# Microsoft Teams use case: 2: Research: Departments/units/teams

## Applicable to

- Applies to researchers and research support staff who would like to create a Microsoft team and use Teams as a platform for remote collaboration within their research project.

## When to use

- Use when researchers and research support staff are collaborating within their departments or across departments using Teams.
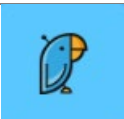
## Description and purpose

This covers the case in which staff and/or students collaborating on a research project with each other as well as with researchers from other institutions use
Teams when working towards a common goal: to facilitate communications, online meetings and activities for research (staff, students, postgraduates, researchers) in academic departments/units/teams across campus and with external institutions or parties to enable them to carry out research activities remotely, effectively and efficiently.

## Tools and tabs recommended

### Tools recommended

| Icon | Tool | Used for: |
|---|---|---|
|  | OneNote | • Taking informal/formal notes during or after meetings |
|  | Whiteboard | • Brainstorming during discussions or workshops |
|  | Wiki | • Documenting proceedings during or after meetings |
|  | Glossary | • Providing a standard set of terms/acronyms and definitions for use within the committee/group to ensure shared understanding |
|  | Planner | • Planning and coordinating tasks within the PASS department/unit/group |
|  | Stream | • Manage recordings of meetings<br><br>• **Note:** Permissions to meeting recordings should be managed to ensure that they are only made available to those authorised to access them. |

| | Website | • See Tabs recommended section below.<br><br>• **Note:** Only secure links (i.e. HTTPS) may be added. |
|---|---|---|
| | Microsoft Forms | • More comprehensive, formal and/or extended surveys/questionnaires to be sent to the committee/group outside of meetings. |
| | Polly | • Quick informal polls during committee/group meetings.<br><br>• Gauging member views quickly and providing a report within the meeting. |

**Tabs recommended**

Examples of tabs that might be useful or applicable to different departments or areas:

| Title | Used for: |
|---|---|
| UCT Research portal | • UCT research administration |
| ZivaHub – Open Data UCT | • Storing UCT research data |
| UCT eResearch | • Obtaining assistance with finding the most appropriate tools/ services to support the research life cycle |
| UCT Libraries | • Finding literature and related research materials |
| SAP for Finance | • Monitoring and reporting on funds allocated to research. |
| ServiceNow portal | • Logging IT incidents, problems, change requests, development requests |
| PeopleSoft | • Support staff in Faculty Offices/Departments |
| <other links to websites> | • Providing resources/information to support the activities of research staff outside of those provided by Microsoft Teams<br><br>**Note:** Only secure links (i.e. HTTPS) may be added. |

## Channels recommended

### Examples of channels for Research

Channels should be created based on the research project or group's specific needs (such as by topic, discipline, or subject). However, examples of types of channels that you could create are:

• General channel for general discussions, operations, miscellaneous items;

• Private channel for private collaboration or discussions between senior research staff or managers of the research project

- Research stream/s channel/s;

- Sub-research groups or related research group channel, if applicable.

**Good practices for using channels**

Some good practices are listed below, but for a full list of good practices, please see the channels section in the [Good practices guide for Microsoft Teams](#).

| Area | Practice/s |
|------|-----------|
| Naming of channels | Ensure that you use a reliable and agreed naming convention for channels that will be sustainable in the long run within the team. |
| Permissions in channels | Can schedule meeting [permissions](#) in channels to limit and manage access to meeting recordings to ensure that only those permitted to access recordings can access them. |
| Private channels | Private channels may be used in committees for private discussions between two or more members of the committee. |

## Features

- [Confidentiality and security](#)

- Files management - [Manage meetings documentation](#)

- [Engaging with external parties/guests](#)

- [Communications and chat outside of meetings](#) (using *Posts* tab)

- In meetings

  - [Hand raise](#)

  - [Chat](#)

  - [Attendance count](#)

  - [Meeting roles](#)

  - [Meeting recordings](#)

## Related tips, tricks and FAQs

- Orientation: [Getting to know the Teams user interface](#)

- [Microsoft Teams best practices guidelines](#)

- [Setting up your new Team](#) ([creating an icon](#), [name](#), [setting up channels](#), etc.)

- [Research Announcement: Using Microsoft Teams for research](#)

- Organising your list of teams ([ordering](#), [pinning](#), [hiding](#))

- [Adding Tools/apps to the sidebar](#)

- [Meetings FAQ](#)

  - [Manage your meetings using Teams](#)

  - [Meeting roles](#)

  - [Permissions](#)

  - [Meeting recordings](#)

- [Tips and tricks](#)

- [Teams at UCT](#)

- [Using the Microsoft Help feature within Teams](#)

- [Using your Activity feed within Teams](#)

- [Finding information within Teams](#)

- [Creating a new team](#)

- [Archiving an expired team](#)

- [Creating and using private channel](#)

- Engaging with communication methods within and to Teams ([announcements](#), [@mentions](#), emails to [channels](#) or [individuals](#), etc.)