

# EVERYDAY ETIQUETTE IN MICROSOFT TEAMS



## The Definitive “How to” Guide

Ensuring you and your colleagues have a better Teams experience by keeping things clean, organized, and productive.



# EVERYDAY ETIQUETTE IN MICROSOFT TEAMS

**Microsoft Teams is a chat-based workspace app that's meant to facilitate ongoing collaboration and communication occurring among any team, project, organization, or group of people. Teams provides single-point access to conversations, planner, files, notes, and tasks.**

## Table of Contents

- › General
- › Chat Conversations
- › Teams & Channels
- › Files
- › Meetings & Calls
- › Resources

It combines the features of Skype for Business (status, chat, audio & video conferencing), SharePoint Online and OneDrive (file sharing and collaboration), OneNote (note-taking), Planner (everyday task management), plus tabs that provide other tools like MS Lists, and MS Forms. Access to all of this – and more - is available directly in the Teams app. No jumping between windows, logins, or screens to access all your team's content.

For many users, Teams is a breath of fresh air compared to working with colleagues via separate tools like email, file shares, and phones. As with any new tool, the best practices on how to use it are still developing. But it's safe to say the community of Teams users has quickly learned the rules that help everyone make the most of Teams.

This definitive "How to" guide covers some everyday etiquette and best practices for using Microsoft Teams. Following these guidelines should ensure you and your colleagues have a better Teams experience by keeping things streamlined, organized, and productive (yet still fun and enjoyable).





## Table of Contents

- › General
- › Chat Conversations
- › Teams and Channels
- › Files
- › Meetings & Calls
- › Resources

## CHAPTER 1

# GENERAL

Below are some initial tips that will help you enhance your overall Teams experience.

› **Access the Teams app from your computer and download the app to your phone.**

You'll be able to leverage better features, built-in notifications and offline support as well. Also, access Teams online at [teams.microsoft.com](https://teams.microsoft.com). Login using your State of Delaware credentials. Note: Company portal is required on the device.

› **Configure your notifications.**

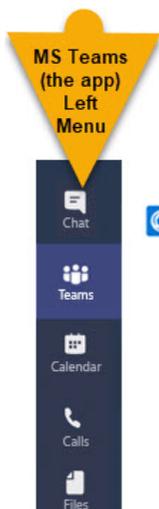
If you're over- or underwhelmed by the notifications you're getting, make sure you get them right. Check *Settings* in the desktop app or *Notifications* on your mobile device. [This video can help.](#)

› **Keep Teams as your internal collaboration tool; use email for more formal, external communication.**

Contrary to your initial reaction, it's easy to juggle the two.

› **Understand the difference between Microsoft Teams (the application) and a Teams workspace and Channels.**

Microsoft Teams (the app) consists of Activity, Chat, *Teams*, Calendar, Calls, Files and other MS products that are accessible directly from the Teams left menu. A *Teams workspace and Channels*, once requested and established, will be accessed by selecting the menu icon labeled *Teams*.



Teams workspace and Channels





## Table of Contents

- › General
- › **Chat Conversations**
- › Teams and Channels
- › Files
- › Meetings & Calls
- › Resources

## CHAPTER 2

# CHAT CONVERSATIONS

***Persistent chat* is the name of the game with Teams. While it might seem like you're using iMessage, WhatsApp, or Android Messenger, you're definitely not. These are some ways to keep things organized, easy-to-follow, and streamlined.**

› **Use chat for ad hoc conversation or just to ping co-workers.**

Teams chat is equivalent to any other instant message service. Use it that way.

› **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 had sent an email.

› **The like button isn't for sentiment.**

Use the thumbs-up button as an equivalent for "got it," "sounds good," and "okay." This saves the unnecessary and annoying "I acknowledge"-responses.

› **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).**

If you see that they are out of the office, your commentary about yesterday's meeting can probably wait until they get back in the office. A red status can mean busy, in a meeting, or do not disturb. Message accordingly.

