# Transitioning to Teams and OneDrive for Business

Introduction, Best Practices, Tips and Resources Workshop
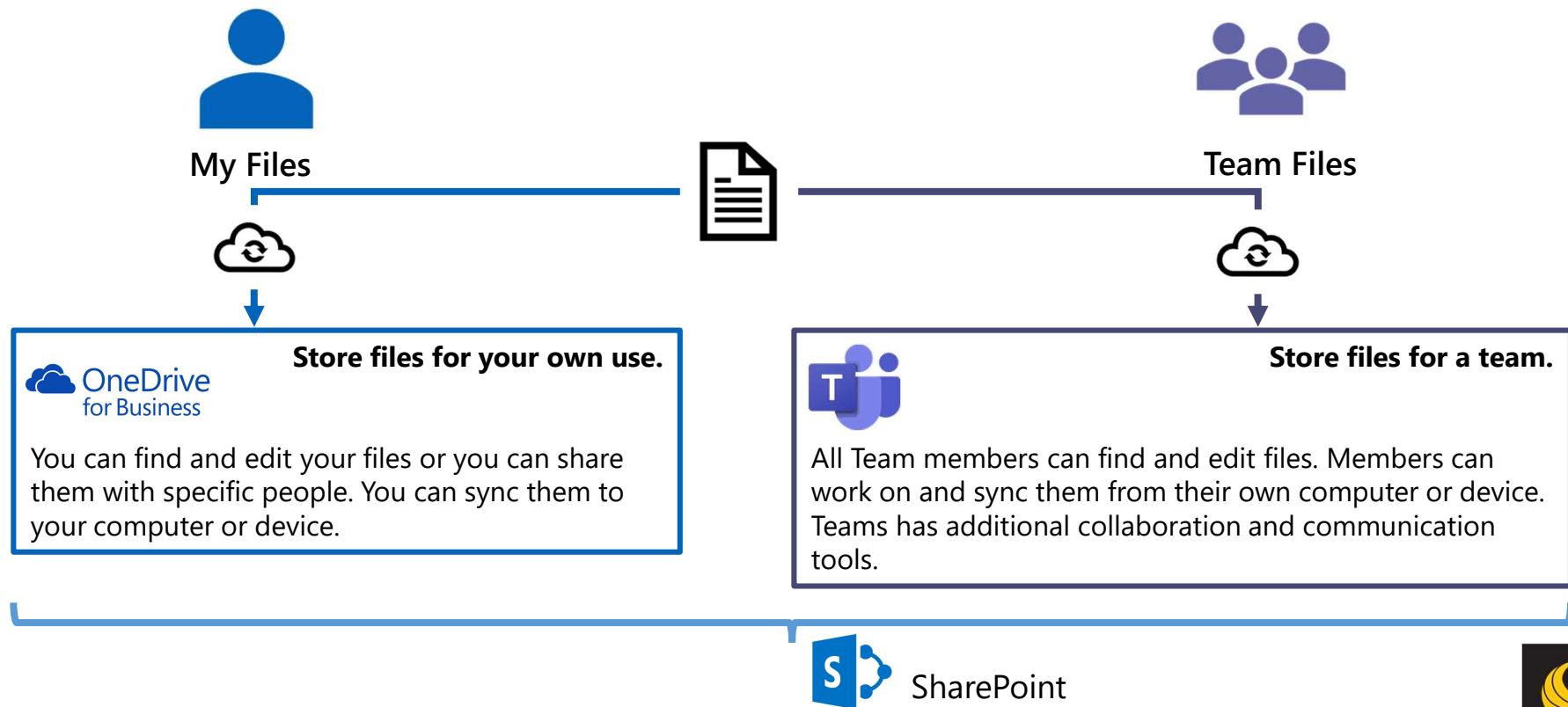
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# Session Goals

- Introduce you to OneDrive and Teams

- Provide a planning strategy for your transition to Teams and OneDrive

- Illustrate best practices for creating and using Teams

- Highlight some Teams features and tips for using them

- Share recommendations for file management

- Provide additional resources

- Answer your questions

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# OneDrive for Business vs Teams

**My Files**

**Team Files**

**Store files for your own use.**

**OneDrive for Business**

You can find and edit your files or you can share them with specific people. You can sync them to your computer or device.

