OneDrive and Teams
Training Manual

Academic Departments, Schools & Colleges

FACULTY OF LIBERAL ARTS & PROFESSIONAL STUDIES

eServices Office
# ONEDRIVE AND TEAMS DOCUMENTATION

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General Introduction to OneDrive and Teams

Have you ever lost or forgotten a document, or misplaced your USB? Have you edited and saved in Excel and could not roll back to a previous version? Have you thought that collaborating on a document without creating unlimited drafts with your team would be useful, but forgot which version was final? Have you ever worked on the file together as a team: not one person, not even two, but all of you together?

Why OneDrive and Teams?

York University introduced Microsoft Outlook (Email) from the Office 365 suite which hosts many web applications that interconnect with each other. At this time, OneDrive and Teams are specifically covered in this training manual.

OneDrive and Teams can be accessed anytime, anywhere and from any device. These two applications are available to you with endless features and are covered here in detail.
Improve on your work experience: Security, Accessibility, and Team Collaboration

**What can the applications do for you?**

- Save your files automatically and securely, no matter how many users are editing simultaneously
- Synchronize with your devices seamlessly, ensuring you no longer need to save/bring the USB key or email the file
  (NB: OneDrive – the synchronization might take some time depending on the internet connection and if the device is switched on)
- Allow you to work on one file as a group, eliminating the need for different copies of the same file.
- Uses the same application (MS Office) regardless of the operating system, eg. MAC or PC
- Many more features are available

**What is OneDrive?**

OneDrive is a free online storage space for your individual work files. You can access it, whenever you want, using your phone, tablet, or computer. Any changes will be updated on all your devices – it is called synchronization. The files are secure, and OneDrive is encrypted using SSL.

The intent of the OneDrive is for your personal work use. York University offers you 5 Tb of webspace and there are no restrictions on the file size (either upload or download). Store and manage your files there, instead of the X Drive!

In addition, OneDrive provides the opportunity to share the files/folders with other co-workers. You can use it to create drafts before uploading to the shared space. Contacting tech support and waiting for them to add someone’s access to a drive becomes a thing of the past, once you begin using OneDrive’s shared feature. You may access your secured files from home, work or even a remote vacation spot, once you have a highspeed internet connection/data plan and a device (mobile, tablet or computer)!

The files can be shared with one person or a group of people; hence no more large emails’ attachments but a simple link that is sent to the person/group.

**What is a Group?**

Outlook group has the same concept of groups as you would experience in real life. You selectively and methodically choose group members according to their roles and then create the group. You may give
the group members one of two access roles: Members and Owners. The difference is in the ability to edit: Members can view only, while Owners can add/edit/remove group-members/files.

**Important:** By default, each group you create will have the prefix “LAPS-“. This is because you belong to the LAPS faculty and can be easily identified among York U’s community; there is no way you can remove or edit this prefix. For more information on the naming convention, please read the “**Naming Convention**” in the Group sections.

Each created group inherently has its own email address and you can use it to communicate with one another within the group. You will also be able to reference the calendar or even use a group calendar for scheduling important dates as a team.

In order to be synchronized with any other future Microsoft products, it is highly recommended that you create a group first (**FIRST STEP**). This will help you to share the files and create additional tools that are added later, with the proper synchronization (i.e. Teams).

**Note:** Your OneDrive and your group OneDrive are two different web spaces. You can share your personal OneDrive files with specific people or with a group. The group OneDrive is automatically shared its own OneDrive with the group members.

**What is a Team?**

Teams creates a simple dashboard for a group to share exclusively. This team-centered web space is used for its collaborative communications: i.e. files and documents, video chats, simple chats, share screen, etc. The content is updated by the team more often and the team size is usually relatively small. The whole team has access to the files, chats/messaging/comments. It is a good tool for working on the files in real time. The greatest advantage is that you do not need to be with the person in the same room.

**Note:** It is worth re-mentioning, that based on experience, it is advisable to create groups first before creating the corresponding Team.

Teams allows users to create Channels that separate/categorize the team interactions or projects. Here you can segregate the tasks within department: application processes, hiring process, etc.

**When to use OneDrive and Teams?**

Some features can be interchanged; however, remember, OneDrive is designed for **individual** work whereas Teams are designed for **collaborative** work.

