

- » Navigating the Teams app
- » Managing your status and profile
- » Configuring your settings
- » Searching across Teams
- » Adding apps, tabs, and other extras

Chapter 1

Getting around in Teams

Throughout the first six sections of this book, for the most part I've treated Office 365 as though it was a suite of apps designed for a single person to get their work (or play or creativity or whatever) done. Nowadays, though, around a quarter of the way through the 21st century, getting work (or play or creativity or whatever) done by yourself feels more than a little old-fashioned. In the modern world, especially if you work in an office and/or for some behemoth corporation, you're more likely to be part of a team. And one of the main characteristics of a team is that everyone collaborates with everyone else on the team.

Collaboration is such an important topic now that I devote an entire mini-book to it (that would be Book 8). But the true Office 365 collaboration experience begins right here in Book 7 with an in-depth look at Microsoft Teams. As the name implies, Teams has been designed from the ground up to enable teams of colleagues to work together: keep up with team news, have conversations, chat, share files, meet remotely, and more. The chapters here in Book 7 show you how to use all of these Teams features to make it easier to collaborate with the others on your work team.

In this chapter, you find out how to access all the major features in Teams, update and share your status, use apps and plug-ins, and find people, messages, and files.

Introducing Teams

Teams brings together communication, collaboration, and online meetings into a single app, complete with strong integration with most of the other Office 365 apps. Teams also has an App store that enables you to connect to additional Microsoft-created features as well as third-party tools like Evernote, Trello, YouTube, and even Zoom. Teams is fully supported on all major operating systems — Windows, macOS, iOS, iPadOS, and Android — through a dedicated app for each. You can also use a browser version of Teams on almost any desktop computer. You can easily hop between a PC at work, a Mac at home, a browser in a hotel, and an iPhone — all from the same account.

Teams provides the following features:

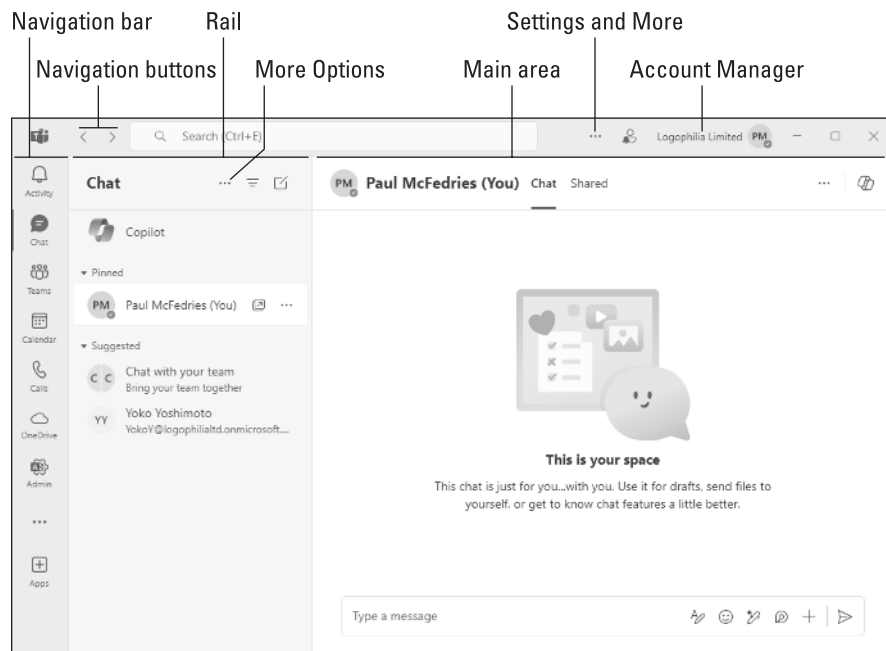
- » **Teams and their channels:** In the Teams world, a *team* is a permission-protected online workspace for threaded conversations, file sharing and editing, and channel meetings. A *channel* is a subcategory of a team, used to divide a team into pertinent subtopics. A team and its channels are meant to help move clunky communication and collaboration processes from your email Inbox into a centralized location, with the goal of reducing notifications overall and keeping work better organized. Chapter 2 of this mini-book focuses on teams and channels.
- » **Chat:** You use the Chat app to have one-on-one and group private chats with both colleagues and external users of Teams and Skype. Teams chat is similar to other chat apps like WhatsApp, IRC, and Skype, but it has many more features than most of those other tools. Chapter 3 of this mini-book focuses on how to Chat.
- » **Calls and meetings:** You can host interactive video conferences within Teams and include anyone inside or outside your organization, or simply start an audio call with a single person. Chat, share your screen, upload files, record meetings, lead webinars, and interact from your desktop or mobile device. This feature is similar to Zoom but provides a lot more capabilities thanks to its deep integration with the rest of Office 365. Chapter 5 of this mini-book tells you much more about meetings.
- » **Files:** Access your OneDrive, SharePoint, and Teams files right in the Files app in Teams. You can even bring in files from other services, like Dropbox and Google Drive. Book 7, Chapter 4 covers the Files app.

