



## OHDSI MICROSOFT TEAMS BEST PRACTICES AND GUIDANCE

### What is Microsoft Teams?

Microsoft Teams is a chat-based collaboration platform complete with document sharing, online meetings, and many more extremely useful features for business communications.

Having an excellent team space is key to being able to make creative decisions and communicate with one another. OHDSI has transitioned into the Teams platform to encourage and promote community collaboration through open communication and shared workgroup experiences.

### How Do I Get Microsoft Teams?

In order to get the most functionality from the Teams platform, it should be downloaded onto your desktop. You may click on this link to download the MS Teams application: [Download Teams](#) for your desktop, iOS, or Android.

You may also log into MS Teams from the web; however, please note that you will not have all the features that the desktop version allows. You may click on this link to join MS Teams from the web: <https://teams.microsoft.com>.

### How Do I Get Added to the OHDSI Microsoft Teams Platform?

#### Existing OHDSI Teams Guests:

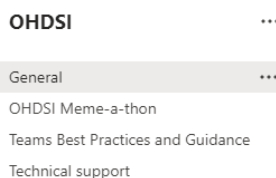
If you attended the 2020 OHDSI Symposium, you have already been added as a guest to the OHDSI Teams environment (also called tenant). You should continue to log into OHDSI Teams using the same email you used during the symposium. If you signed up with more than one email, it is important to remember which email you used as you should only be using one email in the OHDSI tenant. If you log in with different emails, you may have limitations as to what you can and cannot see in the tenant.

For example, if you originally joined the OHDSI Teams tenant with one email, [johndoe@xxx.com](mailto:johndoe@xxx.com), and then joined a different Team (an OHDSI work group) with another email, [jdoe@xxx.edu](mailto:jdoe@xxx.edu), you will only be able to see the teams specific to that email. Therefore, you should always be using the same email when being added to all the Teams within the OHDSI environment. **If you wish to remove your duplicate emails from the OHDSI tenant, please fill out this form: [Duplicate Email Removal from OHDSI Teams](#)**

#### Newcomers to the OHDSI Teams Environment:

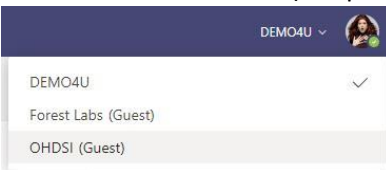
For newcomers who wish to join our journey in Microsoft teams, we encourage you to collaborate with us in the OHDSI Teams environment. To get started, please fill out this form: [Join OHDSI Teams](#)

After you submit the form, you will receive an email from Microsoft and an email from the OHDSI Teams Coordinator within 48 hours with further instructions. After a successful sign in to OHDSI Teams, you will see the OHDSI Team on the left side and **4 channels**: General, OHDSI Meme-a-Thon, Teams Best Practices and Guidance and Technical support (see pic below).



## Important things to note when signing up for OHDSI MS teams:

- 1) The email that you use to sign up in OHDSI Teams is the email you should use at all times while in the OHDSI Teams environment (tenant); you should use this same email when signing up for OHDSI work groups in Teams.
- 2) MS Teams users with other organizations must make sure they are in the OHDSI Teams tenant when collaborating in OHDSI. Those who use Teams with other organizations will have a dropdown menu upon log-in where they can toggle back and forth between their different Teams tenants (see pic below).



- 3) OHDSI weekly community calls take place on Tuesdays at 11 am ET. To join a community call, you can find links to join the meeting in the “General Channel” of the OHDSI Team and also on our website [OHDSI Community Calls – OHDSI](#).
- 4) Any questions pertaining to OHDSI Teams may be asked in the “Technical support” channel of the OHDSI Team.

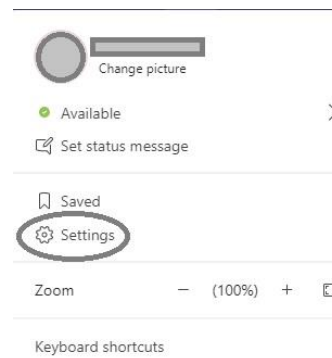
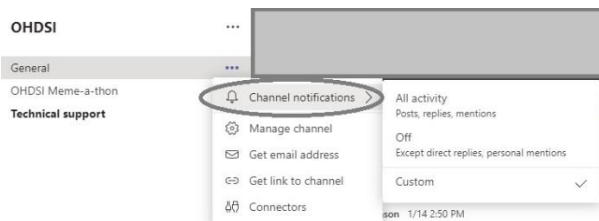
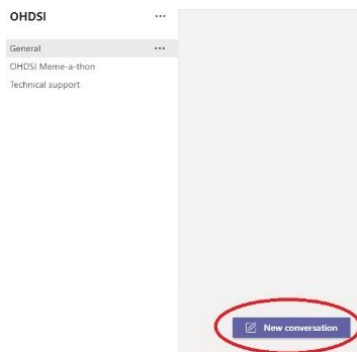
## **WHAT FUNCTIONALITY DOES A GUEST IN THE OHDSI TEAMS ENVIRONMENT HAVE?**

When you sign up for OHDSI Teams, you are added as a “GUEST” into the environment. The guest features are:

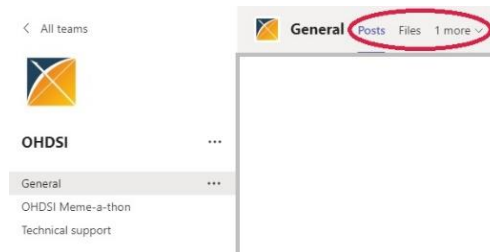
**1-Private Chat:** chat with one or more people in the OHDSI tenant; you can search for a user either by their email address or by their name. You may add as many people to the chat as you like. In addition, you can use the video icon on the upper right side to video call the people in the chat. To add a person to the chat after the chat has begun, simply click on the people icon and enter the email of the new person.



