Microsoft Teams: Owners Guide

Requesting a Microsoft Team

Once team requirements have been discussed with an ICT Desktop Support team member, and a Microsoft Team has been suggested as a suitable option, log a Team Creation Request using Service Now.

- It is highly recommended that Team options, team requirements, team channels and file structure be discussed with your team members BEFORE submitting a Service Now request to have a Team created. Having a clear picture of what is required will minimise serious issues caused by renaming Channels or Teams.
- Follow JCU naming convention when requesting a Team name - **Department/School - TeamName**
- Log a request via Service Now if you require more information about Teams.

Microsoft Teams will be one of the first Owner Managed application options at James Cook University.
As such, Team Owners will have additional responsibilities to ensure their team runs smoothly, including:

- Choosing a Team name – once created, changing the Team name is NOT recommended
- Adding a Team image – must be appropriate (contact Marketing if assistance is required)
- Managing Channels – once created, changing the Channel name is NOT recommended
- Managing Team Tabs – owner decides who can add or remove tabs
- Adding and removing Team members and Guests, and changing member permissions
- Requesting Team Deletion – via Service Now at the end of life of the Team

All Teams should have a minimum of two Team Owners at all times.

Team Defaults

With a little help from ICT Desktop Support you can set up your Team the way it works best for your staff. Team default settings are able to be changed by the Team owner as needed. By default every Team has the following settings:

Teams feature	Member Can	Team Owner Can
Create or Remove a channel	No	Yes
Create or Remove a tab	No	Yes
Create or Delete Connectors	No	Yes
Add apps (bots in tabs or connectors)	No	Yes
Add or Remove Team Members	No	Yes
Post, delete, and edit all messages	No	Yes
Add Team Members	No	Yes
Invite guest users outside the Office 365 tenant	No	Yes
Post, delete, and edit own messages	Yes	Yes
Upload file to document library	Yes	Yes
Edit Team files	Yes	Yes
Share a file in a personal or public chat	Yes	Yes
Schedule meetings	Yes	Yes

Please discuss implications of changing Team Default settings with an ICT Service Delivery staff member, before altering.

Managing Members

Team Owners are responsible for managing members including adding and removing members of the team. Please note once invited to become a team member all files, channels and conversations are visible.

Adding a Team Member

Only Team Owners are able to add new Team members, adding a member to a Team allows them to access to **all** Channels and files within that Team, there are no private Channels.

1. To add a Member or Guest, **open** Teams and **click** the appropriate **Team name**.
2. **Click more options …** (the triple dot menu next to the team name).
3. Select **Add members**.
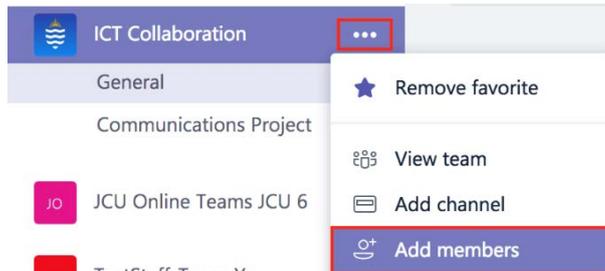
4. Enter an individual's name or a security group (JCU ORGU) then click **Add**.
   Please Note: Adding members via ORGU adds everyone associated with the ORGU to the Team.

Adding Guests

Team Owners can also add people outside JCU (External Users) as Guests. Use the same method as adding Team members, though adding a guest requires typing an email addresses (rather than an individual's name.)

Note: Guests are people outside your organization (JCU), with access to a Microsoft account. External users must accept invitations using the same account that the invitations were sent to.

Guests have different access to resources than members, please refer to the following for specifics.

Teams feature	External Guests
Create a channel (team owners control this ability via settings)	Yes
Join in private chats	Yes
Join in public (channel) conversations	Yes
Post, delete, and edit messages	Yes
Upload file to document library	Yes
Share a file (in SharePoint)	Yes
Share a file in a personal or public chat	Yes
Create a new team	**No**
Add apps (bots, tabs, or connectors)	**No**
View organization chart	**No**
Schedule meetings	**No**

