

GETTING STARTED WITH MS TEAMS

UBC IT OKANAGAN

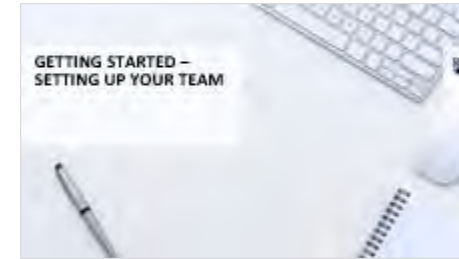
UPDATED: FEB 2021



OVERVIEW OF UBC MS TEAMS & ONEDRIVE

(Click on an image to go directly to that section)

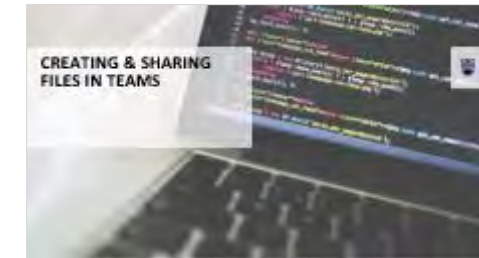
1) Getting Started – Setting up your team



2) Creating Channels



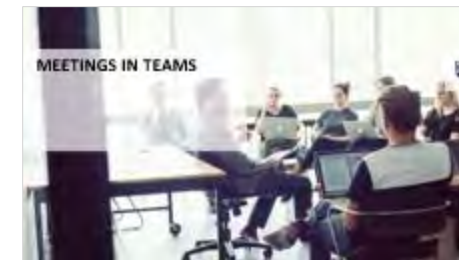
3) Creating & Sharing Files



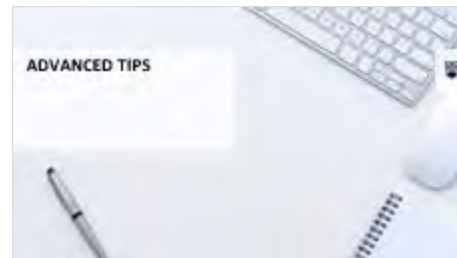
4) Using Chat



5) Creating Meetings



6) Advanced Tips



7) More Help



GETTING STARTED – SETTING UP YOUR TEAM



Microsoft Teams

is the hub for teamwork in Microsoft 365

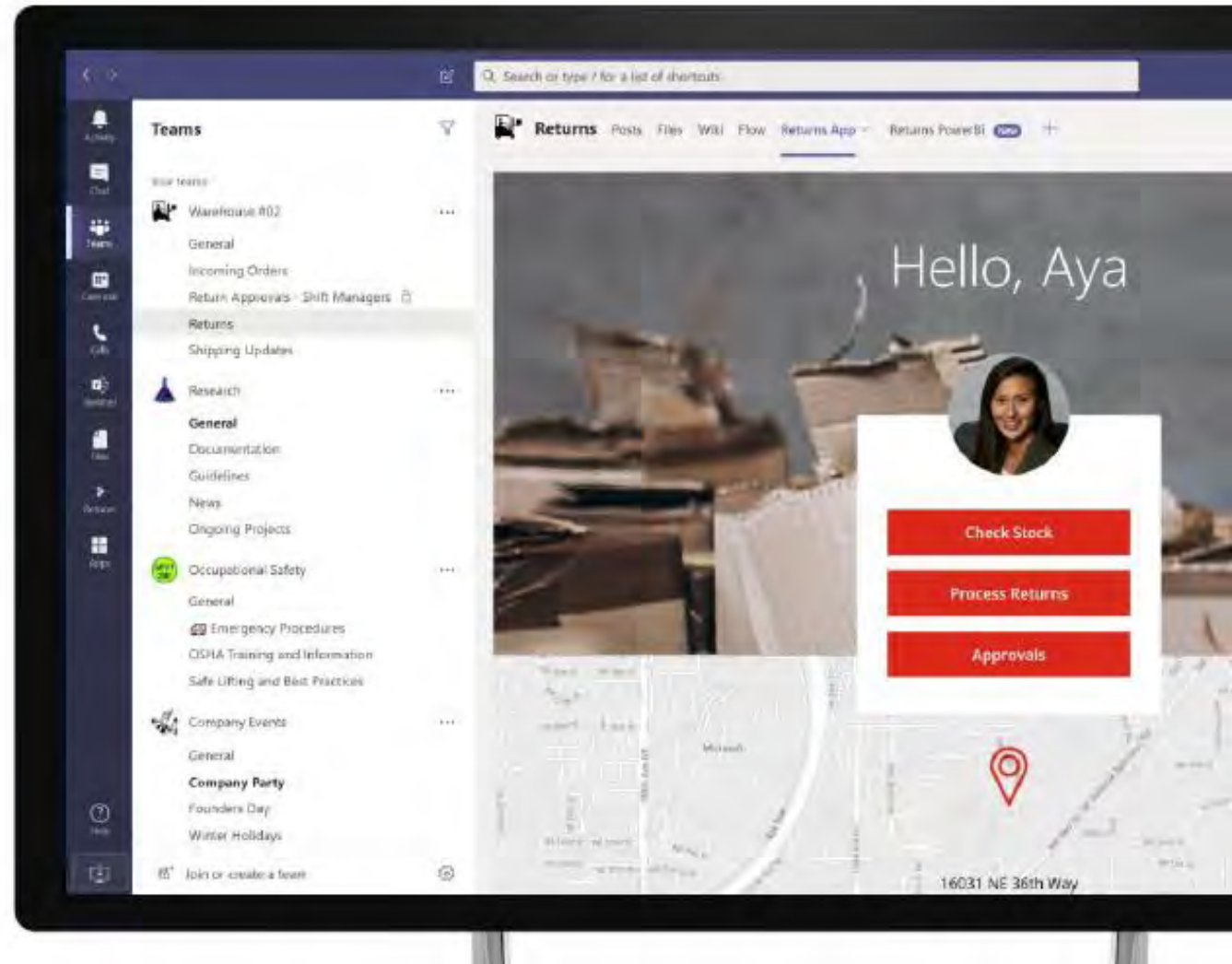
Chats

Meetings

Calls

Files

Apps and workflows



TEAMS – GETTING STARTED

A **Team** is a collection of people within an organization who work closely to get things done.

Channels are created within a Team, as places for conversations or work for specific projects or sub-teams within the larger Team.

Getting your Team set-up

1. [Submit request form](#) to create a new Department / Project / Group Team
2. Add members to join your Team (direct add, invite link, or share team code)
3. Create Channels for specific topics, projects or teams within the larger Team
4. Set-up **MS Teams Training** sessions (UBC IT Okanagan Engagement Services)
5. Ensure everyone is to [Teams Only mode](#) (to access all features) – automatically done after May 31, 2021 (click image for more details)



HOW TO REQUEST A NEW TEAM

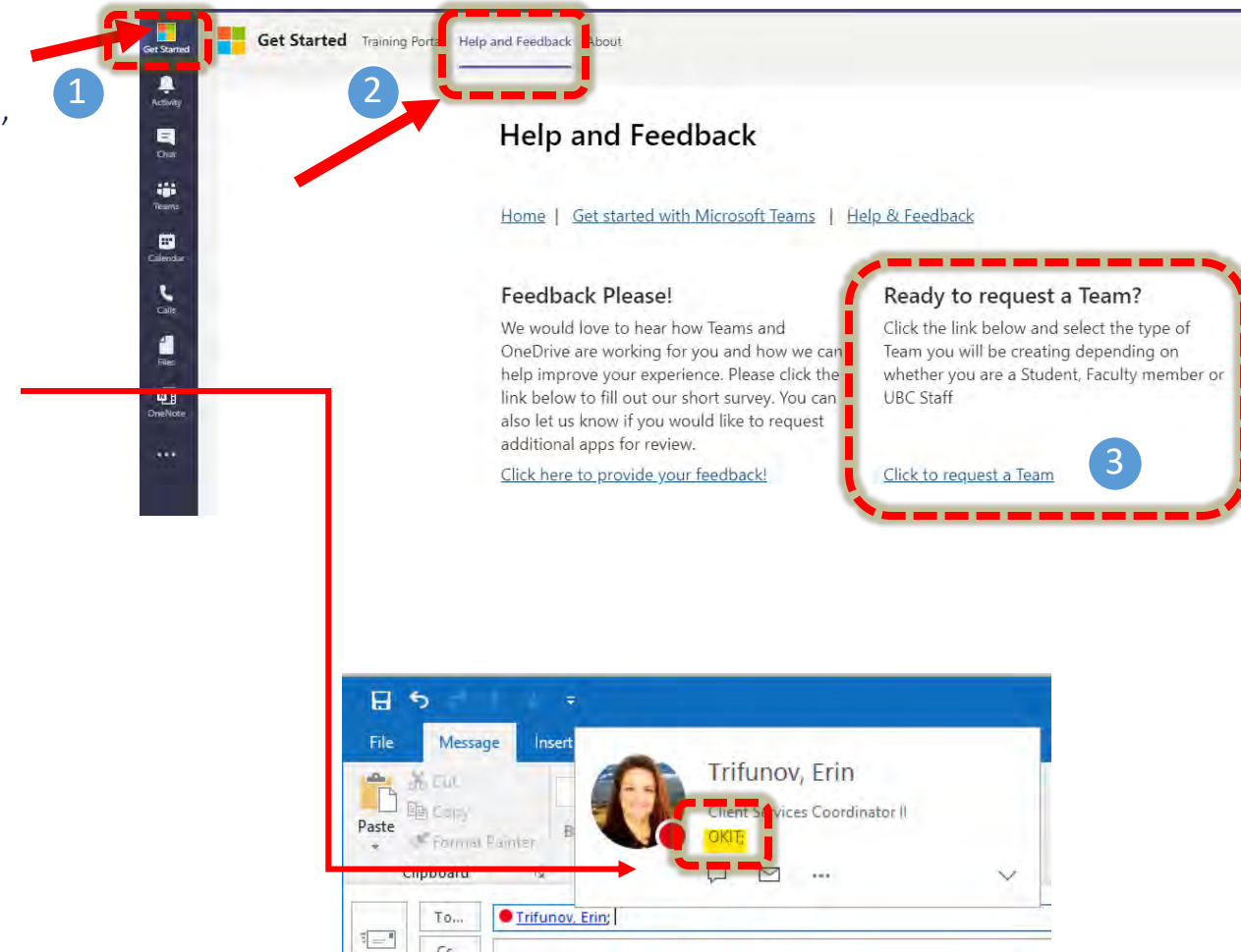
To create a Team at UBC you need to submit a [Departmental Team Request Form for Staff and Faculty](#) (1. Click on **Get Started** at top left side, 2. Click on “**Help and Feedback**” on the top menu, 3. Click on “**Request a Team**”)

You will need:

- IAM ShortCode and IAM Display Name to complete the form (link to this is provided on the form – or can also be found by looking at your profile in Outlook).
- For the **Team Name**, please consider using the following naming convention:
 - [IAM Display Name] [Name] Example: **UBC IT ABC123 Project**
 - **Note: Team owners CAN change the Team name after it is created**
- It is recommended to have a **minimum of two owners per Team AND Channel** (you will need to provide their name or UBC email - `firstname.lastname@ubc.ca`).

Once your Team is created, you will receive an email with a code to share with those who want to join, or you can add people directly.

Note: By default, only Owners of a Team can create new channels (general or private), however this can be changed via the Team settings so that members can create their own channels.



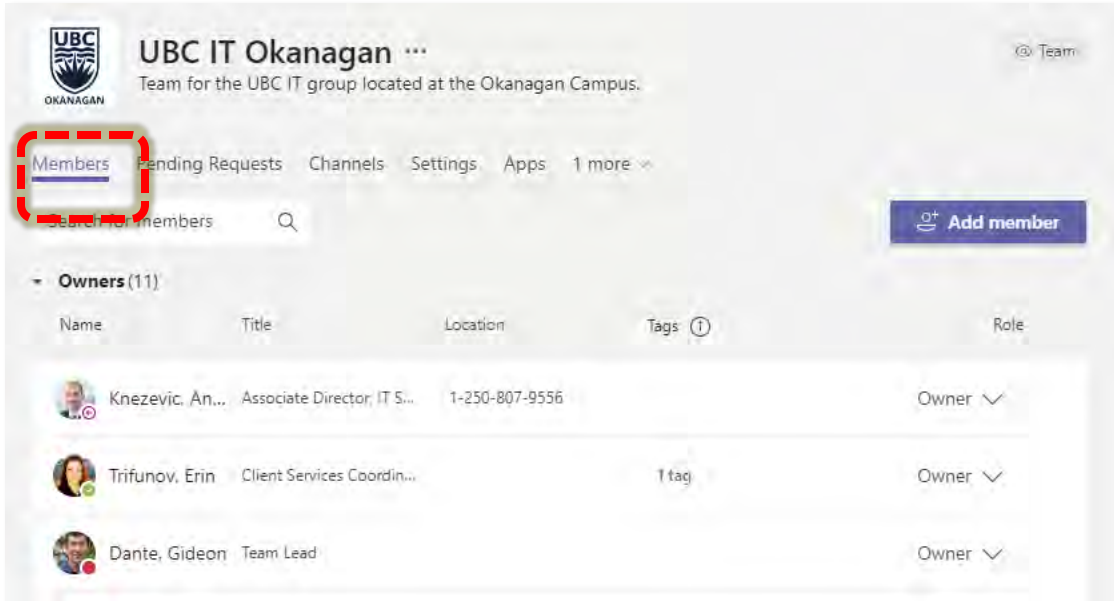
HOW TO ADD MEMBERS

The screenshot shows the Microsoft Teams interface. At the top, the team name "UBC IT Okanagan" is displayed with a red "1" next to it. To its right is a red dashed box containing three dots, representing the "More options" menu. Below this, a list of channels is visible: "UBC End User Support ...", "UBC IT Engagement Serv...", "General", "Fun", and "UBCO AVPFO Leadership...". A red dashed box highlights the "More options" menu, which contains the following items: "Hide", "Manage team", "Add channel", "Add member", "Leave the team", "Edit team", "Get link to team", "Manage tags", and "Delete the team". Red arrows point from the "Manage team" and "Add member" options to their respective detailed views on the right.

The screenshot shows the "Settings" page for a Microsoft Teams team. The navigation bar at the top includes "Members", "Pending Requests", "Channels", "Settings", "Apps", and "1 more". The settings are organized into sections: "Team picture" (Add a team picture), "Member permissions" (Enable channel creation, adding apps, and more), "Guest permissions" (Enable channel creation), "@mentions" (Choose who can use @team and @channel mentions), and "Team code" (Share this code so people can join the team directly - you won't get join requests). Below these settings, the team code "0eu7nne" is displayed, along with options for "Full screen", "Reset", "Remove", and "Copy". A note states: "Note: Guests won't be able to join with a team code."

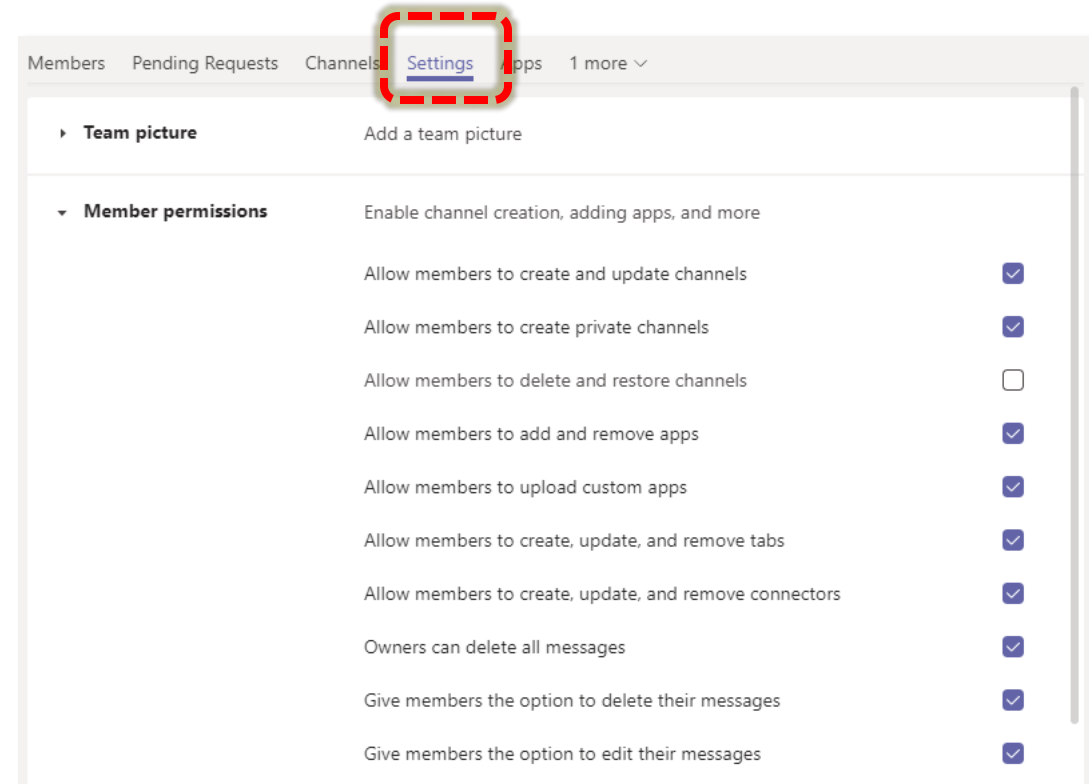
The screenshot shows the "Add members to UBC IT Okanagan" dialog box. It contains the following text: "Start typing a name, distribution list, or security group to add to your team. You can also add people outside your organization as guests by typing their email addresses." Below this text is a text input field with the placeholder text "Start typing a name or group" and a "Done" button.

MANAGE TEAM SETTINGS



Members

- View, add and/or change owners & members

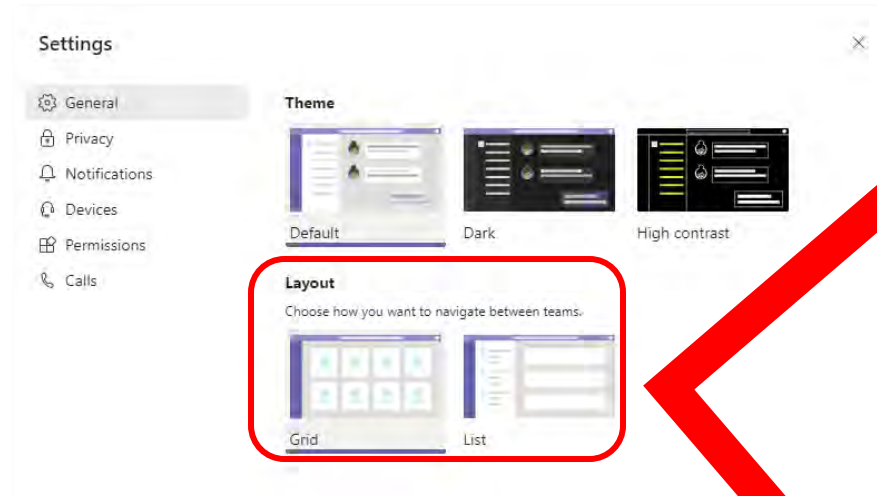
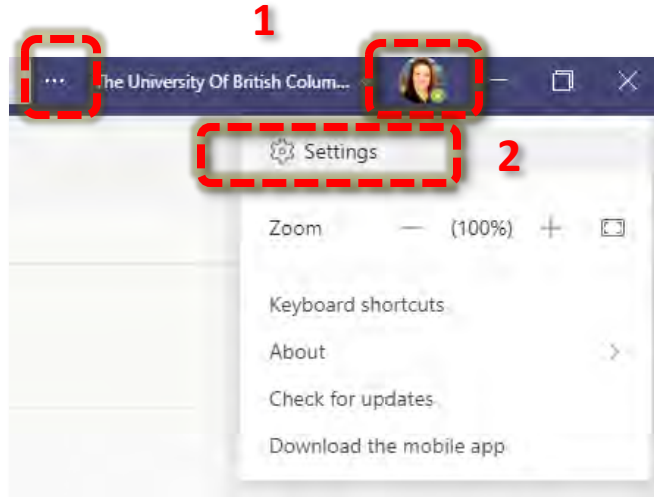


Settings

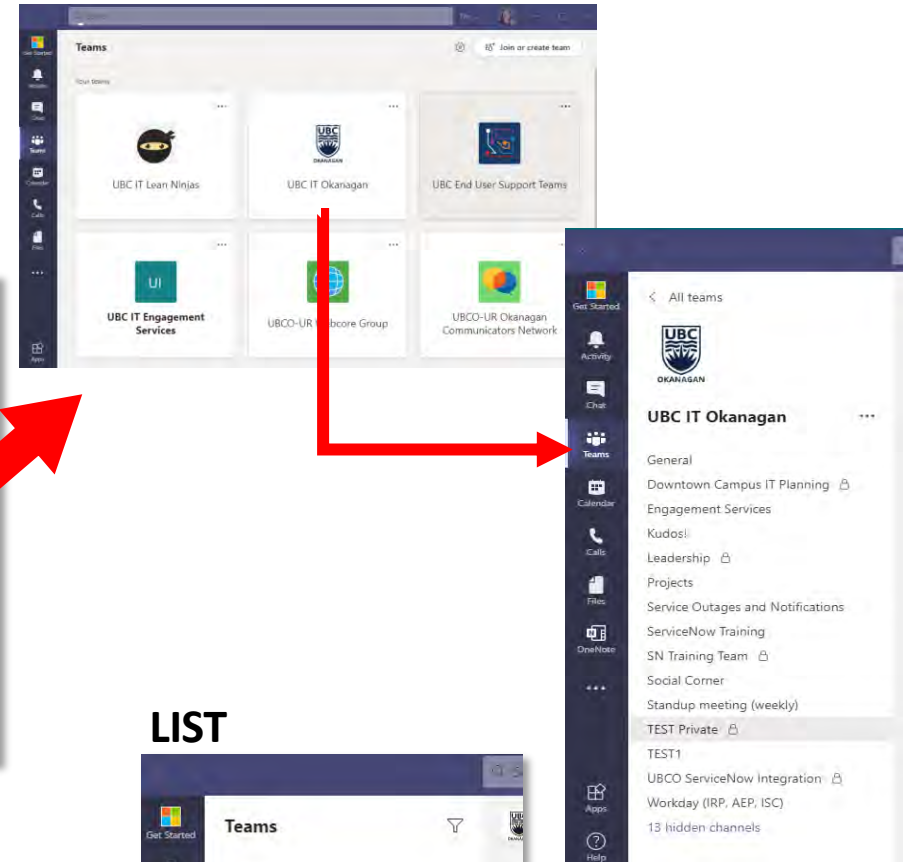
- Change who can create / delete channels, private channel creation, tab creation in channels, edit or delete content

MANAGE PERSONAL SETTINGS

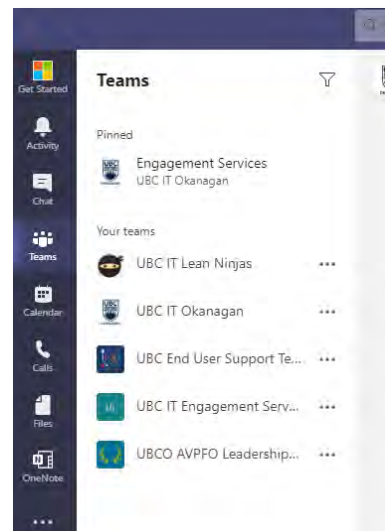
- Change Teams view (and other settings) – **Grid or List View**



