Teams Tips

Settings

To access settings, click on the Activity icon.

Next click on the gear to the right as shown in Figure 1.
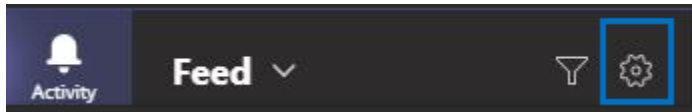

Figure 1

In settings you can do things like change the look of Teams or customize your notifications.
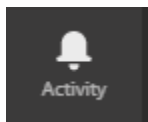
Activity

Figure 2

Activity (icon shown in Figure 2) is where you can see everything going on in Teams. Directly to the right of the Activity icon is the word "Feed" with a drop down arrow next to that. If you click on the drop down you can change Feed to "My Activity."

The Feed lists every post in your teams. In the Feed the contents are listed in chronological order. You can click on the notification in the list and it will navigate to the area where the post took place. Every time someone posts to one of your teams, or in chat, the Activity icon will show a notification (Unless you change your notifications settings. See Settings to change notifications).

If you change Feed to My Activity it shows where you have posted in teams.

Chat

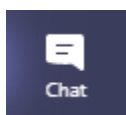To chat with someone, click on the Chat icon shown in Figure 3.

Figure 3

To start a new chat, click on the square with a pen over it. Highlighted in Figure 4.

Figure 4

This works a bit like Outlook. As you type in a name the program will give suggestions as to whom you want to send the chat to. When you see the name you are looking for pop up in the list, click on it and it will populate the "To" field. You can enter more than one name, email, group or tag to set up a multiparty chat.

When in a channel, you can double-click on a person's circle icon to the left of a conversation. This will open a separate chat window.
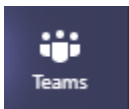
Teams

The Teams icon is shown in Figure 5.

Figure 5

Clicking on teams will either bring you back to the channels for the team you were last in as shown by the example in Figure 6.
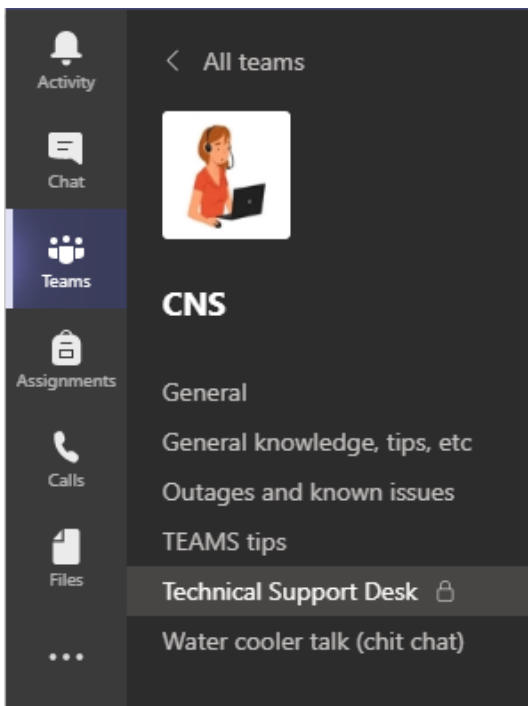

Figure 6

Or, if you can already see your channels, it will bring you to the top level where you can see all your team, as seen in Figure 7.
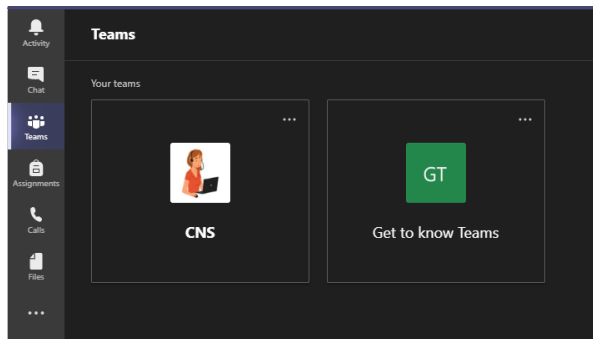

Figure 7

Search

The search field is at the top of the Teams window and looks like Figure 8. Search gives results from all your Teams and chats.

Figure 8

You can search for a word or a person. You can even search for a phrase. To search for a phrase use quotes around the phrase. In other words, if you search for *Activity Icon*, the results will contain any post with either Activity **OR** Icon. However, if you search for "Activity Icon" with quotes you will only see results that have Activity **AND** Icon next to each other.

