

Microsoft Teams Owner Onboarding Guide and Responsibilities Checklist

1. Team Owner

As a Team Owner, you are responsible for setting up the team channel structure and ensuring it aligns with your organization's needs. Here are the steps:

1. Open Microsoft Teams and click on your Team Name select **add a channel**.
2. Add Channel Name.
3. Choose Channel type: **Private** to only allow a few selected users or **Public** so that all members of the Team can view the new channel.
4. Click on **Create**, if **Private** channel is being created you will be prompted to add members that you want to see the channel.

2. Managing Members

As a Team Owner, you can add or remove members and manage their roles. Here's how:

1. Go to the team name and click on **More options** (three dots).
2. Select **Manage team**.
3. Click on **Add member** to add new members.
4. To remove a member, click on the **X** next to their name.
5. To change a member's role, click on the dropdown next to their name and select **Owner** or **Member**.

3. Maintaining Team Structure

It's important to keep your team organized and up-to-date. Here are some tips:

1. Regularly review and update the team's channels and tabs.
2. Archive or delete channels that are no longer needed.
3. Use tags to categorize and manage team members.

4. Ensuring Compliance with NHSmail Policies

As a Team Owner, you must ensure that your team complies with NHSmail policies. Here are some key points:

1. Ensure that all team members are aware of and follow the NHSmail Acceptable Use Policy.
2. Regularly review and manage team permissions to ensure data security.
3. Report any security incidents or breaches to your Local Administrator.

5. Promoting Effective Collaboration

As a Team Owner, you play a key role in fostering collaboration within your team. Here are some tips:

1. Encourage team members to use channels for topic-specific discussions.
2. Use @mentions to get the attention of specific team members.
3. Schedule regular team meetings and check-ins.
4. Use the Files tab to share and collaborate on documents.

6. Leaving a Team as an Owner (Including Private Channels)

Before leaving a Team, you must ensure that:

1. The **Team** has at least **two Owners**.
2. Each **Private Channel** also has at least **two Owners**.

This ensures continued access and prevents data loss.

Note: To add someone to a Private Channel, they must first be a member of the Team.

1. In the popup windows type the name of the member click on it to select it.
2. On the right hand side change from Member to Owner, then click on Add.

Steps to Assign a New Owner

1. For the Team:

1. Go to the Team name, select **More options** then select **Manage team**.
2. Under the **Members** tab, find the person you want to promote.
3. Change their role from **Member** to **Owner**.

2. For Private Channels:

- Right-click the Private Channel select **Manage channel**.
- Expand **Members and Guests**.
- Find the member, click the dropdown under **Role**, and select **Owner**.

To add a new member to a Private Channel:

- Click **+ Add Member** at the top.
- Search for the person (must already be a Team member).
- Select their name, change their role to **Owner**, and click **Add**.