

Microsoft Teams use case: 6: Vendor management

Applicable to

- Applies to UCT managers (and/or their delegates or possibly project managers) needing to set up a Microsoft team to collaborate with vendors/service providers/suppliers remotely around their products/services.
- May apply to other UCT staff collaborating with the vendors and with each other around their products/services who would like to know how best to use Teams.

When to use


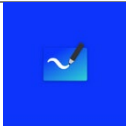
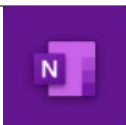

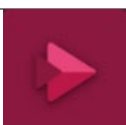

- Use when you are negotiating a new and/or maintaining an existing contract/agreement with a vendor around their products/services in which the relationship interaction will have a duration of at least a few weeks and when a remote platform is needed for this.

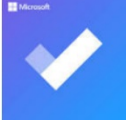

Description

UCT managers/staff using Microsoft Teams to facilitate communications and for collaboration, online meetings and working towards a common goal with vendors/external service providers.

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
	Whiteboard	<ul style="list-style-type: none"> • Brainstorming during discussions or workshops
	OneNote	<ul style="list-style-type: none"> • Taking informal/formal notes during or after meetings
	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

	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>
	Website	<ul style="list-style-type: none"> See Tabs recommended section below. <p>Note: Only secure links (i.e. HTTPS) may be added.</p>

Tabs recommended

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

Title	Used for:
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
Vendor's collaborative tool	<ul style="list-style-type: none"> If applicable, collaboration with the vendor using their tool, e.g. Monday
<other links to vendor-related 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 Vendor management-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;
- Admin/Contract channel for discussions specific to the agreement or administration around the negotiating the agreement;
- Meeting channel for facilitating meetings and discussions related to the meetings and storing minutes/agendas/meeting notes;
- Vendor product/service channel for communications and/or documentation around any enhancements/changes/news/comms/training on their product or service;
- Private channel for applicable UCT staff team members (excluding the vendor staff) for UCT discussions around finance/budget/contract (this could include key stakeholders and/or decision makers relating to this product/service agreement);
- If applicable, project management channel

- If applicable, channel per project stream

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

- [Engaging with external parties/guests](#)
- [Confidentiality and security](#)
- Files management - [Manage meetings documentation](#)
- [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](#), tools, etc.)
- [Confidentiality and security](#)
- [Tips and tricks](#)
- [Teams at UCT](#)

- [Meetings FAQ](#)
 - [Manage your meetings using Teams](#)
 - [Meeting roles](#)
 - [Permissions](#)
- 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.)