**How are they all connected?**

On iCloud everything is interconnected and there are many ways that you can set up connections. If you want everything to be synchronized properly, follow these steps:

1. Get your OneDrive account ready (York University provided – it is your Passport York Account)
2. Create the group (Important)
3. Create the Teams
OneDrive

Logging in

You can access your OneDrive by going to York University site:

1. Go to York University page (http://www.yorku.ca/index.html)
2. Click on Quick Links
3. Click on Office 365 under Faculty & Staff section

Or you can simply type:

1. Go to: yuoffice.yorku.ca or portal.microsoft.com.

You will be asked to Sign in:

1. Log in using your PPY username and password (username@yorku.ca).
   Note: it is important that you enter the “@yorku.ca” part, as this part will authenticate the institution to which you belong (i.e. York University).
2. Enter your Password

3. Click on “Sign In” button

Getting Started – Access your OneDrive

1. After successful authentication, you will see the dashboard of Office 365 home page. All your applications are displayed here, including OneDrive.
2. OneDrive can be accessed on the side menu by clicking on the nine dots icon in the top left corner:

Note: You can always navigate back to the dashboard by clicking on this icon. In the expanded window, you can see the OneDrive.

3. Click on OneDrive

OneDrive – Basics

Viewing and organizing files – General View

The main page will display all files that you have uploaded to OneDrive, including folders, photos, and documents. On the left side, there are several tabs to help you navigate OneDrive:
Note: In the top left corner there is an icon that will allow you to navigate back to the main web application list. Here is the brief introduction of what is available to users. This view is very similar to the Windows Explorer folder structure on your computer.

1. **Files**: You can go to the top level of your files.
2. **Recent**: This tab will display files that you have recently opened, including files that you have created and files that were shared to you by other users.
3. **Shared**: Files that others have shared with you as well as files that you have shared with others will appear here. At the top of the page, you can toggle between two tabs (“Shared with me” and “Shared by me”) to filter your shared files.
4. **Recycle bin:** Any file deleted from your main Files page will be sent to the Recycle bin. If there is a file you have accidentally deleted, go to the Recycle bin, select the file you would like to recover and click on “Restore” -- the selected file will be moved back to the Files page.

   ![Recycle bin](image)

5. **Breadcrumbs:** You can view the folder path; i.e. this image shows that I am currently in the “documentation” folder. The breadcrumbs can be used for the navigation.

6. **Brief summary of a file/a folder:** an icon of a file/a folder, the name, the date, who modified, the size, Sharing status (i.e. private/shared)

7. **Action icons:** this is what can be done in OneDrive: i.e. Add New File/Folder/etc., Upload, Share, etc.

8. **View:** These icons control the view of the online folder structure.

**Uploading and downloading files/folders**

You can upload local files and folders from your personal device to your OneDrive Files tab as well as any shared folders to which you have editing access. To upload to OneDrive:

1. Select “Upload” located at the top of the page.

   ![Upload](image)

2. Select the file/the folder
3. Click “Open” button

**Creating new files/folders**

By selecting the “New” dropdown button at the top of the main Files page, you have the option to create new folders, Word documents, Excel workbooks, and PowerPoint presentations.
Folder: Before creating a new folder, you will be asked to name it.

Files: Common MS Office applications are offered to you to use on-line.

By default, new Word documents will be named “Document.” To change this, click on “Document” located in the header and begin typing the new title. Press the Enter key when you are done.
OneDrive will automatically save new documents, workbooks, and presentations, along with any subsequent changes made to these files. Therefore, when editing, there is no need to manually save your changes.

Files created in OneDrive can be accessed and edited at any time.

Modifying Files

Opening Word documents

Word documents that are saved in OneDrive can be modified using either the built-in online editor in Office 365 or the MSWord program installed in your computer.

By default, clicking on a Word document in OneDrive will launch the online editor. If you would like to open and edit a document using your computer’s Word program:

1. Hover your mouse cursor over the file that you would like to open.

2. Select the button (three vertical dots icon -- ) that will appear to the right of the document name.

3. Select “Open”, then choose “Open in app”.


**Note:** Depending on the Web browser you are using, you may have to allow or give permission for the browser to launch the file in MSWord.

