Using Microsoft Teams for recording and transcribing qualitative research interviews

Guidance Notes, Version 1.1
Contents

1 Introduction .................................................................................................................................................. 3
2 Data Classification, file storage, working remotely ..................................................................................... 3
3 What is Microsoft Teams? ............................................................................................................................ 3
   3.1 What interview options are available in Microsoft Teams? ................................................................. 3
   3.2 Who can create a Microsoft Team? ......................................................................................................... 4
   3.3 How many TCD staff should be in Microsoft Team? .............................................................................. 4
   3.4 How do I become a Microsoft Team member? ...................................................................................... 4
   3.5 How do I start using Microsoft Teams? ................................................................................................. 4
      3.5.1 Research Supervisors and Research Students .............................................................................. 4
      3.5.2 Interview Participants .................................................................................................................. 4
   3.6 How long can the recording of the interview last? .................................................................................. 4
4 Guidance on Privacy .................................................................................................................................... 5
   4.1 Informed Consent – Participant Information Leaflet ............................................................................ 5
   4.2 Data Storage and Retention ................................................................................................................ 5
5 Carrying out qualitative research interviews using Microsoft Teams .......................................................... 6
   5.1 Equipment and Setup ........................................................................................................................... 6
   5.2 Supervisor Tasks .................................................................................................................................. 6
   5.3 Student Tasks ...................................................................................................................................... 11
      5.3.1 Communicating with the interview participant ........................................................................... 11
      5.3.2 Interview Setup .......................................................................................................................... 11
      5.3.3 Research Participant point of view ............................................................................................... 20
      5.3.4 Managing the Recording ............................................................................................................ 22
6 Troubleshooting / FAQ ............................................................................................................................... 24
1 Introduction

The current working environment brought about by the COVID-19 pandemic presents many challenges, not least to our researchers and research students, particularly in conducting qualitative research interviews. In order to support you, IT Services, with assistance from the Data Protection Office have developed this guidance note.

This guidance note is intended to provide information for researchers and research students on using Microsoft Teams and Microsoft Stream to record and transcribe research interviews.

“Research student” as used in this guidance document refers to an undergraduate or a postgraduate student who is carrying out research as part of either a taught course or a research program.

2 Data Classification, file storage, working remotely

It is a requirement that all researchers and research students outline in their ethics application and DPIA (if required) the Trinity acceptable means of storing their interview recordings for their research interviews.

IT Services provide information on data classification, file storage and on working remotely relating to research data. These are available at the following:

- https://www.tcd.ie/itservices/working-remotely/research-data/

In addition, the Data Protection Commission has provided advice on video conferencing:


3 What is Microsoft Teams?

Microsoft Teams\(^1\) (Teams) is a cloud-based product available in Trinity’s Office 365 tenancy that is accessible at http://office.tcd.ie/. Microsoft also provides a client Teams desktop app for Mac and Windows desktops and laptops and a client app for mobile devices.

3.1 What interview options are available in Microsoft Teams?

The interview options available in Teams are as follows:

- Audio only
- Video with no audio
- Audio and video
- Audio, video and an automated Live Caption rendering of speech to text\(^2\) on the screen in real time

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\(^1\) Detailed documentation on using Teams in TCD is given at https://www.tcd.ie/itservices/teams/kb/teams-faq.php

\(^2\) Live Caption speech to text is automated, so it will not in general be a completely accurate record of the audio conversation. Furthermore, it is currently limited to English (US)
• Recording of all the above. The recordings are stored on Microsoft Stream which is part of the Trinity Office 365 offering. The recordings may be watched online or downloaded.
• All meetings that are recorded are automatically ‘transcribed’ subsequently on Microsoft Stream. The accuracy of the recording will vary but is typically >85%.

3.2 Who can create a Microsoft Team?

All Trinity staff have permissions to create new teams and add postgraduate or undergraduate students to those teams. Undergraduate and postgraduate students do not have permission to create new Teams, but their supervisors who are ‘Team Owners’ can add them to existing teams.

3.3 How many TCD staff should be in Microsoft Team?

IT Services recommend that each Team has a minimum of 2 members of staff who are ‘owners’ of the Team for logistical/support purposes. This is to provide backup in the event of staff being absent or having left the University. If this is not acceptable from a research ethics point of view it is technically possible for a Team to have one owner.

3.4 How do I become a Microsoft Team member?

A Trinity supervisor can create a team and add a student to the team as a “member”. Once the student is a team member, they can set up meetings/interviews with interview participants internal to and external to Trinity.

