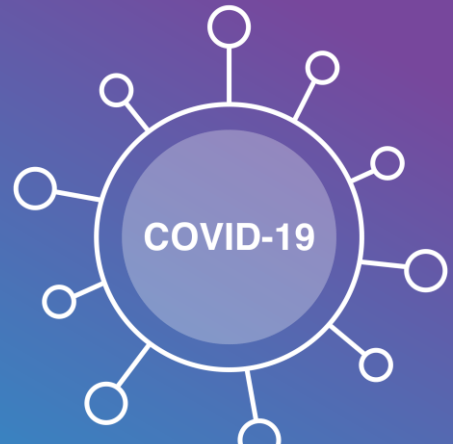




Introduction to Microsoft Teams



Introduction

Microsoft has announced that NHS staff can use Microsoft Teams free of charge during the Covid-19 pandemic.

The HFMA started using Microsoft Teams in 2019. We are sharing our learning in a series of briefings.

This briefing has been written for those who are new to Microsoft Teams. It covers:

- what is Microsoft Teams?
- how can I access Microsoft Teams?
- what can you do in Microsoft Teams?
- links to Microsoft quick start guide and video tutorials
- a few frequently asked questions.

We plan to produce more short briefings for NHS staff on how to use Microsoft Teams. Let us know how we can help you by contacting us with your queries, email us at policy@hfma.org.uk and we will do our best to help.

What is Microsoft Teams?

Microsoft Teams is a collaboration tool that provides remote and dispersed teams with the ability to work together and share information via a common space. Most of the features only connect people working for the same organisation, but the meetings function allows you to connect with others outside your organisation, even with people who do not have Microsoft Teams installed, or only have a telephone with which to join the meeting.

How can I access Microsoft Teams?

Once your organisation has access to Microsoft Teams, you can download the desktop application as for any other Microsoft product. You can also access Microsoft Teams through your browser or download the Android or iOS mobile application.

What can you do in Microsoft Teams?

Chat

The chat function is an instant messaging feature that allows you to have informal written conversations with other people within your organisation – either individuals or groups.

Calls

The call function allows you to speak to other people within your organisation without using a telephone. Your computer or tablet must have a microphone and speakers. Most laptops will have these built in or you could also use a USB or wireless headset. A headset will have the added benefit of improved sound quality, especially in noisy environments.

Meetings

You can hold online meetings with people within your organisation, and also with others outside your organisation, even if they do not have Microsoft Teams software. This function allows you to hold video conferences or share screens with other participants, as well as standard telephone meetings. See our separate briefing [Tips for using Microsoft Teams for meetings](#) for further information including latest updates on changing your background, raising your hand and obtaining a roll call.

Working in a team

Within Microsoft Teams, you can set up 'teams' which allow you to collaborate with others on chosen topic areas. For example, the HFMA has a number of teams set up including a HFMA-wide team, a policy and technical team and the Healthcare Costing for Value Institute team. Access to each team can vary, all HFMA staff can access the HFMA-wide team, but only policy and technical staff can access the policy and technical team. Staff are likely to be members of several but not all teams.