## Table of Contents

- › General
- › **Chat and Conversations**
- › Teams and Channels
- › Files
- › Meetings & Calls
- › Resources



### › **Try to keep messages short and concise.**

No one likes a long email and even fewer like long chat messages. Keep things on point and try to avoid telling your life story.

### › **Find or start a chat from the command-search bar.**

Type the name of the person in the Search bar with who you want to chat. Their name and any group chats you both are a part of will appear.

### › **Pop out a chat.**

Find the name of the chat you want and double click on the Chat name to open a new pop-out chat window!

### › **Pin frequent chat sessions to the top of chat.**

You can pin frequent conversations to the top of your chat list. Find the name of the conversation you want to pin. Select the ellipse (...), select Pin. This ensures that the chat stays at the top of your list. Drag and Drop pinned conversations to the order you choose.

### › **Create a group chat with a custom name.**

Have 3 or 4 co-workers you regularly chat with as a group? Give that chat group a custom name. Select the group chat you want to rename. Click the pencil  icon next to the list of co-worker's names at the top of the screen. Enter a new name for the group chat.

### › **Newly added chat participants may see prior discussions in that chat.**

If there is an existing chat between two or more people and another user is added to the chat, the user adding them has the option to share the full chat history or no history.

### › **Do not assume you have privacy, Teams activity can be audited.**

Chats can be audited. To be fair, from a personal privacy perspective, this is no different from using Outlook or Skype.

### › **Teams Activity IS subject to FOIA.**



## Table of Contents

- › General
- › Chat Conversations
- › **Teams and Channels**
- › Files
- › Meetings & Calls
- › Resources

### CHAPTER 3

# TEAMS AND CHANNELS

**Channels in Teams are like folders in a shared drive or SharePoint. It's a way to logically organize topics that your Team will be dealing with. For example, a Team planning a product launch event may have the following Channels: General (default), Catering, Events, Marketing, Public Relations, and Venue. Incidentally, each channel gets its own folder for files, further keeping the Channel topics separate and organized.**

- › **Not everyone will be a member in a Teams workspace.**

Each team workspace requires two owners. The owners will assign membership and manage the workspace.

- › **Only create new Teams workspace when you must.**

Talk to your group to make sure they all agree a new Teams workspace is the right approach. Frequently, when a Teams workspace already exists, a new Channel will suffice.

- › **Reorder your list of Teams.**

Are there specific teams you access more frequently throughout the day? Use drag and drop to reorder your list of Teams workspaces.

- › **Hide and Show Teams and Channels.**

Are you a member of multiple Teams workspaces, that have multiple Channels but you're only working within a few of the Teams and Channels? Hide or Show Teams and Channels by selecting the ellipse (...). They are always accessible, just conveniently hidden.

- › **Match your meme and gif usage to your organizational culture. Don't go overboard.**

They take up space, not everyone likes them, and you may not be as funny as you think you are! Keep a specific channel for fun stuff where memes and gifs are fair game. And remember you are in a work environment.

## Table of Contents

- › General
- › Chat Conversations
- › **Teams and Channels**
- › Files
- › Meetings & Calls
- › Resources



### › Use subject lines when starting new conversations.

Subject lines make conversations easier to find. And you wouldn't send an email without a subject, would you? Select New Conversation and use the formatting tool to launch text formatting options, such as bold, italicize, underline and more.

### › When chatting in a Channel, @mention individuals to get their attention and a response.

When you are posting something on a channel, you are posting it for all members to see. But if there's a particular person whose attention the message needs, you can mention them using @ and the person will get a notification. Use @mentioning accordingly; don't overuse it.