Use an asterisk * to get results for any words with a matching prefix. Type the first few letters of a word followed immediately by an asterisk. For example, type "Serv*" into the search box at the top of the app, and you'll get results for all words that start with those four letters (server, service, etc.).

Once you have entered a search term the results will be shown in the side bar. There are several ways to filter your search further at the top of the sidebar, as shown in Figure 9.
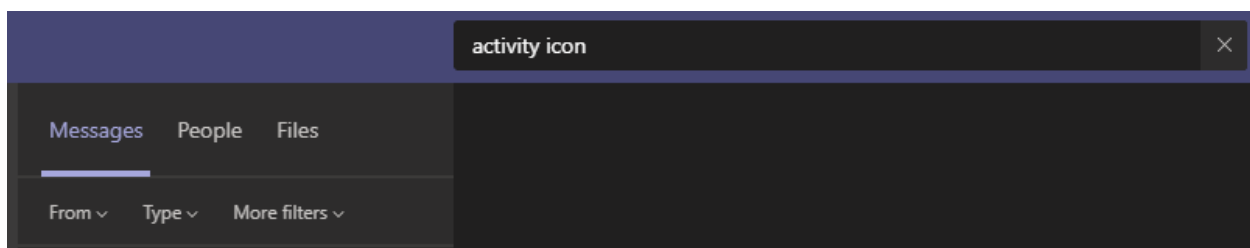

Figure 9

If you want to search a particular channel or chat, place your cursor in the Search bar while in the channel or chat and hit Ctrl+F (cmd+F on macOS) on your keyboard and it will search just the channel or chat.

When in Chat you can enter a person's last name in the search bar and it will list all the chats (including group chats) that the person is in.

Channels

A channel is created to cater to a specific group, topic, or project within a team.

For example, I am in a Team for the CNS department. We have a General channel that everyone is invited to and everyone can see. However, within our department are units like Networking and the Technical Support Desk. I created the Technical Support Desk channel and made it a private channel. You can tell it is private because there is a lock next to it as shown in Figure 10.
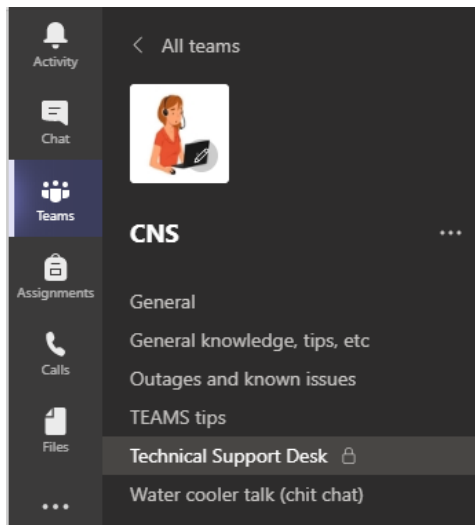

Figure 10

I invited only the Technical Support Desk employees to the channel. No one from the CNS Team can see that channel without an invitation. Conversely if Networking has their own channel I would have to be invited to participate. Their channel would not show up in my channel list.

Creating a Channel

To create a channel, click into the team you where you want to create a channel. To the right of the team name there are three dots as shown in Figure 11.
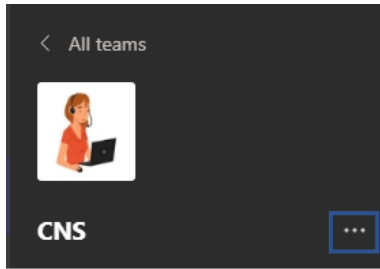
Figure 11

Click on the dots. In the menu click on "Add channel." Fill out the title and use the dropdown to make the channel public or private. Then click the "Next" button. To make a channel private, add the names of people you want added to the channel. Like Outlook it will give you suggestions as you type. When you are finished click "Add" and you will have the opportunity to add another name. When finished click the "Done" button.