**Store files for a team.**

All Team members can find and edit files. Members can work on and sync them from their own computer or device. Teams has additional collaboration and communication tools.

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# What is OneDrive for Business?

- A university-approved cloud storage service that you can access from anywhere

- Stores all types of files

- Enables you to securely share files and folders by security levels with colleagues

- Helps you collaborate on projects and co-author Microsoft Office documents

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# Devices and Access

OneDrive for Business

- **PC or Mac** – always keeps your files up-to-date and synced via the cloud to your other devices or people you've shared with

- **OneDrive.com** – access your files anywhere you have internet access from your browser

- **Phone or Tablet** – reach your files through mobile apps for Android and iOS

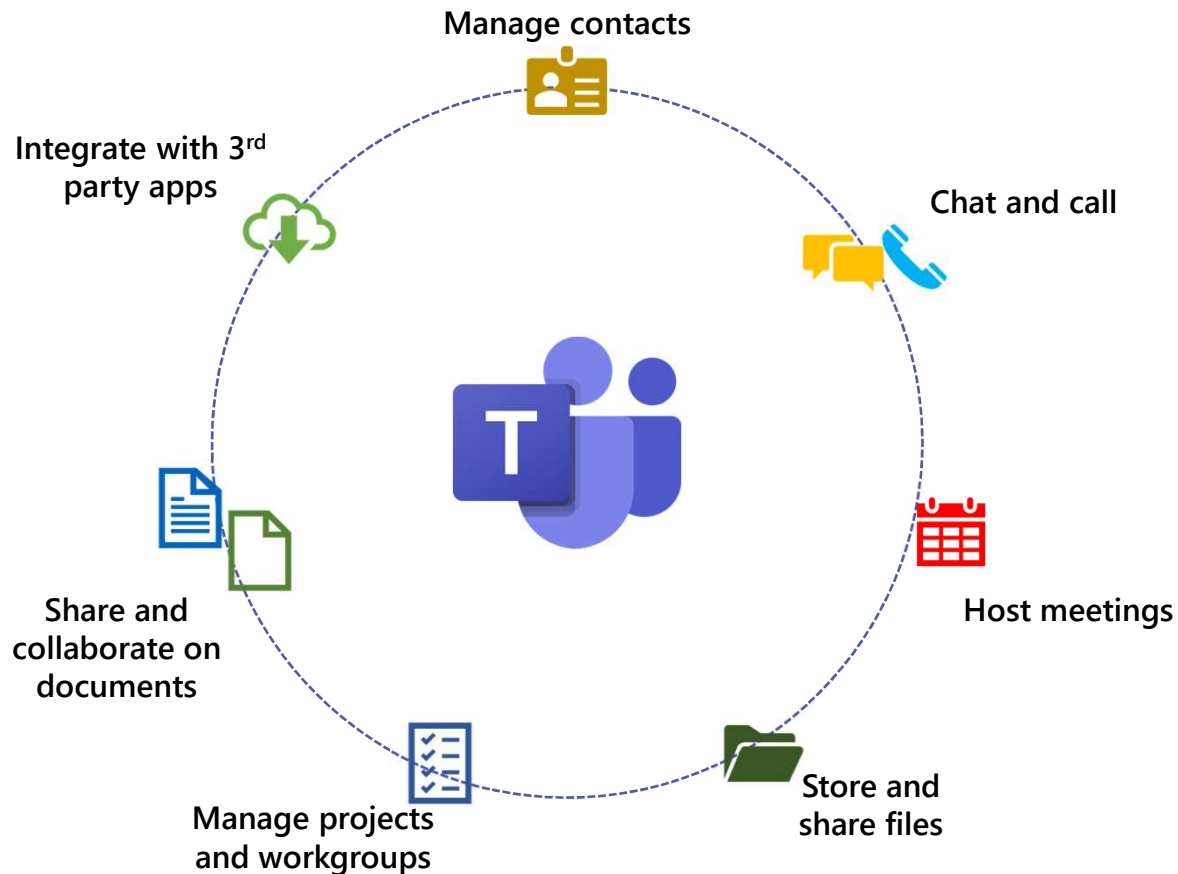# Some Features

OneDrive for Business

- **Share Files and Folders** – share across the university and with external colleagues