3.5 How do I start using Microsoft Teams?

3.5.1 Research Supervisors and Research Students

• It is recommended that all supervisors and students install the MS Teams app on University issued laptops or desktops that will be used to record or manage interviews.
• You must start the interview on a laptop or desktop, using the Teams app or within a browser, as you cannot start a meeting from a mobile device.

3.5.2 Interview Participants

• All interview participants are required to use the Google Chrome browser in Incognito Window mode (See 5.3.3 below) if they are using a desktop or laptop
• If an interview participant is using a mobile device, then the student carrying out the interview should request that they install the Microsoft Teams app on their device before the interview commences
• When the above have been completed, the researcher can then initiate online audio and video calls with the participant in order to carry out the interview.

Full details are using Microsoft Teams for carrying out qualitative interviews are included at Section 5 below.

3.6 How long can the recording of the interview last?

Recordings are currently subject to a 105-minute limit. If the participant has agreed that the interview can be recorded, the interviewer must remember to start and stop the recording. After this time has elapsed, a new recording must be started.
4 Guidance on Privacy

In order to minimise any privacy issue which may arise, the following guidance is provided.

- Supervisors must create separate Teams for each student.
- If more than one student is in a team, then students will be able to see recordings carried out by other students. This would contravene ethical/privacy legislation. Each student can carry out multiple interviews in the team assigned to them.
- Supervisors may create up to 250 teams.
- MS Teams includes a feature called ‘channels’. The recommended model of one Teams channel for each interview is given below (see 5.3.2). Note: the maximum number of channels within a team is 200. This includes deleted channels. Where more than 200 interviews are to be conducted as part of the research, the supervisor will need to create additional teams for the student to conduct these interviews.

4.1 Informed Consent – Participant Information Leaflet

1. Please note that prior to recording of any interview, the researcher must make sure that the research participant has received their Participant Information Leaflet for the study.
2. This must outline information about how long the data captured will be retained.
3. Research participants must also be invited to give their consent to the recording of their data in line with Research Ethics permission that has been received for the study.
4. That is, it must be made clear to the research participant whether the recording is audio only, audio and video or video only.

4.2 Data Storage and Retention

When a recording of an interview is made, it is saved to Microsoft Stream cloud storage.

Associated with the recording is an automated speech-to-text transcript. Because this is automated, it is not a completely accurate transcription record. It is currently available only for English language recordings.

A final transcription of the interview will need to be verified by the researcher. Some research project protocols will also have the built-in goal of sharing a transcript with their research participants, and this tool helps in doing this piece of work.

Participants invited using a URL link cannot see recordings of the interviews in Teams. In order for participants to see the recordings, the recordings will have to be sent to them by separate, secure means.

The recording, and associated automated transcript, can be downloaded from Stream to secure local storage.

The DPO’s office recommends a retention period of a maximum of one week for storage of recordings on Microsoft Stream cloud storage. During this period the recording should be downloaded to secure local storage.

The DPO’s office recommends a retention period of one month for the recording in secure local storage unless the requirements of the research project dictate a longer retention period and have been specified in your Research Ethics documentation.
Teams created by supervisors are configured to be deleted within a year, but they can be extended by one of the Team owners on a year by year basis.

5 Carrying out qualitative research interviews using Microsoft Teams

5.1 Equipment and Setup

- Where supervisors and students have University-issued laptops or desktops (with cameras where necessary) these should be used
- These computers should run the Windows or MacOS operating systems.
- The Teams app should be installed on these computers.
- Interview participants require a computer or mobile device for which the Teams app is available. Students should request that the research participant install the Teams app on their device.
- Students should ensure that research participants who are using laptops or desktops know how to open an “Incognito window” in the Chrome browser. Details of this are given in section 5.3.3 below.

5.2 Supervisor Tasks

1. Open the Teams app on your computer. IT Services recommend that each Team has a minimum of 2 Owners all of whom should be members of staff. If this is not acceptable from a research ethics point of view it is technically possible for a Team to have one owner.
2. Log into the Teams app with your TCD credentials.
3. Click The “Teams” button in the vertical menu on the left of the Teams app. This will bring up a list of Teams you have access to. You may have access to no teams. This is OK. Note It may be necessary to click the “Teams” button more than once.
4. In the top right of the screen, click the “join or create a team” button. (If your teams are listed on the left sidebar, then the “join or create a team” button may be on the bottom left of the screen).