Taking a Look Around

This section demystifies the Teams interface. Along the far-left side of the window is the *navigation bar*, which is the vertical pane that holds your basic Teams apps: Activity, Chat, Teams, Calendar, Calls, and so on. You can pin other Teams apps that you install to this bar as well; check out “Enhancing Your Teams Experience with Helpful Extras,” later in this chapter, for details.

When you click any of the apps on the navigation bar, Teams opens to a window showing the rail and the main area for that app. The *rail* is the jumping-off point for which app is open and typically lists the most recent or important information in that app. The *main area* contains the actual content for the app you’re in. Each app in Teams deals with these areas differently, but the setup stays relatively constant. The Calendar app is the exception; it has no rail but instead takes up the whole space and displays your Office 365 calendar, which is the same calendar you use in Outlook 365. Refer to Figure 1-1 for an overview of the areas in Teams.

FIGURE 1-1: You access the Teams apps via the navigation bar, and most apps have a layout similar to the one shown here for the Chat app.



REMEMBER

As you begin to move around in Teams, keep these navigation tips in mind:

- » To switch among Teams apps, click the app name in the navigation bar. The rail may have a title in bold type at the top, such as Teams, Activity, or Chat, depending on the app.

■ ■ ■

- » To the right of the app title, you usually see the More Options button (shown in the margin and pointed out in Figure 1-1). Clicking More Options opens a drop-down menu that offers one or more ways to modify the app view (the commands that appear vary depending on the app).
- » Use the Back and Forward navigation buttons (pointed out in Figure 1-1) to navigate previously visited Teams apps.

Personalizing Teams to Use It Effectively

You can configure Teams to better meet your needs by choosing among the built-in settings and personalization options. The following pages cover how to add or update a profile photo, manage your status and notifications, enable dark mode, and configure your audio and video devices for meetings.

Adding a profile photo

The first thing any good (or bad, for that matter) Teams user should do is add a profile photo so that your peers and colleagues can attach a face to your name. Adding or updating your photo in Teams updates your profile in all Office 365 apps (though the update can take hours or days to work its way through all the apps).



TIP

Use whatever photo you're comfortable with, but ideally the photo should follow these guidelines:

- » The photo should be a straight-on view of your face, with good lighting and a clear contrast between your face and the background.
- » It's best if your photo is cropped square or as close to square as possible before you upload. You can't crop or rearrange non-square photos, so do the image work before uploading. A JPEG or PNG image sized to 1024 x 1024 seems to work best.
- » Your face should take up as much of the profile photo circle as possible. You don't need to show off your blouse or tie, or anything that might be in the background. Many areas within the Office 365 apps where your photo will show up are small, so the more tightly the image is cropped to your face, the better.