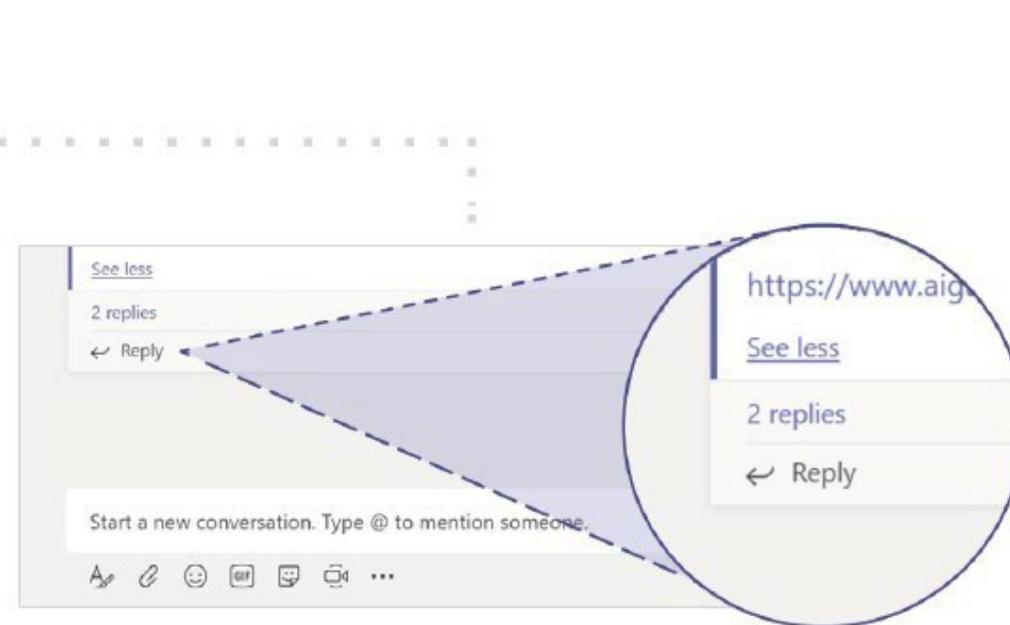
### › Don't @mention a Team or Channel unless you really need to.

Nobody likes more notifications than they need.

#### IMPORTANT:

### 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 one.



## Table of Contents

- › General
- › Chat Conversations
- › **Teams and Channels**
- › Files
- › Meetings & Calls
- › Resources



### › **If you are an owner of a Team, you have etiquette rules as well.**

Stay up to date on adding and removing members from the Team. Add a unique photo or graphic for the Team profile. Consider what settings and tabs you would like to add for Team members. View the [“Teams Owner Training”](#) recording.

### › **Only create Channels when you know you really need them.**

It's common to end up with too many Channels, which leads to confusion on where to post. So, avoid that from the start by not creating a Channel unless you *really* need it. Also, once a Channel is created, don't rename it. Renaming a Channel will create a new document file path and break previously shared document hyperlinks.

### › **Keep the General Channel for announcements and topics not fit for other Channels.**

Every Team Workspace is set up with a General Channel by default. You need to have a miscellaneous space. The General Channel is a convenient place for that.

### › **Channel names can't contain certain characters or words.**

Type	Example
Characters	~ # % & * { } + / \ : < > ?   ' " , ..
Characters in these ranges	0 to 1F 80 to 9F
Words	forms, CON, CONINS\$, CONOUT\$, PRN, AUX, NUL, COM1 to COM9, LPT1 to LPT9, desktop.ini, _vti_

Channel names also can't start with an underscore (\_) or period (.), or end with a period (.).

### › **Don't invite external guests unless everyone knows they're there.**

By default, guest access is not permitted the use of chatting, external sharing, etc. unless the external entity has been vetted and approved by the Enterprise Security Office. When there is a business need to collaborate with an external partner/vendor a request must be submitted.



## Table of Contents

- › General
- › Chat Conversations
- › Teams and Channels
- › **Files**
- › Meetings & Calls
- › Resources

## CHAPTER 4

# FILES

**Teams is an excellent place to work on files alone or simultaneously with coworkers. However, many users don't have a clear understanding of where the files are stored.**

### › **Files stored in Team Channels.**

Files uploaded and shared in a team channel are stored in SharePoint Online. Each channel gets a dedicated folder in the SharePoint library. Every member of that team workspace has access to these files.

### › **Files stored in Chat Conversations.**

Files uploaded and shared in a chat message are stored in the submitter's OneDrive for Business.