**Example:** For Google Chrome users, this pop-up may appear. Click on “Open Url: Word Protocol”.

After opening the document, your Word program may ask you to log in using your PPY account. If you are using a personal computer, you will only be asked to log in once.

*Editing Word documents online*

Office 365’s built-in online editor has several useful features:

1. **Simplified Ribbon:** By default, the Simplified Ribbon will be turned on; to turn it off, click on the button located in the top right corner of the page. See views below of Simplified Ribbon On, then Off, respectively.
2. **Adding comments:** To add comments to the document, click “comments” near the top right corner (for Shared Files).

   a. Click “New” to start adding a new comment.
   b. Enter the comments and click Enter to post the comment.

3. **Version history:** To see the version history of a document, go back to the list of documents, click the three vertical dots beside the desired file, and select “version history” from the menu.
**Note**: A panel will show up in the right side of the screen. It will show all the past versions of the document and their date. Click on the version number and OneDrive to create a prompt asking the user to open the document in the desktop application.

4. **Teamwork and collaborators**
   When more than one person is editing a document, their names will appear near the top right corner. Clicking the thumbnail will display more information about the user.
Note: that the circle color around the team member’s icon corresponds to the color of their text cursor.

5. **Sync button and autosave**
   By default, the web application version of OneDrive office applications automatically saves whenever a user edits the document. However, in the desktop application, you need to click on a “sync” button to synchronize the document with the one saved in the cloud.

Managing files in drive

1. **Uploading a document to drive:**
   To upload a document from OneDrive, click the “Upload” button at the utility bar near the top left. Once clicked, a drop-down menu will pop up. Select accordingly if the upload is a file or folder. Then, a file selection panel will appear for the user to select a file/folder to upload.
2. **Downloading a document from drive:**
   To download a document from OneDrive, go to the list of documents, click the three vertical dots beside the desired document, and click “download” from the menu.

3. **Sharing a document:**
   There are many ways to share the document:
   a. While editing the file: Click on the button “Share” in the top right corner.
b. From the file directory: Click on the “Share” button or menu option.

Note: Once you share the file, you will notice that the Sharing status will be updated from Private to Shared

c. In the panel popping up after the button is clicked, click the defaulted line with “People in…”, the panel will switch to a list of selections.

d. From the options, select “Specific people”, select or deselect “Allow editing” if the receiving users should be allowed to edit the document and click “Apply”.
e. Next, type the email address of the user or the group to share this document/folder and you may add an optional message for them to see, and click “send”. The user(s) will receive an email notifying that they had been given permission to view or edit the document.

4. Revoking permissions of a shared document
a. To revoke permission of a document shared per account, go to the “Share” panel, click the three horizontal dots near the top right, and select “Manage Access”
b. Click on “Manage Access” option available

c. Click on the three horizontal dots to get more information about the user(s)
Select the option to update the settings for the users or simply remove the user access by clicking on the “X” symbol next to the specific user.

Save changes

OneDrive Size

To find the amount of space used or free storage space remaining follow the instructions below. At the end you will find simple Analytic information - a list of the folders and files sorted by the size.

1. Go to York University page (http://www.yorku.ca/index.html)
2. Click on Quick Links
3. Click on Office 365 under Faculty & Staff section
4. Click on OneDrive
5. Click on the gear icon in the top right corner
6. Click on “OneDrive settings”
7. Select “More Settings”
8. Click on “Storage Metrics” link
9. In the top right corner, you will see the Site Data in GB

Note: the main page will have general information about the folder and files on your OneDrive. You can navigate through the folders to determine the memory use.
Guest access to OneDrive

External sharing is possible with OneDrive, but with some limitations.

There are a couple external sharing criteria:

- Users who are not employees
- Users who do not have access to Office365

Users with external Microsoft emails (ex. Hotmail, Outlook, etc.) can be granted immediate access; the users using other email accounts (ex. Gmail, Yahoo, etc.) will need to have their accounts associated with Microsoft, and only then they will be able to access the shared material.

Note: When users access the shared files link, the one-time registration and verification process will start with their name and the email address with Microsoft. The users will then be asked to enter the email address, password and the name. To complete registration, the emailed verification code will need to be inserted.