Follow these steps to upload a new or updated profile photo:

1. Click the Account Manager (pointed out earlier in Figure 1-1).

The Account Manager menu opens and displays your photo or initials, status, and other options.

2. Click the image to the left of your name.

If you haven't uploaded a profile photo in the past, the "image" will just be your initials.

The Change Your Profile Picture window saunters in.

3. Click Upload.

The Open dialog box makes an appearance.

4. Navigate to the folder that contains the photo, click the file, and then click Open.

Teams returns you to the Change Your Profile Picture window and displays the image you selected. If you're not happy with the photo you chose, feel free to repeat Steps 3 and 4 until you find an image that satisfies.

5. Click Save.

Teams updates your profile picture.

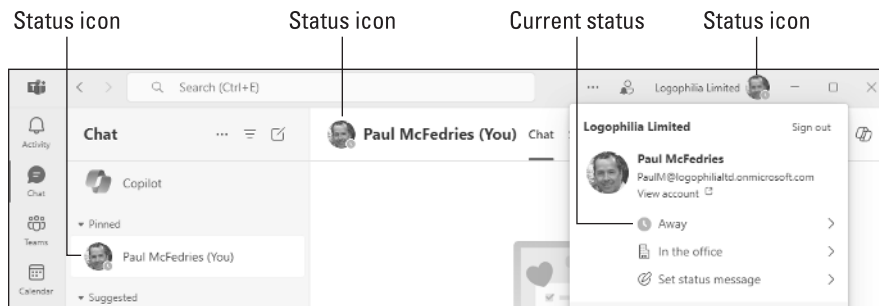
Setting your status

On Teams, your *status* is an indication of your current engagement with the Teams app. The status is useful because it lets others know whether you're available for a meeting, chat, or phone call. For example, if someone wants to invite you to a meeting right now, they'd delay that meeting if your status indicates that you're not currently available.

Your status appears anywhere your profile photo does in Teams, like your Account Manager menu, a chat, or a conversation. If you do nothing with your status, Teams automatically updates the status depending on what you're doing:

- » **Available:** You're actively using Teams, and you're not booked in an appointment or sharing a screen in a meeting. The Available status icon is a green circle with a white checkmark.
- » **Away:** You haven't interacted with the Teams app for a while (or you've let your computer go into sleep mode). The Away status icon is a yellow circle with clock hands. Figure 1-2 shows the Away status as it appears in the Account Manager menu and also points out several places where the Away icon appears in the Teams interface.

FIGURE 1-2: Your current status appears in the Account Manager menu and wherever your profile picture appears.



- » **Busy:** You're in an appointment on your calendar (Outlook or Teams) that lists you as busy. The Busy status icon is a solid red circle.
- » **Do Not Disturb:** You're in a Teams meeting and you're sharing your screen. The Do Not Disturb status icon is a red circle with a white bar.

However, there might be times when you're technically "available," but you don't want to be contacted because you need to focus on what you're doing. In such cases, you can take control of your status and set it manually to Busy or Away or Do Not Disturb or whatever you think will keep others on your team at bay. You can also set a duration for your manual status and include a status message, which can help direct people who want to reach out to you.

Follow these steps to change your status and status message:

1. **Click Account Manager near the top-right corner of the Teams window.**
Your Account Manager menu opens.
2. **Click your current status.**
A drop-down menu with status choices appears, as shown in Figure 1-3.
3. **Click the status you prefer.**



REMEMBER



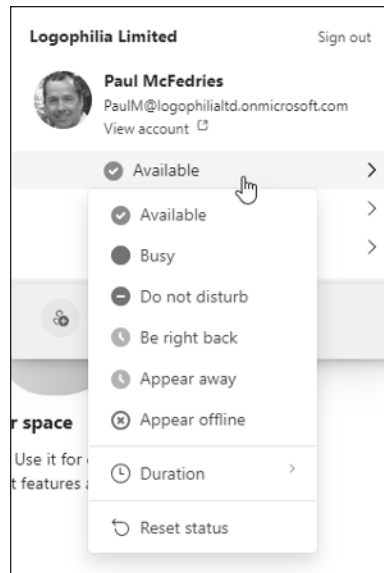
TIP

You can't set your status as Available for a duration (probably so that people can't appear to be working when they're not, not that you or I would ever do such a thing).