5. On the panel containing the text “Create a team”, click “Create team”

6. Select a team type “Other”, give it a name and select “Private” Privacy status.
7. When given a chance to add members, you may do so now, or skip this step by selecting “Skip”
8. The team is created, and you are placed in the “General” channel.

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<thead>
<tr>
<th>Activity</th>
<th>Teams</th>
<th>Chat</th>
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9. To add students as members, click on the three dots “…” to the right of the Team name in the sidebar on the left. Select “Add member” and start typing in the student name until the system recognises it. At that point the “Add” button to the right will be enabled.
10. Add the students as “Member” (not “Owner”)

The students are now added to the team and are ready to carry out interviews.

5.3 Student Tasks

5.3.1 Communicating with the interview participant

1. Ensure that you have an email address for the interview participant.
2. Arrange the interview with the interview participant by phone or email in advance. Arrange a date and time for the interview.
3. Inform the interview participant that they will receive a URL by email shortly before the interview is scheduled to happen.

5.3.2 Interview Setup

1. Log into the Teams app on your computer with your TCD credentials.
2. Click the “Teams” button on the far left of the Teams app window. This will give you a list of the teams that you are a member of.

3. Select the team that your supervisor has created for you to allow you to carry out your research related interviews.
4. In the selected team, beside the name of the team in the sidebar on the left, click the three dots “...”. Select “Add channel”. This opens a new window.

5. In this window give the channel a name and set the “Privacy” setting to “Standard”. You should decide on an appropriate naming convention for channels. Click the “Add” button. Please note that you cannot record meetings held in private channels.
6. Your new channel will appear in the sidebar on the left below the “General” channel.

7. Select your new channel.
8. In the main screen of your new channel, in the middle of the screen will be text: “Let’s get the conversation started”. At the very bottom of the screen will be a box “Start a new conversation…”. Just below this box is a horizontal list of icons.
9. To start a new interview, select the “video camera” icon.
10. This will bring up a new window. You will be prompted to add a meeting title. Do so using an appropriate name. Click the "Meet now" button (currently we do not recommend setting up a scheduled meeting).
11. This sets up a meeting. But for the moment you are the only member.
12. On the right there is a vertical sidebar. At the top of this sidebar is a box with the text “Invite someone”. Directly to the right of this box is a pair of linked rings. Click on these rings to copy a URL for your meeting onto your computer clipboard.

13. Go to your mail client (e.g., Gmail). Send an email to your research participant and paste the URL you have just copied into the body of the email.

14. If necessary, contact the participant by phone or text to remind them of the interview.
15. Wait for the participant to use the URL to join the meeting. Ensure that the “Show participants” sidebar on the right is displayed. If not, use the in-meeting horizontal options menu to select it.
16. When the participant enters the meeting, they will appear on the right “People” sidebar in a “lobby”. You must allow the participant into the meeting. The interview can now proceed.

17. When the interview commences and audio/video are set up, bring up the in-meeting horizontal options menu. Select the “…” button. This will bring up a menu. To start recording, select the “Start recording” option from this menu. Doing this will notify you and the participant that recording is now taking place. You must start the recording, not anyone else in the meeting.
18. If desired, you can also select the “Turn on live captions (preview)” to see automated live text of your interview audio. Since this is an automated process it will not be completely accurate.

19. Proceed with the interview.
20. At the end of the interview bring up the horizontal in-meeting options menu. Select “...” and click “Stop recording”, and confirm.
21. Press the red phone button to hang up.

22. A link to the recording of the interview will appear in the Chat for the channel you are in. You will see this link when you hang up. Note that it may take some time for your recording to be processed and appear in the chat.

Note: There can be bugs when recording longer meetings. Therefore, we recommend that if your interview runs for longer than 105 minutes, you split your recording into two or more parts. To do this, you will need to select ‘stop recording’. Do not hang up. After a short pause, select ‘start recording’ to continue the interview. A link to the first part of the interview will appear in the channel chat after some time. It is not necessary to wait until the first part of the recording appears before continuing the interview. In the end there will be two or more recordings listed in the channel chat. These will link to two or more pages on MS Stream.