### › **Send links to documents rather than attachments.**

One of the advantages of Office 365 is the ability to co-edit documents — take advantage of it. Stick to a single source of truth. Thirty draft copies of a file flying around your inbox is so last decade.

### › **Keep file folder limit to three levels of folders deep.**

Not only is this best practice, but there is a character limit to the folder path length.

### › **Create specific folders.**

It's important to create specific folders. Then add your files to the appropriate folders. The most important thing is to decide on a structure and stick to it.



## Table of Contents

- › General
- › Chat Conversations
- › Teams and Channels
- › Files
- › **Meetings and Calls**
- › Resources

## CHAPTER 5

# MEETINGS AND CALLS

**Teams isn't just some chat app. It's also your new home for audio and video conferencing. In fact, Teams will replace Skype for Business. Many of us are already fluent in how to deal with online phone calls and conferences. Here are some of the ways you can ensure a positive experience when using Teams.**

### › **Turn a chat into a call.**

Sometimes, it's easier to talk things through than to try to type them out. If you're in a chat with one or more other people in Teams, you can "pick up the phone" (without picking up anything!) by clicking the Phone Icon button at the upper right of your screen.

### › **Schedule your Teams meetings from either your Outlook or Teams calendar.**

Outlook and Teams calendars sync.

### › **Internal or external, there is no need to dial-in to a meeting.**

Dialing-in to a meeting is a thing of the past. Team meetings allow attendees to join via the computer and mobile Teams app. An audio dial-in license is only necessary when devices are ill-equipped, or WiFi is unavailable. Contact your IT Support group if a Teams Audio Dial-in # license is needed.

### › **When sharing documents and webpages, zoom in.**

This helps your attendees see what you're showing, which is usually smaller on their end. Ctrl/Cmd + will zoom for most browsers.

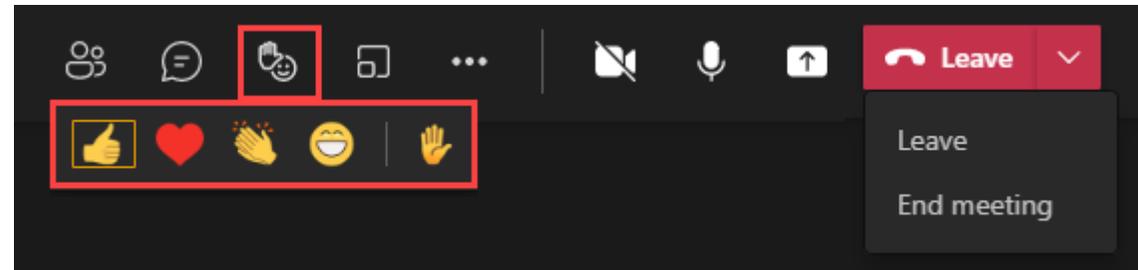
### › **Use video only when circumstances and internet connection support it.**

Video can help to facilitate a much more effective meeting than audio, however if your screen freezes or audio becomes spotty turn off the video feed.

## Table of Contents

- › General
- › Chat Conversations
- › Teams and Channels
- › Files
- › **Meetings and Calls**
- › Resources

### › Know your meeting features:



**Show participants** - Open the participant panel to see who has joined the meeting

**Use chat to help share resources and information during meetings without creating a distraction** - It's helpful to share web addresses, contact names, spellings, and other information while someone else is talking. Chats are part of the meeting, so everyone can refer to them after the meeting, all without disrupting the call.

**Give your approval or gain attention** - Use the emoji panel to give a thumbs up, applaud, or raise your hand without interrupting the presenter.

**Are you the organizer of the meeting?** - Use the Breakout Rooms feature to break large meeting groups into smaller groups for group discussions. Then bring everyone back for the larger discussion and closing comments.

