



Microsoft Teams

Best Practices and Etiquette

Microsoft Teams End-User Best Practices and Etiquette



Getting Started

Get the Teams App

Work on any device by downloading the [Teams app](#) for Windows, Mac, Linux, iOS, and Android. If Outlook is installed on your desktop, you'll be able to schedule Teams enabled meetings from your Outlook calendar.

Teams Quick Tour

The [Activity Feed](#) is a quick way to keep track of recent messages, calls, and voicemails. Use the Filter to focus your feed on certain types of activity.

The [Chat](#) area is for 1:1 chats, [group chats](#), meeting chats, and your [contact groups](#). Contact groups are similar to the contact groups in the Skype for Business client. Use the Calls area to view the contacts synced from your Outlook contacts.

The [Teams](#) area is a list of the teams for which you are a member. You can rearrange your list of teams, hide seldom used teams, and pin important team channels to the top of your list.

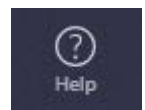
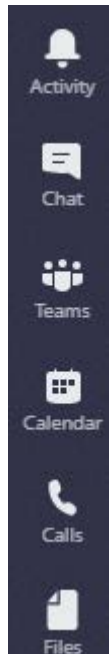
The Calendar is synced with your Outlook calendar. You can [schedule new meetings](#) and manage existing meetings. **Pro Tip:** If you're a member of a team that needs to have recurring status meetings, schedule them in a channel, and use the channel for meeting notes and conversations.

The [Calls](#) area has your speed dial, your contacts synced with Outlook, your call history, and your voicemails. You can make calls from here, but you can also make calls from the Chat area.

The [Files](#) area will show you a list of all files that you've recently worked on in Teams, and also gives you access to your OneDrive. **Pro Tip:** You can move or copy files from your OneDrive to the Files tab in a team channel.

In-App Training

The Teams desktop app has a page in the Help section (bottom left) called **Training**. If you're new to Microsoft Teams, this is the first thing you want to check out. There's numerous 1-2 min videos that will get you up and running in no time. You can also watch the same training videos from the [Microsoft Teams Video Training](#) web site.



Review Your App's Settings

For each device you are using, make sure you go through the settings to make sure they align with your workflow. For example, configure your theme, your audio communications device, and your [notification settings](#). You will also want to turn on and set up your voicemail in the [Calls settings](#).

Notifications

Spend some time understanding how the [notification settings](#) work. They make a big difference in how the Teams App will notify you. For the Teams mobile app, consider enabling the Quiet Hours settings to keep your mobile from interrupting your sleep in the middle of the night.

Out of Office & Status Messages

You [set your status message](#) in Microsoft Teams from your profile area. You can let people know what you're working on, your travel status, or anything else that helps others understand your current status. When you set your Out of Office (OOF) in Outlook it will show up in Teams too, but any status message you have set in Teams will override your OOF.

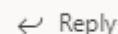
Conversations

Email vs. Teams Messages

Don't worry. Email is not dead, nor is it going away. It's just easier to conduct informal conversations and to collaborate on projects and documents in Microsoft Teams. For formal communications, you'll still want to stick with email. Also, just like with email, you'll want to keep your chat messages short and to the point. Nobody likes to read a long blob of text, right?

Reply vs. Start a New Conversation

In a Teams [channel conversation](#), don't use the Start a New Conversation compose box to reply to an existing message. Make sure you hit that Reply button underneath the message you're replying to, which keeps the conversation grouped together. If you make this mistake, copy your message to the clipboard, delete the message you just created (if allowed), hit the reply button, and paste in your message.



Expand the Compose Box

Consider adding some [formatting to your message](#) by clicking on the "A" format icon, which will expand the compose box and show you all of the formatting tools. Change the font size, add a heading, create a list, add a link or a table -- it's all there.

Start a new conversation. Type @ to mention someone.

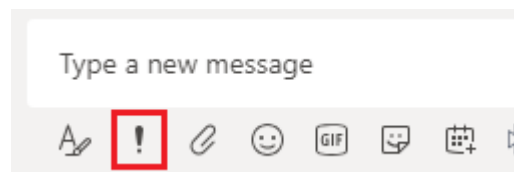


Add a Subject to Your Message

While you have the compose box expanded, [add a subject line to your message](#). Adding a subject makes it stand out, and makes it easier to find. Trust us; you'll notice a difference.

Priority Notifications

When in a [1:1 chat](#) or a [group chat](#), you can click the "!" icon in toolbar to make your message a priority (important or urgent). If you mark the message as urgent, the others will receive notifications every 2 minutes for 20 minutes until they read the message.



Use the Like Button

Use the thumbs-up "like" button as an acknowledgment to a message, which can represent you saying "Okay," "Sounds Good," "You Bet," "Cool," or even saying "Thank You."

