MS Teams Helpful Tips
VPFO Communications & Engagement

Understanding how to best use MS Teams

Chats vs. Channels

|	**Chats and Group Chats**	**Channels**
Purpose	Designed for communication	Designed as work spaces and for collaboration
Use cases	Best for short-term topics and informal conversations.	Best for longer-term projects and when there is a need to keep records.
Examples	• Casual updates and notifications • Sharing short-term files • Quick questions • Short discussions. Does not replace all emails, but can help reduce the number of emails sent out.	• Formal updates and notifications that need to be logged • Complicated projects that require collaboration • Administration platform / project communications • Processes such as website update requests and logs There's an opportunity to trigger automated workflows using Power Apps to help streamline processes and communication
Data retention	3 months When adding new members, you can choose to have chat history shared, but they won't be able to access files that were shared prior to being added as files shared in Chat are connected to personal OneDrive's. You can also choose not to share chat history.	Forever, until deleted New members will have access to all the information and conversations in the channel including posts and files. Files are saved onto the channel's SharePoint library.
Permissions & controls	Anyone can add or remove anyone from a group chat.	Only Owners can create/delete channels or add people to a channel. Settings can also be set where only Owners can post messages and members can only reply.

Overview

Logging into Teams

1. You can log in to the online browser version at teams.microsoft.com.
2. Sign in using your firstname.lastnam@ubc.ca email and enter your CWL password.
3. You can continue to use the browser version or you can download the app to your laptop (you will be prompted if you want to download the app).

Starting a chat or group chat

1. Start a new chat by clicking on the Chats icon on the left panel.
2. Then click on the New chat icon: at the top of the chat list.
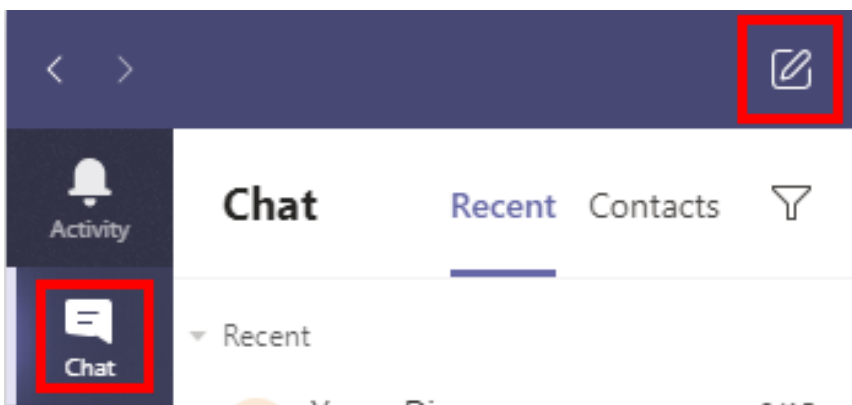
3. Enter the person(s) name you want to chat with, compose your message in the box at the bottom of the chat. To open your formatting options, select Format beneath the box where you type your message.
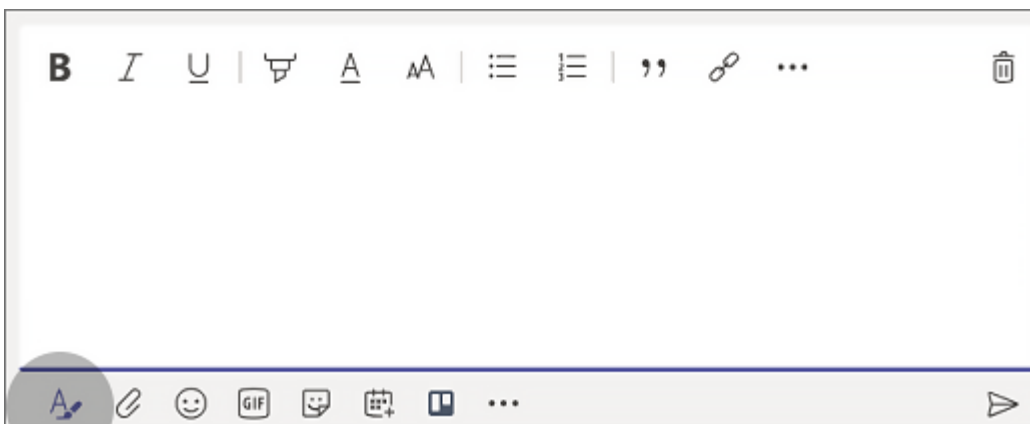
4. When you're ready, select Send ▷ . This starts the chat.
5. You can also Edit or Delete your message by hovering over your message and clicking on the 3 dots ⋯ .
6. You can also Reply to a specific message by clicking on the 3 dots ⋯ and then clicking Reply ↵ Reply .