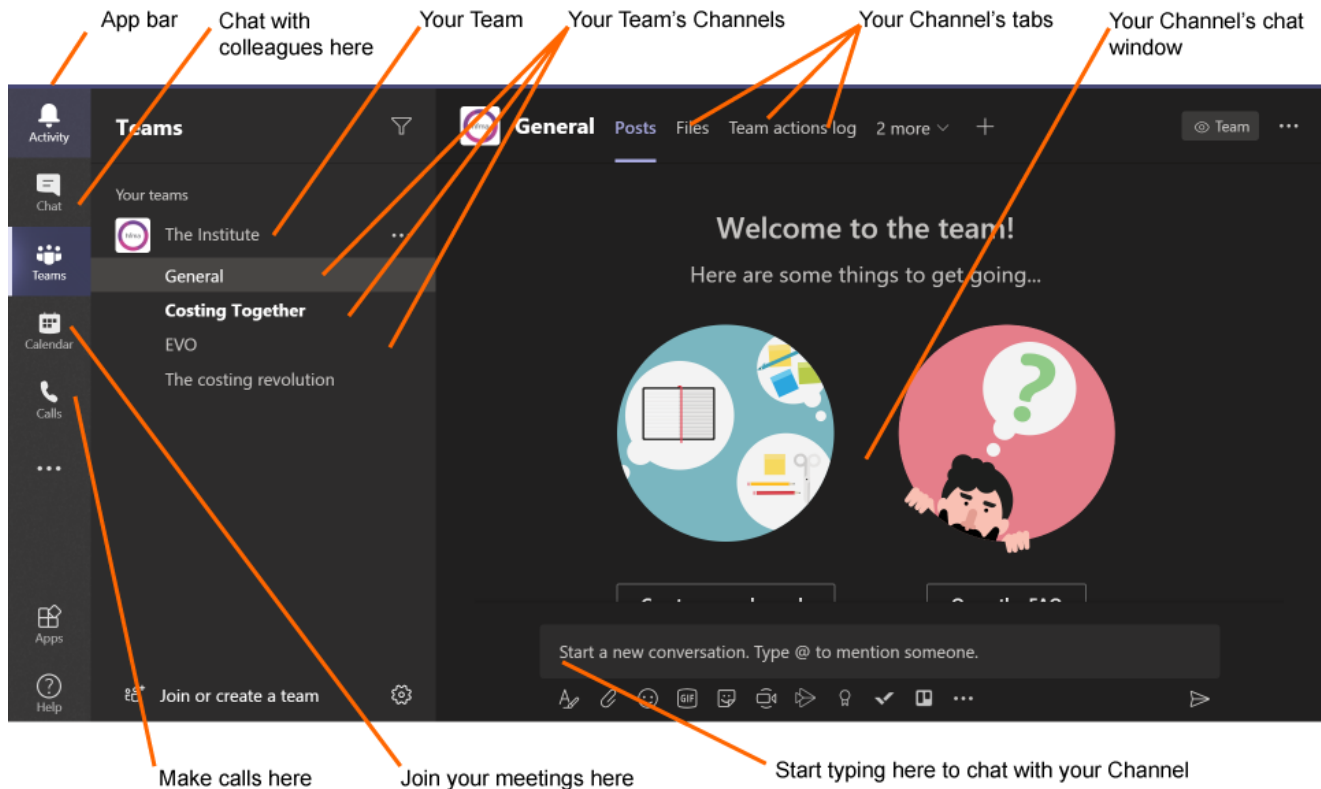
Channels

Each team is made up of channels, which categorise the content to make it easier for the team to navigate. In a channel you can have conversations and collaborate on documents so that all team members are viewing, and working on, the same version. Many Microsoft applications are available in Microsoft Teams so members can work on documents in Word, Excel, PowerPoint and so on.

Every channel has a chat room where members can discuss ideas or highlight useful information and share relevant weblinks. It is possible to notify team members that they have been mentioned or should look at something by typing the @ symbol before their name. This generates a notification in the same way as a new email message might.

All members of the team can see all the channels, and you can add as many channels as you need. A channel is made up of tabs, including the chat tab, files tabs and other tabs that the members add. Members can link numerous different types of resources and integrate several other Microsoft applications.

Here is an example for the HFMA Healthcare Costing for Value Institute.



Microsoft quick start guide and video resources

Microsoft has a [quick start guide](#) for those new to Microsoft Teams.