Hello, Are You There?

When you reach out to someone in chat, don't send a "Hello" and then wait for a response. Especially if the status of the person on the other end is available. Instead, include your question or whatever you want to say along with your hello. There's nothing worse than replying to someone's hello, and then having to wait for them to type up their message after you have responded. That becomes an interruption.

@Mentions

In a Teams [channel conversation](#), [@mentions](#) are used as a call to action. You can @mention an individual to get their attention, or @mention a channel or the entire team to get everyone's attention. Just don't overuse it.

Tip: After @mentioning a person's name, hit the backspace key to remove their surname or any other information in the name. @Mentioning with just their first name (given name) will make your message less formal.

1:1 Chat vs Group Chat

Use [1:1 chats](#) for high-priority questions or just to ping colleagues. Use a [group chat](#) for simple conversations that are not needed in a team channel, and try to keep the group chat's membership small.

Group Chat vs Channel Conversations

Use a [group chat](#) for simple ad-hoc conversations that are not needed in a team channel. If you think others in a team would benefit from the chat, start the [conversation in a team's channel](#) instead. That way you won't have to cover the same ground again with members of your team.

Adding Members to a Chat

You can [add people to an existing chat](#) and choose whether they see the chat's history, but before you add anyone, scan the

chat's history for content they shouldn't see.

Save a Message

You can [save a message](#) for later by bookmarking it. This allows you to group important messages together, and retrieve or resume an old conversation.

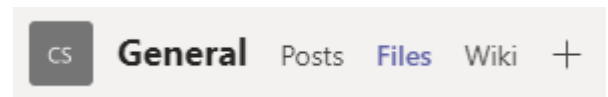
Chat Privacy

It's best to assume that your 1:1 chats and group chats are not private. Chats can be audited by your IT administrators, which is no different than an audit of your Outlook mailbox.

Files

Teams Files

Each Team gets a SharePoint Online document library to store the Team's files, and each channel in the Team has its own folder in the document library. After selecting a channel, click on the Files tab to access and manage the channel's files.



Teams Files vs OneDrive Files

When you upload a file into a team's channel, the file is saved in SharePoint Online. If you upload or share a file in a 1:1 or group chat in Teams, the file is shared from your OneDrive.

Collaborate on Files

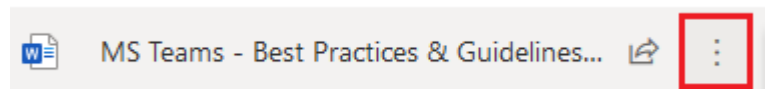
The best place to [collaborate \(co-author\) on files](#) is in a Teams channel. However, if you just want to co-author a file with a single person, make sure the file is in your OneDrive, and then link the file in a 1:1 chat with that person.

File Management

You can [move and copy files](#) between your OneDrive, between your Teams, and between channels within a Team. You can also connect the OneDrive sync client on your device to the files in a channel, which allows you to work offline. If your administrator allows it, you can also connect to 3rd party cloud storage providers.

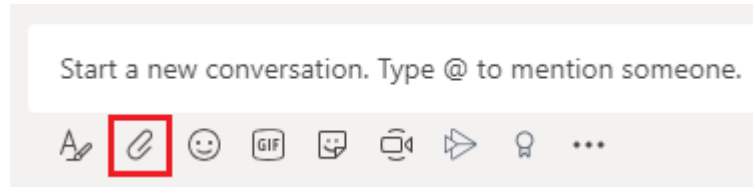
Version History

If you need to [revert a file to a previous version](#), go to the Files tab and click Open in SharePoint. Then browse to the file, click on the file's hidden menu button, and choose Version History. In the popup window under the Modified column, click the drop-down for the version you want to View or Restore.



Link to Your Files

Do you want to start a channel conversation on a document or announce a document that needs to be edited by the team? Use the attach icon to [upload your document](#) to the channel, or [link to your file](#) if it's already there. If your file is in your OneDrive, move or copy it over to the team channel first.



File Size & File Path Limits

The file size limit in a Teams channel is 15 GB, and the character limit for a file path is 250. It's best to keep your folder structure less than 3 or 4 folders deep, and keep your file names as short as possible. [More Teams limits](#)

Teams

Team Planning

Plan your team ahead of time. This includes [channel names](#), [membership](#), and permissions. Also, add a unique photo or graphic for the team picture, and consider which apps will be important to the team. For example adding the Planner app, or another 3rd party app.

Team Membership

Don't invite too many people at once. Keep your team compact at first, and then add people as needed. Also, stay up to date on [adding and removing members](#) from the Team.