Removing a Team Member

1. To remove a guest or member, **Click more options ...** next to the team name.
2. **Select Manage team**.
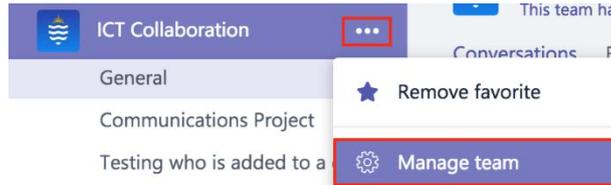
3. Scroll through the list to locate the member.
4. Mouse over the member or guest's name and click **X** to the right.
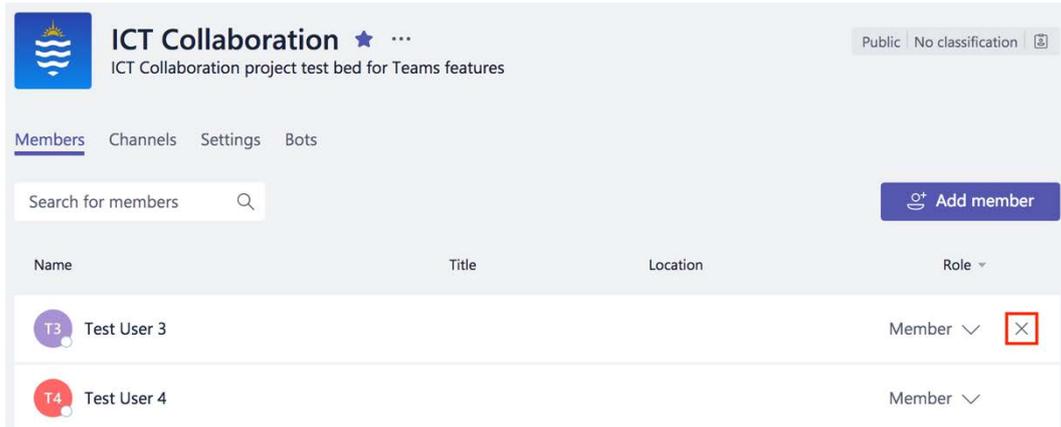
Promote Member to Owner

A team owner can change team roles, promoting members to owners as required eg: in case of staff leave or changes.

1. To change a member's role, **Click more options ...** next to the team name in the Teams and Channels section.
2. Select **Manage team**.
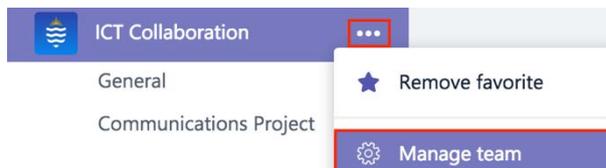
3. **Click** on a team member's current **role** to modify.
4. Select the desired role from the menu.
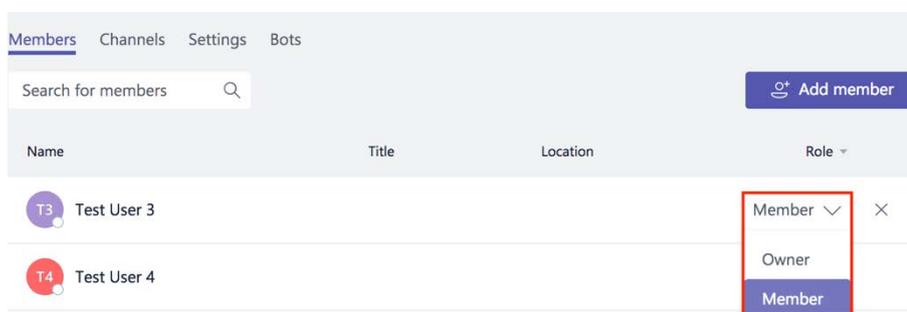
Add Team Logo

Team owners are responsible for uploading a suitable team image or logo. Please choose an image representative of your area and appropriate for display on a JCU corporate site, if in doubt leave the Team image blank, consult the Marketing

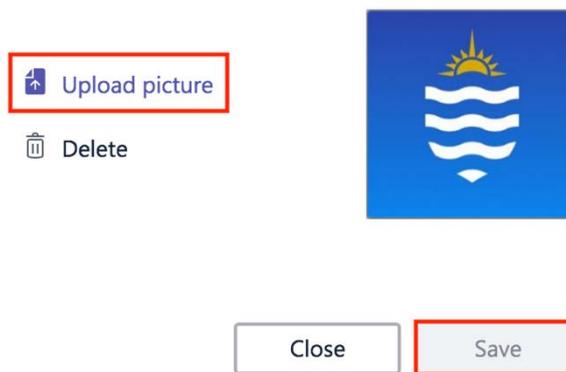[Brand Manual](#) or JCU Marketing.

