

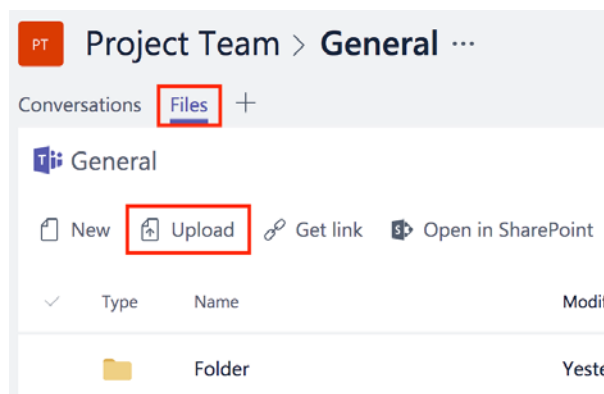


# Microsoft Teams: File Management

File management with Microsoft Teams (which uses a SharePoint document library) provides new options for working collaboratively. Some options will require assistance from ICT Desktop Support (eg: linking the SharePoint document Library directly to your computer), but once set-up Teams allows more flexibility when working with files than ever before.

## Uploading Files

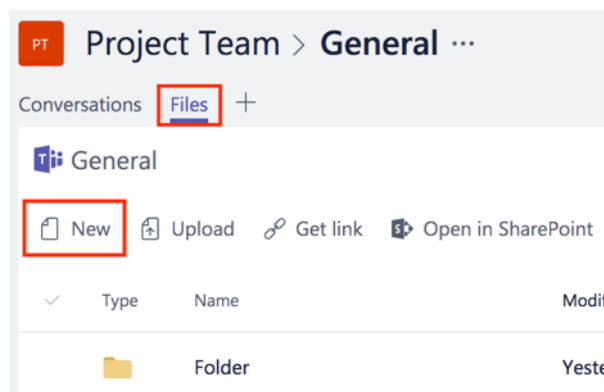
1. From [O365 online](#), open Teams from the App Launcher or start the **Microsoft Teams** app on Desktop Mac or PC.
2. **Open** the required **Team** and the Channel, then **select** the **files** tab.



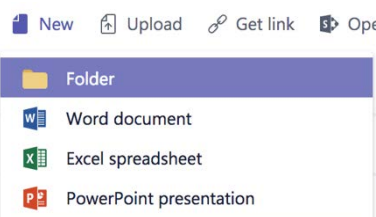
3. Click **Upload** from the toolbar and **browse** for the file to upload, **select** the file and **click open**.

## Creating Files

1. **Open** the required Team Channel and **select** the **files** tab.



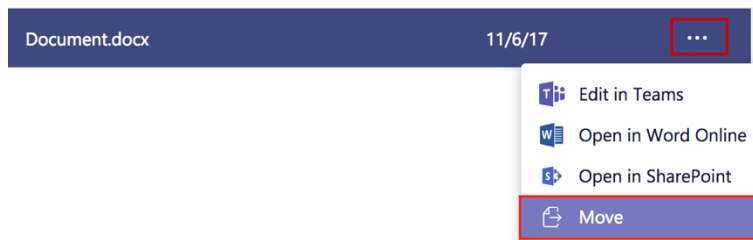
2. Click **New** from the toolbar and choose: Folder, Document, Spreadsheet or Presentation, to create a new file (or folder) and save it into the Team Channel Document Library (all Team members can create or upload documents).



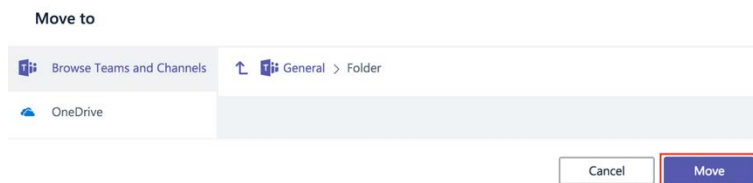
3. Click **Close** to **save** the file and return to Teams.