Writing (Posting) in a Channel

In teams you can reply to a conversation or you can start a new conversation. In the Figure 12 below you can see there is a conversation about Formatting. Other people have replied to the original post. To post your own addition to the conversation, click into the "Reply" at the bottom of the conversation and type your response. Do not start a "New Conversation" unless you are starting a new topic.
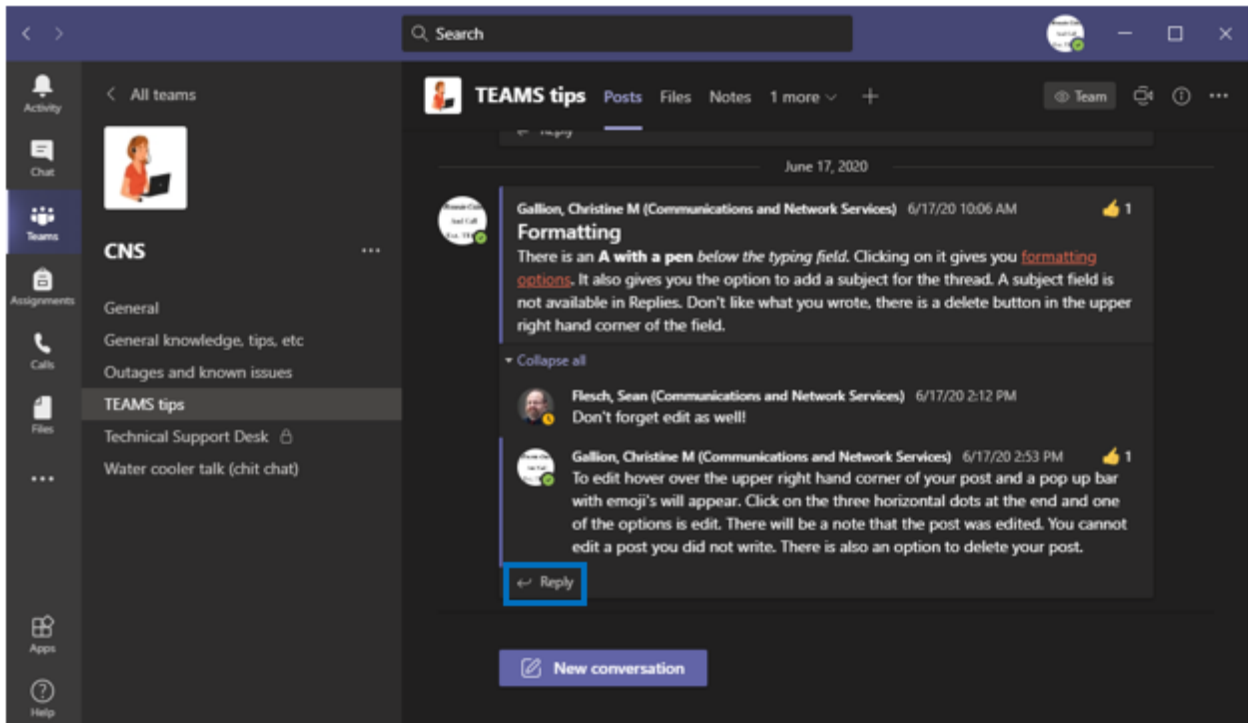

Figure 12

Formatting

When starting a "New conversation," there is an A with a pen below the typing field as seen in Figure 13.
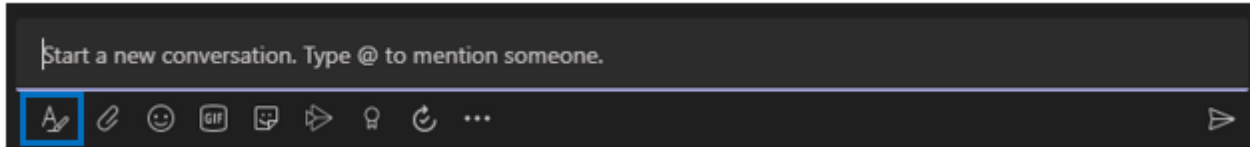

Figure 13

Clicking on it gives you formatting options as seen in Figure 14. It also gives you the option to add a subject for the thread. A subject field is not available in Replies. Don't like what you wrote, there is a delete icon in the upper right hand corner of the field.
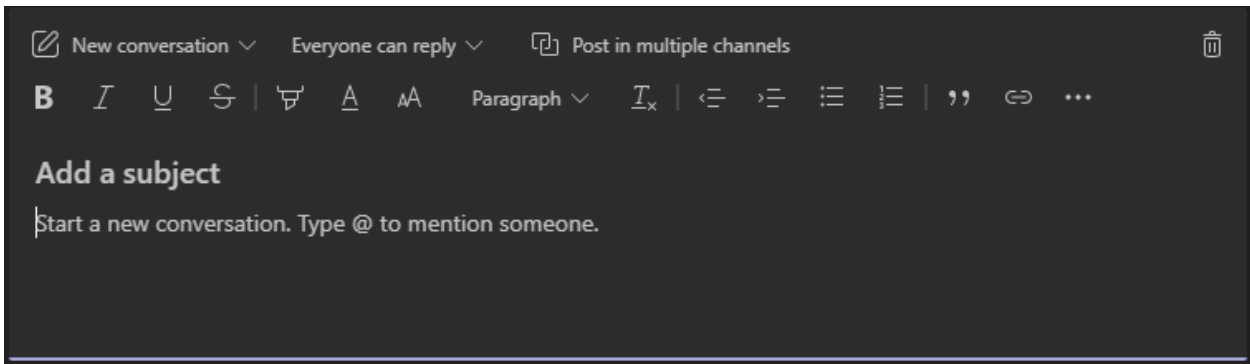