To add or alter a Team logo:

1. **Click more options …** next to the team name.
2. Select **Manage team**.
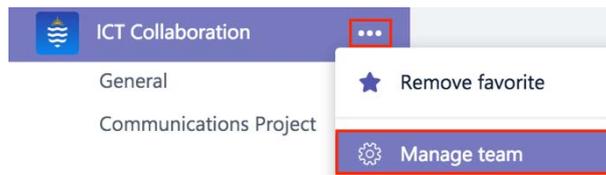
3. **Click** the **pencil** on top of the Team logo.

4. **Select upload**.

5. Navigate to the required image and **click open**.
6. **Click save**.

Managing Channels

A channel, is a section within a Team for discussing a specific topic or project. A Team can have multiple channels to help organise your conversations and files.

- Discuss names with your Team BEFORE creating a new Channel, as changing a Channel name currently causes issues, associated OneNote Tabs / Notebooks and Document Library folder names do NOT automatically update.
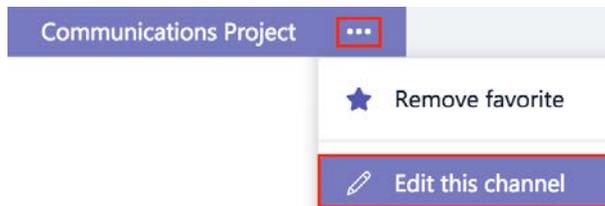
Adding a Channel

1. **Click more options …** next to the team name, where the new channel is required.
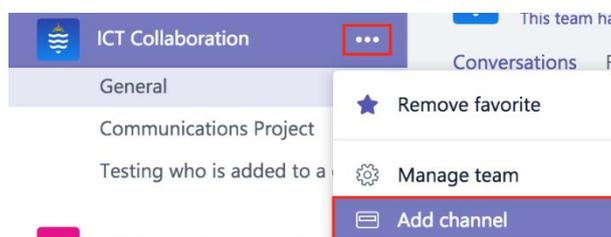
2. Select **Add channel**.
3. Enter the name of the new channel and click **Add**.

Editing Channel Description

1. **Click more options …** next to the name of the Channel.
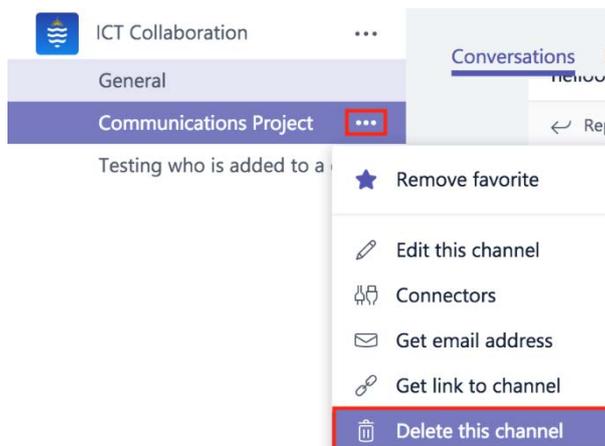
2. Select **Edit this channel.**

3. Edit the **Channel Description** and click **save**.

Editing a Channel name is NOT advisable, as changing the name causes issues - associated OneNote Tabs / Notebooks and Document Library folder names do NOT automatically update.

Removing a Channel

When a Channel is removed, all files and folders in OneNote and the Document Library remain intact, only the channel itself, along with any conversations are deleted. Once removed, the Channel name is 'locked-out' and is unable to be reused.

1. **Click more options ...** next to the name of the Channel to remove.

2. Select **Delete this channel.**

If the Channel has been accidentally removed, it can be restored by the Team Owner.

1. Click Team name and **Click more options ...** then select **Manage Team** from the drop down box.
2. **Click** the **Channels** tab and click **Deleted** to view deleted Channels.
3. **Click Restore**, the Channel along with any conversations are restored.