## Moving Files and Folders

1. **Open** the required Team Channel and **select** the **files** tab.
2. Find the **file** or **folder**, and **click** the **options** menu ... to the left of each file or folder name, select **Move**.



3. **Browse** to the new folder.

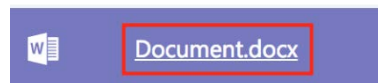


4. **Click Move** to move the file or folder into the new location.

## File Conversations

Starting a new **Conversation** about a file, posts a message to your Team Channel **Conversations** tab so others in the Team can view your comment and replies. This conversation is private and only visible to other Team members. File Conversations are different from Microsoft Word track changes and comments and are not embedded in the document, conversations are only visible within Teams.

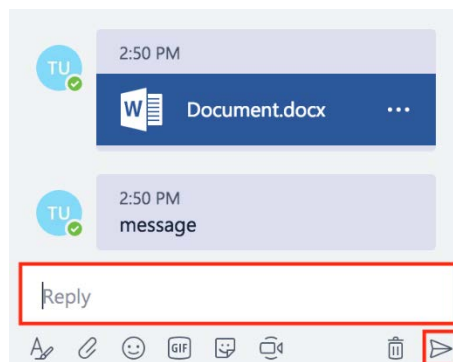
1. **Open** the required Team Channel and **select** the **files** tab.
2. **Click** the **file name** to preview the document.



3. **Click Start conversation** at the top of the page, this launches the document Conversation window.



4. **Type** a comment into the **text box** and click **send** to begin a conversation.

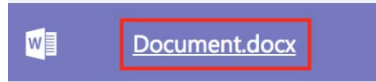


All new conversations are posted in the Team Channel **Conversations** tab and are visible to all team members.

# Commenting on Files

Commenting on a file is public with comments being saved within the file itself. Comments are visible to anyone viewing the file – Team members and non-Team members.

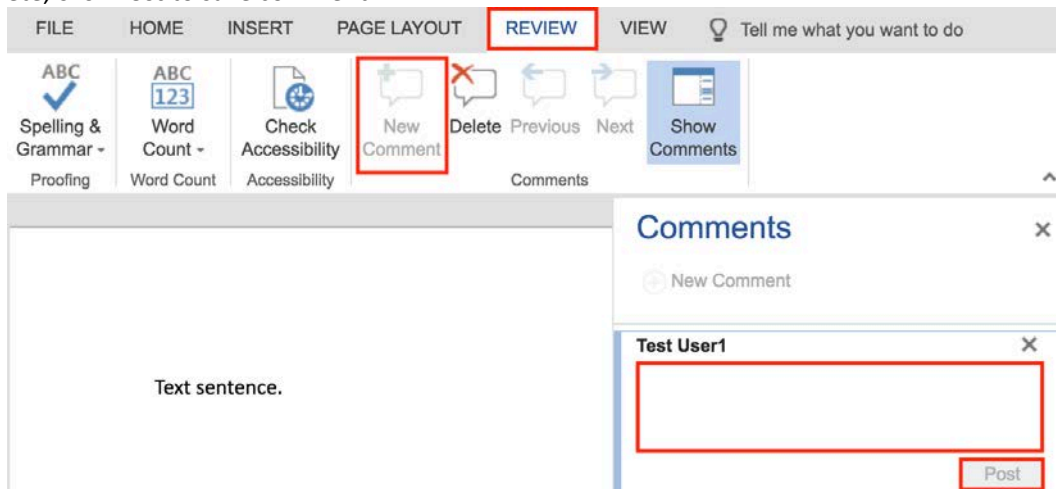
1. **Open** the required Team Channel in Teams online or Desktop App, and **select** the **files** tab.
2. **Click** the **file name** to preview document.