Messages sent through Chat are stored for 90 days as per UBC's data retention policy. Files are uploaded and shared through Chat via OneDrive. You can view the shared file outside of Chat after 90 days by going to OneDrive > Shared > Shared with you. Shared files don't disappear, but they're harder to find as the file is associated with a personal OneDrive account.

Helpful Tips

Changing your default to 'Open in Browser'

By default, files that are opened in Teams, opens within in the Teams window which can be distracting if you are trying to multitask.

1. Hover over any file and click on the three dots.
2. Hover over Open and then click Change Default.
3. Set the default to Open in Browser. This will make any file (except PDFs) shared on Teams open in the web browser so you can better collaborate without losing your spot.
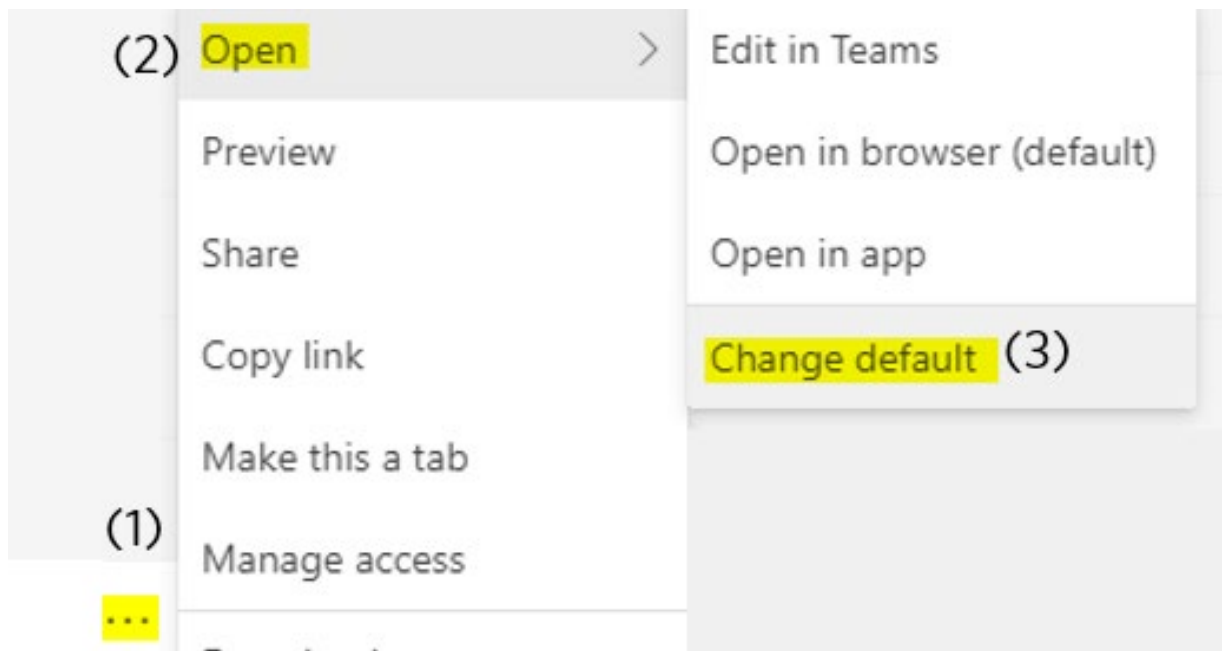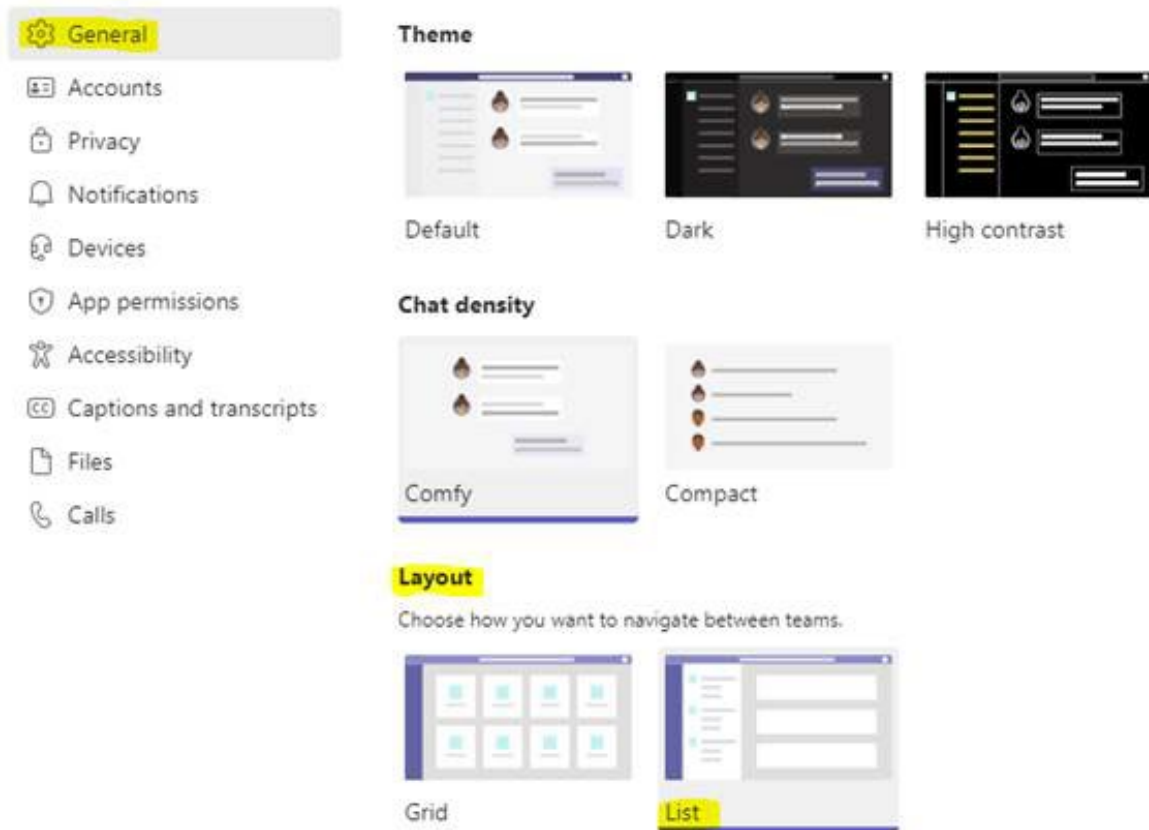