23. Click the “…” icon to the right of the meeting displayed in the chat. Select the “Open in Microsoft Stream” option. This will open the Microsoft Steam site in a web browser. Stream is detailed in a later section.
5.3.3 Research Participant point of view

The participant joins a meeting as follows:

1. The participant receives an email containing a URL which links to the meeting.
2. If the participant is using a laptop or desktop, they should be instructed to open the URL link using the Chrome browser and use an “Incognito window”.
3. If the participant is using a mobile device, we assume that the Teams app is already installed on the device. Clicking on the URL will open the Teams app, or give the participant an opportunity to open the Teams app.
   - If the participant is not a member of TCD, then they should be taken directly to the Teams meeting.
   - However, if they have a pre-existing Microsoft account they may have to log in with those credentials.
If the participant is a member of TCD, they may have to log in with their TCD credentials in order to access the meeting.

4. The participant waits in the “lobby” for the student to allow them into the meeting.

5.3.4 Managing the Recording

All actions involving the recording take place on the Microsoft Stream site, not in Teams.

To open the recording in Stream, click the “…” option beside the recording in Teams channel chat. Select the “Open in Microsoft Stream” option. This will open the Microsoft Stream site in a web browser. The recording may still not be fully processed in Stream; processing the recording takes some time; processing the transcript may take even longer.

5.3.4.1 Downloading the Recording

1. Click on ‘…’ icon below video. Select “Download video”.

2. This will download the recording in “mp4” format. NOTE: the automated transcript is not included in this video file.

3. In order to access the transcript:
   a. Click again on ‘…’; Select “Update Video Details”.

4. [Image of Microsoft Stream interface with highlighted options: Linked groups/channels, Update video details, Update video details again]
b. On the “Options” panel to the right, select “Download file” to the right of “Captions”.

c. The captions download as a .vtt file. When you play the downloaded mp4 file on your computer, you can load the .vtt file to see the transcript.

5.3.4.2 Deleting the recording

1. On the web page in Microsoft Stream containing your video.
2. Click on ‘…’. Select “Delete” and confirm. This will move the video to the “Recycle bin”. There the video lasts 30 days before deletion.
3. To remove the video from the recycle bin, select “My content” from the horizontal panel at the top of the screen and select “Recycle bin”.

4. Find your video in the recycle bin and in the “Actions” column, select the trash can icon to delete the video.

6 Troubleshooting / FAQ

- I tried to schedule a meeting with a participant rather than using “Meet now” but it didn’t work: Using the schedule meeting functionality sometimes fails. We recommend using the “Meet now” method for the moment.
- When setting up the interview I tried to use the “Invite someone” box in the People sidebar to send an email but it won’t work: Teams can send emails to TCD members using this box, but it does not always work if you are sending an email to participants external to TCD. For now, it is best to use the linked rings icon beside the “Invite someone” box to copy the meeting URL to clipboard. Then send a separate email to the participant.
- I tried to download my video from Microsoft Stream but I got an “internal server error”: This is not a common occurrence. If it happens, wait and try again in a few hours. If the problem persists for more than a day, contact helpdesk.
- I tried to paste the URL link to send to the participant but it didn’t work: pasting the URL link into applications such as notepad may not work. It works for most email clients (e.g.,
Outlook, Gmail, Mail). You may have to open a new email rather than replying to an existing one. If pasting does not work for your email client, contact helpdesk.

- **The menus in my Teams app don’t look like the pictures in this document.** Teams is a rapidly changing platform. We will endeavour to keep this document up to date, but it may not always match the current Teams interface.

- **I got an error that the recording failed to upload.** We are aware of an intermittent issue that impacts meeting recordings that are greater than 2 hours. To avoid the risk of losing a recording, for now, we recommend that you record a long interview in parts that do not exceed 1hr:45min.

- **My Live Caption transcript is different from my transcript on Stream** the live caption isn’t recorded as a transcript and it is not recorded as part of the video recording unless you are recording the full screen. The transcript of the meeting is a separate item.

- **I (or my participant) get asked to create a Microsoft account.** For instructions on how to create a free MS account, go to https://teams.microsoft.com/l/file/4DC1FE12-16AB-405A-9AF8-86210FD91BFD?tenantId=d595be8d-b306-45f4-8064-9e5b82f52b&fileType=pdf&objectUrl=https%3A%2F%2Ftcdud.sharepoint.com%2Fsites%2FTCD365-
  SharePointTraining%2FShared%20Documents%2FGeneral%20Create%20a%20free%20Microsoft%20account%20via%20an%20invite%20link.pdf&baseUrl=https%3A%2F%2Ftcdud.sharepoint.com%2Fsites%2FTCD365-
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