  Teams for desktop and mobile has lots of features. If you're overwhelmed by the notifications you receive, be sure you set them accordingly. Check *Settings* in the desktop app or *Notifications* on your mobile device.

- **The like button is not for sentiment.**
  Give a thumbs-up as an equivalent for "got it," "sounds good," and "okay." This saves colleagues from multiple (unnecessary) "I acknowledge" responses.

- **Reactions are meant for sentiment.**
  The thumbs-up is good for acknowledging a message, which helps keep work on task. Love, laugh, wow, sad, and anger are best reserved for less formal messages and jokes.

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- **Only create new Teams when you must.**
  Perform a search to confirm a Team that meets your needs doesn't already exist. If one does not already exist, be sure to communicate with all involved; clarify a new Team is the right approach. Frequently a new Channel will suffice.

- **A new Team comes with lots of stuff. You don't have to use everything that comes with it.**
  In addition to conversations, you get a SharePoint site, a Planner plan, a PowerBI workspace, and more, depending on the configuration. **This info-graphic breaks it down:**
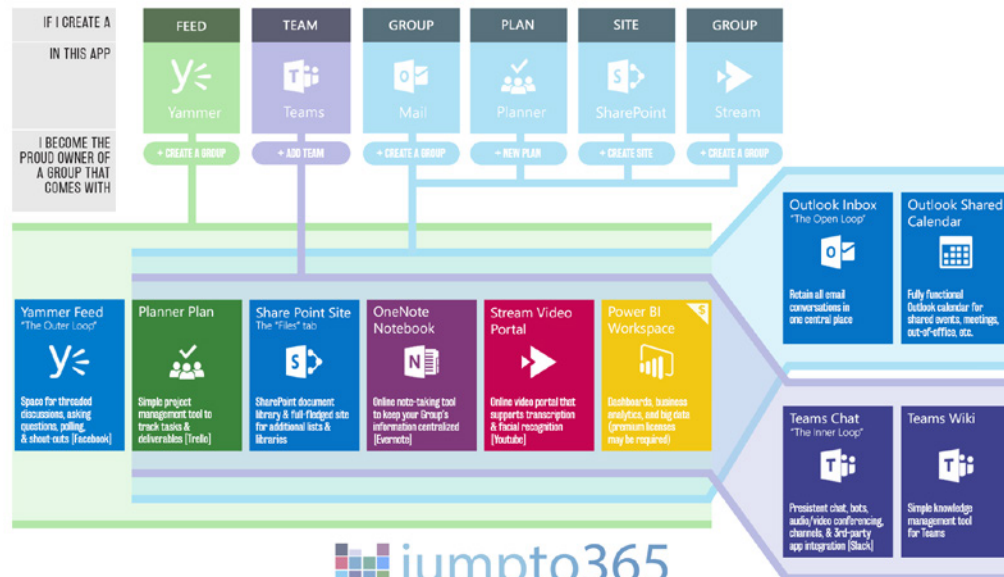
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- **Keep Teams as your internal collaboration tool; continue using email for more formal, external communication.**
  Contrary to your initial reaction, it's easy to juggle both email & Teams.
  Linkedin: **This article can help**.

- **Don't over-invite people to your Teams.**
  If your Team is more informational, not working on dedicated deliverables; provide invitees the option to join or not. **Send join codes**; allowing the recipient to decide if it's appropriate for them to join.

- Make your out-of-office response Teams-friendly.
  Your Outlook out-of-office response displays in Teams as well. Say "Thanks for your message," rather than, "Thanks for your email."

- Send links to documents rather than attachments.
  Office 365 gives you the ability to co-edit documents—take advantage of it. Stick to a single (version-ed) source. Thirty draft copies of a file in your email inbox is so last decade.

- Track Team tasks with Planner.
  In your Channel conversations, add the built-in Planner tab, keeping project deliverables, tasks, and reminders in the front of everyone's mind.

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Private Chat

Teams Channels are great for team-level discussions, but sometimes you need a specific question answered by an expert or simply share lunch plans with a friend. That's where private chat comes in. Begin a private chat with something like; "Hi, are you free to chat?"
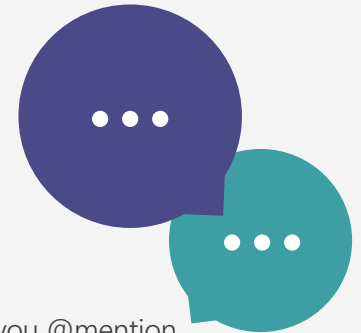
- **Use private chat for questions or just everyday discussion.**
  Teams private chat is equivalent to other instant message services; Skype, Jabber, iMessage, WhatsApp.

- **Urgency in private chat is comparable to Cisco Jabber.**
  If you message someone, you're implying higher urgency than if you @mention them in a conversation. Use @mention in chat to give that extra nudge in their activity feed.

- **Keep member count low.**

  If you have a lot of colleagues in a private chat, it may justify a Team instead.