GRID



LIST



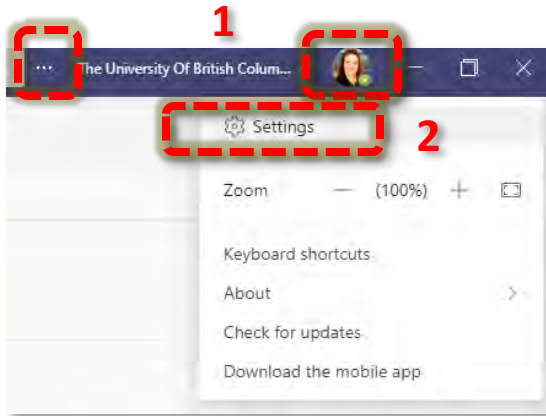
To Change Teams Layout

1. Click on your profile at the top right corner OR the three dots next to the Search Bar
2. Select **“Settings”** from the drop down menu

Under “General”, select Layout, either

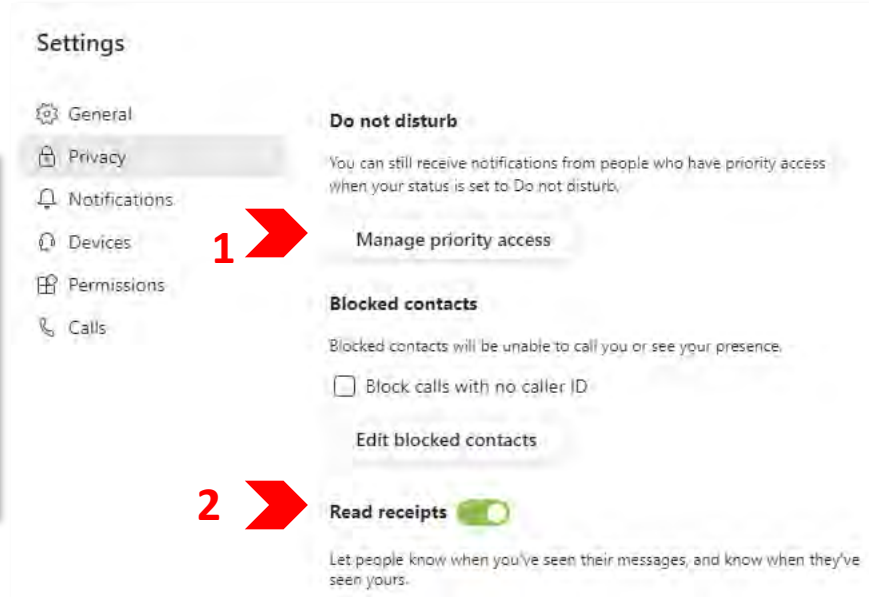
- **GRID** (display a single Team and Channel at a time) – OR
- **LIST** (see all Teams and Channels you belong to)

MANAGE PERSONAL NOTIFICATIONS



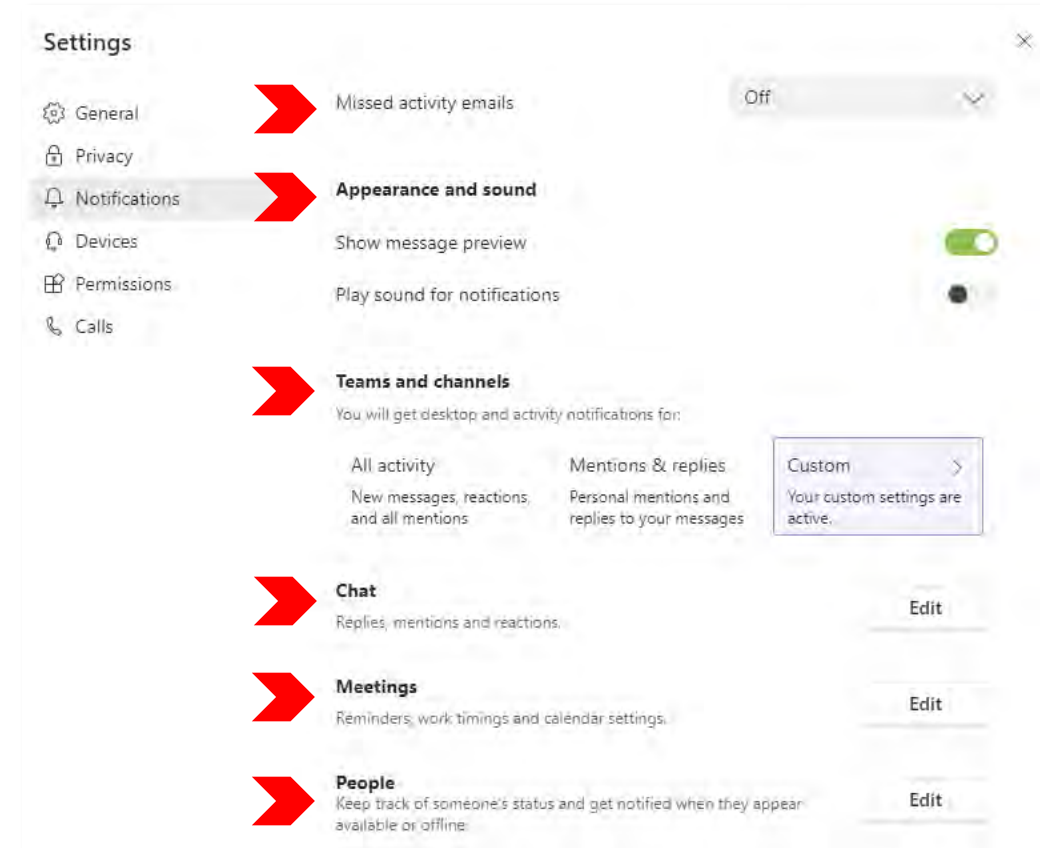
To Change Personal Settings & Notifications

1. Click on your profile at the top right corner OR the three dots next to the Search Bar
2. Select “Settings” from the drop down menu



Privacy

1. Enable certain people to contact you even when your status is DND
2. Choose whether people can see you’ve read a message in Chats (and see when they read yours)



Notifications

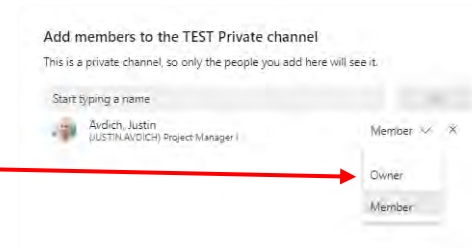
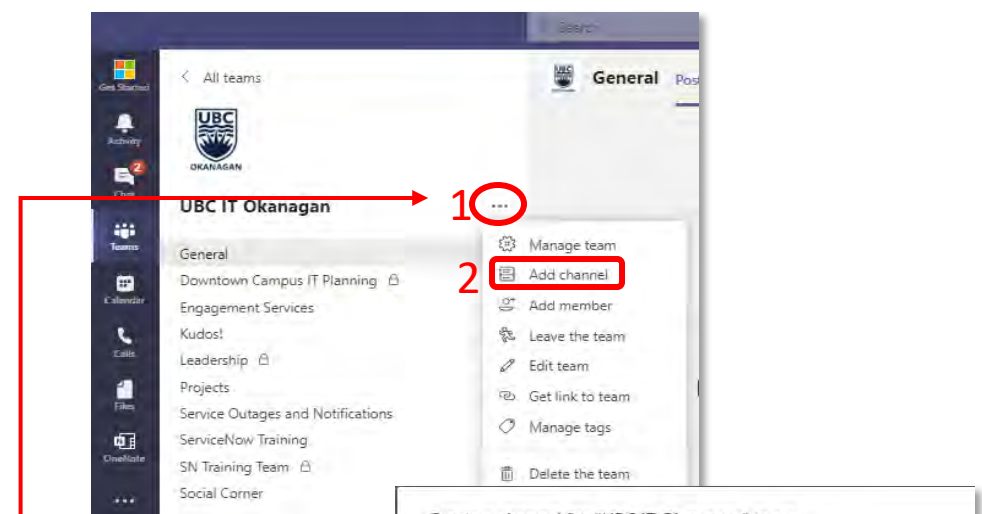
1. Receive emails about Teams activity
2. Manage visual and audio notices
3. Manage notices in Teams vs Channels
4. Manage Chat notifications
5. Manage Meeting activity & notices
6. Get notified of status for specific people

CREATING & USING CHANNELS



CREATING CHANNELS*

- All Teams are automatically given a “General” channel (this cannot be deleted).
- To Create a **NEW Channel***:
 - 1) click the three dots next to Team name,
 - 2) Select **Add Channel**
- Channels can be created with a **Privacy Setting** of either
 - **Standard** (accessible to EVERYONE on the team) or
 - **Private** (only available to members of the Team specified by Channel owners)
 - For **Private Channels** you should have **at least TWO Owners**
 - Private channels have less functionality than standard ones
 - **NOTE: These settings CAN NOT be changed after the channel is created**

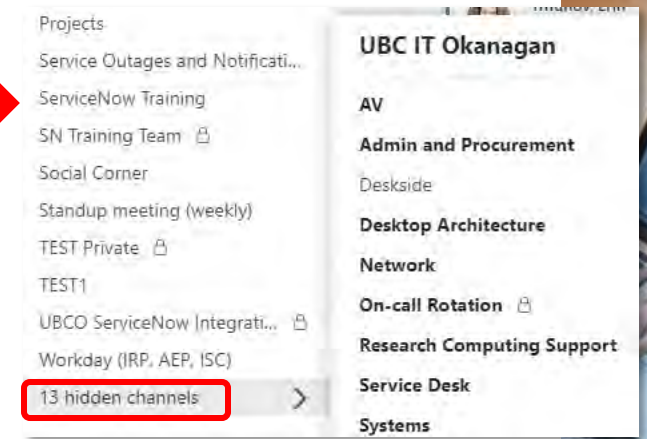
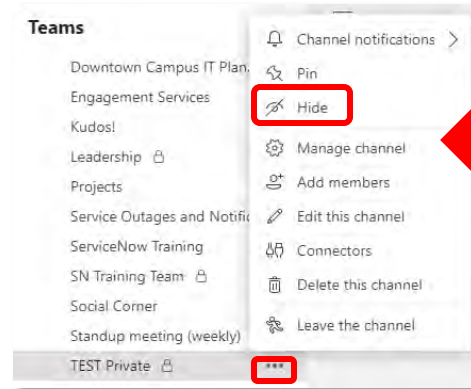
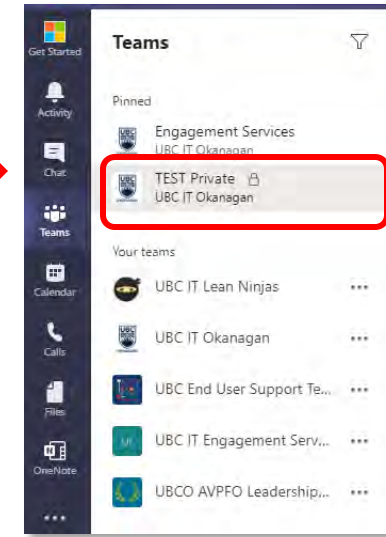
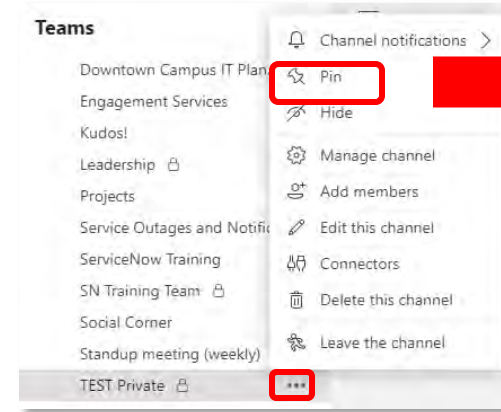


*Note: by default, only Owners can create Channels unless this is changed in “Team Settings”



CHANNELS – VIEWS & NOTIFICATIONS

- If your Teams view is set to “List” (see [this slide](#)) you can **Pin** important channels to find them more easily
- You can **Hide** channels you don’t need to see, or unhide (see Hidden channels)
- You can manage your notifications by channel as well, using **Channel Notifications**



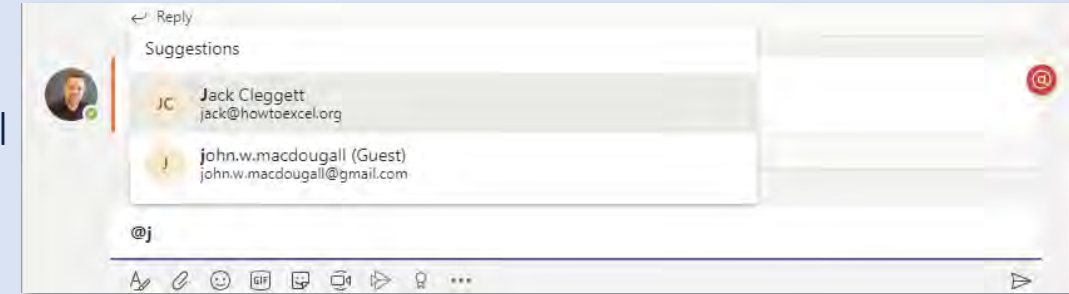
Channel Notifications



COMMUNICATING IN CHANNEL POSTS & CHATS

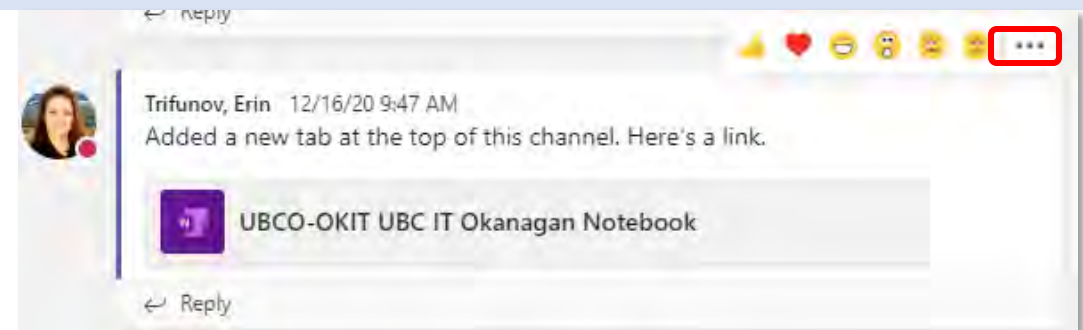
@mentioning

- You can use an @ mention to make sure a particular person gets notified of your message.
- Just type the @ symbol anywhere in your message (in a Channel post, Chat or Document Conversation) and then start typing a person's name, channel name, tag or team name. Then you can select from the suggestions list to mention them.
- The person will get a notification depending on their setting, it will appear in their activity feed and they will see a red circle with the @ symbol next to the post where they were mentioned.



Liking a chat or post

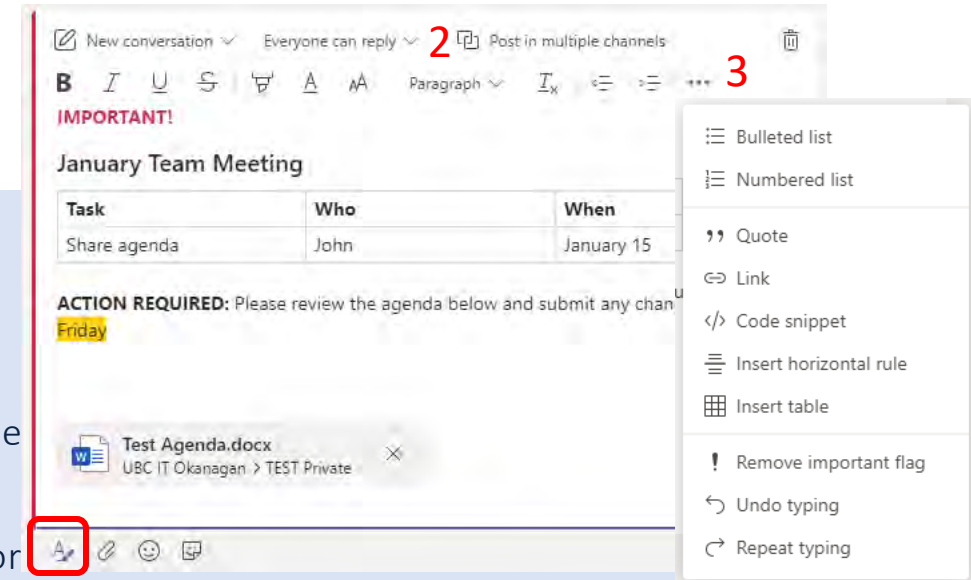
- Acknowledge that you've read a message or agree without having to type a reply. Hover over a message and click on the thumbs up or other icon.



FORMATTING POSTS & CHATS

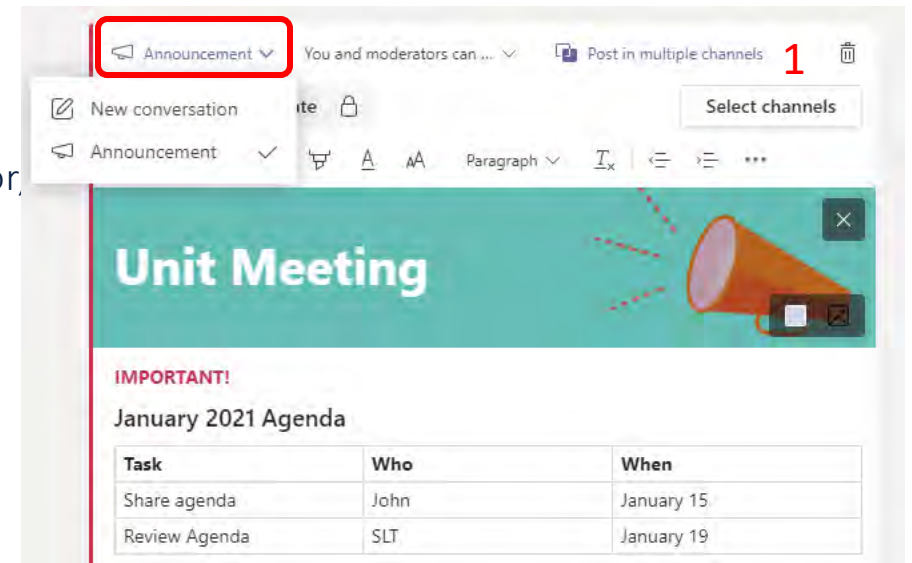
Add Formatting

- Make your post stand-out by adding text formats including bold, highlighter, change text size and color, add headings, tables, bullets and more.
- Click in the A with paintbrush icon at the bottom left corner of a new post to open the formatting options.
- You can add a post to multiple channels (1) and select who can reply to the post (2) or click the three dots at the top right (3) to see more formatting options




Announcement Style

- If you want the message to really stand out, select **Announcement** from top left corner instead of *Conversation*. This will add a header block which can be a solid color, illustration or uploaded image.
- You can still modify who can reply and post to multiple channels.
- For extra attention, add “Important Flag”
- or mention **@Channel_Name** or **@Team_Name** to ensure people see the post in their Activity Centre and/or whatever other notifications they have set up.

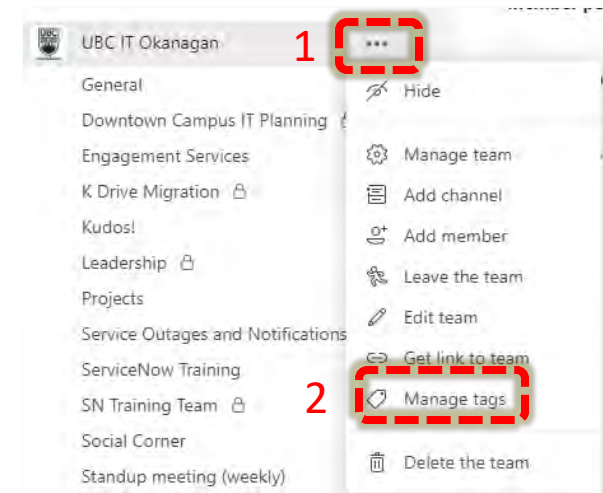


USING TAGS

Tags let users quickly and easily connect with a subset of people on a team. You can create and assign custom tags to categorize people based on attributes, such as role, project, skill, or location.

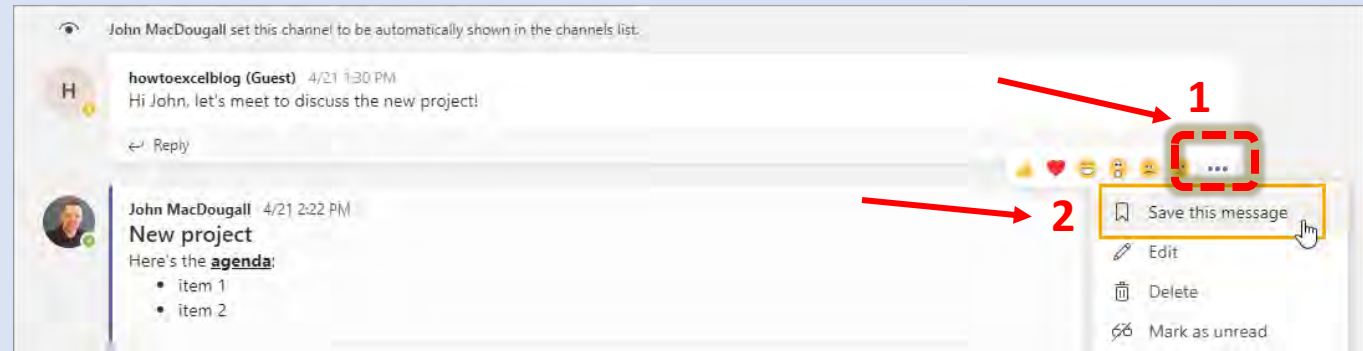
- After a tag is added to one or multiple team members, it can be used in **@mentions** by anyone on the Team in a Channel post or to start a Chat with only those people who are in that tag.
 - Note: tags **cannot** be used in Private Channels (with lock icon next to Channel name). **Private** 

- To manage who can create and edit Tags for your Team, click go to “Manage Team” (see this [slide](#))
- To create or edit Tags, click the three dots to the right side of the Team name (1) then select “Manage Tags” (2) from the drop-down menu
- From this window you can Create new tags (1), view existing Team tags (2) and view tags you belong to (3)

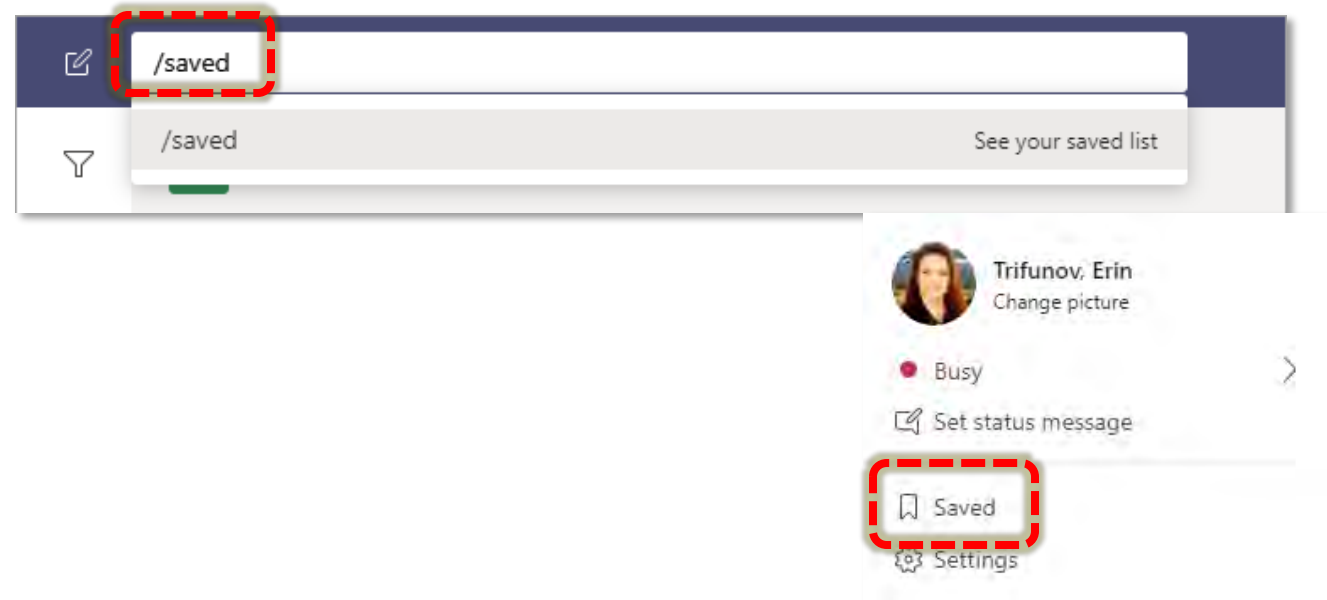


BOOKMARK / SAVE POSTS & CHATS

- You can bookmark any message (in Chat or Channel Posts) so it's easy to find later on.
- Click on the **three ellipse** in the top left corner of the message and select **Save this message**.