- **Manage Security** – control who can view and edit what you share

- **Version History, Backup, and Recycle Bin** – revert back to earlier versions of files, restore your OneDrive to a previous time up to 30 days, restore deleted files up to 90 days.
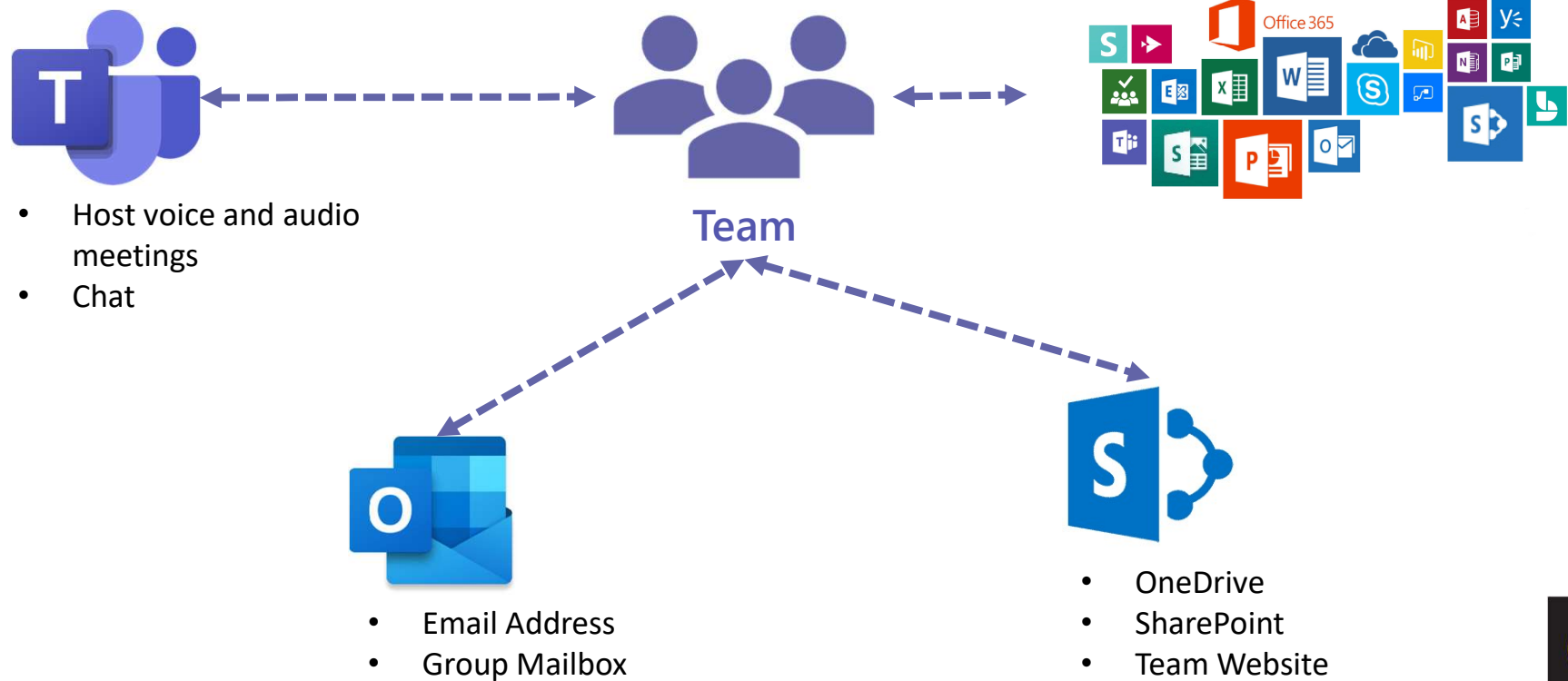
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# Some More Features