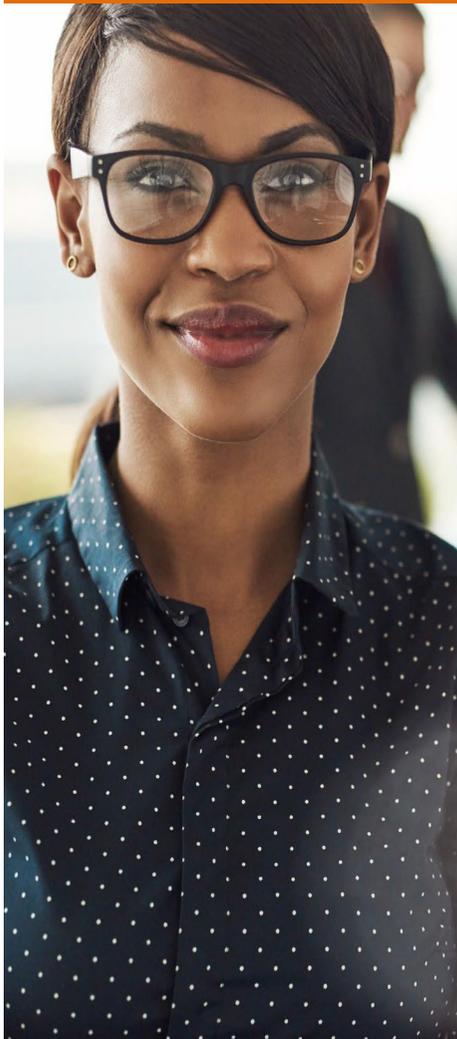
**Ah, the ellipse (...)** - Whenever you see an ellipse, click on it and check out more actions that are available beneath it.

**Webcam** - Easily turn it on or off.

**Audio** - Easily mute or unmute yourself.

**Share content** - When the organizer permits it, participants have the ability to share content.

**Leave or End meeting** - understand the difference. Leave means "you" are exiting the meeting. End meeting means you are ending the meeting for everyone!



## Table of Contents

- › General
- › Chat Conversations
- › Teams and Channels
- › Files
- › **Meetings and Calls**
- › Resources



### › Get the most out of your Teams audio and video experience with 3 experts tips:

› **1 - Get a Good Set of Headphones:** Before you start calling in Teams, connect a set of headphones to ensure high-speaker quality and to block out the ambient noise around you.

› **2 - Make a Test Call** to ensure your devices are working properly and are connected.

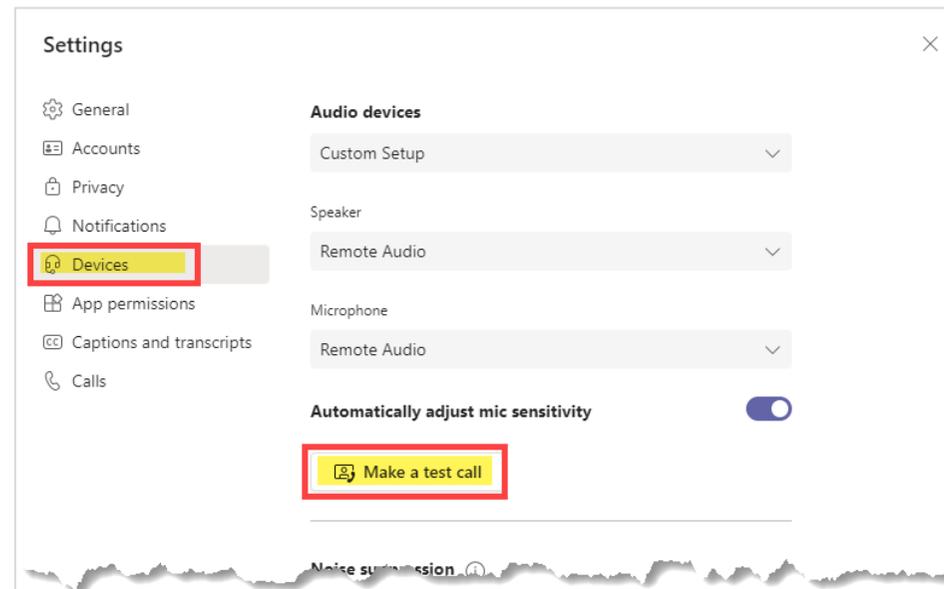
This is how you do it: Open your Teams desktop client >>> Click the ellipse (...) to the left of your name/picture meme, which appears in the upper right-hand corner.

