

# MS Teams: Collaboration options

This guide describes some of the ways you might use Microsoft **Teams** for collaboration.

Teams is available to all registered University of Aberdeen staff and students. You can also invite external colleagues to Teams meetings and add them to your Team as a guest.



Please remember that information or files you post on a Teams site may be available to other team members. Teams is for communication related to your job role and should not be used for personal chat not related to your work. Information you record on Teams could be disclosed in response to a freedom of information request or to someone you refer to in Teams chat. Consider the appropriateness of what you record; only record what is relevant and necessary; and do not share anything that impacts on the privacy of individuals. If you are unclear about how and where to appropriately record information, please contact the Information Governance Team at [dpa@abdn.ac.uk](mailto:dpa@abdn.ac.uk).



Teams is *not* a substitute for MyAberdeen (including Blackboard Collaborate), MyMBChB or MyBDS. These VLEs remain the University platforms for resources, materials, and communication within programmes and courses for Teaching and Learning.

## Teams collaboration options

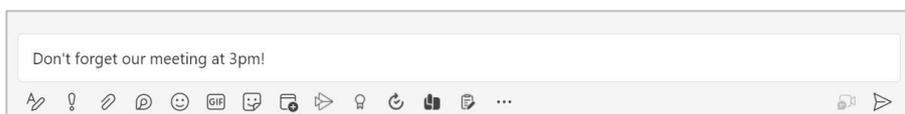
### Ad Hoc Chat – with individuals and groups

To talk privately – either one on one, or group chats with University staff colleagues and students, and guests – you can use the **Chat** facility in Teams.

#### Contact an individual

1. Go to **Chat**, in the app bar on the left of the screen. 
2. Click the **New chat** icon at top of screen. 
3. Type the **surname** of the person you want to chat to in the **To:** box.

4. **Choose** the individual you want to chat to from pop-up list of results – students can be distinguished from staff by the (**PGR**, **PGT**, **UG**) suffix, and the fact that their name appears in caps, eg BLOGGS, JO (PGT).
5. **Type** your message in the chat window at the bottom of the screen.



6. Press **Enter** or click the **arrow** to post.

After you have chatted with someone, their name will appear under **Recent**. To chat with that individual again, simply select them from your chat history and pick up where you left off.



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## Add more individuals to an existing chat

To add others to the *same* chat:



1. Click **Add People** (top right of screen).
2. Start typing the **surname** of the first person you want to add.
3. **Choose** the individual from the pop-up list of results.
4. **Choose** whether you want to include the chat history.
5. Click **Add**
6. **Type** your message in the chat window at the bottom of the page and press **Enter** or click the **arrow** to post.

The group of individuals will appear under **Recent**. To chat with them again, simply select the group from your chat history and pick up where you left off.

## Start a Group chat

1. Go to **Chat**, in the app bar on the left of the screen.
2. Click the **New chat** icon at top of screen.
3. Click the drop-down arrow at the top right to **Add group name**.



To: Enter name, email, group or tag 

4. Give your group a **name** and add team members to the **To:** field as required.

Group name: TaD Team Members

To:  Fraser, Pauline  Richmond, Kim  Stephen, Linda J. 

5. Type your first group message in the chat window and send it to the group.

The group chat will appear under **Recent**. To chat with the group again, simply select the group from your chat history and pick up where you left off.



You can turn any chat – individual or group – into a **video** or **voice call** by clicking the appropriate icon at the top right of the screen.



You can open any chat in a pop out window by clicking on the **pop out chat** icon at top right or by hovering over chat title in your chat list and clicking on the same icon.



## Team conversations

If you are working with a group of people for a particular purpose or project, it will be important to keep a **history** of any conversations.

In such cases it is best to **create a Team** for your group or project in which you can easily communicate with each other. Conversations within Teams are **private** to Team or Channel members, and they will see the complete history of posts and threaded conversations.



### First, create a Team

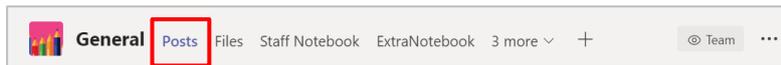
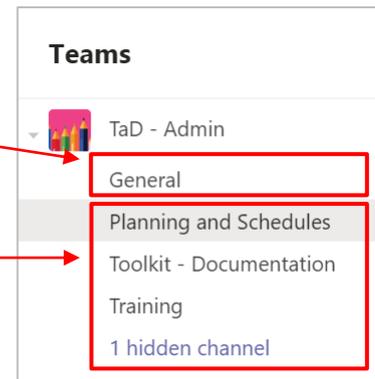
To create a Team, follow the guidance in our [Create a Team Quick Start Guide](#).

## About Channels – where team conversations happen

- All Team conversations are stored in **Channels**.
- Every Team has a default Channel called **General** and, as its name suggests, this is a good place to have *general* team conversation.