- **Syncing Files** – seamlessly synchronize files and folders directly to your computer or device

- **On-Demand Files** – view, search for, and interact with files stored in OneDrive without having to download them and take up space

- **Collaboration and Co-Authoring** – edit Office documents with select, multiple people at the same time from different locations

# What is Teams?

**Manage contacts**

**Integrate with 3rd party apps**

**Chat and call**

**Share and collaborate on documents**

**Host meetings**

**Manage projects and workgroups**

**Store and share files**

- Unifies and streamlines connections, communications and collaborations

- Combines persistent chat, video meetings, file storage and other features into one cloud-based solution

- Enables you to securely share files with your team

- Helps you organize projects

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# What is Teams?



- Host voice and audio meetings
- Chat

**Team**

- Email Address
- Group Mailbox

- OneDrive
- SharePoint
- Team Website

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# Devices and Access

- **PC, Mac, Linux** – always keeps your files up-to-date and synced via the cloud to your other devices or people you've shared with

- **teams.microsoft.com**– connect and access your files anywhere you have internet access from your browser

- **Phone or tablet** – connect through mobile apps for Android and iOS

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# Transition Planning

Before you begin your transition, some planning will help create a better Team and OneDrive experience.

- Who will be part of this team?

- How large is the team?

- What information do you plan to share?

- Are you moving existing files?
  - Review the file and folder structure
  - Take the opportunity to reorganize and make a fresh start
  - Only move necessary data, consider archiving or deleted outdated content

- Do you need to do more than share files?

- With whom do you want to share files?

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# Transition Planning – Building your Team

- Start with a small number of Team members

  Consider how the team works and what information you
  need to share

- Add people as you go

  They can see previous conversations and files

- Avoid creating multiple Teams with the same members

  Use channels instead to focus discussions

  Create Teams with larger members and more channels

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# Teams

A Team can range in size from a few people to hundreds of people and channels. You can belong to multiple Teams.
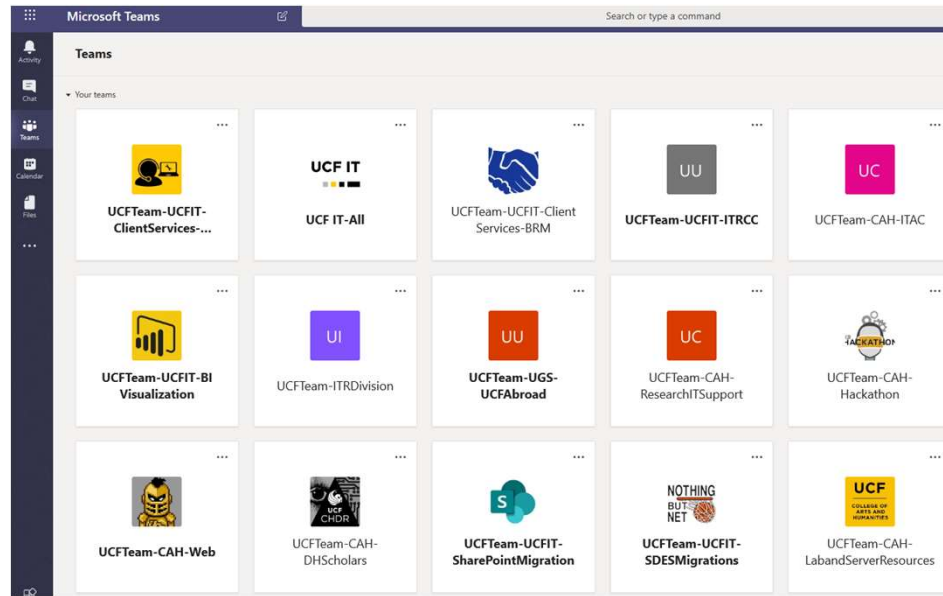
# Teams – Chats

