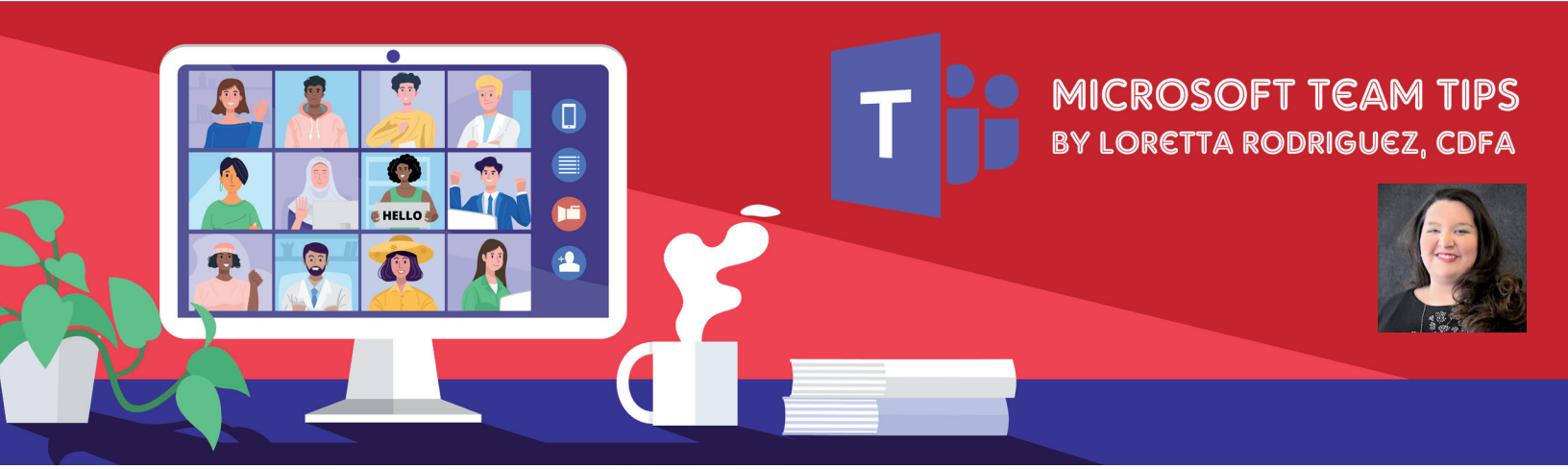


MICROSOFT TEAM TIPS

BY LORETTA RODRIGUEZ, CDFA

Welcome to the Microsoft Teams Tips column! Whether you have been using Microsoft Teams for months or you are considering adding Teams to your business regimen, we hope you will be able to find a useful tip from each quarterly column.

Microsoft Teams was designed to provide an easier way for groups of people to communicate and collaborate. You can call, chat, meet, and team with individuals in and outside your organization with ease.

Teams Feature

Let's focus on the feature this application is named for…. TEAMS! While in the Teams feature, you can create a Teams page by clicking on the "Join or create a team" button.

- You can create your own team or join other teams already formed within your organization.
    - You can create a team from scratch or select a template for "Managing a Project", "Managing an Event", "Organize Help Desk", etc.
    - The team can be Private (people need permission to join) or Public (anyone in your org can join).
    - Select a Team Name and provide a brief description and your team is formed!
- Creating a team, you are assigned the role of "Owner" which allows you to add or delete members, approve member requests, create "Channels" within your team and see "Analytics". You can also assign other members with the role of "Owner" as well to have more than one administrator.

TIP: You can create various tags (i.e. @SDASanAntonio) to notify and alert your team quickly.

Creating a "Channel" is similar to a sub-team. Let's say you create a Teams Page for your Accounting Group. You can then create "Channels" for your Accounts Receivable group and Accounts Payable group. The original Teams Page can be used the notify the whole department of general items, but the individual channels can be used to notify the groups with information that only pertains to them.

Add files to your "Channels" that can be edited by all members.

- Click on your "Channel" and at the top, click on "Files".
- Click on "Upload" to find your file or simply drag and drop.
- One the file has uploaded; you can access it in "Files" or you can create a "Tab" for easier and quicker access.
- Click on the "+" and select the type of file that you want to add. For example, if uploading a spreadsheet, select "Excel" and all of the Excel files uploaded will be listed. You then select the file for your tab.
- Click "Save" and your file can now be accessed from the top menu next to "Files".

TIP: Right click on new tab and rename.

Microsoft Teams is very versatile and constantly updating their features to find the best solutions for their customers. I look forward to sharing more about the various tools within Teams and finding valuable tips for everyone to use.