- To find saved / bookmarked messages you can either:
 - go to the search bar at the top of Teams, type: /saved and you will see a list of saved items
 - Click on your Profile Image at the top right corner of Teams, and then select "Saved" from the pop-out window



ADDING NEW TABS TO A CHANNEL

A channel has two tabs only by default: Posts & Files. Additional tabs can be added to create quick access to important files, applications or even websites related to the channel.

- **Note:** By default only Owners can do this, or you can enable this for all channel members under the **Settings** for the Team (see [THIS SLIDE](#)).

There are two ways to add a tab:

1. Click the + symbol (1) to see a selection of apps available for UBC (to request more apps fill out the [Feedback Form](#)). Helpful apps include:
 - **OneNote**—See [THIS SLIDE](#) for more details on using OneNote.
 - **Website**—add a URL to link directly to a website such as Workday or a departmental website.
 - **Whiteboard**—collaborate or draw / take notes in real time
2. From the “Files” section – [SEE HERE](#) for more details.

When you select an application to add as a tab, you can also:

- click “**About**” (2) to see more details about the application
- Check the box at the bottom (3) to post to the Channel about the new tab

The new tab will now show at the top of the channel next to Files (4)

- You can click and hold on any tab to change it’s position (Posts and Files can NOT be moved).

1

2

3

4

Trifunov, Erin 4:05 PM
Added a new tab at the top of this channel. Here's a link.

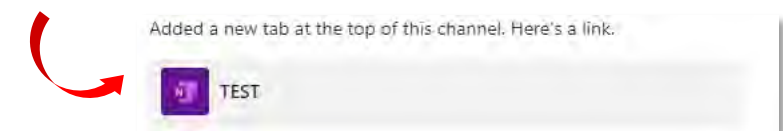
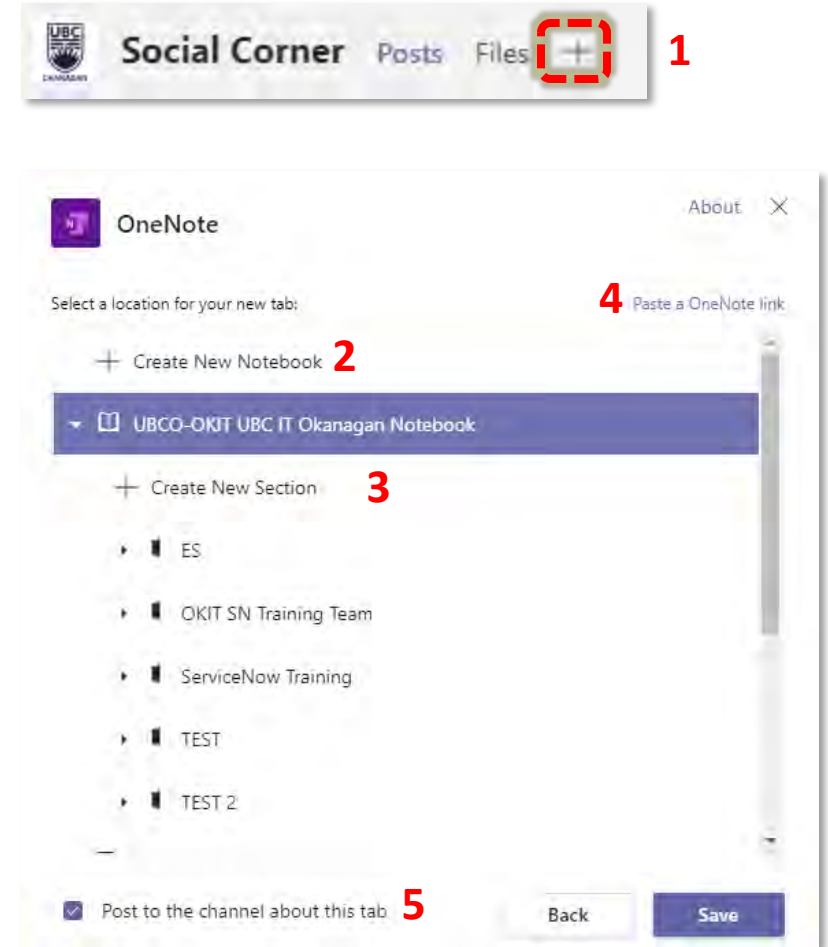
ADD A ONENOTE NOTEBOOK TO A CHANNEL

To add a new or existing OneNote notebook to a channel in Microsoft Teams, select **Add a tab** (1) at the top of the channel and select **OneNote**.

From there, choose an option:

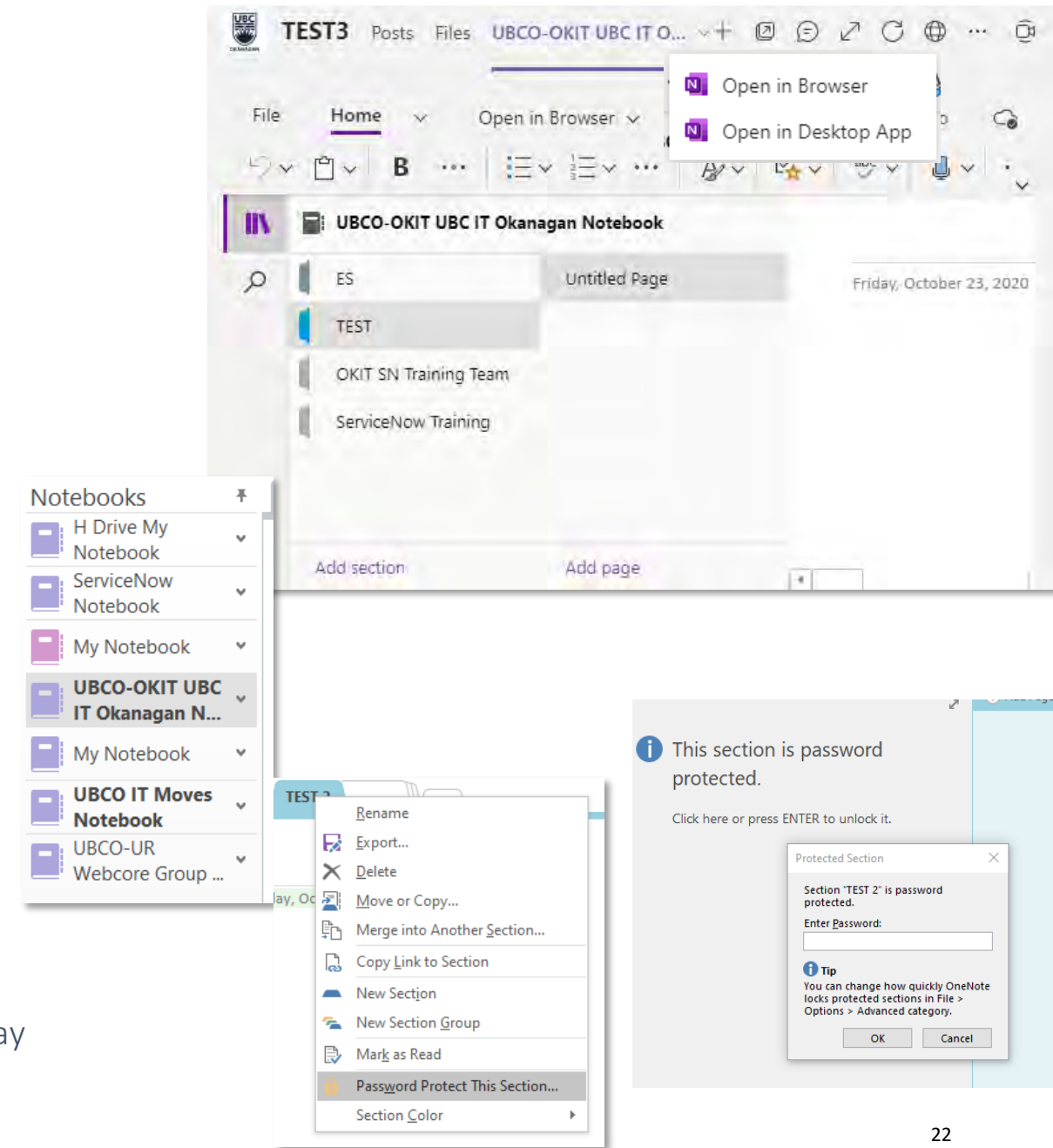
- To start from scratch, select **Create a new notebook** (2), add a name to the **Notebook name** field, and click **Save**.
- To add an **existing notebook** (3), select from a list of **notebooks available**, choose the notebook and/or section (or Create a New Section), and select **Save**.
- To add a link to an **existing notebook**, select **Paste a OneNote link** (4), add the address, and select **Save**.

You can check the box at the bottom (5) to post about the notebook to the channel.



ONENOTE & TEAMS

- When a new Team is created, a OneNote Notebook is created for that team. You can add a OneNote tab in a channel and create a Section specific to that Channel (for meeting notes, etc).
- If you are a member of a Team, and use OneNote, the Notebook will be automatically added to your OneNote collection.
- You can edit pages within Teams (in a channel) or open it in a Browser or in your Desktop (this is recommended if you want to enable more features like add meeting details, change privacy setting etc.)
- To restrict access to certain sections,
 - open the desktop version of OneNote
 - Right click on the section you want to restrict access
 - Select **“Password Protect This Section”**
 - Set a password and share with relevant people as needed
 - You can change Password setting including how long sections stay unlocked by going to File > Options > Advanced > Passwords.



CREATING & SHARING FILES IN TEAMS

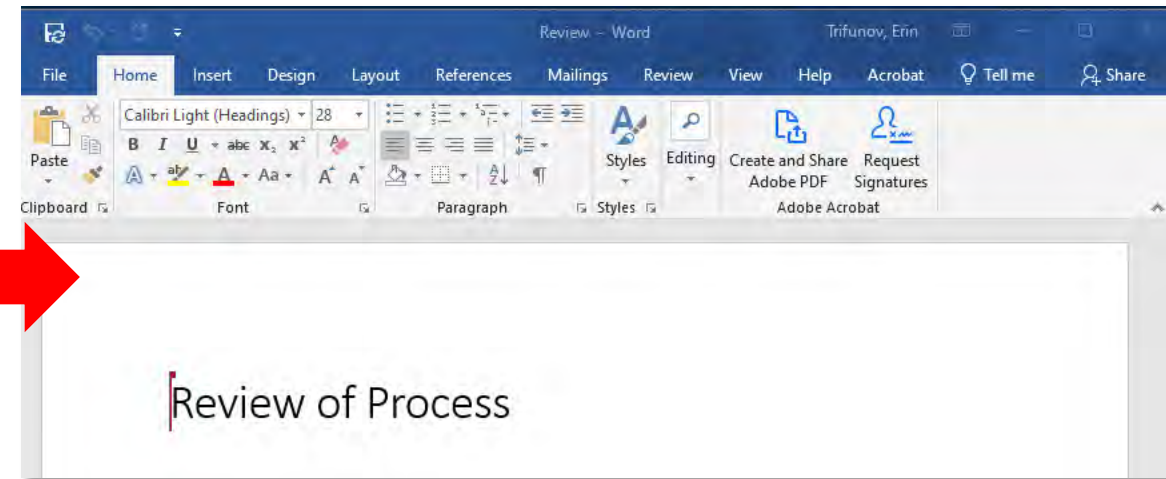
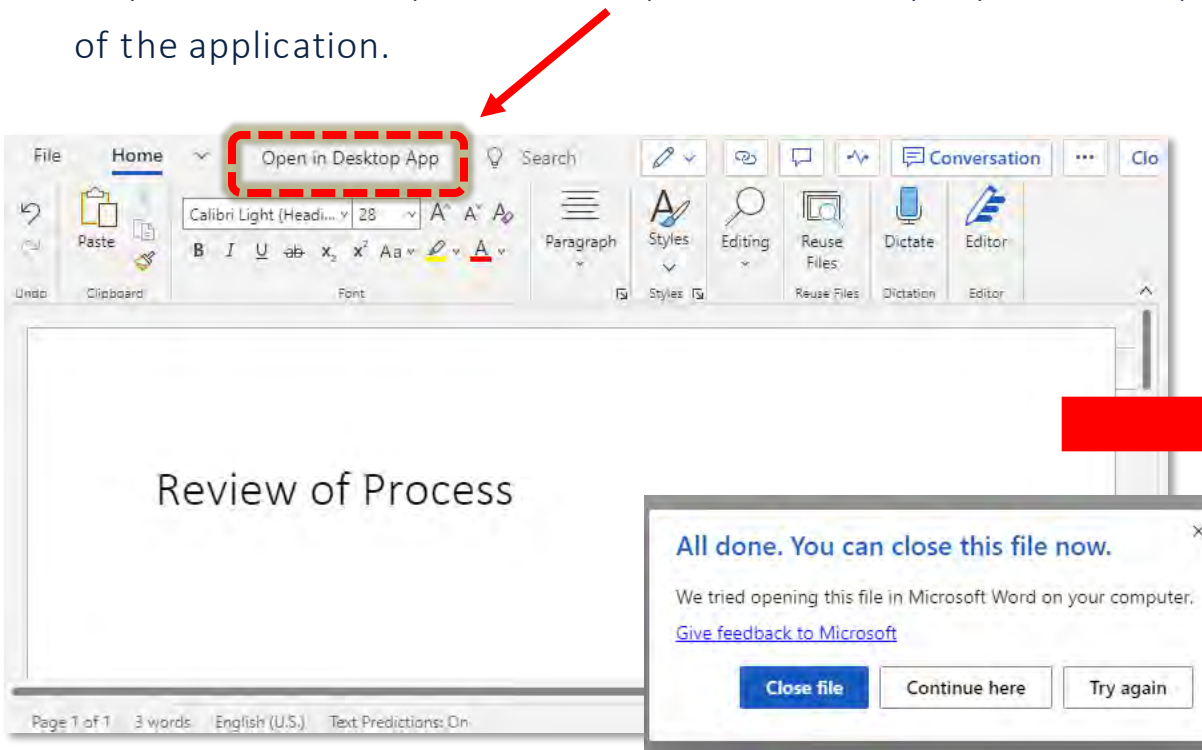
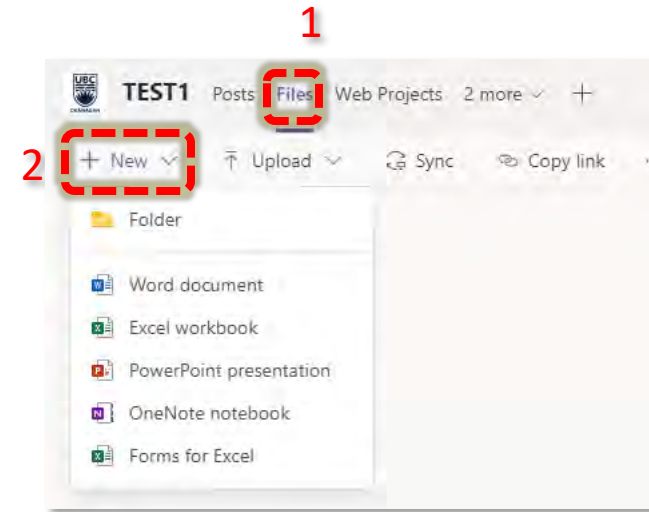


```
46 new WP_Query('posts_per_page=6&cat=312');
47 while ( $loop->have_posts() ) : $loop->the_post();
48     require ('part-homepage-cat-feed.php');
49 endwhile;
49 wp_reset_query(); ?>
50 <div class="cleaner"></div>
51 <h2 class="homepage_cat_feed"><span class="white"><?php echo get_cat_name(312);
52 </span></h2>
53 <?php $loop = new WP_Query('posts_per_page=6&cat=122');
54 while ( $loop->have_posts() ) : $loop->the_post();
55     require ('part-homepage-cat-feed.php');
56 endwhile;
57 wp_reset_query(); ?>
58 <div class="cleaner"></div>
59 <h2 class="homepage_cat_feed"><span class="white"><?php echo get_cat_name(122);
60 </span></h2>
61 <?php $loop = new WP_Query('posts_per_page=6&cat=6');
62 while ( $loop->have_posts() ) : $loop->the_post();
63     require ('part-homepage-cat-feed.php');
64 endwhile;
65 wp_reset_query(); ?>
66 <div class="cleaner"></div>
67 <h2 class="homepage_cat_feed"><span class="white"><?php echo get_cat_name(6);
68 </span></h2>
```

Line 1, Column 1

HOW TO CREATE A FILE IN TEAMS

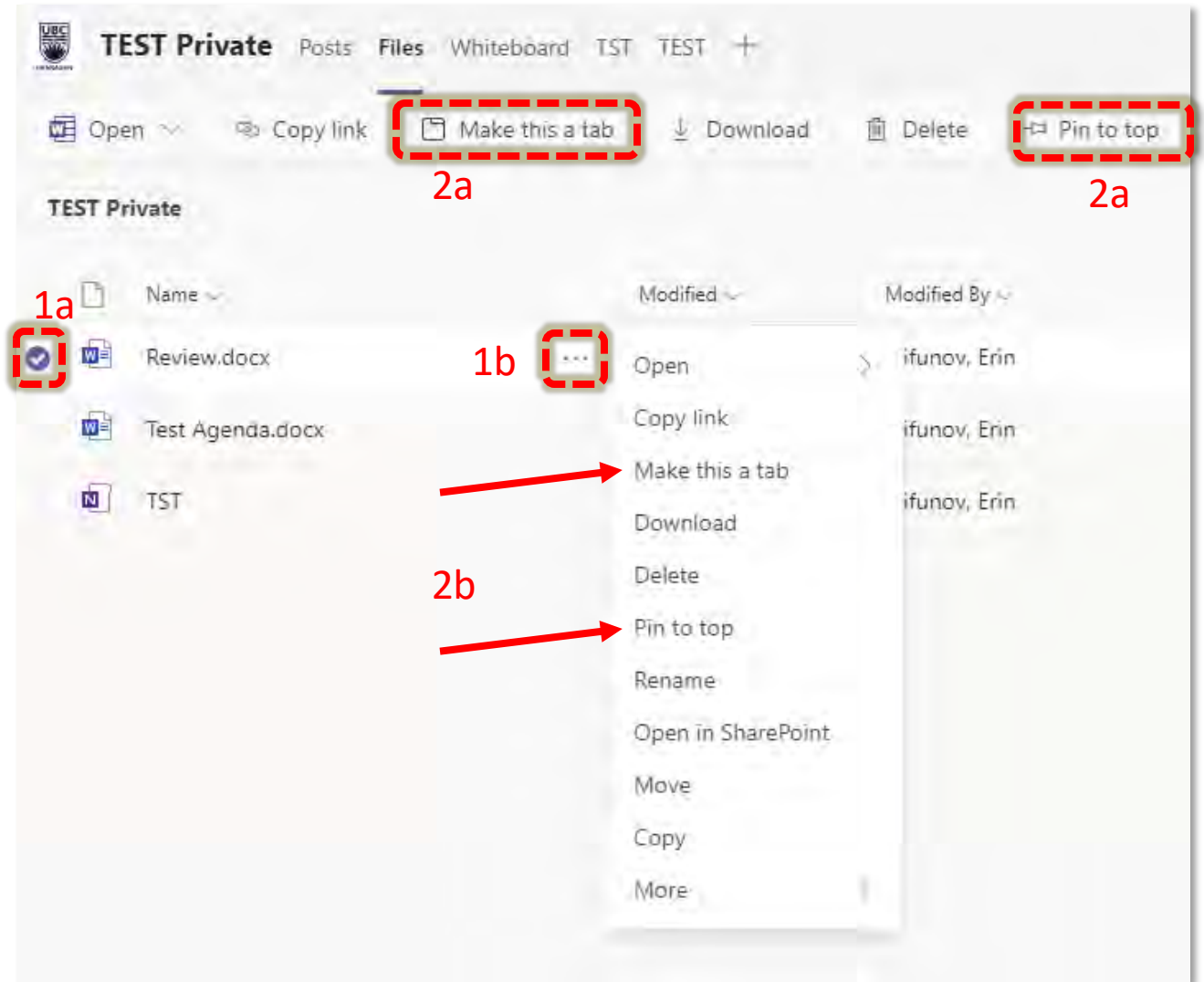
- In a Channel go to the Files tab (1) and select “+ New” (2) to create a new file in the team, then select the type of file you want to create.
- You can edit the file directly in Teams (and others who are part of that channel will also be able to access and edit the same file in Teams in real time as well).
- Or you can select Open in Desktop to edit directly in your desktop version of the application.



PIN OR ADD FILES AS A TAB

To access important or commonly used files more quickly you can **Pin** them to the top of the file list, or **Add them as a Tab** to the top of the Channel side menu.