Figure 14

Editing

To edit hover over the upper right hand corner of your post and a pop up bar with emoji's will appear. Click on the three horizontal dots at the end, as shown in Figure 15. Next, click on edit.
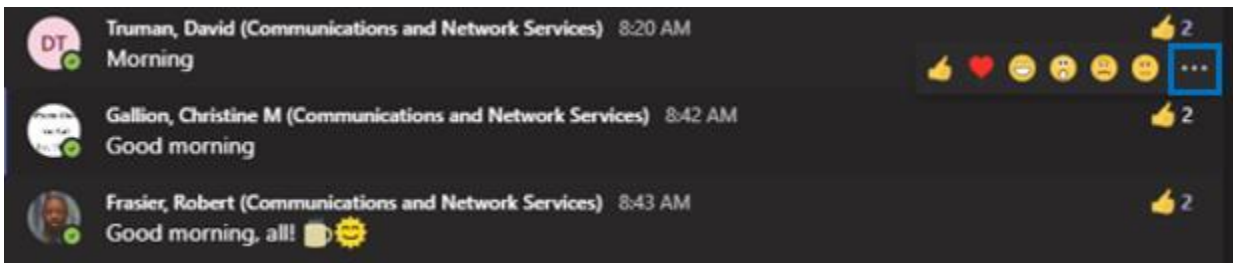

Figure 15

There is also an option to delete your post. There will be a note that can be seen saying "edited" on your post. You cannot edit or delete a post you did not write.

Saving a message

To save a message, select the More options dots at the end of the emoji popup, as seen in Figure 15. Then click on "Save this message."

To see a list of your saved messages, select your profile picture at the top right corner of the app, then choose Saved. Or type shortcut command /saved in the search box at the top of the app.

Files

You can download a file to a channel or a chat using the paper clip below the text field. Once the file is downloaded it is also stored in the Files tab at the top of the page. If the file is a Word, Excel or Power Point file the file can be edited it Teams. You can also attach PDF's and pictures but they will not be editable. More editing options will appear when the file is open. Now anyone with access to the channel can edit the file and two people can edit it at once. The document will change in real time. **Editing the document in Teams will not affect a copy on the M drive.**

Once a file that is editable is open, you can download it or open it in a browser with an online version of the Microsoft program you are using (Word, Excel, ect.). To find these options click on the three dots in the upper right hand corner as shown in Figure 16 outlined in dark yellow. Also outlined in Figure 16 is the link to open the document in the desktop app.
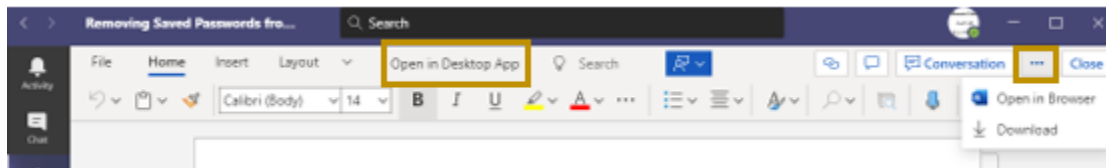

Figure 16

When opening it in a browser with the online version of the program it will not be editable at first. If you go to edit it, Microsoft will ask you to log in. Use your MCC credentials to log in. Your changes online will be made in the document on Teams in real time.

Click "Open in Desktop App" to open it on the program on your computer. On the Desktop App you are making changes to a copy and the changes will not show in Teams or the online app until you save it. If your coworkers make changes to Teams while you are in the desktop app they will show up in the Desktop App. To save the file back to Teams you must save the document or use Save As and save it to the current folder.

Note: If you do a "Save as" and save the document back to your desktop, the M drive or some other area, the document that has been saved is now a copy and changes to it will not update back in Teams.