After testing external accesses, the current settings revealed that sharing files had a time expiry of about 3 hours once the material had been accessed.
Groups is the tool that will help you to collaborate on your documents (eg. MS Office), projects, sending emails, sharing calendars, etc. You can group the people with whom you communicate or often share work. You can manage the group(s): add, delete or modify the permissions of each member.

The greatest benefit is that you can send mass emails to the whole list by typing only one email address. Additionally, if you delete the communication inside your inbox, there is still a copy in the group email inbox.

**IMPORTANT:** O365 offers you a vast variety of tools to use; however, to ensure seamless integration of the services available, you will need to create the group **FIRST**.

**Things to consider**

Each group has its own OneDrive (5Tb) and a generic group email with a shared calendar. All teammates can add and manage the calendar. If you have created the group(s) first, any additional tools added later (e.g. Teams) will be automatically synchronized with this group’s calendar, OneDrive, etc.

**How to create a Group**

The first step in group creation is finding the appropriate name for the group. By default, each group created will have the prefix “LAPS-” which will identify you as specific users of the York U community. This association identifies that you belong to the Faculty of LAPS. Users cannot remove or edit this prefix.

The naming convention is very important, as it will allow your group to be found/located more easily and ensure that the name is unique. There is no limit to how many groups you can create; however, you are advised to adhere to the following naming convention.

**Naming Convention**

The naming convention to follow:

LAPS-Department-“sub-department(or program)-name”-optional description

The examples of the group names:

- **LAPS-SOSC-CRIM-Faculty**
- **LAPS-DEANS -Research-Team**
- **LAPS-HUMA-Fulltime-Faculty**

Note: The pre-fix “LAPS-“ is automatically added; hence you are responsible for “SOSC-CRIM-Faculty”.

If you would like to rename the group, check “How to update Group settings” section.

**Group Creation Instructions**

1. Go to York University page (http://www.yorku.ca/index.html)
2. Click on Quick Links
3. Click on Office 365 under Faculty & Staff section
4. Click on Outlook
5. Scroll to the bottom of your left navigation pane to the Groups menu

6. Click on “New group”
7. Enter the name: ex. eService-Training-Group
   Note: You can see that the name is automatically adjusted to LAPS- eService-Training-Group
8. Contract the group email address if necessary
9. Check that the privacy is selected as private
10. Click Create
    Note: Now the group is created
11. Enter the group members that will need access to the group by entering their names or email addresses.
    Note: All added members will receive an invitation in their inbox.
12. Click Add to complete the addition of users to your groups.

Now the new group has been added to your list of groups.

How to Update Group Settings

To edit the settings: the group name, group image, members’ list, etc., you need to go to the settings of the group.

1. Go to your Web Outlook
2. Click on your Group
3. Click on the dots (…) located just under the Group name in the main section of the screen
4. The Group settings will appear on the right side of the screen
5. Click on “Edit Group” link
6. Edit the settings: i.e. the group name, the description, the image, etc.

7. Click on “Save” button to save the changes, or “Disregard” button – to ignore any changes done to the settings or to the “Delete group” link – to delete the group completely

How to manage Group (users, email, etc.)

To review and manage the group you need to go to your Web Outlook:

1. Go to Outlook and scroll to your group section
2. Click on the name of the group in the main section:

3. The group information screen will pop-up:
Here you can see and access the groups settings (click on Edit link in “About this group”), see the Group members list and the Apps (the online tools that are currently available to you in the group). This form allows you to manage the whole group.

Add/Remove/Update User Settings

To manage group members, you need to click on Members tab:

You can see the list of all Members that have access to the groups and their Role. You can search for the users if the number of members is very extensive; otherwise you can simply scroll through the list.

To Add Members:

1. Click on “Add Members” links
2. Enter the Name or the email address of the person you would like to add
3. Repeat the step 2 to add more people
4. Click on “Add button” and close the window

Note: All new members are added as “Members” (i.e. they cannot change the settings of the group; however, it does not affect their group participation).
Changing the Role Settings

a. Click on the Role title of the user
b. In the pop-up box, select the role you would like to assign to a member. You only have two options: Owner and Member

Note: the external guests can only be Members and you will not be able to modify their Role settings.