- You can be name, pin, mute and hide chats to help you manage them
- You can share files in chats
- You can add tabs to apps and files
- You can add people later and choose to let them see the chat history or not
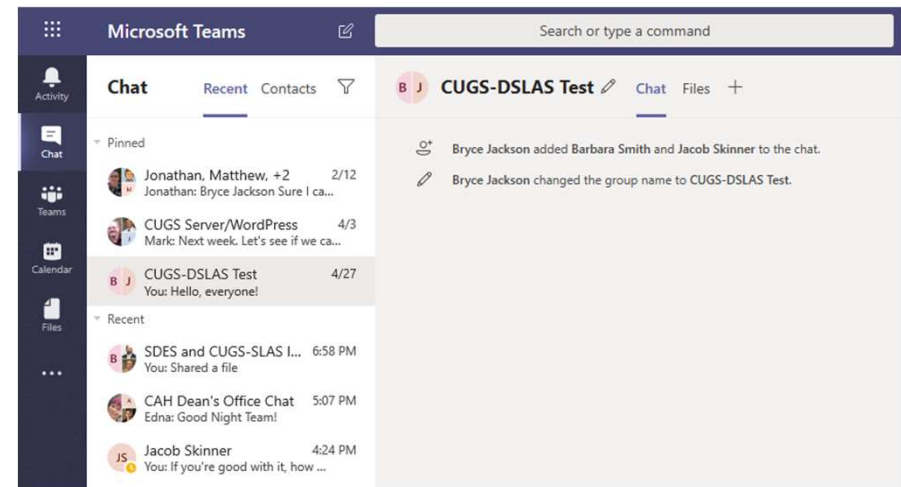


Use @mentions to get someone's attention in chat

# Teams – Owners and Members

## Owners

- University max of 10 owners per Team
- Add new members and other owners
- Manage Team settings
- Rename the Team
- Delete the Team

## Member

- 10,000 member limit per Team
- 1,000 Team membership limit per person
- Add additional channels to the Team

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# Teams – Channels

Teams are made up of channels. You choose what channels you want shown and what alerts you receive for the channel. Channels are open to everyone on the Team, so anyone can drop in and see what everyone is talking about. Channels can be created to cover topics, departments, workstreams or Projects.
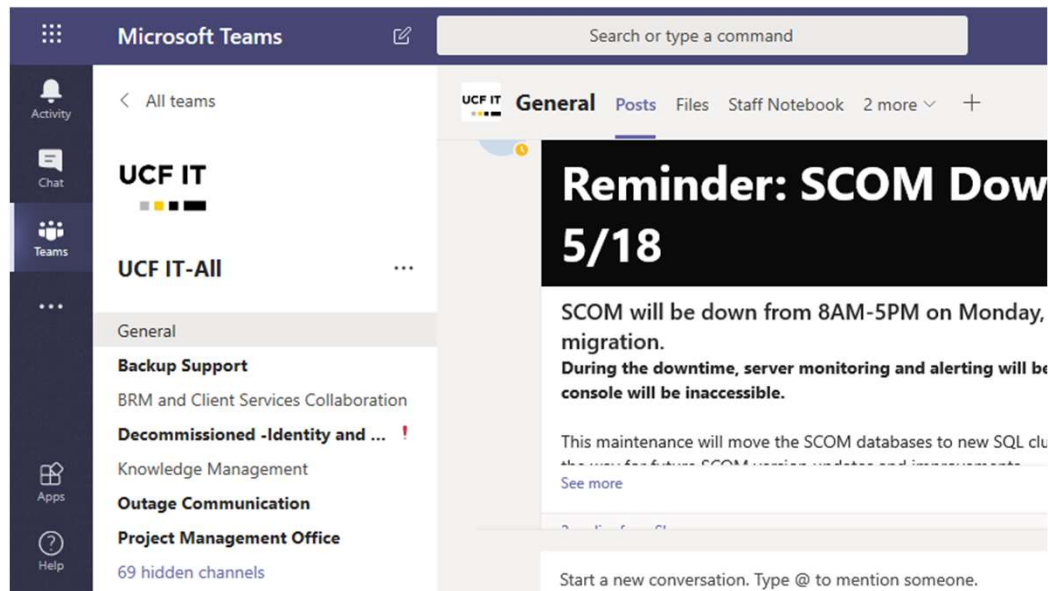


When someone @mentions you in a channel you've hidden, you will still receive an alert.