YouTube: [A series of short 1-2 min videos introducing the features in Microsoft Teams](#)

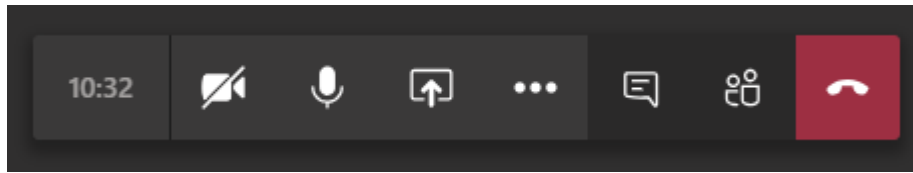
YouTube: [A 15 minute live demonstration of Teams from a Microsoft conference in 2019](#)

Frequently asked questions

The HFMA's IT team has shared a few of the most common questions HFMA staff ask them. Share your questions with us by emailing policy@hfma.org.uk and we will add them to our future briefings.

Q: I am in a call and the sound is coming out of my computer and not my headset – what do I do?

A: You need to adjust the audio settings and there are two ways to go about this. If you are in a call, the quickest way is to use the call controls bar, seen here.



Click on the ellipsis button (the 3 dots button). A sub-menu appears. At the top of that menu is an option to access device settings where you can control audio and video inputs and outputs. Change the speaker or microphone options to your headset to fix the problem.

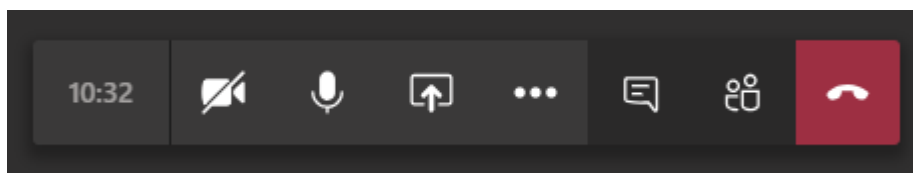
Q: When someone calls me while I am not wearing my headset, I cannot hear the call ring. What can be done about this?

A: There is a setting called 'secondary ringer' where it is possible to set your computer's built in speaker, or another attached sound device, to ring whenever a call comes in.

To find this setting click on the small circle in top right corner of Microsoft Teams. This circle may have your photograph in it, or it may just state your initials. Click on that circle to reveal a menu of options. Choose Settings from that list, and then Device Settings. You'll find 'Secondary Ringer' there.

Q: I am making a video call but need to hide the background, can I do this?

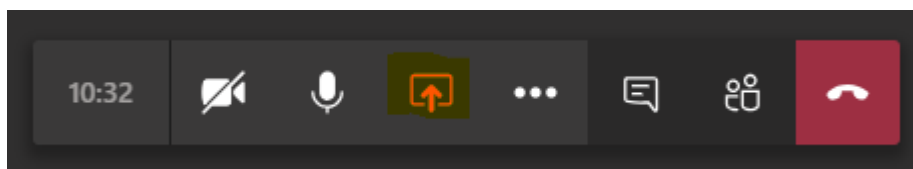
A: Microsoft Teams has a clever feature for video calls that blur the background, but not yourself, or provide alternative background images. To activate it, either before or during a call, we need to use the call controls bar, seen here:



Click on the ellipsis button (the 3 dots button). You will find the background blur and available images option there.

Q: Can I share my screen or a presentation during a call or meeting?

A: You can share any screen connected to your computer or specifically any app that you've got open. You can also allow meeting participants to 'take control' of your shared screen, or application. Sharing is found on the call controls bar, seen below, where we've highlighted the screen share button.



About the HFMA

The Healthcare Financial Management Association (HFMA) is the professional body for finance staff in healthcare. For nearly 70 years, it has provided independent and objective advice to its members and the wider healthcare community. It is a charitable organisation that promotes best practice and innovation in financial management and governance across the UK health economy through its local and national networks.

The association also analyses and responds to national policy and aims to exert influence in shaping the wider healthcare agenda. It has particular interest in promoting the highest professional standards in financial management and governance and is keen to work with other organisations to promote approaches that really are 'fit for purpose' and effective.

The HFMA offers a range of qualifications in healthcare business and finance at undergraduate and postgraduate level and can provide a route to an MBA in healthcare finance. The qualifications are delivered through HFMA's Academy which was launched in 2017 and has already established strong learner and alumni networks.

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