- **Keep conversations ad-hoc.**
  If the private chat gets into business decisions that require team involvement, bring it back to the Channel for open discussion.

- **Membership matters.**
  Example: If you have an existing chat with three people and you create a new chat with those same three people, there will be two chats with the same three colleagues in two different conversations. Try to avoid repeating private chat sessions with colleagues, if possible.
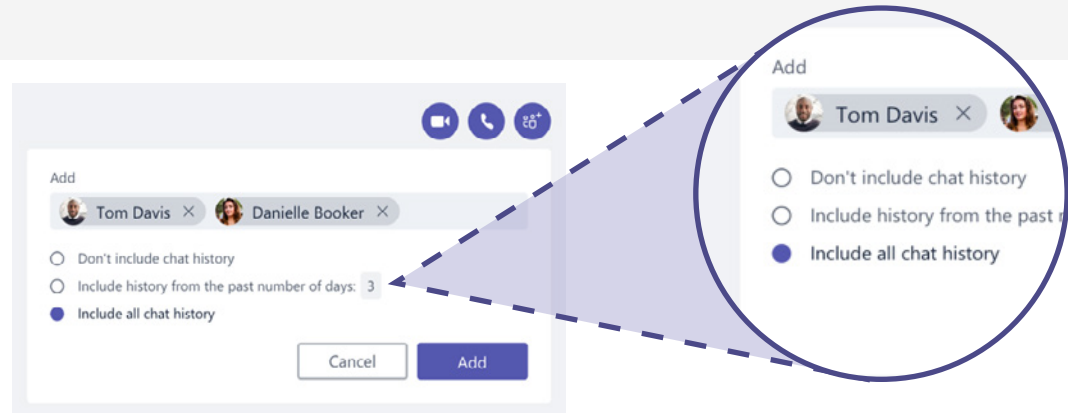
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- **Control Chat History when adding colleagues to a private chat.** While adding a colleague to a private chat, confirm it's okay they view previous discussions or don't include the chat history.

- **You can name private chat groups.**
  A topic or group-specific name makes the chat easier to find and keep everyone on topic.

- **Pay attention to your colleague's availability status. They could be available, away, busy, or out of the office (typically displayed as a green, yellow, red, and purple, respectively). Example:** If you see that they are out of the office, your commentary about yesterday's meeting can probably wait until they get back from PTO.

- A red status can mean busy, in a meeting, or do not disturb. Message accordingly.

- **Do not assume you have privacy.**
  Chats can be audited. To be fair, from a personal privacy perspective, this is similar to using Outlook or Cisco Jabber.

- **Files uploaded in private chat are saved in OneDrive for Business.**
  Each file automatically uploads to the *Microsoft Teams Chat Files* folder in the OneDrive of the colleague who uploads it, and is automatically shared with everyone in the private chat.

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Conversations

Persistent chat is a game changer with Teams. It may seem like you're using Cisco Jabber, iMessage, WhatsApp, or Android Messenger, but Teams is unique. Here are some tips to keep things organized, easy-to-follow, and clean.

- **@mention individuals to get their attention and a response.**
  @mention-ing is equivalent to placing someone in the To or CC field of an email.
  Use @ accordingly; not excessively.

- **Press backspace (delete) after inserting an @mention to remove surnames or extraneous information.**
  Sometimes Teams includes job titles, or locations in the colleagues name. If you prefer to be informal with your colleague(s); a shorter @ mention will set the tone of the conversation.

- **Don't @mention a whole Team or Channel unless necessary.**
  Nobody likes more notifications than necessary.

- **Urgency in conversations is comparable to urgency of an email.**
  Don't expect an immediate response even if you @mention someone in a conversation. Expect the response time to be similar to if you sent an email. Use the **!** button to mark a message as important.

- **Use subject lines when starting new conversations.**
 Subject lines make conversations easier to find.

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- **Match your meme & gif usage to the Trinity Health culture. Please don't overuse them.** Meme & gif images take up more space, not everyone appreciates them, and you may not be as funny as you think. Keep a specific channel where fun stuff is fair game.