# Transition Planning – Creating Channels

- Create Channels for focused discussions, departments, topics or workstreams to aid in organizing work
    - Give channels descriptive names
- Add tabs to Channels to make it easier to find content and organize work
    - Add tabs to files, Planner boards, OneNote notebook or a Wiki
- Consider what will work best for current and future collaborations
    - Another channel or Team might not be the best solution.

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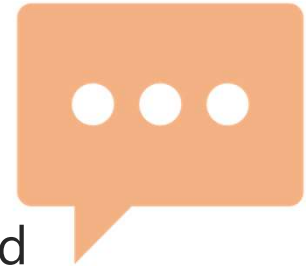
# Transition Planning – Channel Considerations

For sharing files and co-authoring, think about who needs to work together, where they are, and what the collaboration is about. Teams and OneDrive offer different solutions.

| Is there already a team that has these people as team members? | Does this work need to be kept private from others? | Are there multiple distinct topics to discuss? | Are you the only one who primarily needs access to the files? Do you anticipate sharing with only a few people on occasion? | Recommendation |
|---|---|---|---|---|
| Yes | Yes | Yes | No | Create a private channel in the existing team for each topic. |
| Yes | Yes | No | No | Create a private channel in the existing team or use OneDrive when collaborating with only a few people. |
| Yes | No | No | No | Create a channel in the existing team. |
| No | No | No | No | Start with a chat, then create a team if necessary, or use OneDrive when collaborating with only a few people. |
| No | No | Yes | No | Consider creating a new team. |
| No | Yes | No | No | Create a new team. |
| No | Yes | No | Yes | Use OneDrive. |

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# Teams – Channel Uses

The General channel is created by default.

## Some General Channel Uses

- Sharing an overview of the team or a project charter
- Welcoming and orienting new team members
- Announcements

**i** Consider creating a channel for fun and casual conversation, a "virtual water cooler"

**i** Don't rename your channels unless you communicate the change first. It can lead to confusion and disruption.
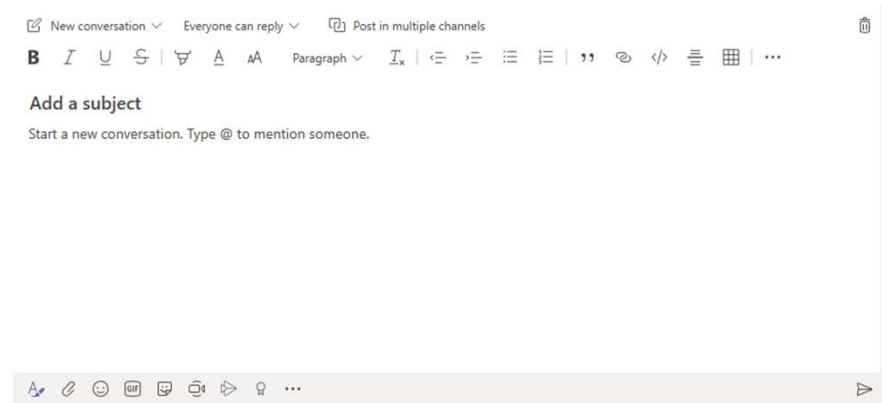
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# Teams – Channel Conversations

**Threaded Conversations**

- Use **reply** when adding further points to a conversation
- The bottom chat entry should be used to start a **New Conversation**

**Conversation Options**

- Announcement
- Delivery options
- Set a subject
- Indicate who can reply

You can use @mentions like @team or @channel names to notify everyone. Consider using subjects for each conversation to help with long-term organization.

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# Teams – Staying Organized

- Activity Feed

  Type to filter or use a predefined filter

- Files

  Use Recent View

- Search

  Looks through messages, people and files with additional filtering features

- Planner Boards

- Calendar

  See your schedule, schedule a Teams meeting or Live Event, or start a private meeting

# Teams – Files

Files and folder names combined are limited to 150 characters maximum.