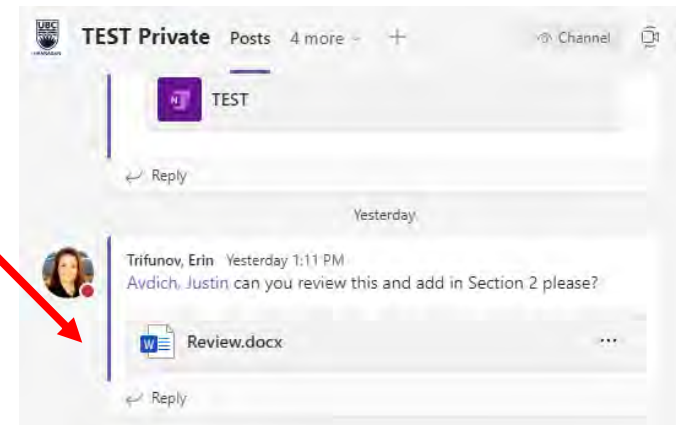
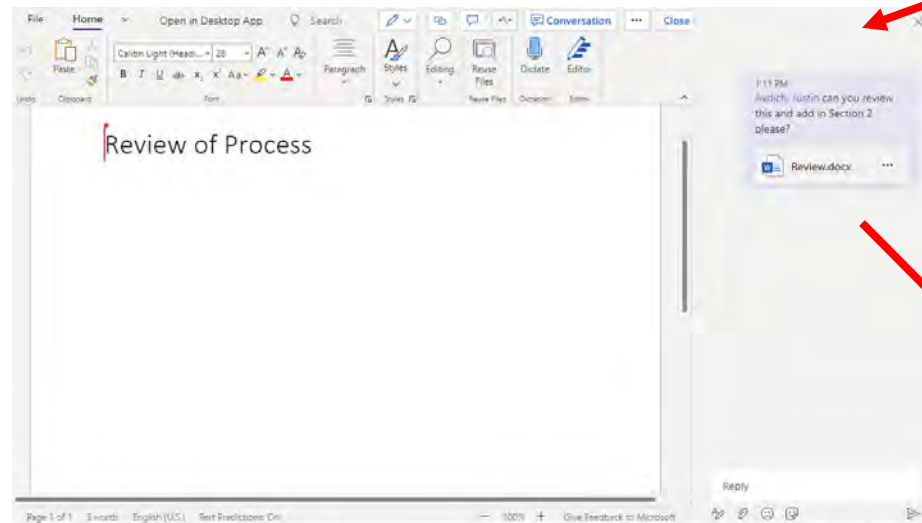
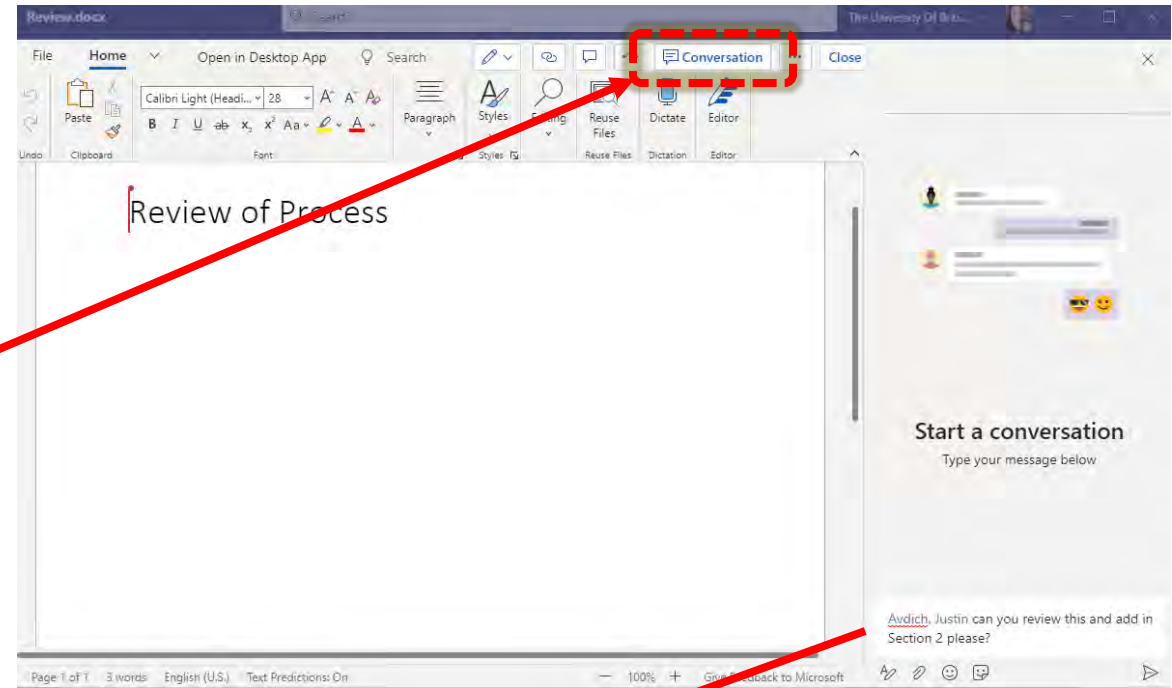
- Go to a **Channel**.
- Go to the **Files** section for that Channel.
- Select the file or folder you want to pin or make a tab (2 options):
 - Click the circle **(1a)** to the left of the file name to activate the check symbol
 - From the menu bar at the top, select either “**Make this a tab**” or “**Pin to top**” **(2a)**
 - Click on the three dots to the right of the file name **(1b)** to open a new menu.
 - From the popup window that appears, select either “**Make this a tab**” or “**Pin to top**” **(2b)**



COLLABORATING ON FILES

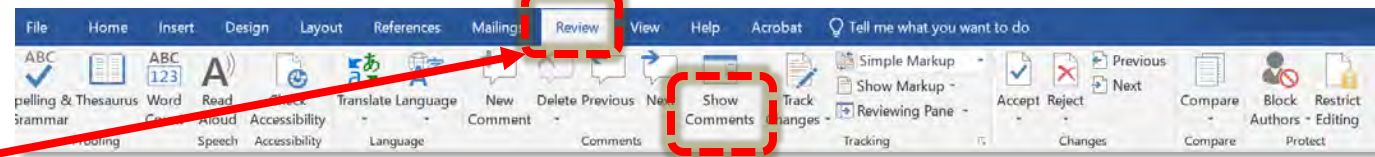
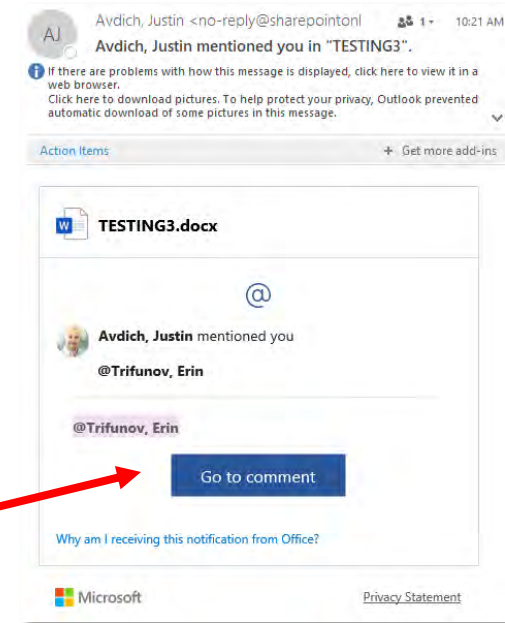
Using Conversation

- If you edit the file in Teams, you can use the **Conversation** feature to add a Post in the channel related to the document and tag people as needed (e.g. to request people to review or edit a document)
 - (Note – sometime the “conversation” button disappears, if so, try closing the file then re-opening it in the Teams Channel)
 - Conversation is different from **Comments**
- Click on the **Conversation icon at the top right of the file** to open the Conversation bar on the right side of the document (only available while editing in Teams)
- Add your comment or request, using @ to mention specific people or tags.
- The comment will be added to the document conversation AND appear as a post in the channel with an easy image of the doc to directly link to the file.



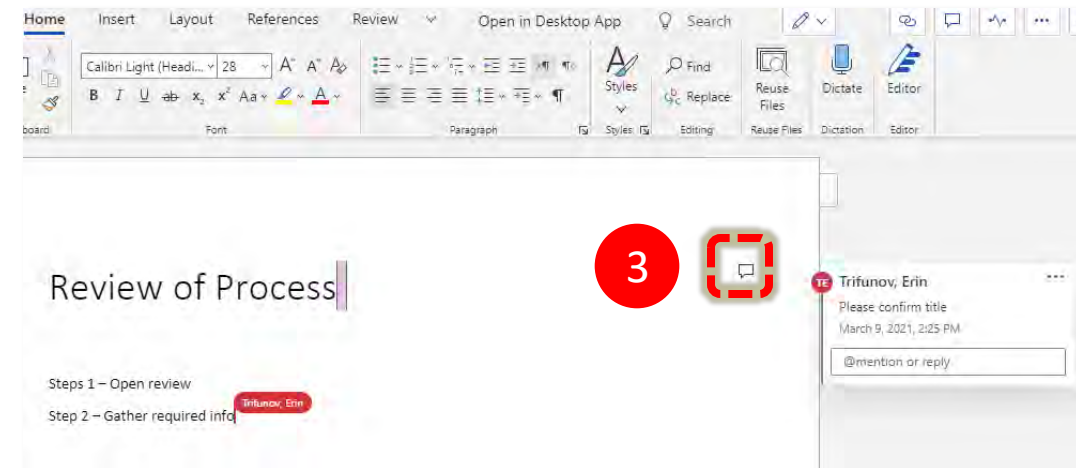
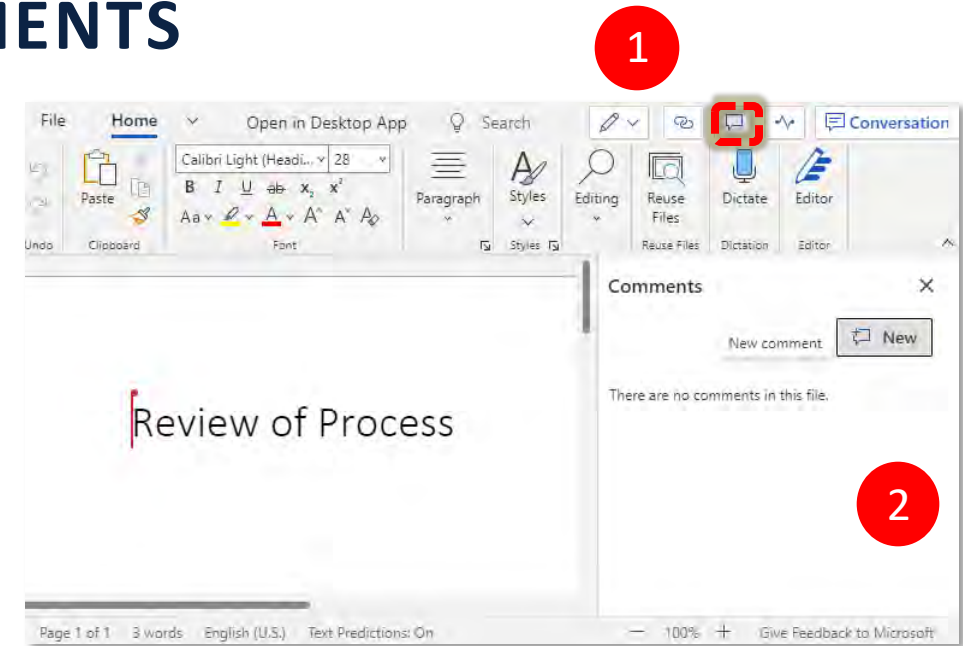
COLLABORATING ON FILES - CONVERSATION

- **Private Channels** – you can only use *Conversation* with other members of the Channel the file was created in (because it will appear in the Posts section of the Channel)
- If someone responds to you in a document and uses @ your name to tag you, you will receive an email notifying you of the comment with a link to the file.
- If you open the file in your desktop or in a browser, you will not be able to see the *Conversation* anymore, however you can still see and make Comments (under the “Review” section of the top menu bar).
- “Catch Up” – If you are editing a document in Teams, if you click on “Catch Up” at the top right side you’ll see all activity in the document since you last opened it.




COLLABORATING ON FILES – USING COMMENTS

- To make a Comment in a document open in Teams, click on the **speech bubble icon (1)** at the top of the menu bar.
- The Comment dialogue box **(2)** will open on the right side of the document and a comment bubble **(3)** will be inserted wherever the cursor is (you can highlight a group of text to comment on a broader section of the document).
- To view the comment, click on the speech bubble, then you can reply, edit or delete / resolve the comment.
- You can @mention anyone at UBC even if they are not a member of your Team or the Channel, however they will not be able to access the document if it has not been shared with them.
 - They will be notified via an email that you have mentioned them with a link to the document. If they don't have permission they will be given the option to request permission
 - THIS SLIDE has details on how to manage file permissions
- You can tell others are in the same document when you see a colored cursor – hovering over it will show the persons name.
- You will see their edits appear live in real time.

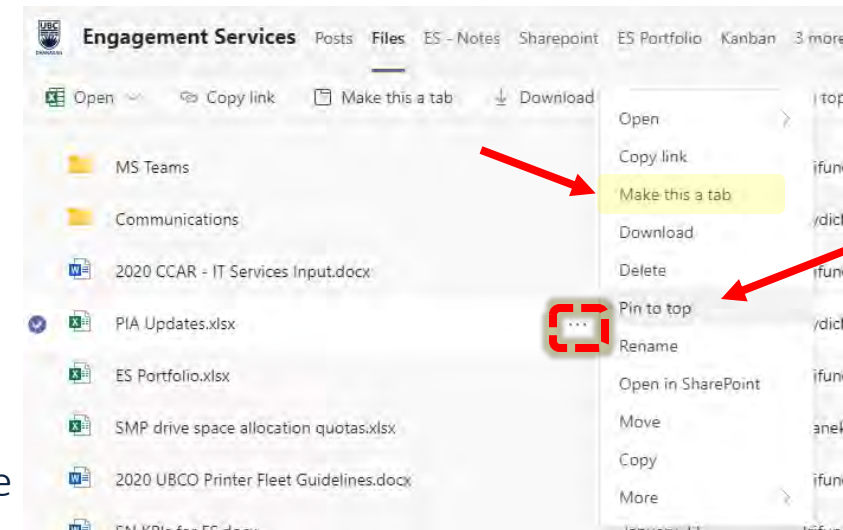
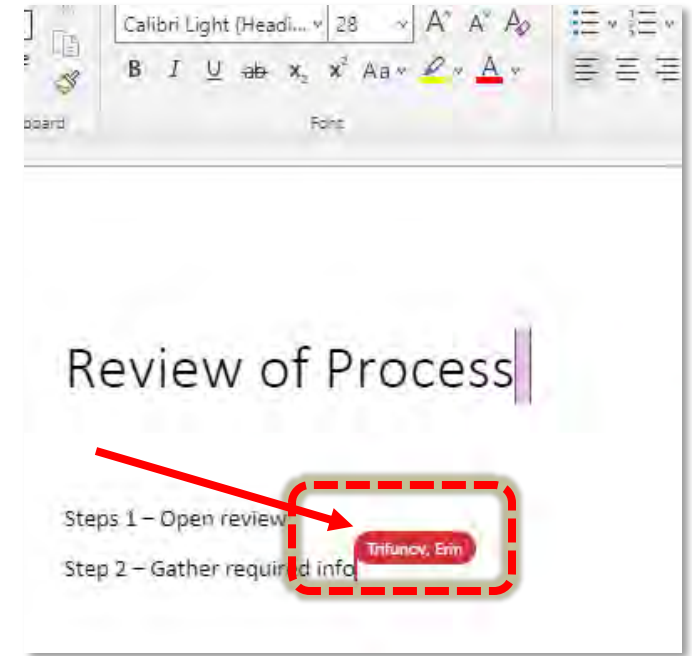


COLLABORATING TIPS

- If you edit a document within **Teams**, changes are saved automatically and show up in real time;
 - You can also see the edits from others in real time and tell that others are viewing and/or editing the document (colored lines will appear to show where their cursor is in the document, and if you hover your mouse over the line their name will appear)
- If your file is opened in your **desktop**, you may need to refresh your changes (click save at top left corner)  before changes are visible to others.

Check Out Function

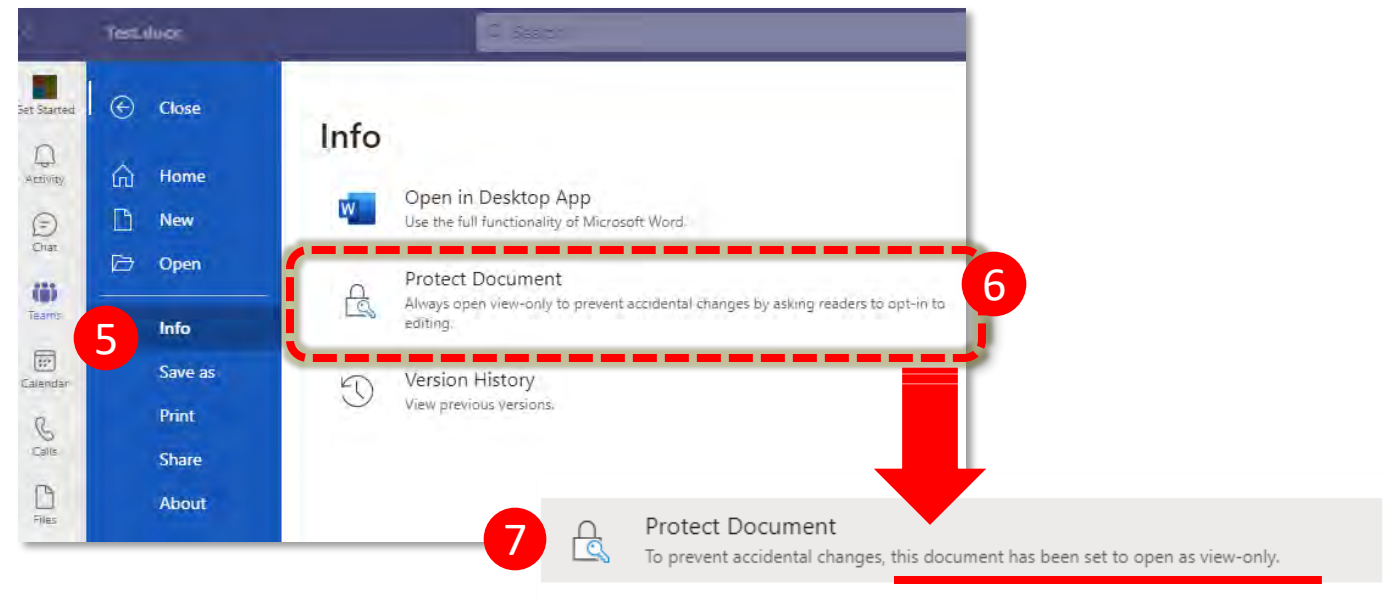
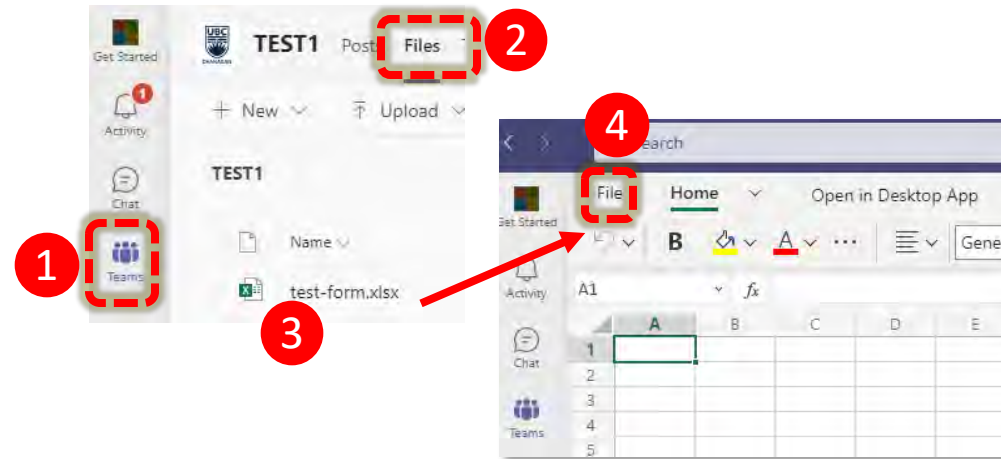
- If you **check out a document**, even though others can view it, they will not be able to edit it until you check it back in.
- **To check out a file**, hover over the document to find the ellipsis (show actions) and click on that, find the option “**More**” and then click on the **check out** function.
- **To check in a document**, go to the “More” option and select **Check In**. You will be given the option of leaving a comment before you check the document back in.



COLLABORATING ON FILES - PROTECT DOCUMENTS (IN TEAMS)

From Teams

- Open a file from within Teams (1 ->2->3), then click on “File” (4) from the top left menu bar.
- Select “Info” (5) from the far left side menu, then click on “Protect Document” (6) to turn off/on opening the document in “view-only” mode by default to prevent accidental editing
- When view mode is selected, the **Protect Document** box will change to say “this document has been set to open as view-only” (7)
- You can click on this box again to toggle it off (and open documents in regular edit mode).

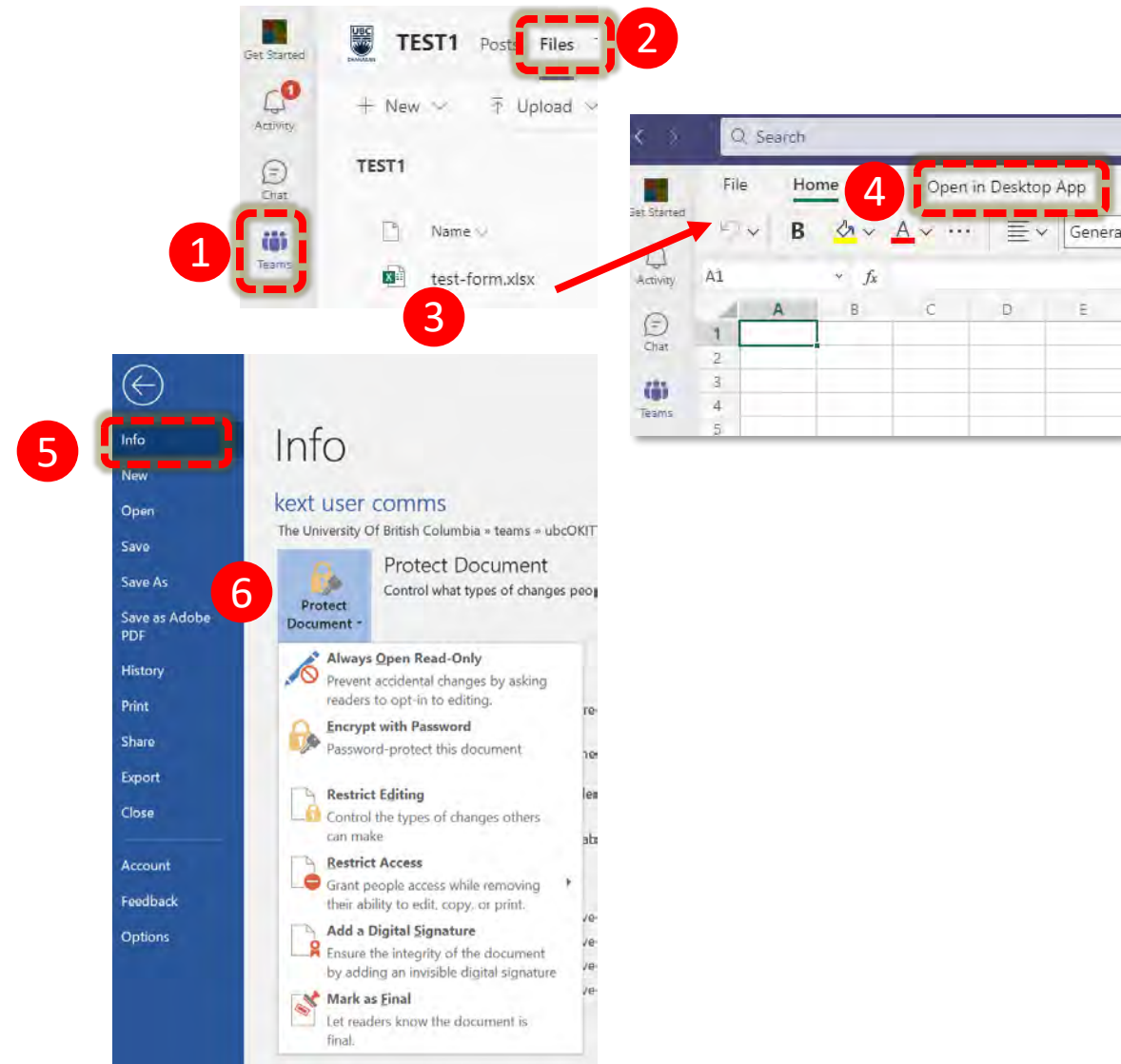


COLLABORATING ON FILES– PROTECT DOCUMENTS (DESKTOP)

From Desktop App

Opening a file in the desktop app will give you greater options and functionality than editing within Teams.

- Open the file in the desktop app (open the file in Teams then select “Open in Desktop App 1->4)
- Then select “Info” (5) from the left side menu, and then select **Protect Document** (6).
- This will open a pop-up window with more options to protect the document.