Guest Membership

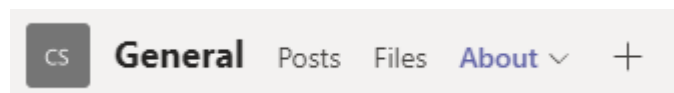
If your organization allows guest accounts in your team make sure everyone in the team is okay with [adding them](#). Keep in mind that guests have access to everything in your Team, including past discussions.

@Mention New Members

[@Mention](#) the team to let everyone know when you've added new members, and welcome them aboard.

About Your Team

Use the [Wiki](#) in the General channel to document the purpose of your Team, its goals & expectations, and any additional information relevant to the team. Then rename the **Wiki** tab to **About**.



Team Channels

The Channel List

In a [Team's channel list](#), the General channel is always pinned to the top, and it cannot be removed or renamed. All other channels are listed alphanumerically.

Pro Tip: To pin a channel to the top of the list, prepend the channel name with a number or a [Windows 10 emoji](#).

Channel Sprawl

Keep your list of channels simple to start and let it grow over time. Too many channels will lead to confusion and possible aggravation.

The General Channel

Consider using the [General channel](#) for making announcements to the entire team. For example, when adding new members to the team. You can also use the General channel for recurring meetings that involve the whole team.

Channel Moderation

With [channel moderation](#) you can prevent members & guests from starting new conversations, but still allow them to reply. This is useful when you need a channel for posting announcements and articles.

Send Emails to a Channel

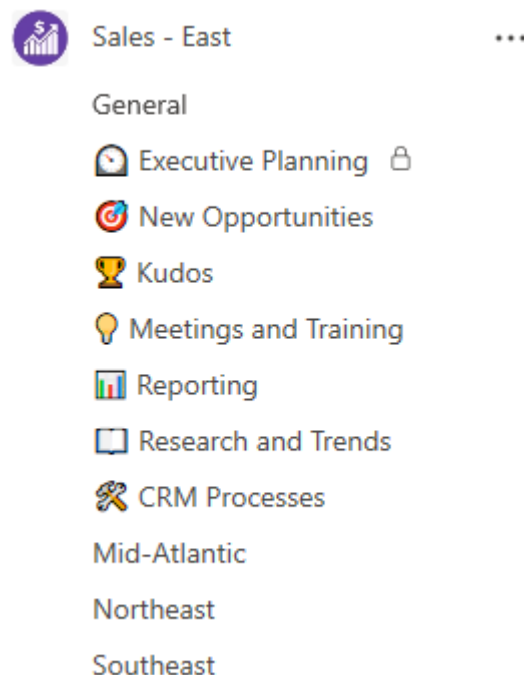
Each channel has its own email address, which makes it handy to continue a conversation that started with email. When forwarding an [email to a channel](#), consider trimming the bits of the email thread that detract from the conversation like email signatures and email headers.

Renaming Channels

[Renaming a channel](#) can cause issues. For starters, renaming a channel does not rename the underlying folder in the Team's SharePoint document library. This can cause a lot of confusion when browsing folders and files from the SharePoint web interface.

Fun Stuff

If you own a team with a large group of people, consider creating a channel for fun conversations where members can joke around with memes, and gifs. This will keep the other channels focused on work.



Private Channels

When to Use Private Channels

Use a [private channel](#) when you have a group of people in your team that want a focused space to collaborate without having to create a separate team. Another use for private channels is for discussing sensitive information, such as budgets, resourcing, strategic positioning, etc..

Who Can Create Private Channels?

By default, both owners & members of a team can create private channels. However, guests cannot create private channels. The person who creates the private channel becomes the owner of the private channel.

Tip: Owners can turn off the ability for members to create private channels in the team's settings

Who Can See Private Channels?

Owners of a team can see all private channels, and they can delete private channels, but they cannot view a private channel's member list or its content unless they are a member of the private channel. Members of a team can only see the private channels for which they are a member.

Private Channel Membership

The owner(s) of the private channel can manage its membership, but the members & guests have to be a member of the team before they can become a member of the private channel. Removing a member from the team removes them from all private channels.

Private Channel Limitations

Currently, Planner, Forms, & Stream cannot be used in private channels because they can be accessed by other means.

You cannot convert an existing channel to a private channel, and you cannot convert a private channel to a normal channel.

The max number of private channels in a team is 30.

The max number of members in a private channel is 250.

[More Teams limits](#)



Employees are safely working from home and the business is running.

Now you need a permanent, integrated Work Anywhere strategy for the future.

Collaboration - Voice Services
Mobile Desktop Workspaces - Contact Centers

Integrated securely on any device, anytime, anywhere.

EVOLVE 

Get a free, Work Anywhere™ blueprint for your business
Call: 888.908.6357 or email pierre@thexetagroup.com



XETA GROUP

Evolve IP Partner
thexetagroup.com