

Microsoft Teams use case: 7: Projects

Applicable to

- Applies to UCT project managers and/or project administrators needing to set up a Microsoft Team to collaborate with project staff remotely and to provide a platform for facilitating the management of the UCT project.
- May apply to project staff collaborating on a UCT project with each other and possibly with external consultants who would like to know how best to use Teams.

When to use


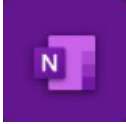
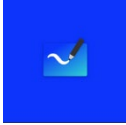


- Use when you start a new project that ideally has a duration of at least a few weeks that will need a platform in which to plan and collaborate within the project and manage project documentation.





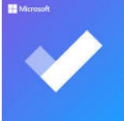
Description

This covers the case in which staff collaborating on a project with each other and possibly with external consultants use Teams when working towards a common goal: facilitate communications, online meetings and activities for projects staff in PASS and/or Academic departments/units/teams across campus (and possibly with external consultants) to enable them to carry out and monitor project activities remotely, effectively and efficiently.

Tools and tabs recommended

Tools recommended

Icon	Tool	Used for:
	Planner	<ul style="list-style-type: none"> • Planning and coordinating tasks within the PASS department/unit/group
	OneNote	<ul style="list-style-type: none"> • Taking informal/formal notes during or after meetings
	Whiteboard	<ul style="list-style-type: none"> • Brainstorming during discussions or workshops
	Wiki	<ul style="list-style-type: none"> • Documenting proceedings during or after meetings
	Stream	<ul style="list-style-type: none"> • Manage recordings of meetings <p>Note: Permissions to meeting recordings should be managed to ensure that they are only made available to those authorised to access them.</p>

	Glossary	<ul style="list-style-type: none"> • Providing a standard set of terms/acronyms and definitions for use within the committee/group to ensure shared understanding
	Polly	<ul style="list-style-type: none"> • Quick informal polls during committee/group meetings. • Gauging member views quickly and providing a report within the meeting.
	Microsoft Forms	<ul style="list-style-type: none"> • More comprehensive, formal and/or extended surveys/questionnaires to be sent to the committee/group outside of meetings.
	Website	<ul style="list-style-type: none"> • See Tabs recommended section below. <p>Note: Only secure links (i.e. HTTPS) may be added.</p>
	To do	<ul style="list-style-type: none"> • For individual task management which integrates with Microsoft Planner and Microsoft Outlook. <p>Note: This is available from the Microsoft Store (not from within Teams) but works well with Planner and Outlook for managing tasks.</p>

Tabs recommended

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

Title	Used for:
ServiceNow self-service portal	<ul style="list-style-type: none"> • Requesting assistance, logging a request, incident, problem etc.
SAP/SAP Business Objects	<ul style="list-style-type: none"> • Finance administration and reporting in SAP and/or SAP Business Objects on project budgets and funding
ICTS website	<ul style="list-style-type: none"> • Referring to UCT IT support information and policies
Finance website	<ul style="list-style-type: none"> • Referring to UCT Finance information and policies
<other links to project tools or websites>	<ul style="list-style-type: none"> • Providing resources/information to support the activities of the project team outside of those provided by Microsoft Teams

Note: Only secure links (i.e. HTTPS) may be added.

Channels recommended

Examples of channels for project teams

Channels should be created based on the project team'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;
- Channel/s for each stream within the project, if applicable;
- Project management channel;
- Private channel for private collaboration or discussions between project managers and key stakeholders or project sponsors or selected project team members.

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](#).

<u>Area</u>	<u>Practice/s</u>
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.)
- [Meetings FAQ](#)
 - [Manage your meetings using Teams](#)
 - [Meeting roles](#)
 - [Permissions](#)
- [Tips and tricks](#)
- [Teams at UCT](#)
- Organising your list of Teams ([ordering](#), [pinning](#), [hiding](#))
- [Adding Tools/apps to the sidebar](#)
- [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.)