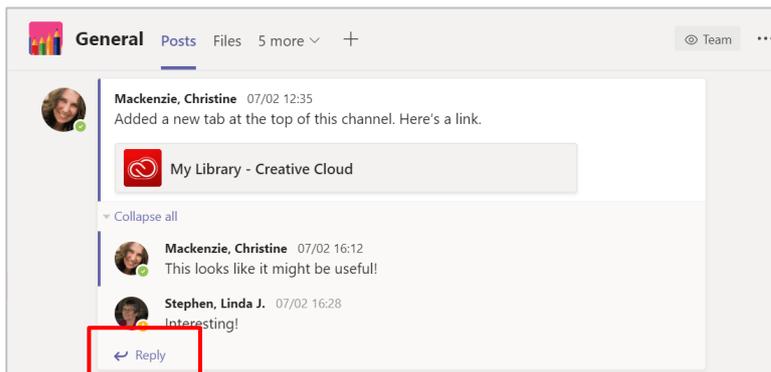
However, if you have created additional Channels (eg for a particular topic, or specific aspect of a project) you can have a dedicated conversation in each Channel.

- Every Channel has a **Posts** tab – this is where team members post messages and replies. The Posts tab is the first tab in every channel.



## To post or respond to messages

1. Click on the name of **Channel** you want to contribute to. The **Posts** tab will be foremost.
2. Note that conversations are threaded.
3. To contribute to an *existing* conversation, click **Reply**, type your response in Reply field that appears, and press **Enter** or click the arrow to post.



4. To start a *new* conversation, click **New conversation** at the foot of the Posts window, type in the box and press **Enter** or click the arrow to post.



## Drawing attention to posts using @mention

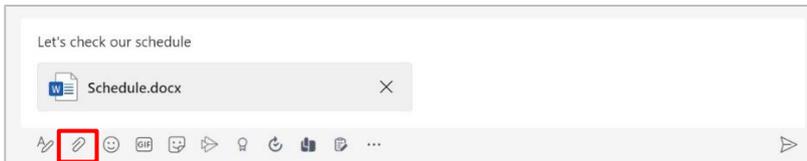
1. To draw *everyone's* attention to your post, prefix the post with **@Team name** or **@Channel name** – as you type, suggestions will pop-up. Select the appropriate Team or Channel name to resolve.
2. To draw an *individual's* attention to a post, type **@their name** – as you type, suggestions will pop-up. Select the appropriate individual to resolve.



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## Collaborate on a file within a conversation

To attach a file to a conversation: click the paperclip icon, choose where to get the file from, eg OneDrive or your computer, and select your file. Posting a file in a conversation allows you and your team to comment on it and edit it together. The file is stored in the **Files** area of your Channel (unless you have chosen to share a link to a file in your OneDrive).



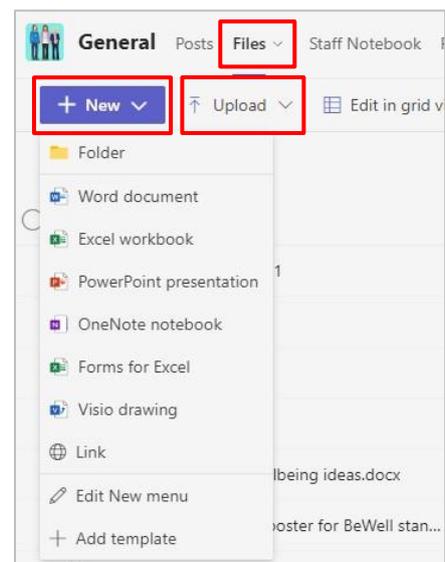
## Team Collaboration

As well as conversations, there are many other Teams features you can use to collaborate, whether working together as a group or collaborating on a Project.

By default, all Team Channels will have at least 2 default tabs – **Posts** (as described under Team conversations, above) and **Files**.<sup>1</sup>

### The Files tab

- You can **upload** files to this area or **create new** files here. This allows Team members to find files easily, work on them collaboratively, and also prevents too many versions of a document being circulated, as can happen with email.
- All files in this area are stored in a dedicated SharePoint site in Microsoft 365 (cloud storage). This means opening a file from this area allows you and your colleagues to work on it concurrently. Changes are automatically saved, and a version history created.



Look for **AutoSave On** at the top left of your Microsoft desktop application to ensure you are working in Microsoft 365 and your changes are being saved automatically.

AutoSave

- You can use a folder structure in the **Files** area to help sort your files – the folder structure will be replicated on the SharePoint site.
- When opening a file and working on it within Teams, you may find the editing options<sup>2</sup> available to you are somewhat limited.