Delete a member

To delete a member of the group:

1. First, find a member on the list by scrolling/searching
2. Click on the X associated with the user:
3. Confirm the removal of a member:

![Remove member dialog box]

**How Groups Works**

Any group gets its own OneDrive with the corresponding 5Tb space and this allows you to manage the files, the shared calendar and the communications (emails). The main point is to be able to communicate easily with team members using one generic email address. The copy of the email will be delivered to your personal work email inbox. The main email will be stored in the group email inbox that you have access to.

Any file added to the group’s OneDrive is automatically shared between the group members. The collaborative work starts here. Anyone can add, edit or delete the files (i.e. members or owners).

The Group’s OneDrive document can be shared with guests the same way as your personal OneDrive.

**How to access Group Calendar**

Each group has its own calendar which can allow you to scheduler meetings, add the notices that your group needs to be aware off: i.e. the vacation days, group training days, etc. This calendar can be synchronized with your personal calendar.

To access the calendar:

1. Go to your Web Outlook
2. Click on your Group
3. Click on the calendar icon
Note: You will see the calendar for your group.

4. Click on “Calendar” to synchronize your personal Calendar with the group

The use of the calendar is the same as you would do in your personal Outlook email (web application or client)
Note: All groups calendars and email Inboxes can be accessed via the client email Outlook (via the application on your computer). The Calendar can be viewed by selecting the desired group or can be merged by multiple selecting several groups.
Teams

Teams has the unique dashboard shown below.

1. **Navigation to the home page**: The nine dots icon will bring you back to the page where you can navigate to your personal OneDrive, Outlook, Calendar, etc.
2. **Activity Icon**: This icon will have a red dot appear if any changes were made in the Teams environment (examples: the file was updated, the post has been made, the user has been added, etc.)
3. **Teams icon**: This will bring you to the list of your Teams that you have access to.
4. **Files icon**: This is the list of your recently accessed files: your personal ones, your group’s and your Team’s.
5. **Group title**: This is the name of the Teams you are currently in.
6. **Channels**: These are the channels that your team has organized in the webspace. Each channel has a Conversation and File space.

   Hover over to allow the three dots icon to appear. This gives options to manipulate the specific channel. Note: the number of options will depend on your role/permissions (Owner vs Member)
   a. **Channel Notifications**: Allow users to sign up for notifications for this channel.
   b. **Hide**: Allow users to hide this channel from the view. You can still access it; however, you will need to click on “# hidden channels” link under the list of all channels.
c. **Manage channel**: Allows users to control who has access to the channel. This option is still being developed by Microsoft.

d. **Get email address**: Each channel can have the email address.

e. **Get the link to channel**: If you think a team member is lost; you can email the link.

f. **Edit this channel**: This is the basic renaming channel option

g. **Connectors**: This option will not be discussed in detail at this time; however, it gives you an option to add a few features (i.e. additional reward stickers, etc.)

h. **Delete channel**: This option removes the channel

7. **Manage Channel**: These settings apply to Teams and is limited to Owners only):

   a. **Manage Team**: This brings users to the generic settings of the team: members, Requests, Channels, Teams settings (icon, permission, etc.), statistics, so on.

   b. **Add Channel**: Allows users to create additional channels to organize projects or distinctive work.

   c. **Add Member**: Allows users to add team members individually or as a group.

   d. **Leave the team**: You can leave the Team yourself. However, if the group has been added to this Team with your profile, you will need to be removed from the group and not the Team.

   e. **Get link to Team**: New users have a hard time finding Teams. This link will allow them to gain access to the files and information faster.

   f. **Delete the Team**: Used to delete the Team. It is hard to restore the Team once it has been deleted - all members will lose access to this Team.

8. **Navigation breadcrumbs**: Demonstrates the current Team name and the name of the channel.

9. **Horizontal tabs**: Conversations, Files, etc. – these are the generic options that are available for each channel. Conversation tab will allow you to post/communicate with your team members in real time, and the Files tab will allow you to share the files.

10. **Search**: This textbox will allow users to search through the conversations and files available through the Team or the channel

11. **Conversation box**: Where users can converse with the Team members. Users can expand the area by clicking on A icon, add the attachment (pin icon), send emoji (the smiley face), attach the gif image and organize the video chat.