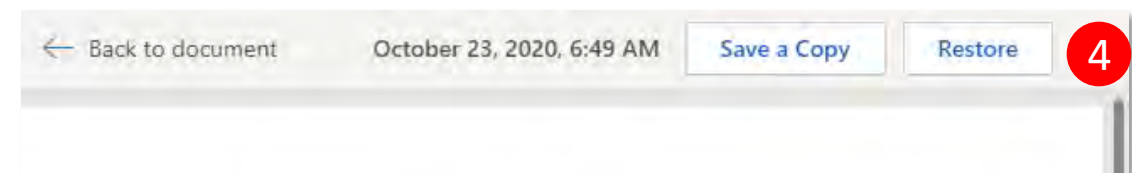
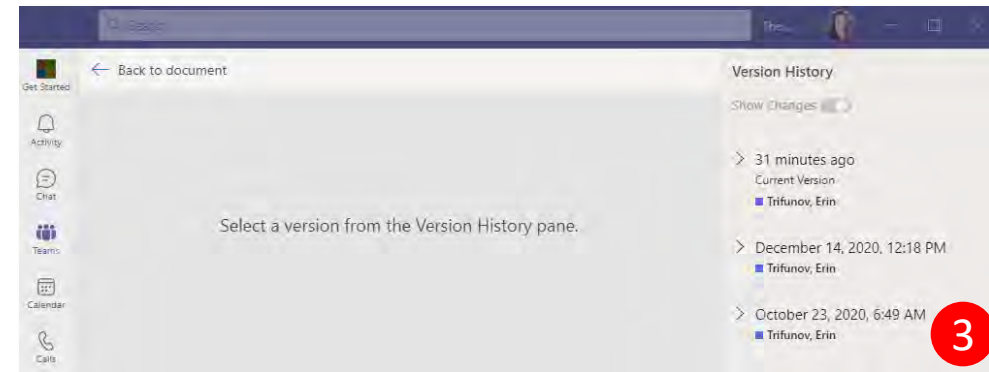
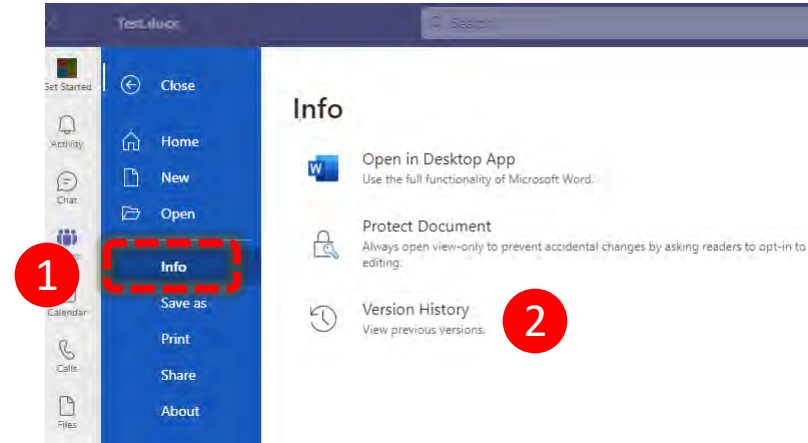
COLLABORATING ON FILES– VERSION HISTORY (IN TEAMS)

Version history

You can view the version history of files and revert back to an earlier version to recover if needed. You can also see who made the edits for each version.

In Teams

- Open the file, click on **File** from the top left menu bar (see previous slides)
- Select “**Info**” (1) from the side left menu then select “**Version History** (2)
- Click on the version you want (3), you will then have the option to (4) **Restore** the document to that version or **Save it as a copy**
 - Note: you will only have a limited option of locations to save the file to, so if you want to store it in a different folder you should open the document in Sharepoint or in the Desktop App for more options



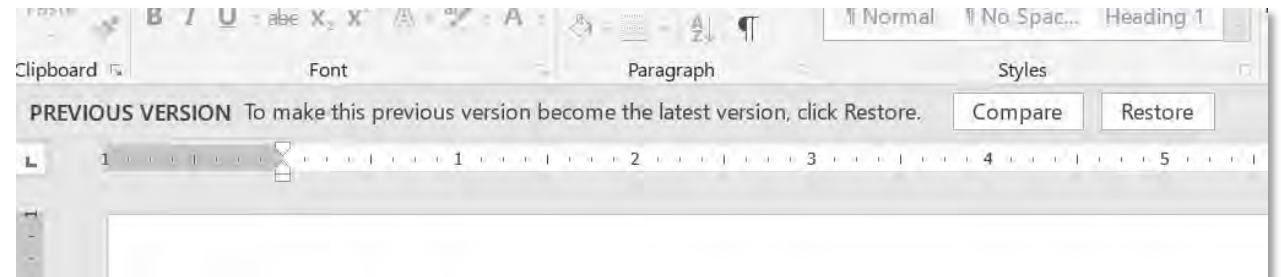
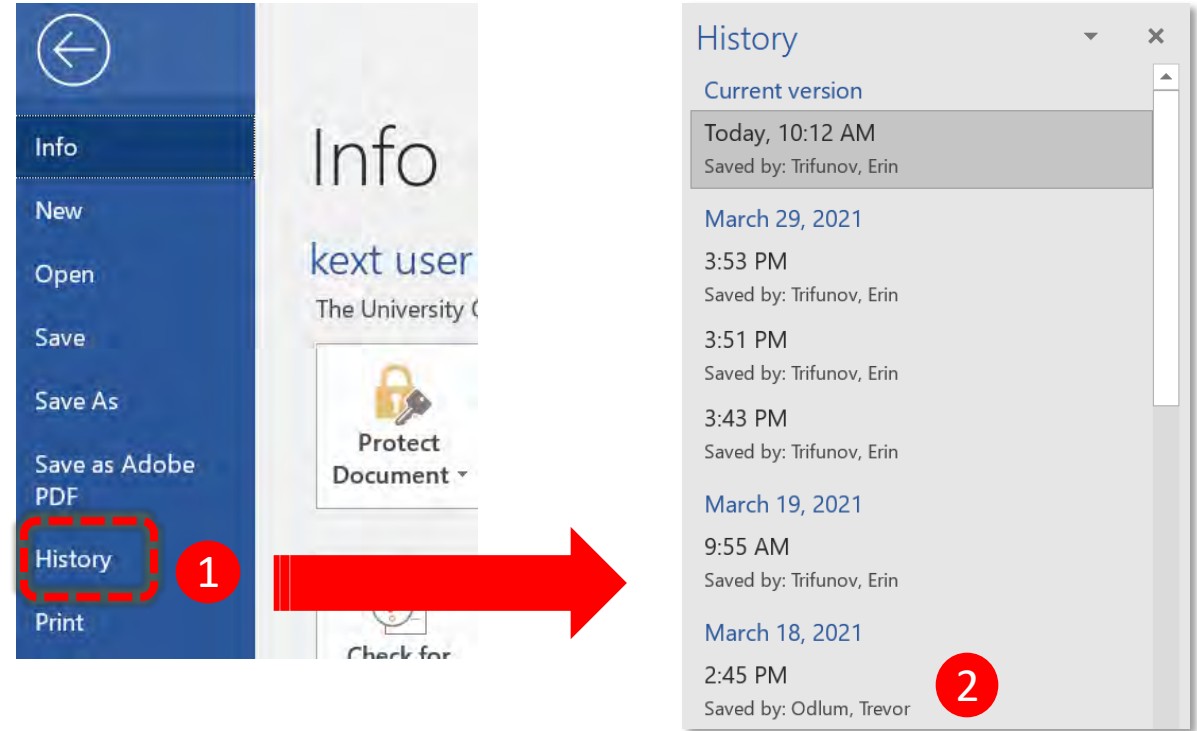
COLLABORATING ON FILES– VERSION HISTORY (DESKTOP APP)

Version history

You can view the version history of files and revert back to an earlier version to recover if needed. You can also see who made the edits for each version.

From the Desktop App

- Open the file in the desktop app (see previous slides)
- Click on **File** from the top menu (far left)
- Select “**History**” from the left side menu
- This will open the document again with a new side bar window on the right side listing all the previous versions, times & dates they were saved and by whom.
- You can then select a version by clicking on a time and user.
- This will open a new window with the previous version (in read only mode). At the top will be an option to compare or restore the document. You can also Select “**File**” from the top menu and then “**Save As**” to save a copy of the version instead.



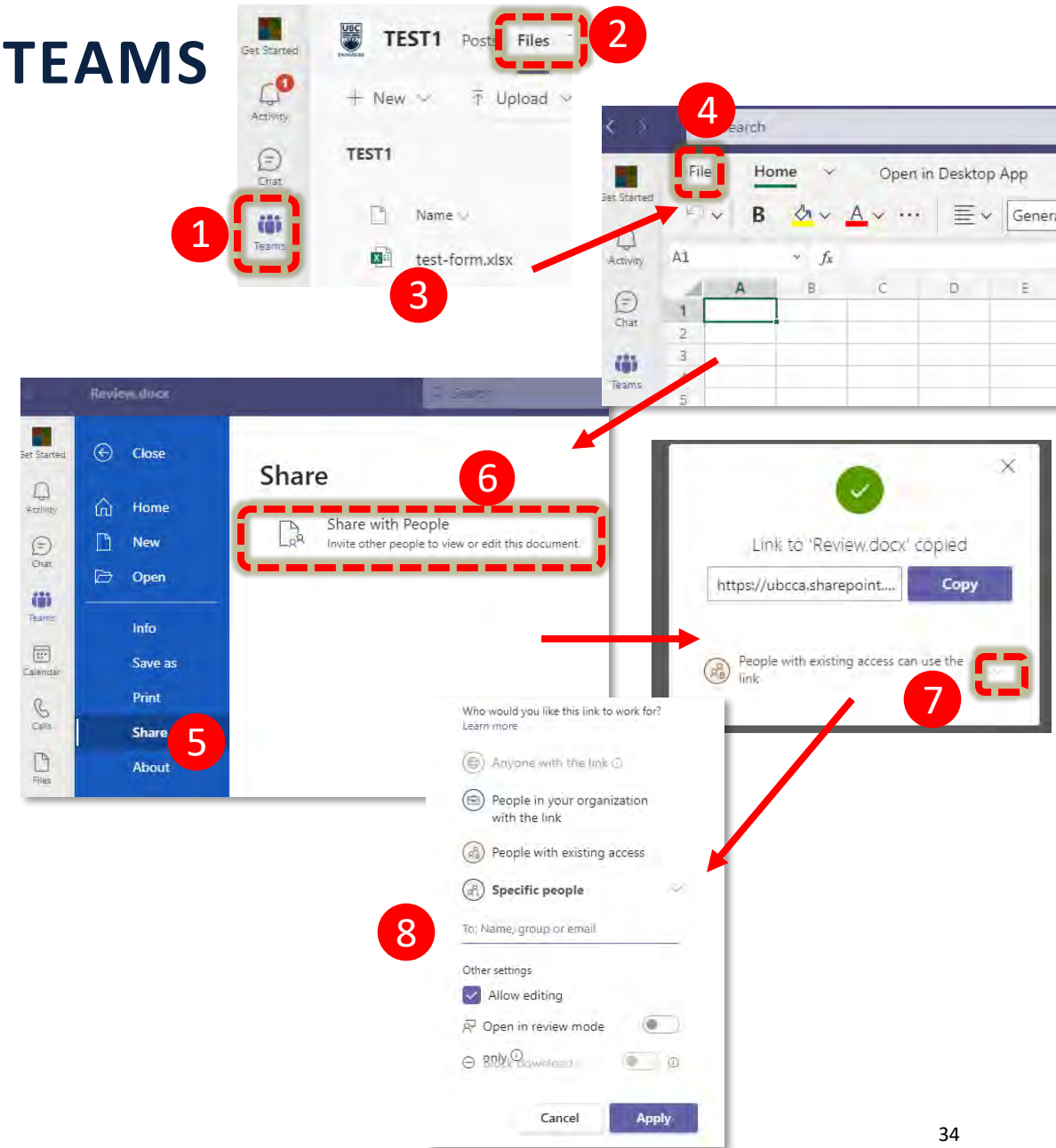
SHARING DOCUMENTS - EDITING IN TEAMS

Documents created or uploaded to in a Channel in Teams (accessed under the “Files” heading in the channel), are owned by & accessible to all members of that Channel (if the Channel is public it is owned and accessible by all members of the Team)

To manage sharing permissions while editing **In Teams**:

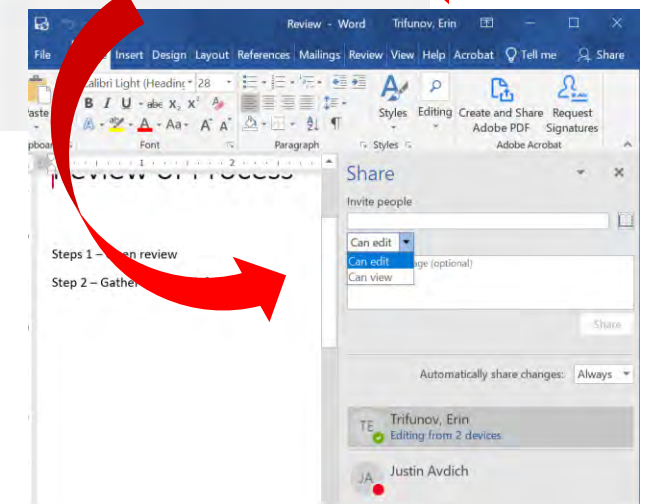
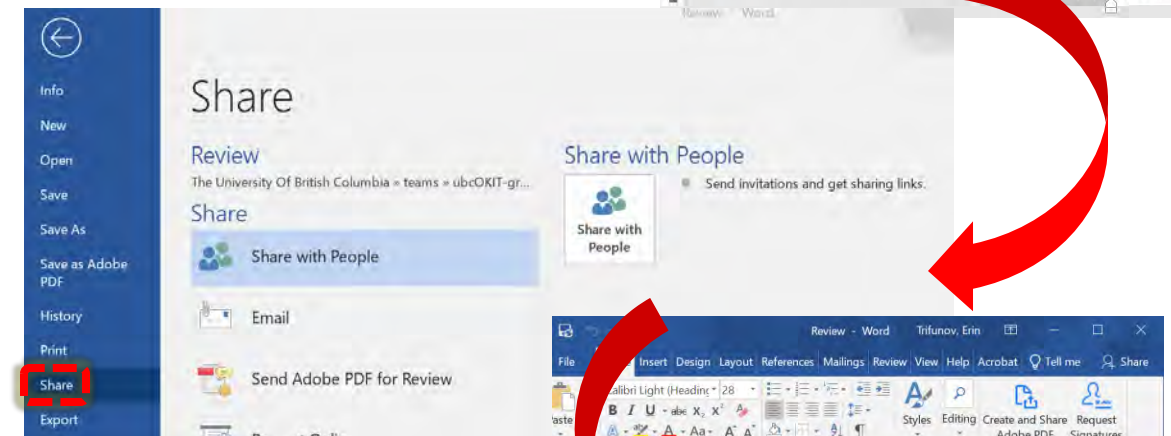
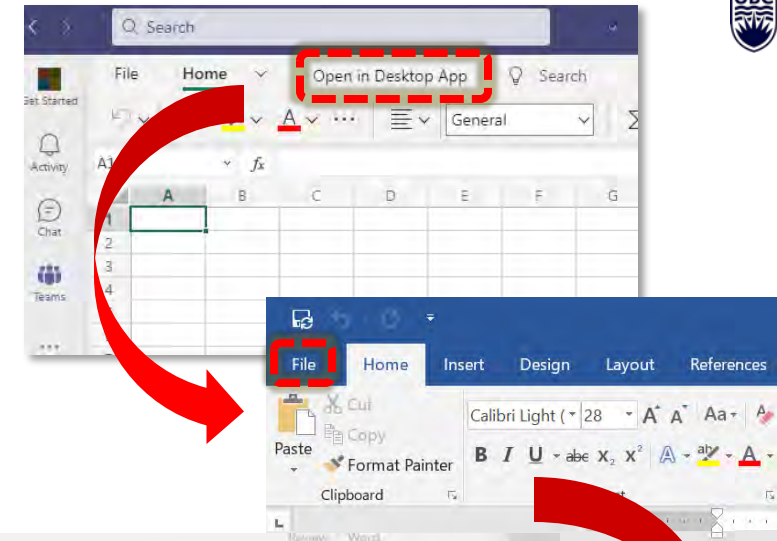
- Open the file, click on “**File**” from the top menu (far left side) then select “**Share**” from the left side menu near the bottom, and then click on “**Share with People**” at the top right.
- The default setting is to share the link with “People with existing access” (i.e. members of the Channel), however you can change this by clicking the down arrow
- You can give access to anyone at UBC or select specific people (using names, group or emails)
- You can also specify what level of access they can have (view only or edit access)

NOTE: To manage the sharing settings in more detail **open the file or folder in Sharepoint** to see more options for managing sharing permissions and file management (moving files too) – see THIS SLIDE for details



SHARING DOCUMENTS– EDITING IN DESKTOP

- To manage sharing permissions for files opened in your **Desktop**:
 - Open the document in your desktop, click on “File” from the top menu (far left side) then select “Share”
 - To share with specific people, click on “Share with People”
 - You can see who already has access and give individuals either edit or view access.
 - You also have the option to send an email with a link to the document (if
- If you want to manage the sharing settings in more details open files or folders in Sharepoint to see more options for managing sharing permissions and file management (moving files too)



USING SHAREPOINT

All Teams created in MS Teams also have a Sharepoint Site created for the Team. This is where all files created within Channels of that Team are saved (files in Chat are stored in the OneDrive of the person who created them).

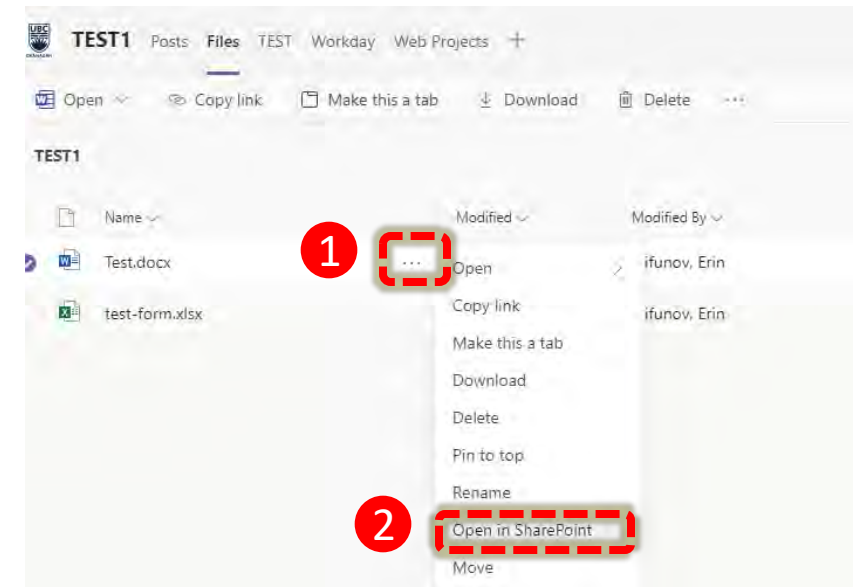
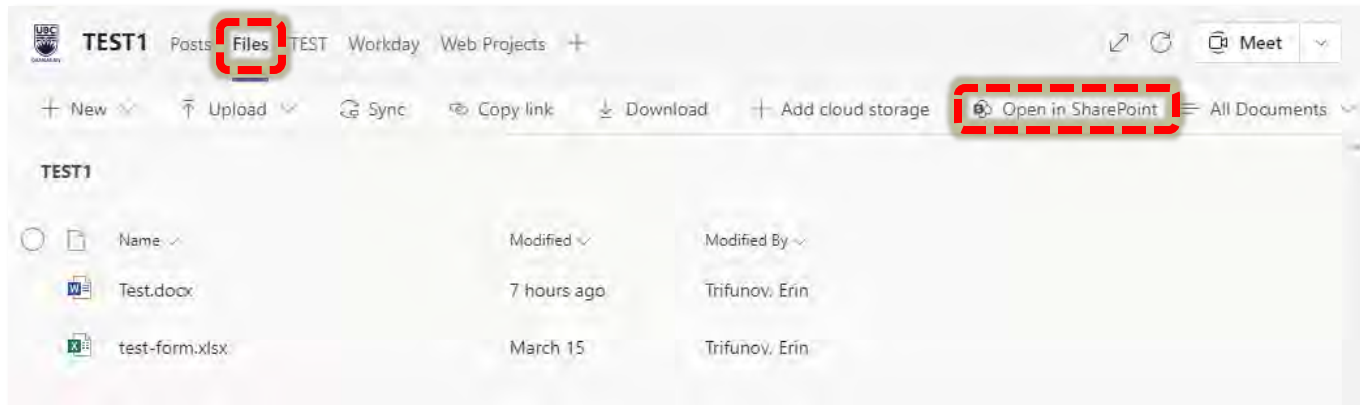
To open Files in Sharepoint, open the **Files** section of a Channel.

- Then you can either:

1) open the entire folder of files for that Channel by clicking on “Open in SharePoint” from the top menu

OR

2) Select an individual file to open in SharePoint by clicking on the three dots to the right of the file name, then click on “Open in SharePoint” from the pop-window that opens.