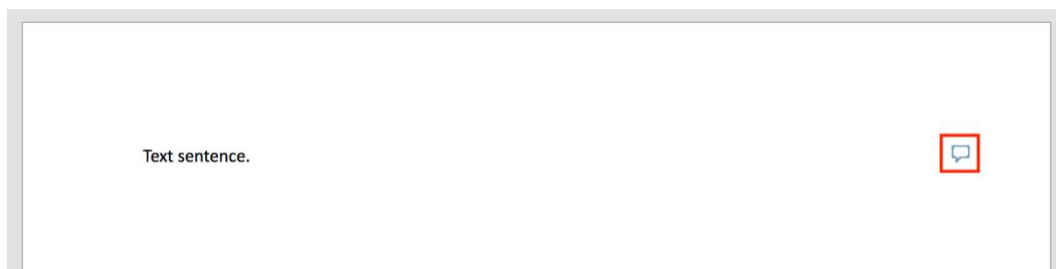
3. **Click Edit** at the top of the page, to open the document in editing mode.



4. Click **Review** from the document Menu and click **New Comment** to begin commenting on the file. When complete, **click Post** to save comment.



5. Other people viewing the document will see a speech bubble icon to indicate there are comments. To view comments **click** the **speech bubble** or select **Review** from the document Menu and click **Show Comments**.

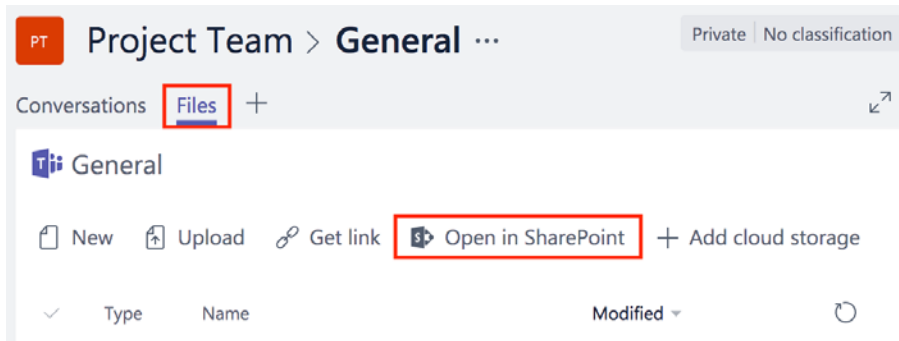


6. Click **Close** which auto-saves the document and returns to Teams window.

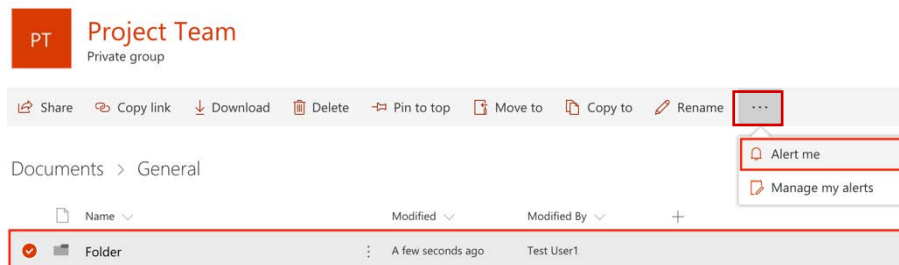
# Tracking Files and Folders

It's never been easier to track changes when working with colleagues. Tracking can be set to generate a personal alert when the contents of a file or folder is altered, making it simple to stay up-to-date with any new changes or information. Tracking options are a personal setting and need to be applied for each Team member as required.

1. **Open** the required Team Channel and **select files**.
2. **Click Open in SharePoint** (may need to log in with JCU credentials if prompted).



3. **Browse** to the **file or folder** to track.
4. **Click** once on the file or folder **name** to select.
5. **Click more options ...** from the tool bar, select **Alert me**, this opens the options panel.



6. **Choose** changes to be tracked and preferred notification alerts.