Adding
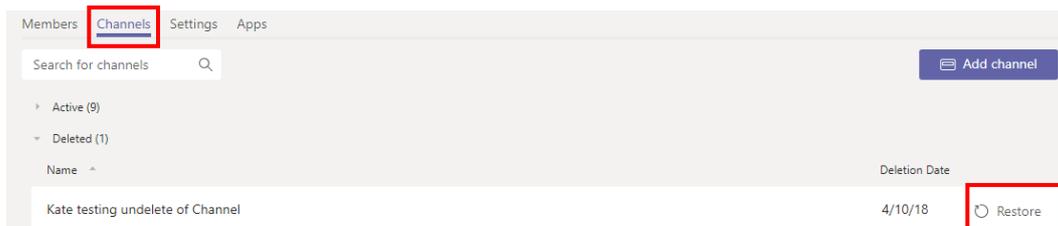
Tabs

Tabs allow your team to integrate frequently used tools and services, have conversations about documents, generate analytics and more, all within your Team window. By default, each channel comes with default tabs for **Conversations** and **Files,** a Team Owner can add additional tabs as required.

Adding a Tab

1. **Click +** on the tab row.
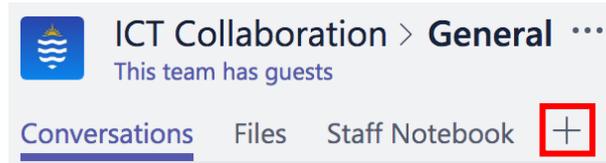
2. **Select** the **service, app or web page** to add, please note some options require a subscription or licence to access.
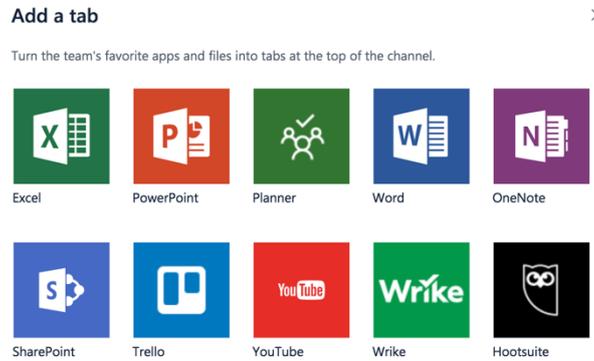
3. **Accept** the service agreement (if required) and follow prompts to add the service, app or web page, some options may require additional information, log a job through ServiceNow if assistance is required.

By using this tab, you agree to the developer's License terms and Privacy statement.
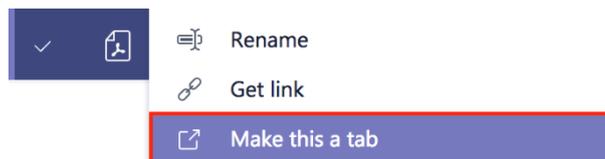

Creating a New Tab from a File

Important documents or presentations can be added as a Tab to ensure all team members can quickly find and comment on the document.

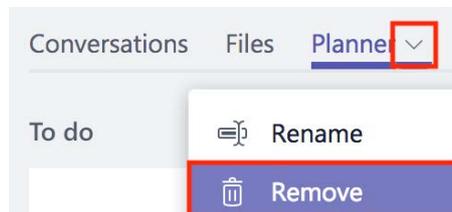1. **Click** the **Files tab** on the appropriate Channel.

2. Locate the file to make into a tab and right click the file name.
3. **Select Make this a tab**.

Deleting Tabs

1. **Click** the **arrow** next to the tab name.

2. Select **Remove**.

Team Owners Checklist

Before requesting a Team, check the following (you will need to consult your ICT Service Delivery staff for assistance):

☐ Are all Team members using Microsoft Office 2016 or above?
☐ Are Team members using a computer with the Win 10 Creators Update installed (if using a PC)?
☐ Who will be the nominated Team Owners (minimum of two required at all times)?

- ☐ Are all Team members aware that co-authoring is ONLY possible on .docx, .xlsx and .pptx files and that older versions (eg: doc) are not compatible with co-authoring?
- ☐ Have you decided on a Team name – this should NOT be altered once the Team is created.
- ☐ Have you decided on a Team structure, eg Channels/Sections – this should NOT be altered once the Team is created.
- ☐ Has your Team discussed how you will be using Microsoft Teams, what will be stored in Teams and any team guidelines?

Want to Know More?

Lynda.com has some interesting courses on Microsoft Teams if you would like to know more:

- Microsoft Teams Essential Training