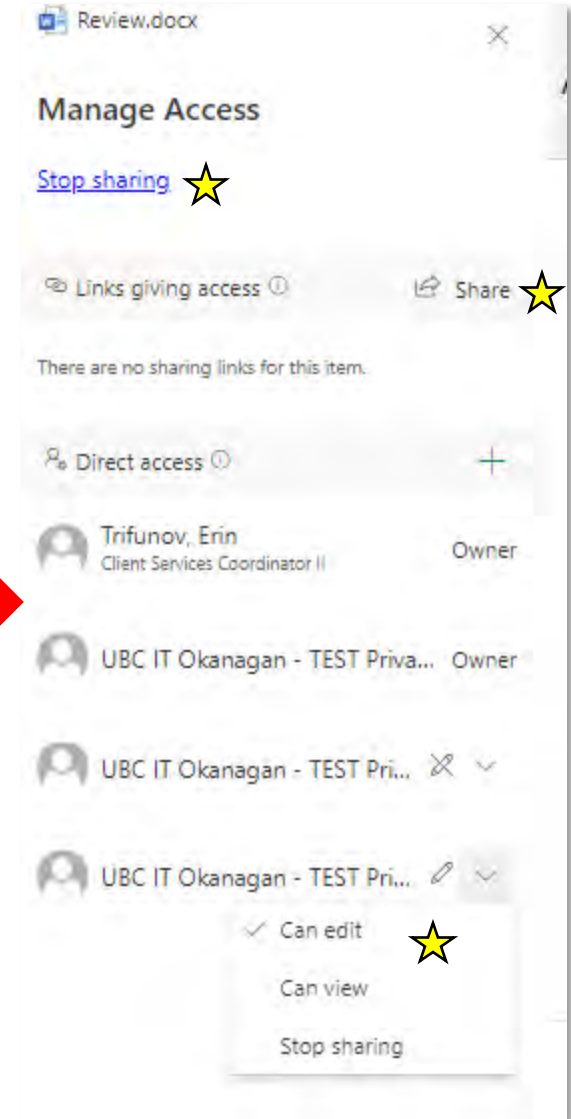
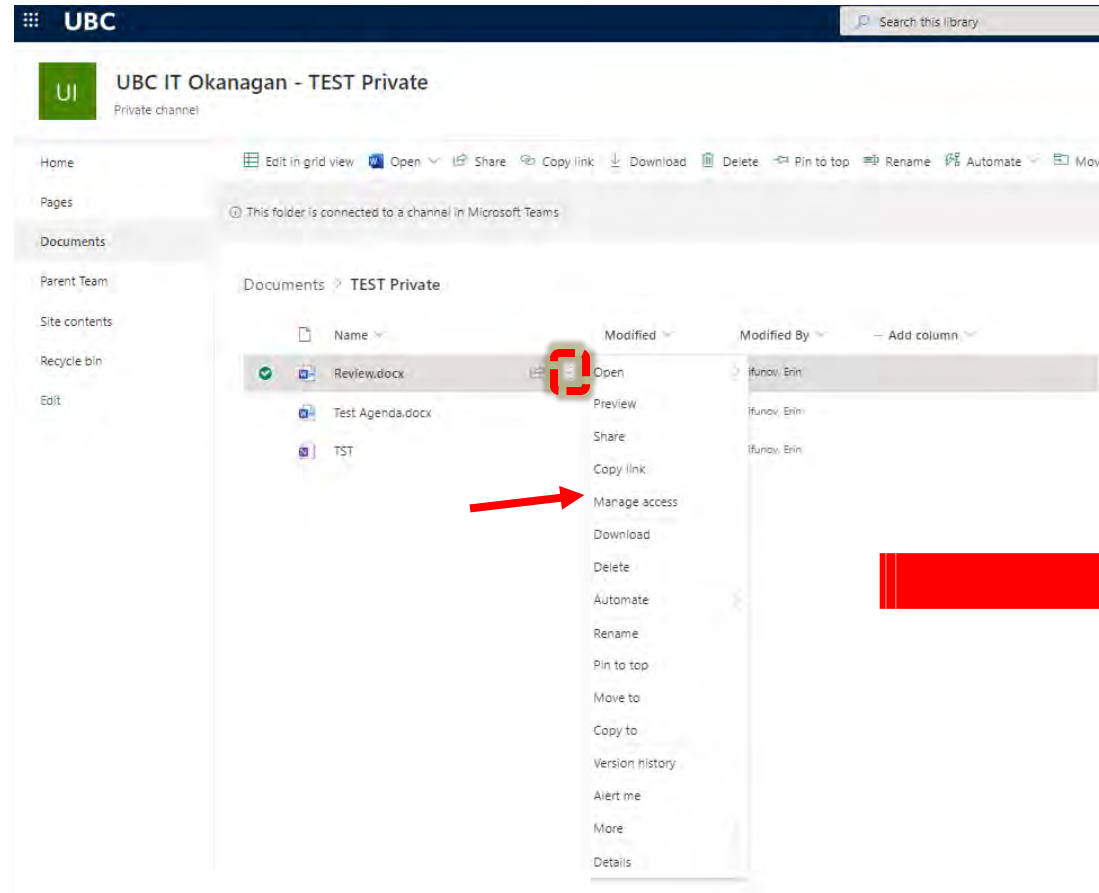


USING SHAREPOINT – CONT'D

From the SharePoint site you have the ability to view and manage more specific details for the files and folders in Teams including:

- Stop sharing with all users
- Copy a link to give access to specific people or anyone at UBC
- Change access by group (can edit, view only, stop sharing)

It is also easier to move files or copy files to other Channels and Teams you are a member of



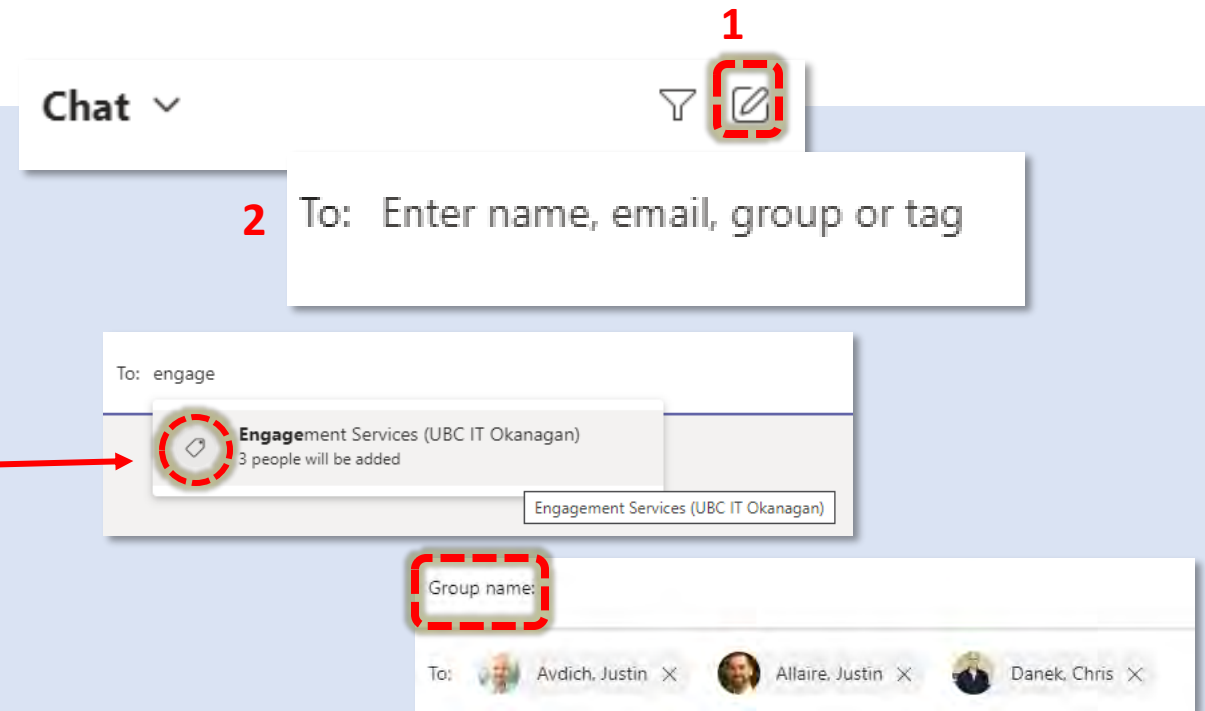
USING CHAT



USING CHAT

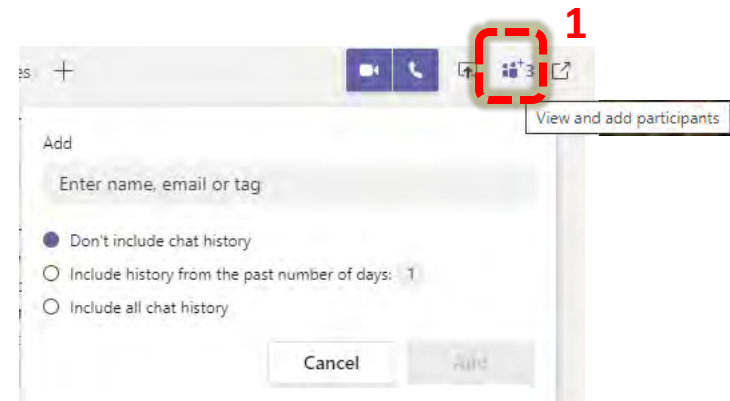
Create a New Chat

- Click on the icon with a pencil over a square to start a new chat (1)
- You can chat with a single person, or multiple people using names, email, group name or tag (2) (see this slide for details on creating [Tags](#))
- If you create a chat with multiple people, you can create a **Group Name** for the chat make it easier to find.



Add People to an Existing Chat

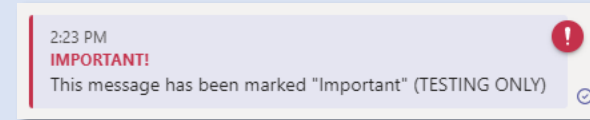
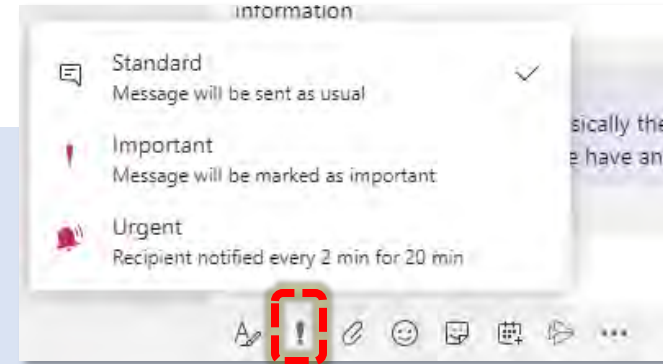
- Click on the people icon on the top right side of the chat window (1).
- Add a person's name, email or tag.
- Select how much chat history the added person will have access to (no previous history, # number of days or ALL chat history)



MORE CHAT FEATURES

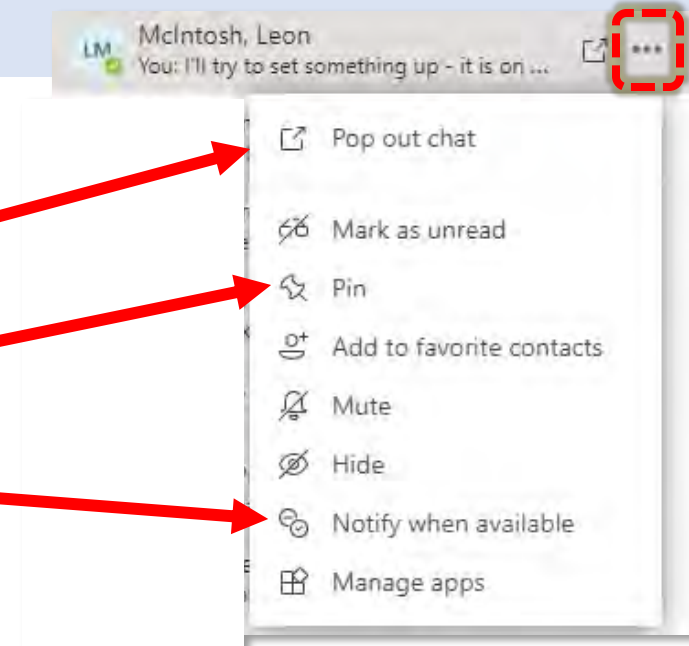
Send Urgent Chat Notifications - Click the **exclamation point** below the message box before you press send to mark a message as important.

- If you select “**Urgent**” the recipient will get notifications every two minutes for the next 20 minutes or until it’s read.
- If you select “**Important**” a red header will be added and an exclamation symbol will be tagged on the message.



Other Chat Options – click the three dots to the right of the person’s name in your Chat list:

- **Pop out chat** – to open the chat in a new pop-out window
- **Pin** – to keep the chat (meeting, individual or groups) at the top of your Chat list
- **Notify when available** – select this to be notified when their status is set to “Available” (green circle)

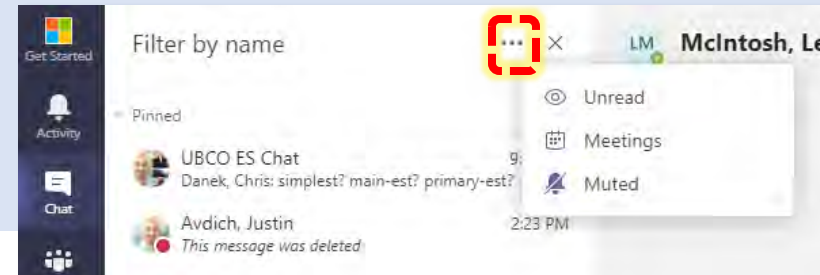
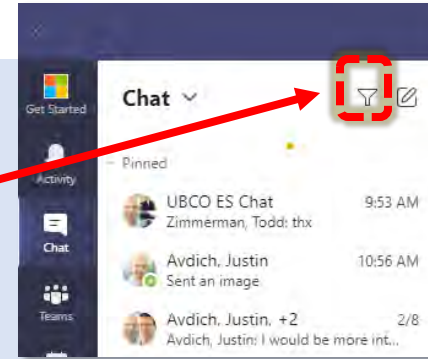


SEARCH & FILTER CHATS

Filter Chats

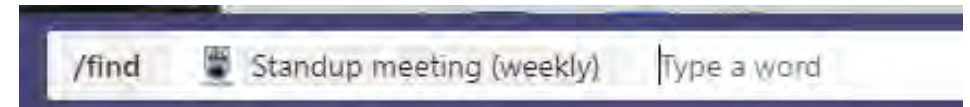
You can use the Filter to search for your chats from a specific person, group or meeting.

- At the top of your Chat list click on the “filter” icon.
- You can then search by
 - Contact or Group name (“Filter by Name”), **OR**
 - Click on the **three dots** at the right side of the search bar to filter by
 - Unread,
 - Meetings or
 - Muted chats



Search in a Chat or Channel Post

- Use Ctrl+F (cmd+F on macOS) to **search** messages **within** a particular chat or **channel in Teams**. While in the desired Channel or Chat, type Ctrl+F followed by your **search** terms, then press Enter. All the **search** results will be displayed from **within** that chat or **channel** conversation.
- You can also type **“/find”** in the search bar at the top of Teams, select a Channel, Person, Group or Meeting and then the search terms.

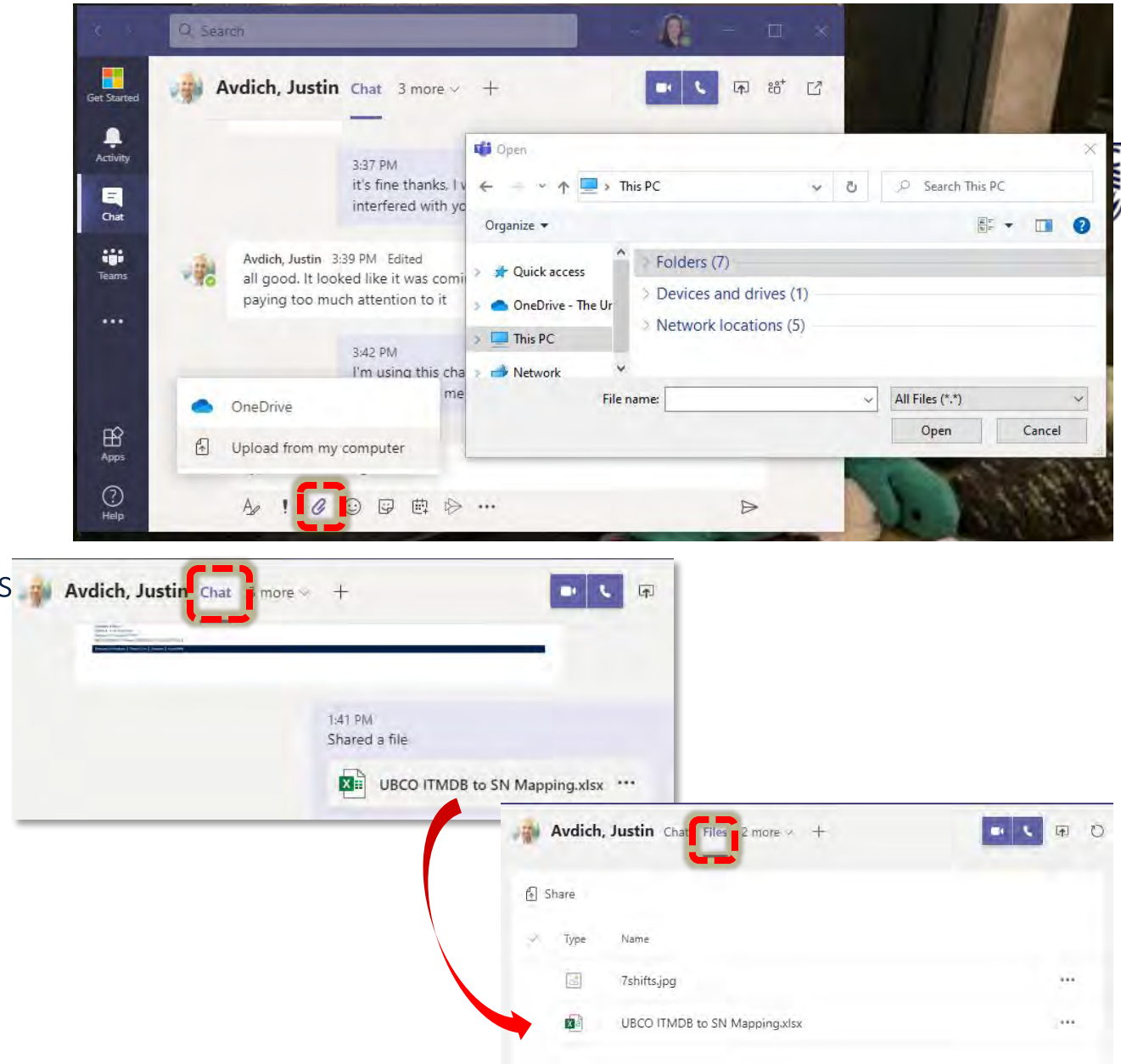


SHARED FILES IN CHAT

Share Files in a Chat

In a chat (individual, group or meeting) you can share files which get kept within the chat history.

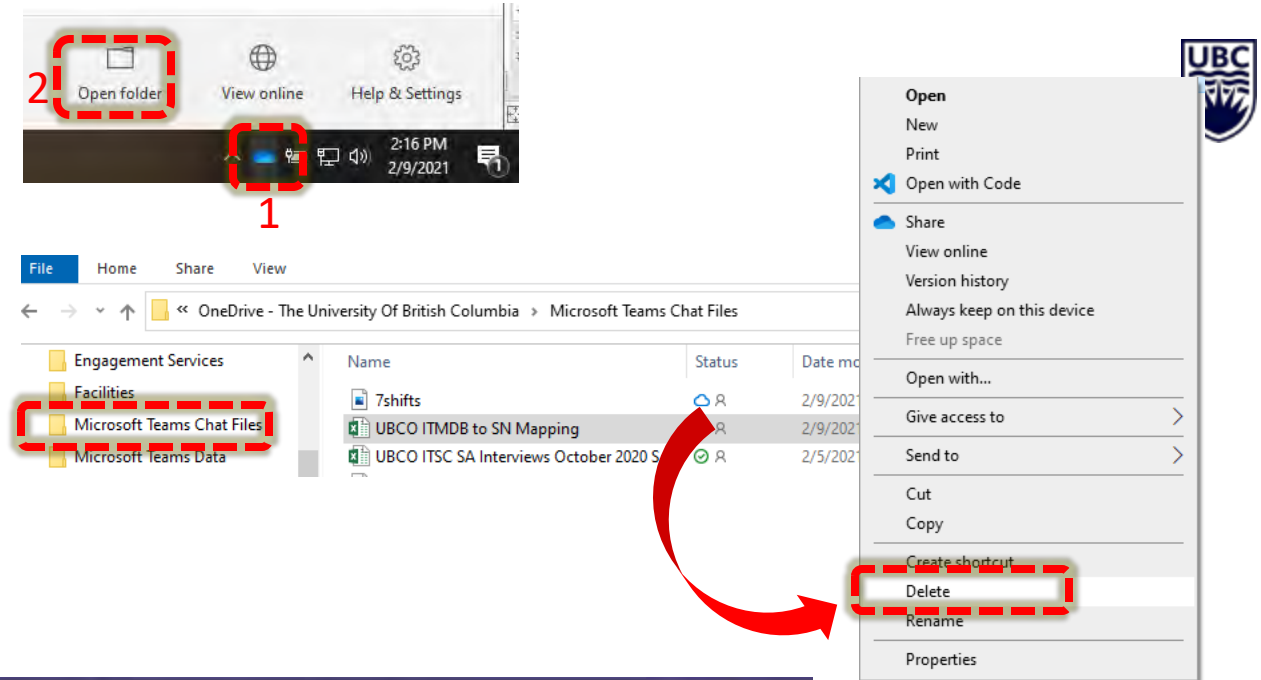
- Click the **paper clip icon** in the message window, to share files from your computer, or OneDrive.
- The file will appear in the **Chat** section, as well as in the **Files** section.
- Files will be saved in the OneDrive of the person who shared the file (in a folder called *Microsoft Teams Chat Files*)



HOW TO DELETE FILES SHARED IN CHAT

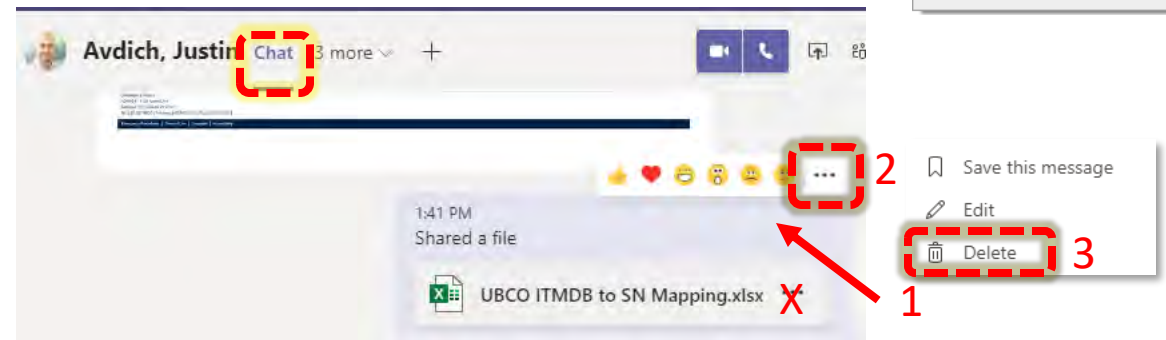
Within OneDrive

1. Open your OneDrive folder (click on the cloud icon (1) at the bottom right side of your screen), then select “Open Folder” (2)
2. Open the “Microsoft Teams Chat Files” Folder
3. Select the file you want to delete, then *right-click* your mouse over the file you wish to remove and select “Delete” from the pop-up window.



Within Chat in Teams

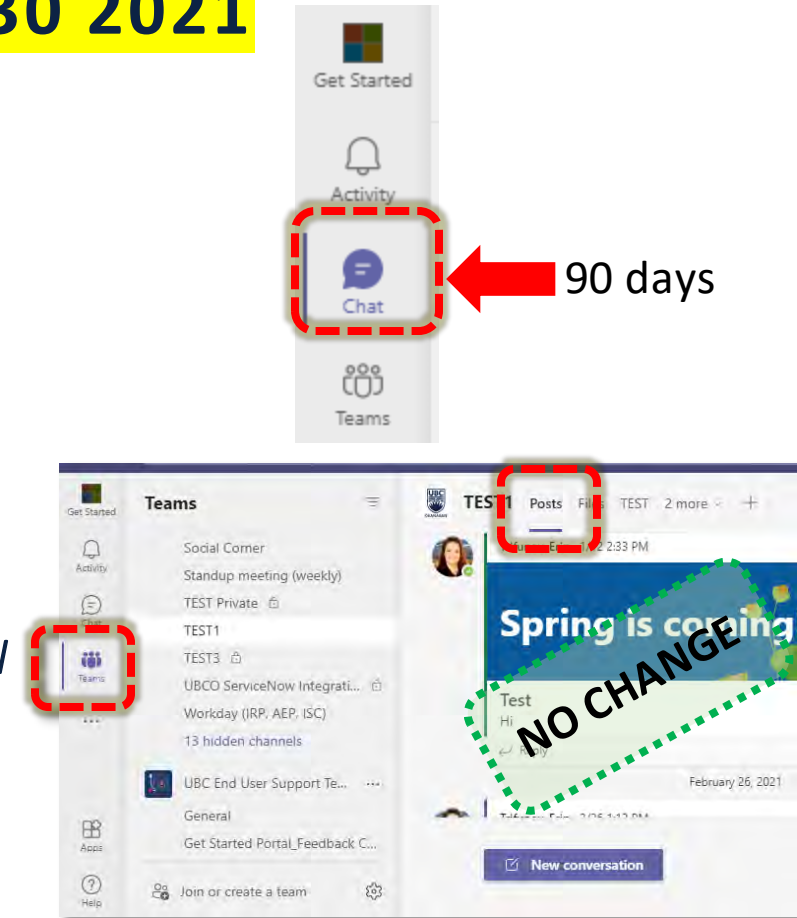
1. Go to the **Chat** section, and find the message where the file was shared.
2. Hover your mouse over the message window (1) until a pop-up window appears with emojis and three dots (2) (NOT the three dots next to the file name) then select “Delete” (3).
3. The message with the previously deleted file will now say “This message has been deleted” with an option to Undo.