Alert me when items change

OK Cancel

**Alert Title**  
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Documents: Folder

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:  
Test User1 x

**Delivery Method**  
Specify how you want the alerts delivered.

Send me alerts by:  
 E-mail testuser1@staff-test.jcu.edu.au  
 Text Message (SMS)  
 Send URL in text message (SMS)

**Change Type**  
Specify the type of changes that you want to be alerted to.

Only send me alerts when:  
 All changes  
 New items are added  
 Existing items are modified  
 Items are deleted

**Send Alerts for These Changes**  
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:  
 Anything changes  
 Someone else changes a document  
 Someone else changes a document created by me  
 Someone else changes a document last modified by me

**When to Send Alerts**  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Send notification immediately  
 Send a daily summary  
 Send a weekly summary

Time:  
Sunday 2:00 PM

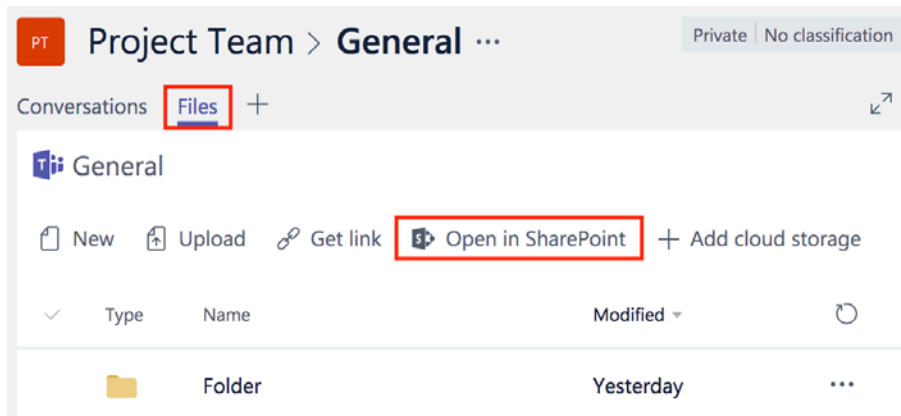
OK Cancel

7. **Click OK** to save preferences and exit.

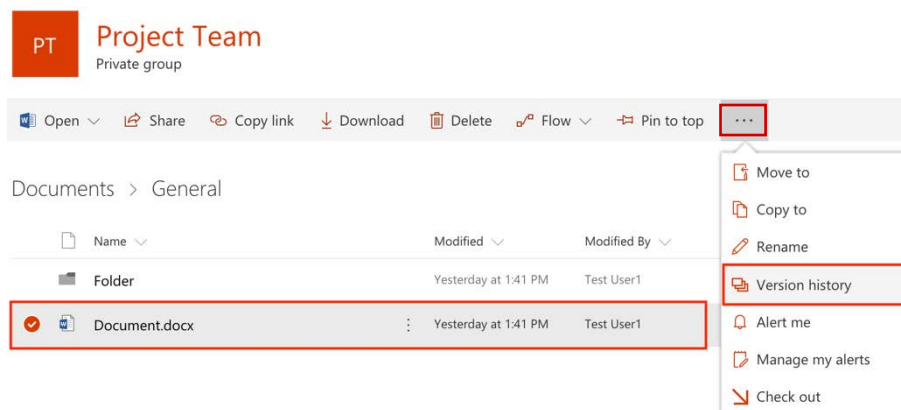
# File Version History

File versioning is a quick and simple way to give your team a little ‘buffer’ when working collaboratively. Versioning allows a Team owner to roll back any changes and restore a previous version of the document, a very useful feature! Currently File Versioning is set to store the last 25 versions of a file automatically, this may change in the future depending on the space available. If your Team requires anything different then the Team Owner will need to submit a Service Now request for Versioning to be customised to meet your requirements.

1. **Open** the required Team Channel and **select files**.
2. **Click Open in SharePoint**.



3. **Browse** to the **file** to review.
4. **Click** once on the file to select (click just next to the name if having trouble).
5. **Click more options ...** from the tool bar, and select **Version history**.



This opens a window listing all previous versions of the document.