## Uploading Existing Files

- For individual files, you can upload via Teams

- For multiple files, you can

  - select "Open in SharePoint" and use the "Upload Folder" option
  - use "Sync" and use Windows Explorer

From Teams, you can **drag and drop** files into a Teams Files pane to upload. You also use "Upload" to select a file or files to upload.

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# Teams – Creating Files and Folders

To create a folder or select types of files in Teams, select **New**, then select what you would like to create.
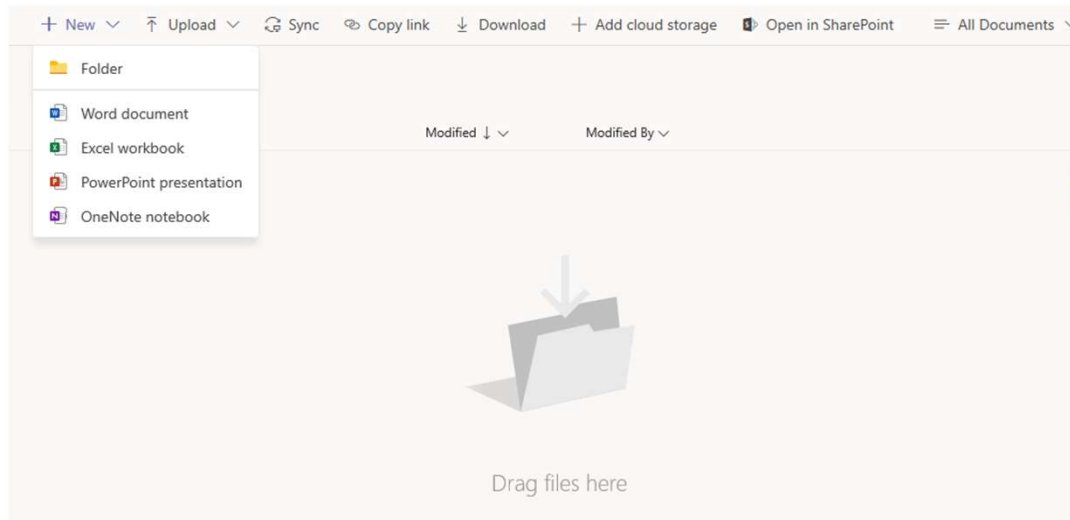


Office files created in Teams initially open in Teams but they can also be edited through online and desktop versions for the Office 365 software.

# Teams – Organizing Files and Folders

- Use folders within a Channels' Files to further organize. For example, by
  - year
  - sub-topic or sub-project
  - service or program
  - descriptive or meaningful categories
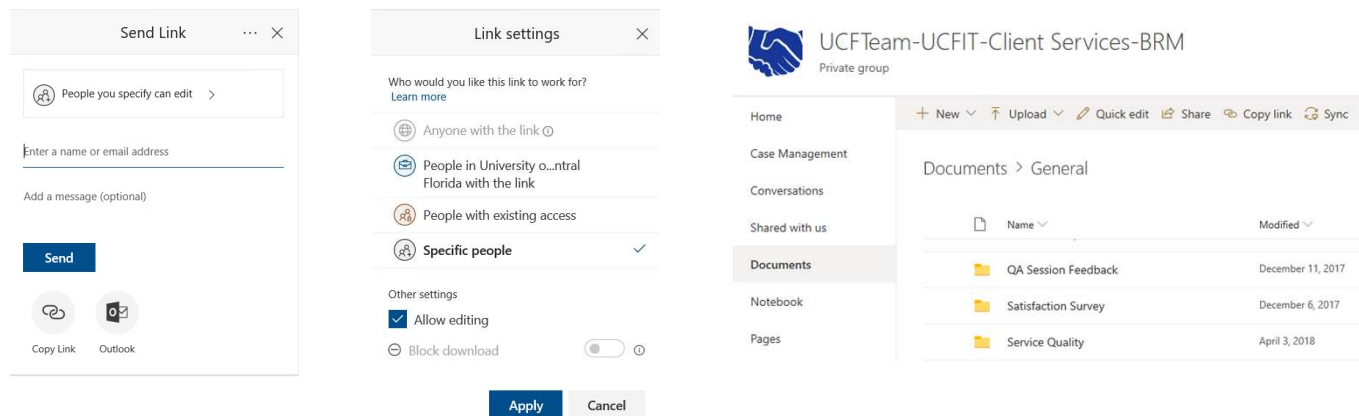
ℹ Teams Chat files you share or upload are stored in your OneDrive in a folder named "Microsoft Teams Chat Files." Teams Channel files you share or upload are stored in SharePoint