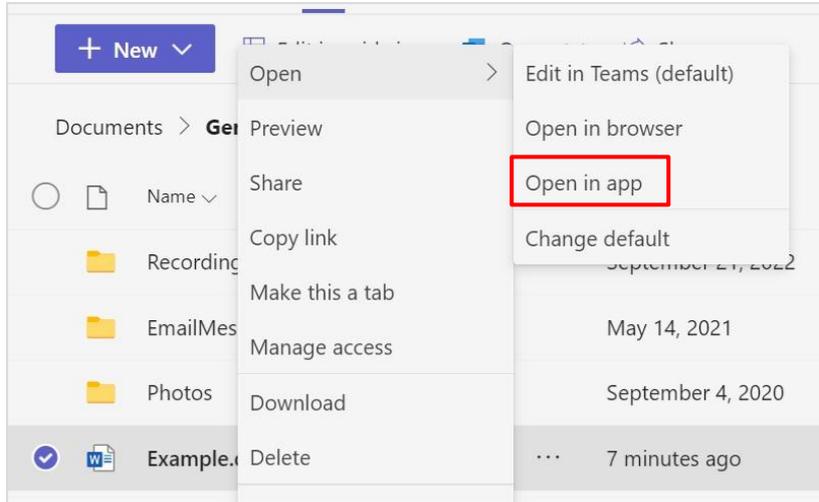
For *full* editing options, you can open and edit a file in the **desktop app**. This allows you to use all app features – for example, Track Changes in Word so that team members can see who edited what.

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<sup>1</sup> When creating a Team, we recommend choosing the Team Type 'Other', which offers most flexibility. However, if your Team type is 'Staff', 'PLC' or 'Class', you will also see a **Notebook** under the General Channel.

<sup>2</sup> You will see different editing options depending on the file type, ie Word, Excel or PowerPoint.

To choose where to open a file, right click on it and click **Open** to see the pop-up menu. For Word, PowerPoint and Excel documents you can either **Edit in Teams**, **Open in browser** or **Open in app** (the desktop app). You can also **Change default**, to select the way in which these file types normally open.

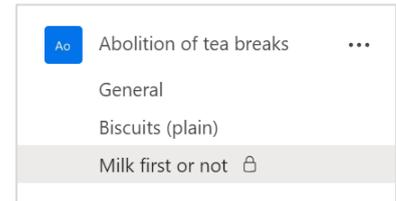


See our [MS Teams: Working with files guide](#) for more information.

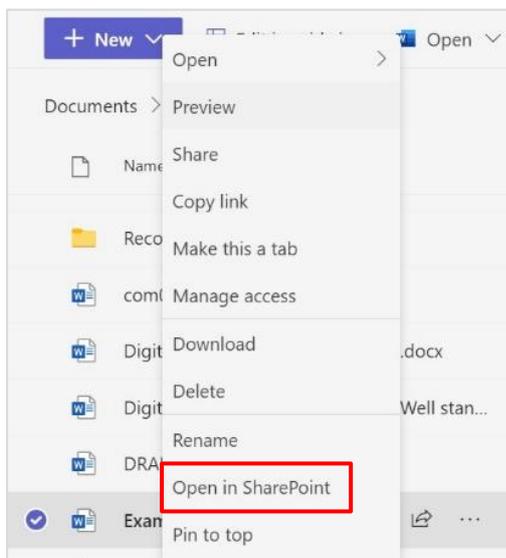
### Restricting access

If you know a subset of people in your team will be working on sensitive or confidential documents, and you want to restrict access to those documents, the simplest solution is to create a **Private Channel**.

Team Owners can then add the relevant members to the Private Channel as required. Only those team members who have access to the Private Channel will be able to access the files located there.



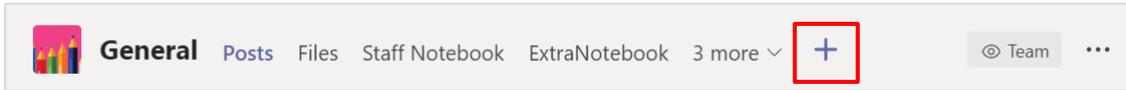
If you are confident setting permissions in SharePoint, it is also possible to open the document in the Teams dedicated SharePoint site and Manage Access at document level there.



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## Additional Tabs

As we have already learned, the default tabs in a Team Channel are **Posts** and **Files**. However, you can add further tabs to a Channel by clicking the + symbol on the Channel toolbar.



Options include:

- **OneNote:** a digital notebook for capturing and sharing ideas and information across the team
- **Planner:** for organising, planning and assigning tasks
- **Website:** to link directly to an existing website
- **Polly:** a mini polling tool for snap polls

## Meetings and Interviews

See our separate user guide [MS Teams: Quick guide to Meetings](#) for guidance on scheduling different types of Teams meetings.

### Interviews

You can **Arrange an Interview** with an *external* user by scheduling a Teams Meeting as described in the document above. You do not need to add them to a Team as a guest.

Send an invitation to the person's email address.

They will receive a link to click on which will enable them to use a browser version of the Teams meeting.



For guidance on how to hold ad hoc or scheduled meetings see our [MS Teams: Quick guide to Meetings](#).

## Help and Support

See [Guides and Links](#) in our MS Teams resource on Toolkit or contact the IT Service Desk: [myit.abdn.ac.uk](http://myit.abdn.ac.uk).