City of Tulsa

Office 365 Teams/SharePoint IT Quick Reference Guide

IT Service Desk Contact Info.

By email at

eservice desk@cityoftulsa.org

By phone at (918) 596-7070

About

What is Teams?

Teams is a collaboration app in Office 365 that helps your team stay organized and have conversations all in one place.

What are the benefits of Teams?

Teams is designed to provide an easier way for small groups of people to communicate and collaborate. The typical approach of communicating via group emails and sharing files via a patchwork of different services can be difficult. There is always the potential for missed messages and files. This is the problem Teams is designed to solve.

How does Teams work with SharePoint?

Teams has a tight integration with Office online and Office groups, which allows users to seamlessly switch between editing documents, group chat, and video and voice calls. When a Team is created, it automatically creates a team SharePoint site for document storage and more.

Opening Teams

Teams can be downloaded from Office.com.

- 1. Go to Office.com from your web browser.
- 2. Click "All Apps" if Teams is not already on your home screen.

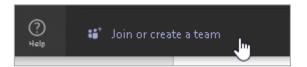


3. Click on Teams to launch app.

Once you're in Teams, you may download the desktop app by clicking "Get App" on the side menu. Teams is part of the Office 365 package purchased by the City of Tulsa and, as such, acceptable for downloading.

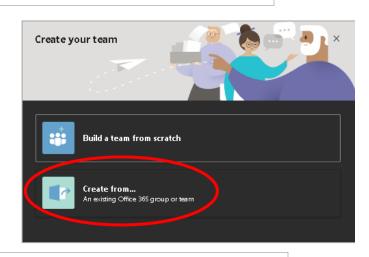
Creating a Team

You may build a Team from scratch or create it from an existing Office 365 group. It is best practice is to create a **new** Office 365 group for use as a team. It is also best practice to make your team private rather than public.



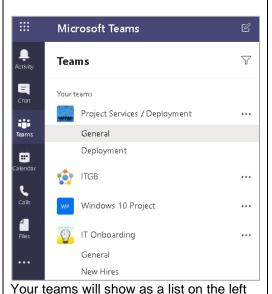
At the bottom left of the Teams page, select "Join or Create a Team."

For a tighter integration with Outlook and email through Teams, it is highly recommended to create a Team from an existing Office 365 group.



Make sure your team has **more than one** owner. This is for safety of your data and information stored on the Teams page and in the SharePoint library.

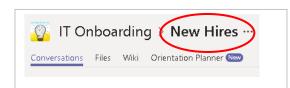




Channels

Channels are where you have conversations, make plans, and store files with your team.

- A "general" channel is automatically created for each team
- Channels scroll like social media where older items are higher up in the feed while newer items are at the bottom
- New activity in the channel will become bold
- You can be a part of many teams and multiple channels
- Turn the most used applications into tabs at the top of the channel
- · Make a team "favorite" by marking with a star



"New Hires" is a channel within the IT Onboarding Team.

Adding Tabs

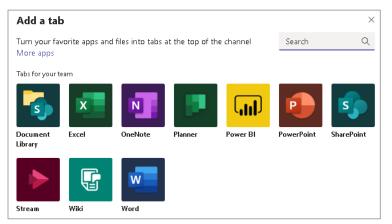
listed under each Team.

Teams

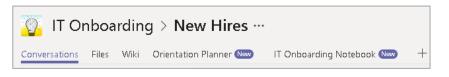


side of the Teams page. Channels are

Use the + to add tabs to the tops of channels within a Team.



Tabs help you to better organize your schedules, files, and notes for each channel.



Each channel can have its own unique set of tabs.

@mentions

- Typing @ + person's name in a conversation will automatically notify a person that they have been mentioned in a feed
- The "@mention" function can also be used in conjunction with files to indicate what a person needs to edit or view
- When a person is "@mentioned," there will be a notification next to the "Activity" bell at the top left of the screen

7 IT Onboarding ··· Access to onboarding materials for IT new hires and their mentors. Members Pending Requests Channels Settings ▶ Team picture Add a team picture Member permissions Enable channel creation, adding apps, and more Guest permissions Enable channel creation (3) Manage team Share this code so people can join the team directly - you won't get join requests Add channel Allow emoji, memes, GIFs, or stickers @ Get link to team

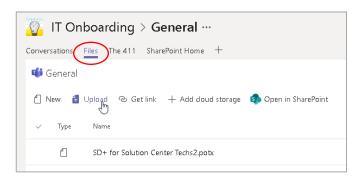
Selecting the ellipsis next to the team name opens a drop down menu that lets you manage the team. Choosing settings allows you to add permissions for members of the team.

Liechti, Sandra Change picture Available 🖂 Set status message ☐ Saved Settings Keyboard shortcuts About Settings Download the desktop app Download the mobile app € General ⊕ Privacy Sign out □ Notifications □ & Calls Manage notifications through the "Settings" menu at the top right of

Notifications

Files in Teams

Managing Teams

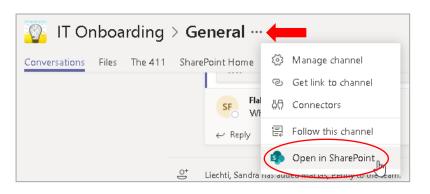


 Files for the team are located in the "Files" tab at the top of the team conversation

the Teams page.

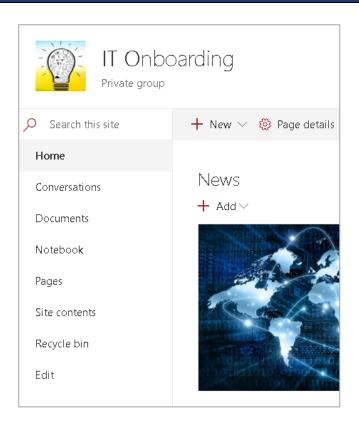
- You can upload files for the team directly to the files document library
- A "Files" tab is automatically created for each channel
- Files for each team can also be found in the SharePoint site provisioned for each team

Team SharePoint



Selecting the ellipsis next to the team title at the top of the team page opens a drop down menu. Choosing "Open in SharePoint" will take you to the online SharePoint page which was automatically created when you created the team. Each team has its own unique SharePoint site.

SharePoint Home Page



Home- add news, quick links, and see recent documents

Conversations- Outlook group email for only those in the team

Documents- document library for all team files. Each channel has its own folder

Notebook- OneNote Notebook created specifically for the team

Pages- lists the pages active in the team SharePoint site

Site contents- lists all site contents and subsites for the team site

You may also upload Team files directly to the SharePoint site

Online Meetings in Teams

Select "Calendar" from the left menu bar in Teams

Choose "Meet now" to immediately contact participants and meet online

Choose "New meeting" to set up a future meeting time for participants online

"New meeting" connects to Outlook and allows the use of scheduling assistant to help set up meetings

Your meeting participants will receive a Teams meeting request via email

Notification to "Join meeting" will occur to all participants at the meeting time