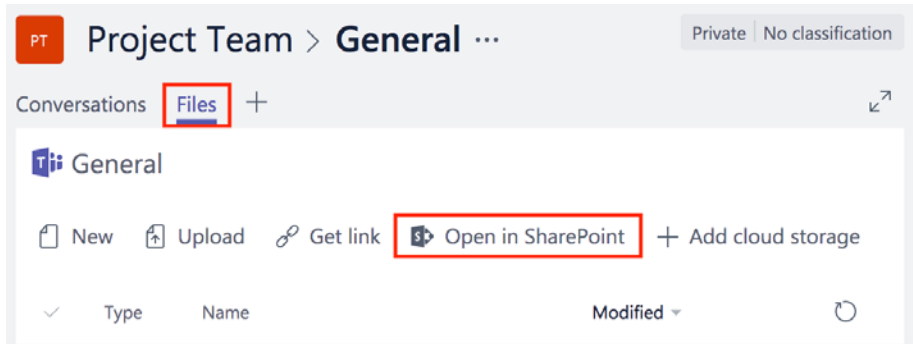
6. **Click** the small drop down arrow next to the file name and select view, restore or delete.



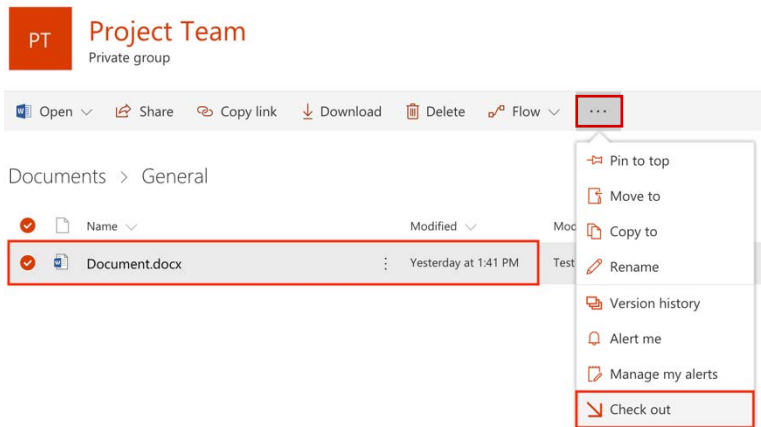
# Document Check Out

Restricting a file and requiring 'check out' before editing, ensures only one person is able to edit a file at a time. The Team Owner needs to submit a Service Now request for this feature to be activated within the Team's Document Library. While this reduces collaboration it ensures there is only one current copy of each file, which may be useful for policy documents.


1. **Open** the required Team Channel and **select files**.
2. Click **Open in SharePoint**.



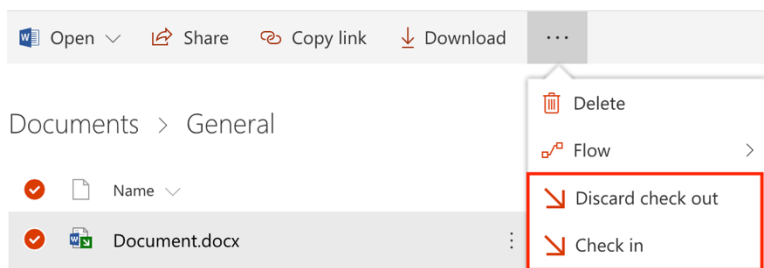
3. **Browse** to the required file and **click** once on the file to select (click just next to the name if having trouble).
4. **Click more options ...** from the tool bar, and select **Check out**.



The document is now **checked out** and no one else is able to edit, until checked back in.

When a document is **checked out**, a green arrow is displayed on document icon.  Document.docx

5. After changes are complete, the file can be **checked in** following the same process (steps 1-4), or can be discarded (deleting changes).
6. To complete the check in select **Check in** from **more options ...** menu.



7. When checking a document back in, comments discussing the changes can be added.