- **Don't mix up Start a conversation with Reply to a conversation.** These are different boxes and it's difficult to recover; if you start a new conversation when you meant to reply to an existing conversation.
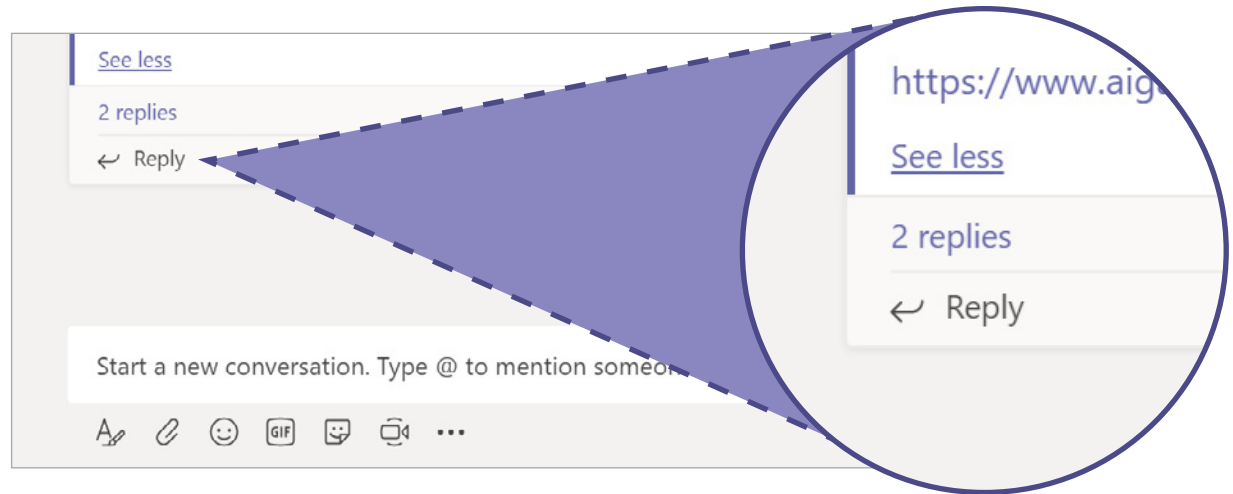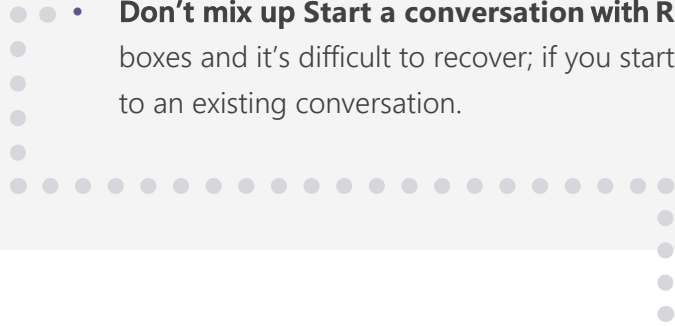
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- **Keep messages short & concise.**
  Most don't like a long email or long chat messages. Keep things on point.

- **Forward emails to Teams for internal discussion before responding via email.**
  Each Teams Channel has an email address. Forward colleague emails that require discussion to a Channel and ask for input there. Only respond via email once a consensus is garnered in Teams. This strategy will aid Teams adoption across Trinity Health ministries.

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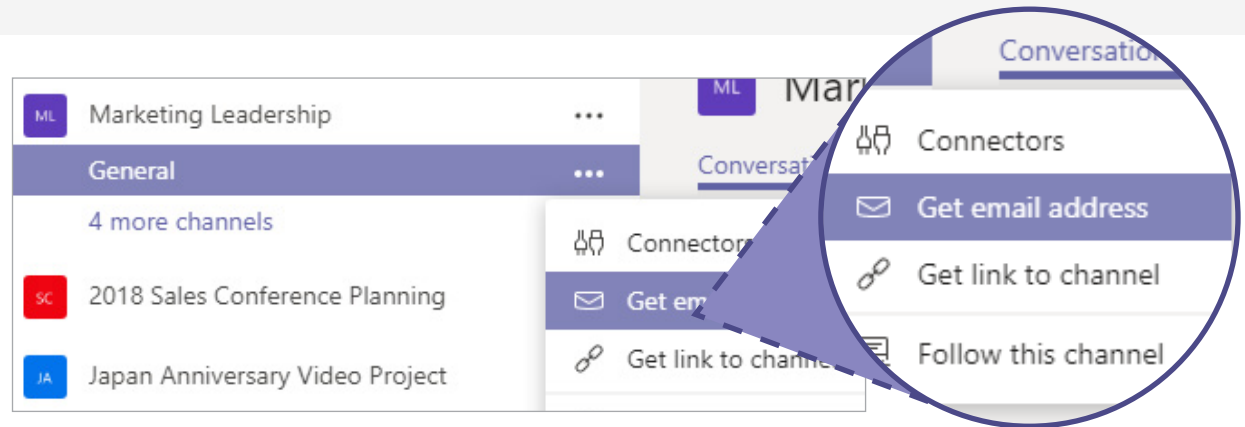
- **Team owners have etiquette rules as well.**
  Stay up-to-date on adding & removing members from the Team. Add a unique photo or graphic for the Team profile. Consider what settings (private or public) and tabs you would like to add for Team members.

Next Steps & Resources

Try the interactive **Microsoft Teams demo** to get an idea of how Teams works.

Download the **Microsoft Teams desktop and mobile apps** for free.

Keep up with updates and feature rollouts with the **Microsoft Teams Roadmap**.

Ask questions and help others by joining the **Microsoft Teams TechCommunity.**

Suggest and support feature requests through the **Microsoft Teams UserVoice**.

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