Changing channel layout to 'List'

By default, your layout is set to Tiles, which isn't the best way to see the teams that you're in.

1. Head to your Settings (the three dots next to your profile picture).
2. Go to General
3. Under the Layout section, select List. This layout will make it easier to see all the teams you're a part of.

Adjusting notifications

You may be missing messages or find that Teams is too noisy. Look into your notification settings and adjust alerts to your preference.

1. In the upper right corner next to your photo, click the 3 dots ⋯ and go to Settings ⚙ Settings .
2. Select Notifications.
3. Change the settings to what you want.
4. To modify your notification style, select Appearance and sound > Notification style:
   a. Teams built-in: Receive your Teams notifications in-app.
   b. Windows: View only your desktop notifications.
5. Under Teams and channels, choose which desktop and activity notifications you'd like:
   a. All activity: Adjust new messages, reactions, and all mentions.
   b. Mentions & replies: Adjust personal mentions and replies to your messages.
   c. Custom: Choose what you get notified for and how.
      i. Modify your customized settings
         1. Under Custom, you can customize notifications for:
            a. All teams and channels: Change notifications for all teams and channels that you have access to.

b. Shown and pinned channels: Change notifications for only a team or channel that shows up in your teams list or anything you've pinned.

ii. Under Settings > Chat > Edit, you can customize your personal @mentions, notifications, and other messaging features in Teams.

6. You can also mute a chat completely by hovering over the chat name on the left and clicking on the 3 dots ⋯ that appear and select Mute 🔕 Mute .

For more information about MS Teams, please visit it.ubc.ca/services/email-voice-internet/microsoft-teams/microsoft-teams-faqs.

Best Practices

Channels

- **Use the @mention feature:** To ensure the right people are notified, use the @mention feature if they are affiliated with the topic. You can also @mention the entire channel if it's relevant to everyone in the channel, but try to use this sparingly. To @mention someone, just type in '@' and continue typing the member's name or the name of the channel. If you don't use the @mention feature then it could be likely that your message doesn't reach the intended audience.

- **Keep topics focused.** Unlike Chats, channels are a more formal and topic-based. Try replying to threads (↵ Reply) instead of starting new conversations to keep threads focused. You can use the edit feature if you forgot to attach a file or find a spelling error.

- **Format your post.** To make your message stand out, select the format (✎) icon and style your text. Use the subject line to really zone in on your topic.

- **Set up a folder structure in Files.** If you're working on multiple projects at the same time, set up a folder in Files. Upload files to the appropriate folder and then link to the file when you start a new conversation.

- **React or like posts.** By reacting or liking posts, you're telling the poster that you've seen the message. This helps confirms that everyone who needs to see the message, did actually see the message.