Teams has lots of collaboration potential, and the most important part is that it can bring the team together regardless of the location of Team members.
How to Create a Team

1. Go to: [yuoffice.yorku.ca](http://yuoffice.yorku.ca) or [portal.microsoft.com](http://portal.microsoft.com)
2. Login with PPY Username and Password
3. Click on *Teams*
4. Click on *Join or create team* on the top right side
5. Click on **Create team**

6. Select **Staff**
7. Enter a name and optional description for your team. There are two options for Privacy, **Private** – Only team owners can add members or **Public** – Anyone in your organization can join. Click **Next**.

**Note:** For the Team’s name, please don’t type LAPS or AP, as the system already has the prefix setup automatically.

Create a team from an existing Office 365 group, for more information see [Group page](#).
8. Type in your team members or group and click **Add**. You have the option click **Skip** this step and add members later.

9. After you have added the members, you have an option to give them a role, **Member** or **Owner**. Click on **Close**.

**Member** - Members are the people in the team. They talk with other team members in Conversations (chats). They can view and usually upload and change files. Members also do usual sorts of collaboration that the team owners have permitted.

**Owner** - Team owners manage certain settings for the team. They add and remove members, add guests, change team settings, and handle administrative tasks. There can be multiple owners in a team.
Now you have created your New Team!

Chat and share files
Compose a message, type and format it here. Add a file, emoji, GIF, or sticker to liven it up!
OneDrive and Teams Plan

1. Formatting
2. Adding attachments, through OneDrive, Upload from computer
3. Adding Emoji, meme or GIF
4. Video call or Audio call
5. More options to add Praise and other suggestions
6. To send message

@mention someone
To get someone’s attention, type @, then their name (or pick them from the list that appears). Type @team to message everyone in a team or @channel to notify everyone who favorited that channel.

Share a file in Teams
1. Go to Files tab
2. Select New to create a new folder, Word document, Excel spreadsheet, PowerPoint presentation or
3. Select Upload, to share a single file or multiple files from computer
How to Delete a Team

**Note:** Only users with access as an **Owner** can **Delete the team.** When you delete a team, all the channels, chats, files, and the Office 365 Group for this team will be **permanently deleted.**

1. Click on the three dots icon beside the Team’s name, opening a drop-down menu.
2. Click on **Delete the team**
3. Select the check box for understanding and agreeing that everything in the teams and anything connected to it, will be permanently deleted.
4. Click **Delete Team.**
How to Add a Member

1. Click on the three dots icon beside the Team’s name, opening a drop-down menu.
2. Click on Add member.
3. Enter the new member’s name, email or group name and click Add.

4. After you have added the member, you have an option to give them a role, **Member** or **Owner**. Click Close.
How to Delete a Member

1. Click on the three dots beside the Team’s name, opening a drop-down menu.
2. Click on **Manage Team**.

3. Click on ‘X’ to delete/remove members. The removed member will not get any notification letting them know that they have been removed from the Team.
4. There is another way to **Add member**, by clicking on the top right-side button.
How to Add a Channel

1. Click on the three dots beside the Team’s name, opening a drop-down menu.
2. Click on **Add Channel**.

Teams are made up of **channels**, which are the conversations that you have with your teammates. Each channel is dedicated to a specific topic, department, or project.

For example, Office 365 team has OneDrive, Teams, Outlook, Training and 35 more channels. All the conversations, meetings, and files in the Training channel have to do with Training and everything in this channel is visible to everyone on the Office 365 team.
3. **Add a Channel name**
4. Options to ‘Automatically show this channel in everyone’s channel list’
5. **Click on Add**, to create a new channel/topic

6. **New channel will be visible underneath ‘General’**
How to Delete a Channel

1. Click on the three dots beside the channel, you want to delete, you will see a drop-down menu.
2. Click on Delete this channel.

3. When you click on Delete, the channel and the all conversations will be deleted. Your files will be accessible though OneDrive.

Delete "Training2019" channel from "LAPS-Testlaps" team

Are you sure you want to delete the channel "Training2019"? All conversations will be deleted. Your files are still accessible here.

Cancel Delete
Additional Resources

Please visit these links for the additional information/resources.


URL: [eso.laps.yorku.ca/onedrive-training-with-teams/](eso.laps.yorku.ca/onedrive-training-with-teams/)

Training Site: [www.lynda.com](www.lynda.com)

Microsoft OneDrive Video Training: [Visit OneDrive site](#)

Microsoft Teams Video Training: [Visit Teams site](#)