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# Teams and SharePoint Integration

Microsoft Teams is strongly connected and integrated with SharePoint. All files uploaded to Teams are automatically stored in the SharePoint library. Through SharePoint, you can share files outside of a Team like OneDrive.

Access from Teams or directly from the web at
https://ucf.sharepoint.com/sites/UCFTeam-Name/

OneDrive is SharePoint

# Teams – Tabs

Tabs always stay visible at the top of a channel, so everyone can get to them. You can add tabs to files, Planner boards, OneNote notebook, a Wiki and more.
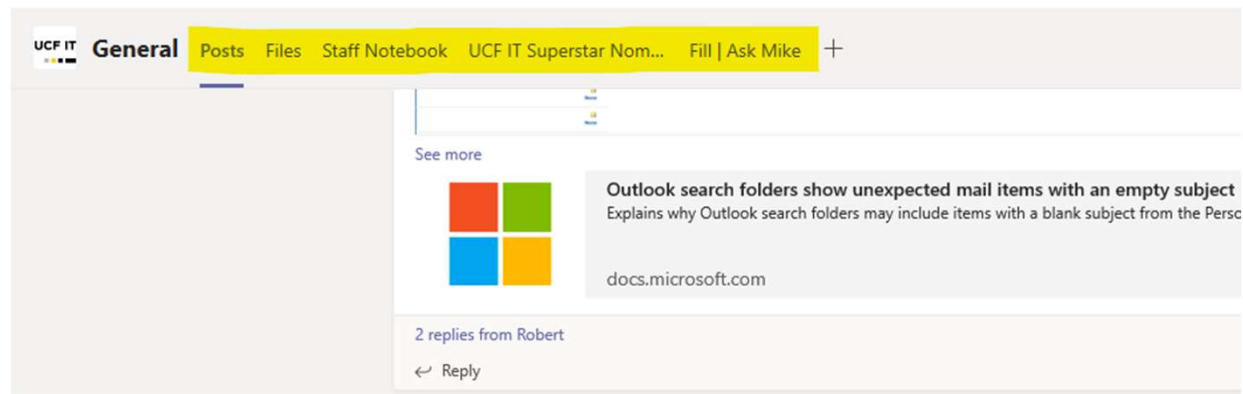
# Additional Learning Resources

- UCF IT's Knowledgebase: https://ucf.service-now.com/ucfit?id=knowledge
  - UCF IT's OneDrive Quick Start Guide
  - Teams Knowledgebase Articles
  - Microsoft Teams Service Now Request - Add, Change, or Update a Microsoft Team

- LinkedIn Learning: https://digitallearning.ucf.edu/lynda/
  - "Microsoft Teams Essential Training"
  - "Microsoft Teams Tips and Tricks"
  - "Microsoft Teams Quick Tips"
  - "Microsoft Collaboration: SharePoint, Teams, and Groups"

- Microsoft Teams Video Training
  - https://www.youtube.com/playlist?list=PLXPr7gfUMmKzR7_jXN5s886apYoHNC3Xk
  - https://support.office.com/en-us/article/Microsoft-Teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7

- Free Instructor-led Training for Teams: https://docs.microsoft.com/en-us/microsoftteams/instructor-led-training-teams-landing-page
  - Get Started with Microsoft Teams
  - Run Effective Meetings with Microsoft Teams
  - Learn How to Take Teams to the Next Level
  - Master Working from Home with Teams

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Questions?