>>> Choose settings, which is represented by a gear icon.

>>> A pop-up should appear in the Settings menu.

>>> Find the menu for Devices. Click that and you are almost ready to perform your test call.

>>> Click Make a test call. Teams will now test the performance of your headphones, returning nicely-formatted results in four areas. It checks the status of the following components and identifies them by name so you can make any necessary adjustments: Microphone, Speaker, Camera, and Network.



## Table of Contents

- › General
- › Chat Conversations
- › Teams and Channels
- › Files
- › **Meetings and Calls**
- › Resources



### › 3 - Turn on your video – but beware of the background

**traps:** We all have been here before – jumping on a meeting, turning on video and not really thinking about what is showing behind you.

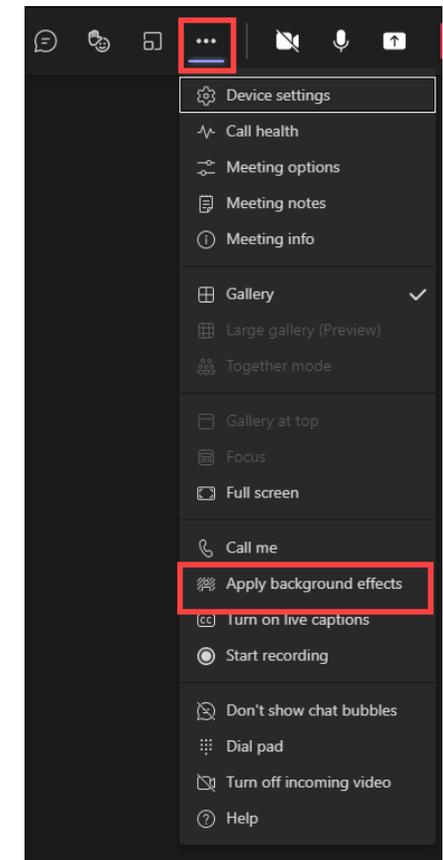
To avoid such exposure Teams comes with some more features that helps you to feel more comfortable during meetings and keeping your environment personal and secure.

>>> Start by joining a Teams meeting from your desktop or mobile application and go to the ellipse (...) at the top of your screen.

>>> Select ... More actions > Apply background effects. There, you can either chose Blur to blur your background, or choose from the available images to replace it.

>>> Once you have decided for a layout you will be able to preview your settings in the preview window.

>>> If you like what you see just hit Apply. That's it.



Now, that you managed to check your audio and video settings let the fun begin. But remember some basic courtesy:

#### › **Stay on mute when you're not talking.**

Nobody wants to hear you cough or listen to your dog whimper about needing to go out.

#### › **Don't interrupt if someone else is speaking.**

If you would like to add something to the discussion or have a question don't just pop it out. Simply raise your hand by hitting the button in a meeting. This will automatically be displayed in the chat and the speaker can directly react without being interrupted.

#### › **Whenever you join a Teams meeting by phone, let the organizer know who is dialing in.**

When you are dialing in via phone, only your phone number will appear in the organizer's attendee panel. Be courteous by verbally telling the organizer that you are dialing in and are unable to participate via computer.

Even when you are using both your computer to view and dialing in via the phone for audio, announce or text your name and phone number to the organizer so they know that the phone number display belongs to you.



### Table of Contents

- › General
- › Chat and Conversations
- › Teams and Channels
- › Files
- › Meetings & Calls
- › **Resources**

# RESOURCES

- › Familiarize yourself with this wide range of [Microsoft O365 resources](#).
- › View [Office 365 Training References](#).
- › Access [Webinar recordings and Recommended playlists...](#)
- › Keep up with Microsoft Teams Government (GCC) updates and feature rollouts with the [Microsoft Teams Roadmap](#).

### Need help?

Email: [Project\\_O365@delaware.gov](mailto:Project_O365@delaware.gov)