This message has been deleted. Undo

CHAT DATA RETENTION – 90 DAYS AS OF APRIL 30 2021

- Chat messages, files and meeting notes will be subject to a data retention period of **90 days** as of April 30, 2021.
- This will only impact conversations held in the **Chat application** of Teams (one-to-one and group chats)
- It **does not** impact conversations within the **Post** section of a **Teams Channel**.
- Data Retention Schedules are required for compliance with UBC Records Management policies (<https://recordsmanagement.ubc.ca/schedules/>).
- MS Teams' Chat is intended to be used as a communications platform for *casual conversations*. It is not meant for exchanging confidential or sensitive data, or for critical/formal decision making.
- Links to the files shared in conversations will also be removed at the 90-day mark; however, the actual files can be found in the MS OneDrive of *the original sender*.



MEETINGS IN TEAMS




MEETINGS IN TEAMS

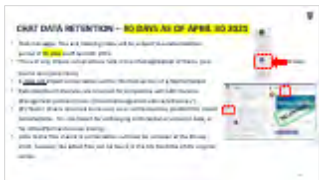
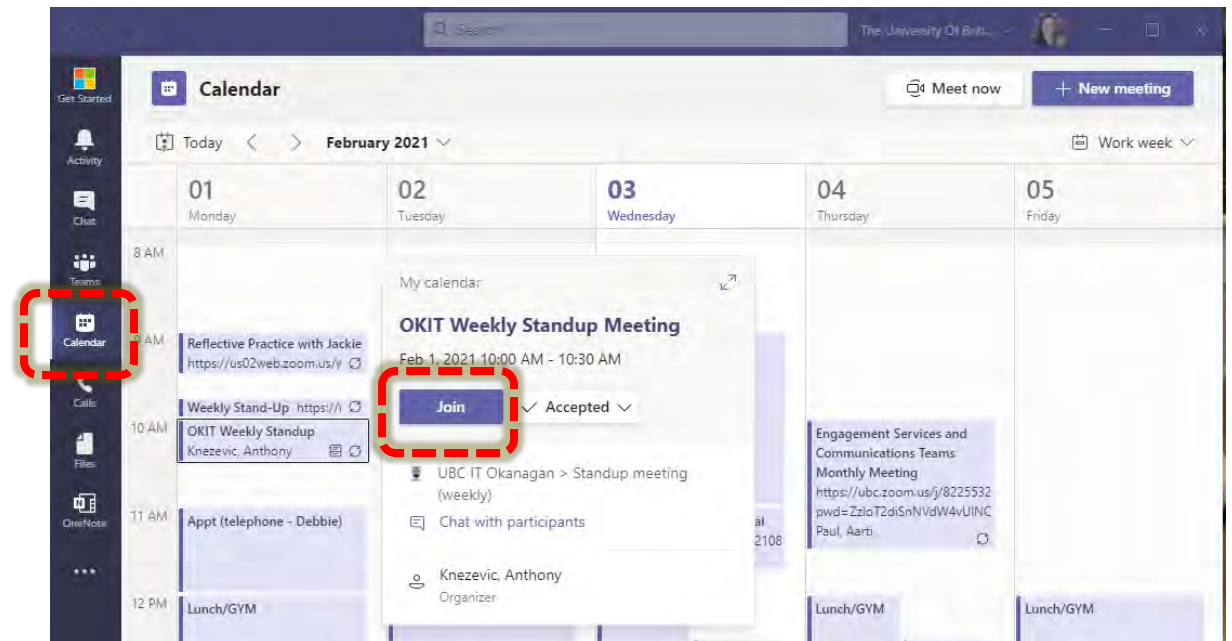
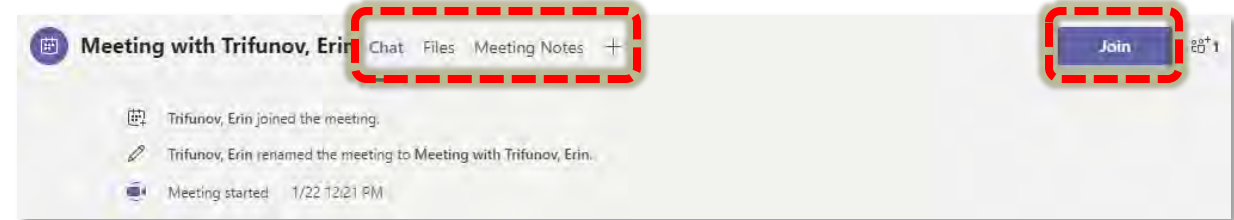
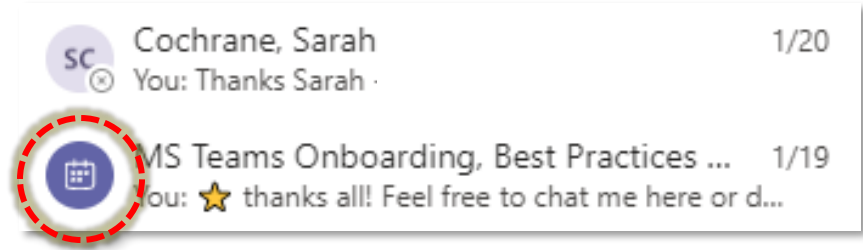
- Once you have switched to [Teams Only Mode](#) you can create meetings using Teams instead of Skype for Business
 - **NOTE: You can use BOTH or EITHER Zoom and Teams** for meetings at UBC. Teams is replacing Skype for Business only.
 - Teams offers almost the same functionality of Zoom except for providing a dial in number for meeting attendees. Teams meetings can only be joined via the Teams app or an internet browser.
- Benefits of using Teams for meetings include:
 - **Chat history** from the meeting is saved (and stored in the Chat section – see [THIS SLIDE](#)).
 - If the **meeting is recurring**, the chat, files and meeting notes will all be saved in one spot for ALL meetings in the series.
 - You can also share files for the meeting in Teams to be easily accessed by all attendees.
 - **Meeting Notes** are also created automatically with each meeting and accessed via the Chat section
 - **Note:** Only people who are on the original meeting invite to a meeting before notes are created will have access to them initially. Others can request access, and the owner of the notes will be notified via email.
 - Click [HERE](#) for more details on taking Notes in Teams Meetings
 - See [THIS SLIDE](#) for details on Chat data retention



MEETINGS CHATS

Meeting Chats

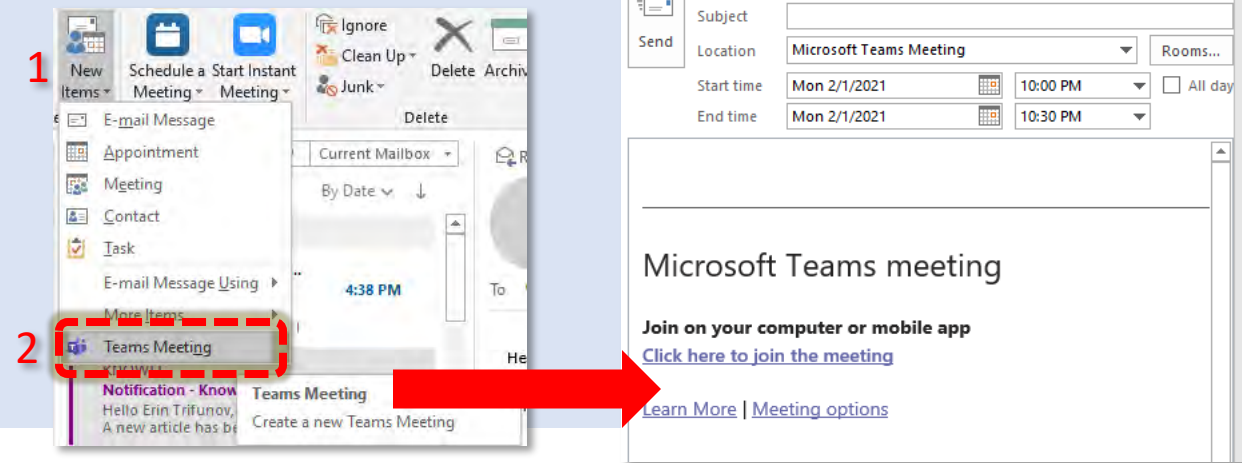
- When you create a meeting in Teams, the Chat history (and Files shared and Meeting Notes) from the meeting is saved in your Chat with a blue icon to show it is a meeting chat 
- You can also join a meeting from this screen, or from the Calendar view of Teams (or from the Teams link in the meeting invite in Outlook)
- If the meeting is recurring, the chat history, files shared within the Meeting in Teams and any Meeting notes will be saved and kept together for all recurring meetings.
- See [THIS SLIDE](#) for details on Chat data retention



HOW TO SCHEDULE A MEETING

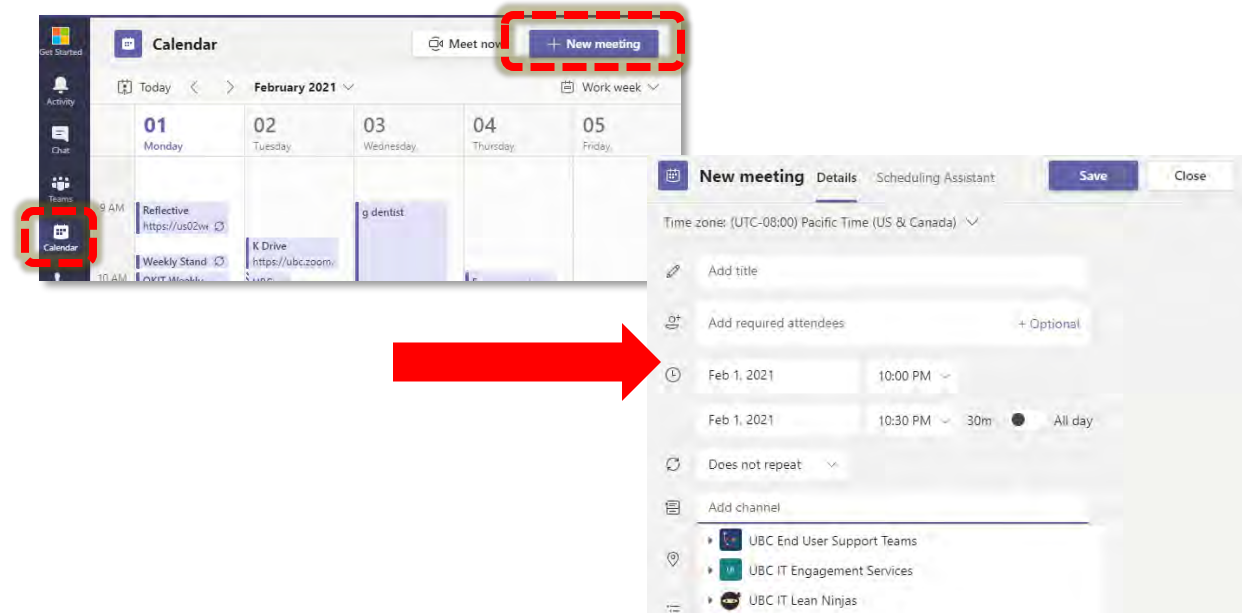
Via Outlook

- From the Home menu, select New Items, then select Teams Meeting
- Then schedule the meeting as you would normally, the Teams Link is added to the invite



Via Calendar in Teams

- The Calendar in Teams is a replica of your FASmail Outlook calendar and will show ALL your meetings, not only Teams. It is synched with FASmail so you can use the same Scheduling Assistant feature to check availability of other UBC members.
- Select the **+New Meeting** button on the top right of the calendar.
- Complete meeting details as usual.
- **NOTE:** The Team connection details do not show when you create the meeting but they will be added to the meeting invite and to the calendar link.



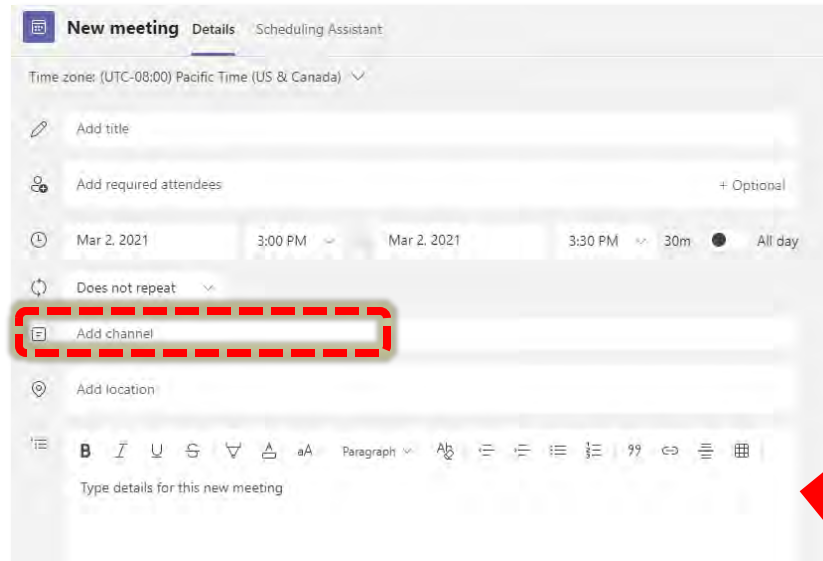
HOW TO SCHEDULE A MEETING – FOR A CHANNEL

Notes:

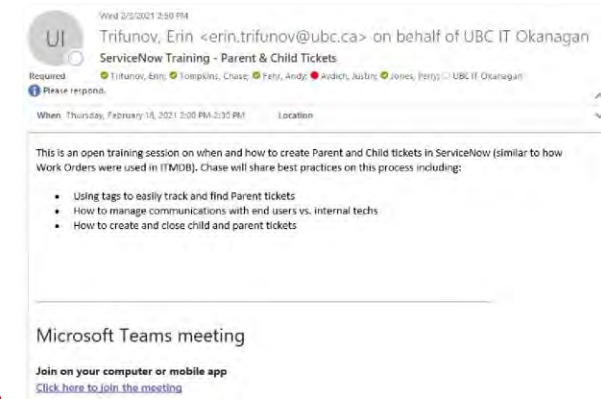
- This is for standard channels only – NOT private channels
- You can create a meeting **for a channel** to send the invite to *everyone* on the Team, linked & posted to a specific Channel.
- You can only select a **single channel** to invite to & post the meeting in.
- This is a good alternative to using a mailing list for a meeting which is open to everyone on the Team or is optional (e.g. training sessions or info sessions).

How to create a Meeting for A Channel

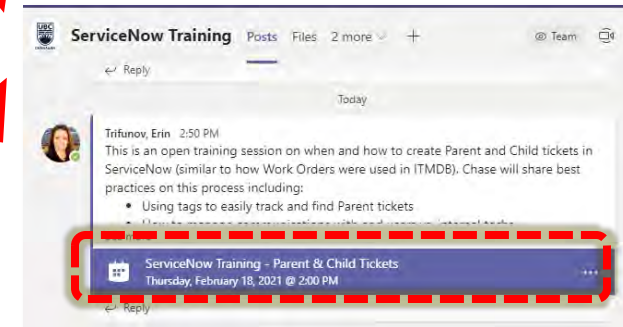
- Create a New Teams meeting in the Teams Calendar (see [THIS SLIDE](#))
- Midway down, there is an option to “Add a channel”
 - **Note:** If the meeting is applicable to only a subset of the Team you should NOT add a Channel but add specific people (in the **Add required attendees** field).
 - You can add both specific people AND a channel to the meeting if certain people are required while the broader group is optional.
- The meeting link will be emailed to all channel members (1) and appear in the **Posts** of the channel (2).



1

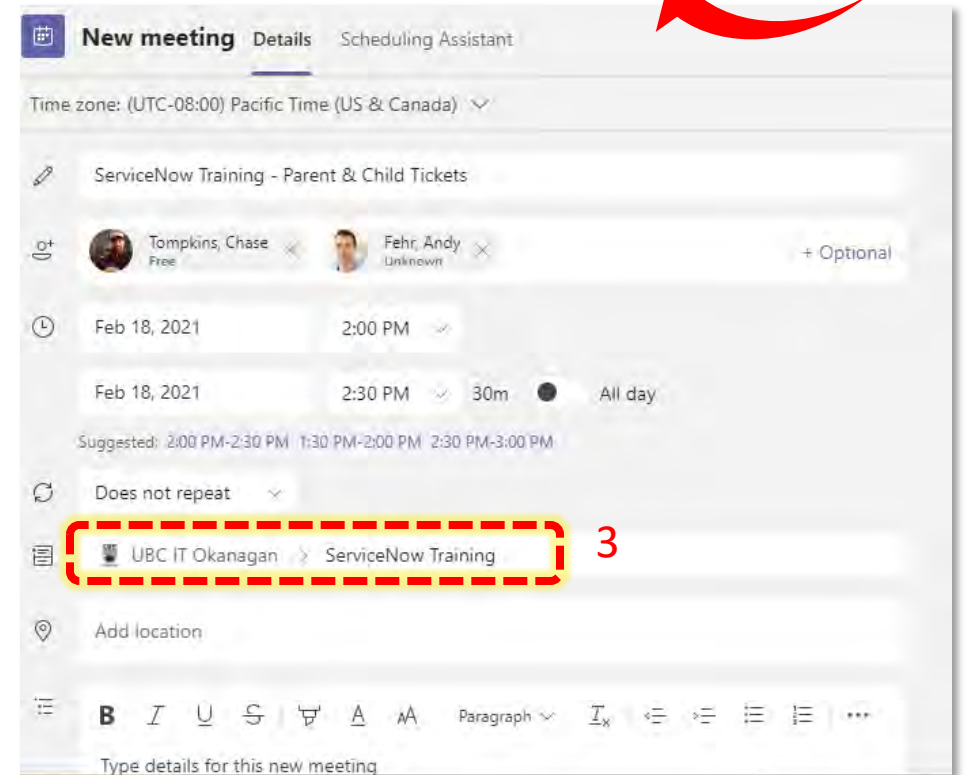
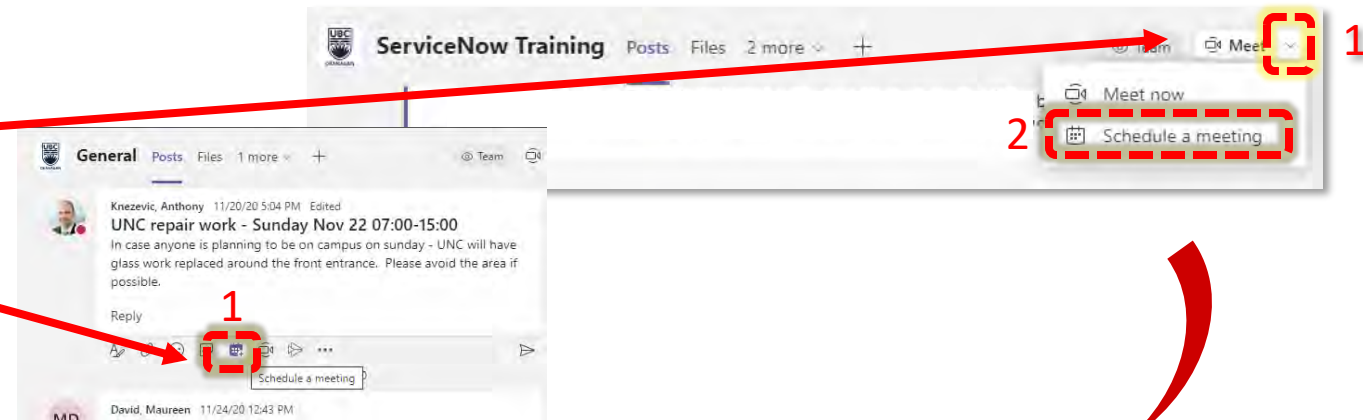


2



HOW TO SCHEDULE A MEETING – WITHIN A CHANNEL*

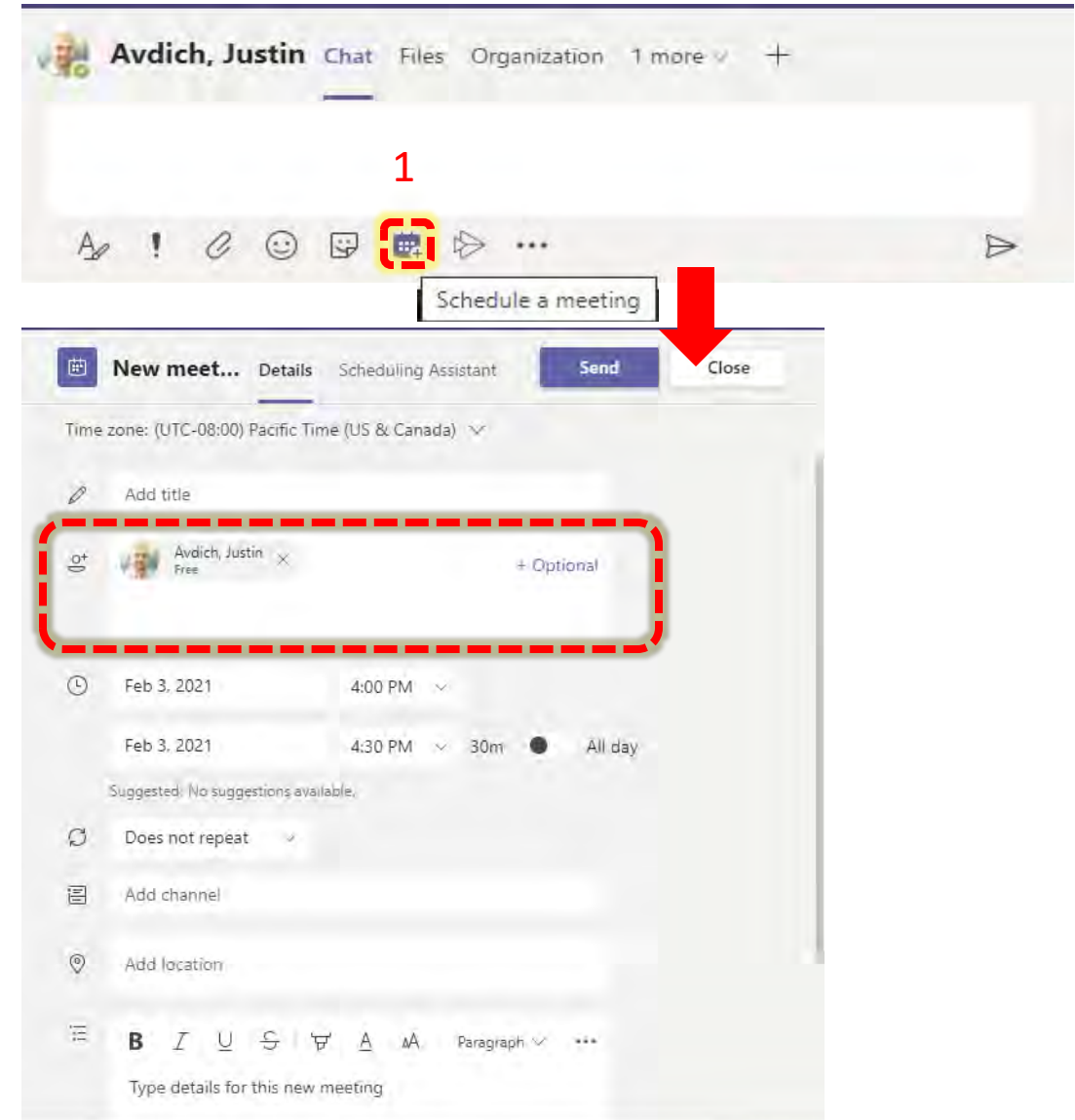
- Go to the channel post section, then EITHER:
 - at the top right of the channel window, click the “v” next to “Meet” (1) then select “Schedule a meeting” (2) (if you click “Meet” it will open a meeting window to *meet now*).
-----OR-----
 - Within a message window, select the calendar icon to **Schedule a Meeting**
- Fill in the meeting details as required.
- The channel is pre-selected in the **Channel field (3)** but it can be removed, or changed if needed.
- Individual attendees can be added (both required and/or optional) but is not required in a Channel is selected.
- Note: Location** is empty but you can add a physical meeting room on campus as well if applicable.
 - Team connection details DO NOT appear in the body of the New Meeting form – however these will be added to the meeting invite sent out to required attendees and channel members.
- The meeting link will be emailed to **all channel members (aka all members of the Team)** and appear in the **Posts** of the channel (see previous slide).