**2-Participate in a Channel Conversations:** To start a conversation in a channel, you can post in the channel of the team. When you click the blue button “New Conversation” you can send a message/question to anyone in that particular team (pic 1); anyone in that team can press reply to answer. **Note: When in a channel conversation or in a private group chat, you can use an @mention (person’s name), and that person will be tagged (in the private chat, the person must be a part of the chat to receive a tag). Channel notifications can be customized to receive only those notifications you want (pic 2). You can also change notifications in Teams by clicking on your profile icon, clicking on settings, then notifications (pic 3).**



**3-Share a channel file, attach files, and access SharePoint files:** In order to access files in the channels of Teams, you must be logged into OHDSI Teams and also be a member of that particular Team.



## How to Join Work Groups, Chapter Meetings and Studies in OHDSI Teams

To further encourage active collaboration within the OHDSI Community, OHDSI offers separate teams for work groups, chapters, and studies; all Teams are open to all collaborators. If you are already added to the OHDSI Teams environment, and you would like to join other “Teams” (work groups, chapters, studies), please fill out this form: [Join OHDSI Workgroups, Chapters, and Studies](#) (Please remember to use the same email for all teams you sign up for in the OHDSI Teams environment.)

## How to Join Work Group Calls in OHDSI Teams and Other Features

You may join a work group meeting/call in the following ways:

- 1) Log into OHDSI teams, find the Team in which you are a member, and click on the meeting link that has been created in the channel by the work group lead/meeting organizer.
- 2) If you have received an email with a meeting link by the work group lead/meeting organizer, you may add the link to your outlook calendar.

**\*\*Please note if you join a meeting using an outlook calendar invite, but you are not logged into OHDSI Teams, you will not have access to the Chat Window; therefore, we encourage logging into OHDSI Teams and clicking on meeting links in Teams channels for full functionality. In addition, anyone joining a call through the MS website will also not have the Chat feature in the meeting. The chat feature, however, is available to all users regardless of log-in method if the meeting was not created in a Teams channel.**

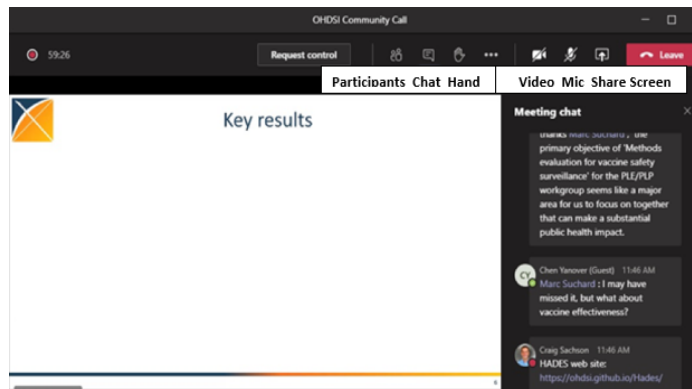
- 3) Anyone can start a meeting by clicking on the “Join” button of the blue banner meeting link (unless the meeting organizer has this feature restricted).
- 4) It is always a good idea to join calls with your Microphone off, especially if you are joining a call late.
- 5) To exit the meeting, you may click on “LEAVE” the meeting or you may “X” out of the meeting screen.
- 6) Guests in the OHDSI tenant cannot create meeting links in channels; however, guests can click on the “Meet Now” Button and have an impromptu meeting in a channel.
- 7) Guests in the OHDSI tenant do not have access to the calendar within the teams environment.

## Teams Meeting/Call Screen and Icon Definitions

When you are on a MS Teams call and you are logged into the OHDSI Teams environment, you will see a screen that looks like the screenshot below (if cameras are turned on). **Note: if you join a call through the website, you will not be able to use gallery view to see participants.**



Below is a screenshot of a meeting where a participant has shared their screen and has opened their Chat Window



**Participants:** This icon shows the participants in the meeting with a total number of participants at the top.

**Chat:** If you are logged into OHDSI Teams and joined the meeting in the teams channel (not via a calendar invite), you will have the chat feature. This is a great way to silently communicate with each other, ask questions or get information from the meeting organizer **(the information in this window can also be found in the channel of the Team by clicking on the replies below the meeting link post).**

**Hand:** If you wish to ask a question, you may click on the Raise Hand icon; the meeting organizer will call on you when he/she is able.

**Video:** You may join a meeting call with your camera on or off.

**Microphone:** It is always a good idea to join calls with your Microphone off, especially if you are joining a call late.

**Share Screen:** If you are presenting in a meeting and choose to share your screen, you can click on the Share Screen icon where you will find choices of sharing your entire desktop screen or just a single application window **(note that the item you are sharing is outlined in red).**