*Note: This is only available for standard channels, NOT private channels.

HOW TO SCHEDULE A MEETING – FROM A CHAT

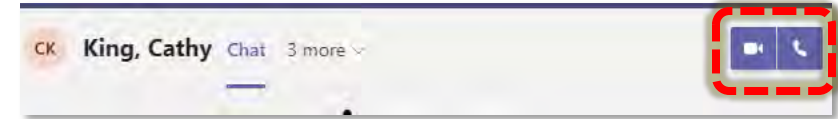
- From a single or group chat, in the **new message bar**, select the calendar icon – Schedule a Meeting (1) to open a New Meeting invite.
 - The person or people in the chat will be automatically added to the **Required Attendees** field (but this can be edited as needed).
- Complete the meeting details as needed (and use the scheduling assistant if needed to find the best time) and then click send.
- The invitee(s) will receive an email with the meeting and Teams connection details.



HOW TO CALL SOMEONE – MEET NOW (VIDEO OR PHONE)

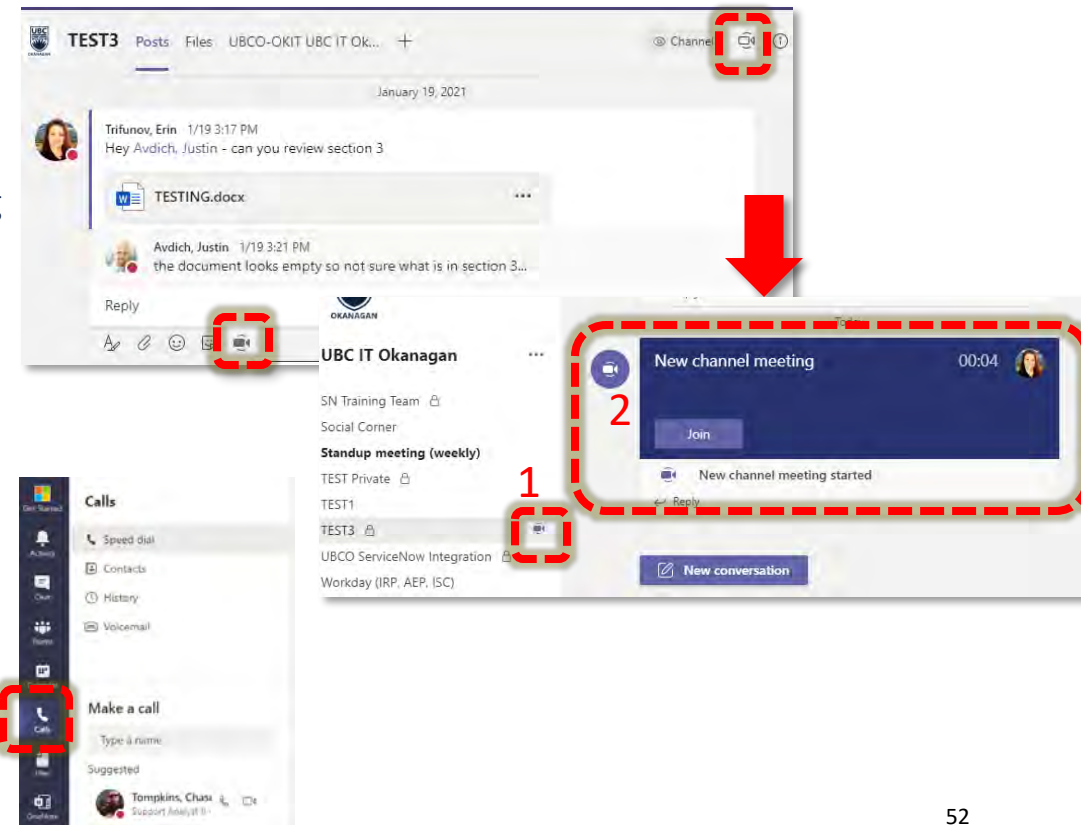
The following methods will start an instant audio or video call to a person or multiple people.

From a Chat (single or group chat) – click the camera or phone icon to start a call with or without camera (you can turn off or on the camera after the meeting has started as well)

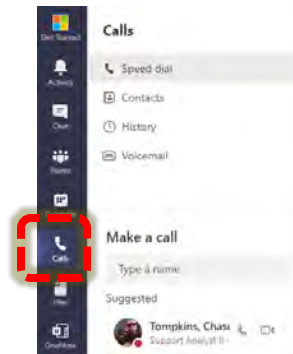


From a Channel Post (Private or General) - click the camera or phone icon at the bottom of the message bar OR at the top right of the Channel window to start a call with or without camera (you can turn off or on the camera after the meeting has started as well)

- A video camera icon will appear next to the channel name (1) and in the Channel Posts (2) so anyone who is a member of the channel can click on the icon to join the meeting as well.



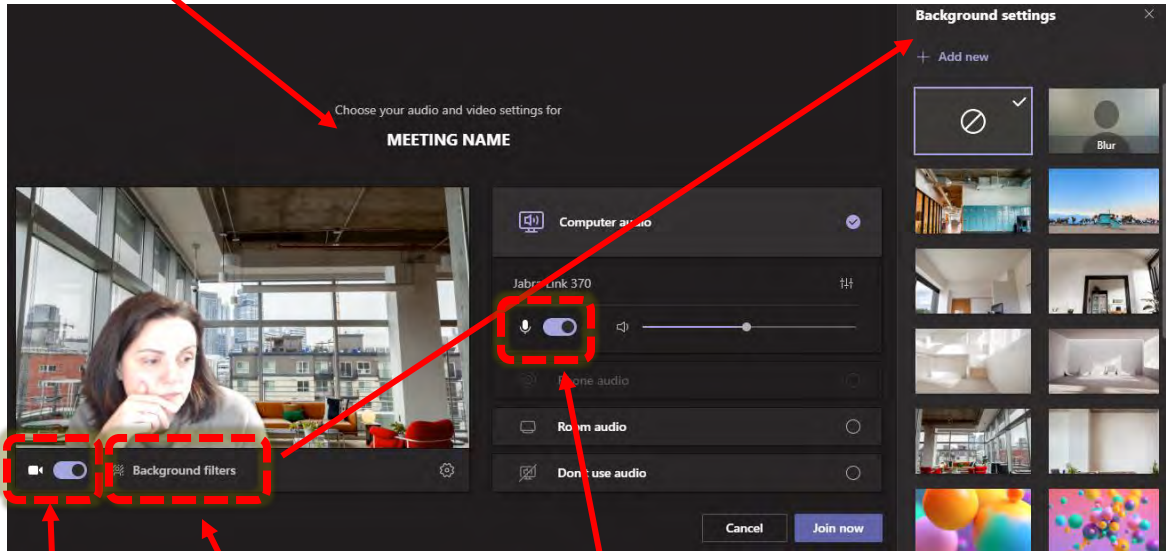
From the Calls application- click on the phone icon on the left vertical menu bar to open the **Calls** application. Call someone from your contacts or search for someone within UBC.



MEETING SETTINGS

When you start a meeting, you can select the following:

Change the meeting name



Camera on / off

Choose background filter

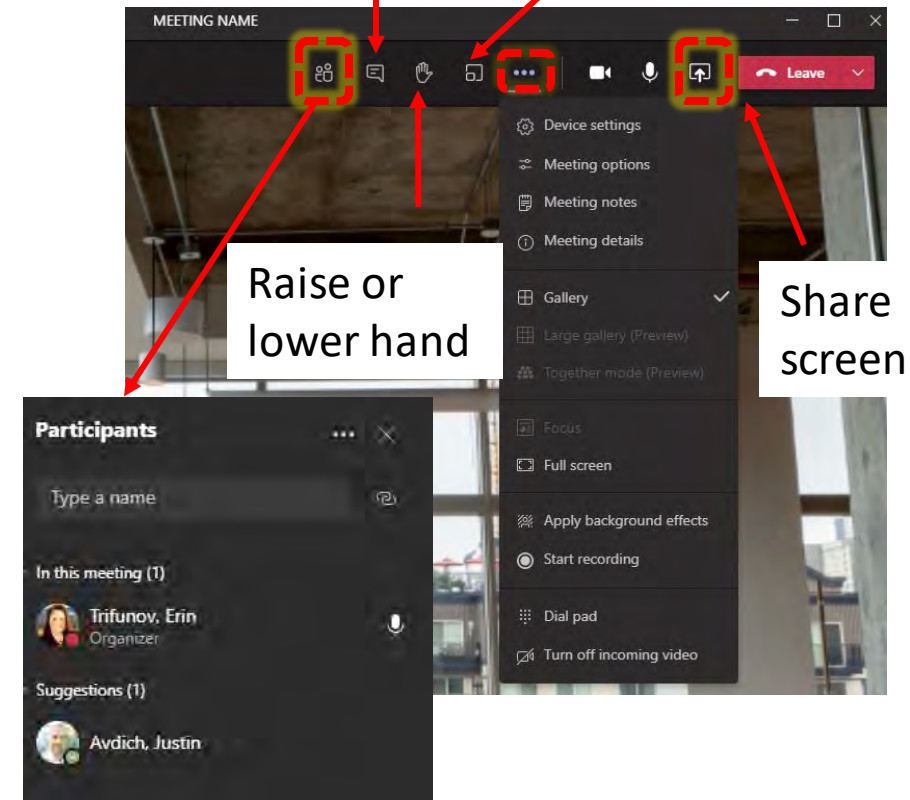
Mute or adjust mic

Once in a video or voice call, you can:

Invite other participants

Open a chat

Create breakout rooms



Raise or lower hand

Share screen

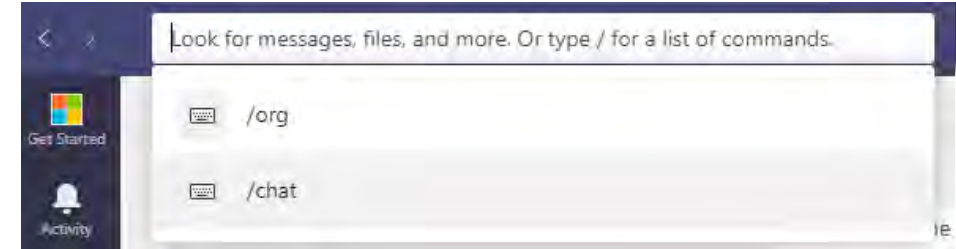
ADVANCED TIPS



ADVANCED TIPS – USING *SEARCH BAR*

/Commands

- Use /commands to move through Teams faster. If you type in “/” into the search box, all shortcuts & commands will show up!
- Click to learn more about commands [here](#).



Using the /goto command to quickly jump to a different Team or Channel

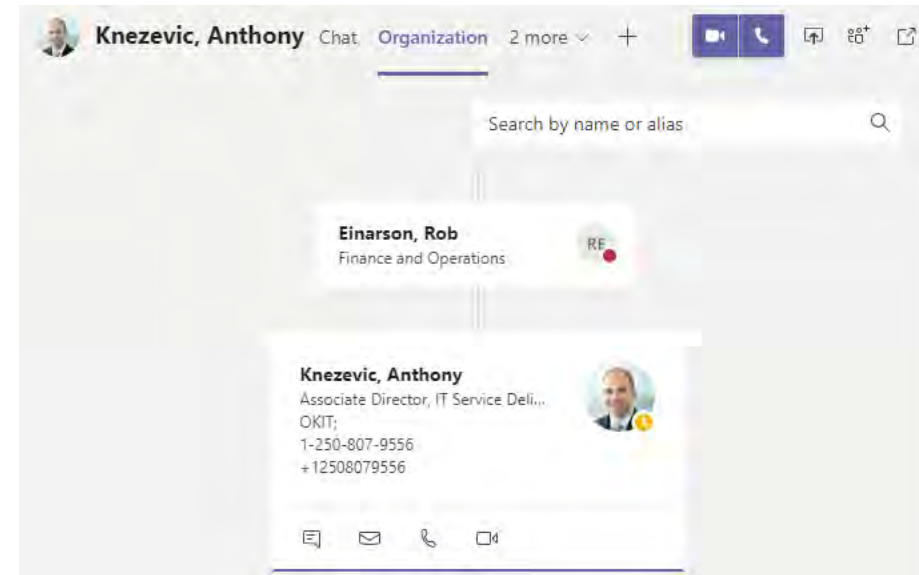
- In the search bar, type “/goto”, then type the team and channel you’d like to go to.!

@mentioning

- You can @mention someone in the search bar and then type your message directly in the search bar
- This sends a quick chat message without leaving your current window or project.

Org Charts

- See the organizational hierarchy, department members, manager, and how they fit into the organization. Type **/org** into the search bar and select the person you want to view
- You can also open a chat with anyone at UBC and click on “Organization” next to their name.



Keyboard shortcuts – click this link for a guide to using Keyboard short cuts with Teams.

USING TEAMS ON THE WEB & MOBILE DEVICES

On the Web

- Access Teams via a website browser by going to the MS Teams web app at <https://teams.microsoft.com>.
- Supported browsers are: Internet Explorer 11, Microsoft Edge, latest version of Chrome and latest version of Firefox.

Mobile Phones

- For iPhone iOS 10.0 and later users, go to App store and search for Microsoft Teams and download the app, or click here for direct link: <https://apps.apple.com/app/id1113153706>
- For Android 4.4 version and later users, go to Play store and search for Microsoft Teams and download the app, or click here for direct link: <https://play.google.com/store/apps/details?id=com.microsoft.teams>

How to Login

- Login with your firstname.lastname@ubc.ca (Faculty/staff) or cwl@student.ubc.ca (Student)
- Enter your CWL password
- You should now be logged into Microsoft Teams and ready to connect with your colleagues.



GUEST ACCESS TO TEAMS

Sometimes you'll want to collaborate with people who aren't part of UBC or might not be eligible for a FASmail account.

Adding a Guest to Teams

If the contractor or guest user does not have a `firstname.lastname@ubc.ca` or `cw/@student.ubc.ca` email address they should first associate their email address with a Microsoft account for the best experience. They can register for a free account here (using their own email): <https://account.microsoft.com/account>

Then follow these instructions to add them as a guest to your team.

Guest experience in Teams:

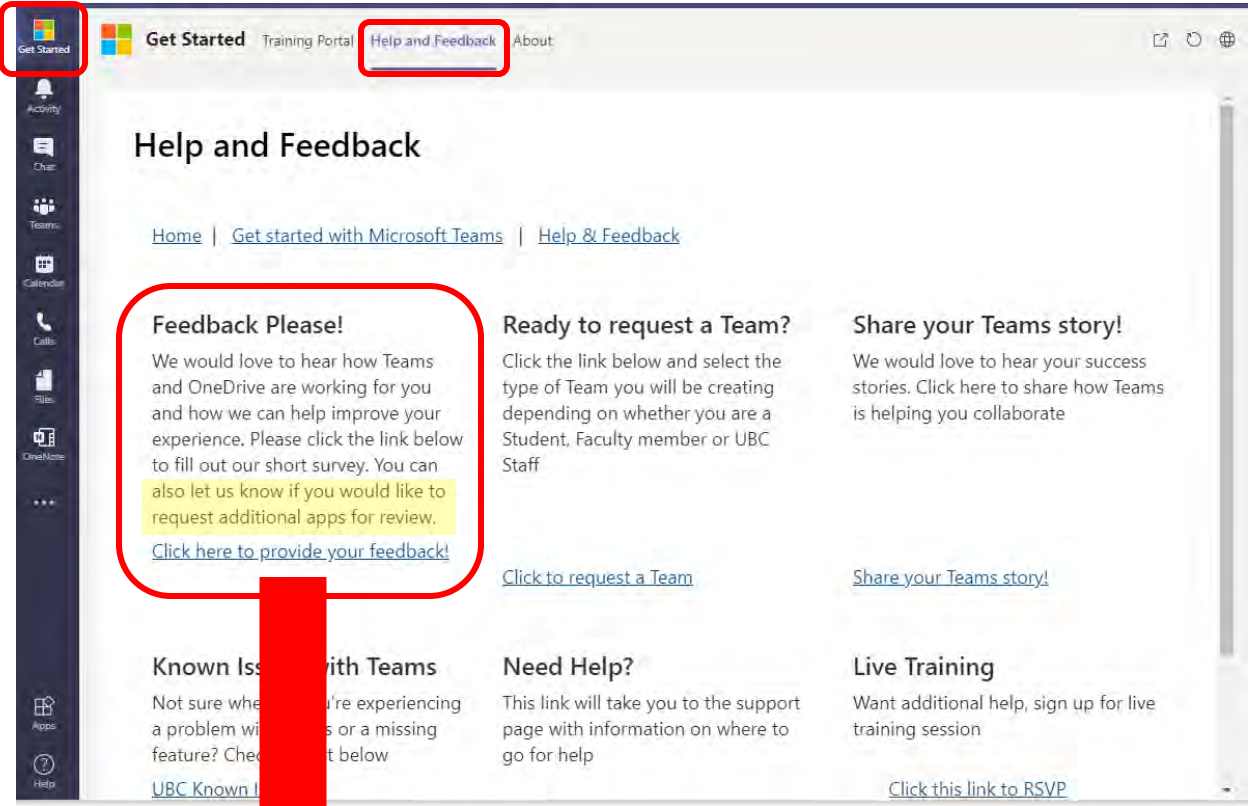
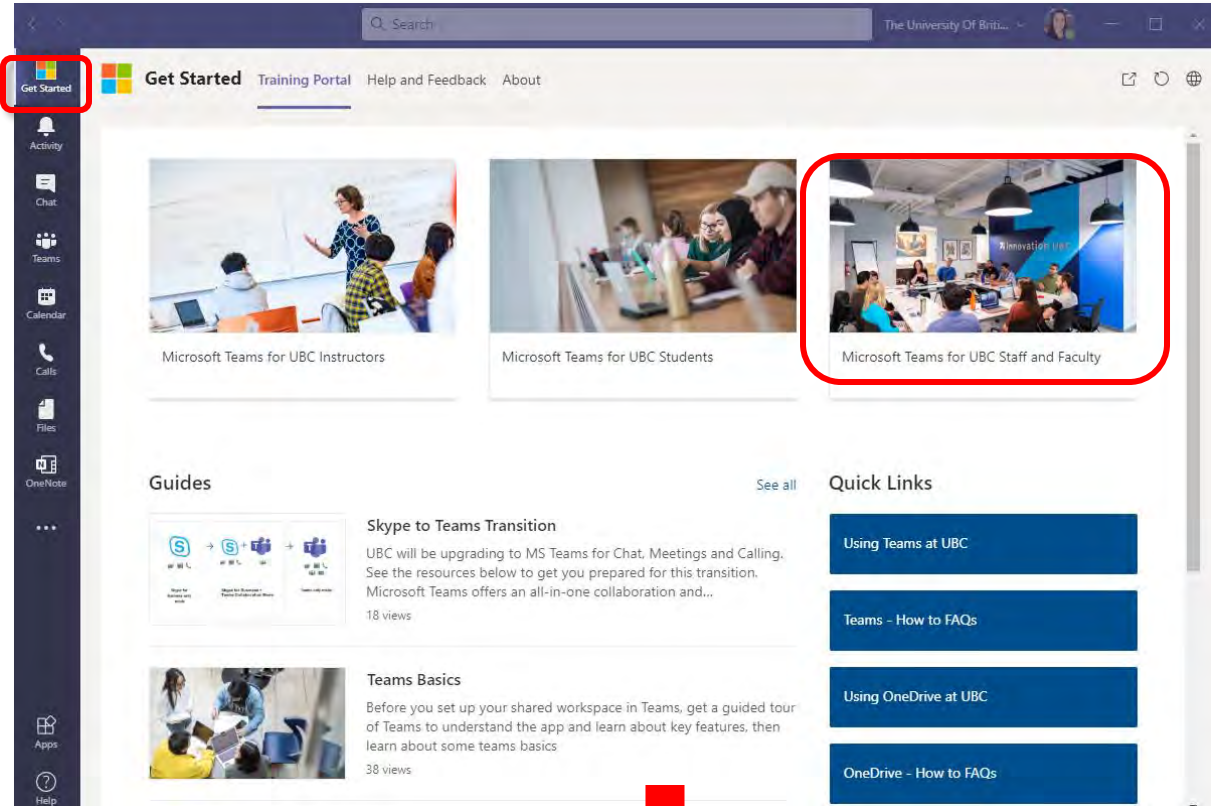
The guest experience and permissions in MS Teams are restricted for licensing and security reasons. [Learn more about the differences here.](#)

Check out these videos about the guest experience in Teams:

- [Join a team as a guest](#)
- [Join a Teams meeting with guests](#)



MORE HELP -> GET STARTED



[Teams Quick Start Guide](#)
[Teams FAQ](#)
[UBC Collaboration Tools comparison](#)

Provide your feedback on Teams AND submit requests for new applications to integrate with Teams / MS365 by filling out [THIS FORM](#) (skip to the end of the form to only submit requests for new apps).

UBC FILE STORAGE OPTIONS & USE CASES



- **MS Teams** – files created for and by groups of people working together (e.g. department, project, working group)
 - General data shared across units at UBC for collaboration purposes – cloud based application
 - Ownership is within the Team where the files are created (stored in Sharepoint)
- **OneDrive** – personal storage (similar to Dropbox) which can also be shared with others; will replace Workspace
 - General data accessible by you and others that you provide read or write access to, including non-UBC users – cloud based application
 - Ownership of files created defaults to OneDrive account holder so if the person leaves UBC unless ownership is changed others will lose access to files
- **K drive / Teamshare** - general and sensitive data accessible by you and your UBC colleagues – requires a VPN connection
- **Home Drive** - file repository for individual files only meant to be accessible by you – requires a VPN connection to access

What is One Drive?

We are now using OneDrive for Business, so you can share and collaborate on all your files from anywhere.

With OneDrive, you can:

- Access and edit your files from all your devices
 - Share inside or outside your organization
 - Work together in real-time on Office documents¹
 - Quickly find the files that matter to you
 - Keep your files protected and backed up
-
- [OneDrive FAQ](#)

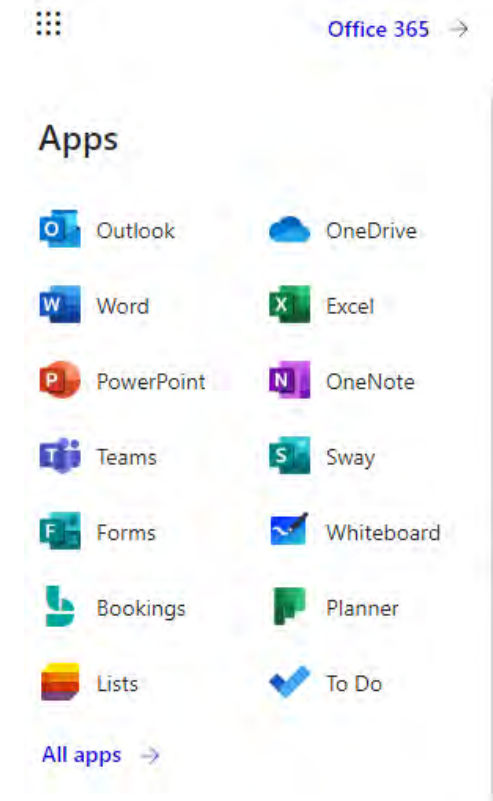


WANT MORE? LOGIN TO PORTAL.OFFICE.COM

- Login to <http://portal.office.com/> to open your UBC Office 365 account in a browser to access all O365 applications, including:
 - Word, Excel, Powerpoint
 - Teams
 - OneDrive
 - OneNote
 - Sway
 - Forms
 - Whiteboard

Note: not all applications are fully available to UBC currently

O365 Support – [Office Applications Help & Training](#)





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