The Do Not Disturb status blocks most notifications and calls from bothering you, so it's useful when you need some uninterrupted focus time. However, you can provide priority access to certain individuals (maybe your boss?) so that they can circumvent your Do Not Disturb status and get through to you. Refer to the "Setting up priority access" section, later in this chapter, for details.

Teams changes your status to your chosen option.

FIGURE 1-3:
Teams offers
a half dozen
choices for
manually setting
your status.



- 4. To specify a length of time for your manual status to be in effect, click the new status, click Duration, use the Reset Status After drop-down list to select a time, then click Done.**

If none of the prefab durations works for you, click Customized, then choose the day and time when you want your status to reset.

- 5. To update your status message, click Set Status Message next to your status, then type your message in the large text box that appears.**

Use the status message to tell people why you're not available or to point them to a resource that might help them when you're not around. The status message automatically displays your out-of-office message (automatic reply) from Outlook when it's set.

You can also select the Show When People Message Me check box to tell Teams to display your status when someone messages you. Finally, you can also use the Clear Status Message After drop-down list to set the duration of your message.



REMEMBER

If you choose to show your status when people message you, your status message displays above any message box a colleague uses to send you a message (for example, in chat or a Team). This feature is incredibly useful for ensuring that people know what to expect when they send you a message.



REMEMBER

You can cancel your manual status at any time by clicking your status and then clicking Reset Status.



TIP

You can quickly set your status using slash commands. In the Teams Search box, type **/available**, **/away**, **/brb**, **/busy**, **/dnd**, or **/offline** (note the forward slash mark before each word) and then press Enter. Refer to the “Saving time with slash commands” section, later in this chapter, for more info on these types of commands.

Setting up priority access

Priority access enables selected individuals to bypass the Do Not Disturb status if you’ve set it manually (or you’re sharing your screen in a meeting or call). Priority access is useful when you want key people to be able to get hold of you — such as your boss — even when everyone else can’t.

Follow these steps to manage your priority access list:

- • • **1. Click Settings and More (shown in the margin) to the left of the Account Manager button.**
Teams unfurls the Settings and More menu.
- 2. Click Settings.**
Teams introduces you to the Settings pane.
- 3. Click Privacy.**
Just like that, the Privacy settings appear.
- 4. Click the Manage Priority Access button.**
Teams takes you right away to the Manage Priority Access screen.
- 5. Use the Search For a Name or Number text box to start typing the name (or phone number) of the person you want to give access to.**
- 6. When the person shows up in the search results, click their name.**
Teams adds the person to your priority access list.
- 7. Repeat steps 5 and 6 to add each person you want on your priority access list.**

You can also remove people from your list by clicking **X** next to their name.

Your updates are saved automatically. When you’re done, just click the Teams app you want to work in next.

Customizing Teams via settings

Teams comes with a lot of settings, but they're not obvious or easy to find. Still, you might find it worthwhile to take advantage of all the toggles, tick boxes, and features available to configure Teams in a way that works best for you.

- ■ ■ To access your settings, click the Settings and More ellipsis (shown in the margin) to the left of the Account Manager button to open the Settings and More drop-down menu, then click Settings.

You should take some time to review the available options. A little time now can save you a lot of time in the future. Options range from choosing how Teams starts up and whether spell-check is enabled to managing notifications in other organizations. You can also manage privacy features, read receipt settings, device settings for video calls, and app permissions, just to mention some.

To navigate Settings, click a category in the Settings pane, then use the controls that appear in the main area of the Teams window.

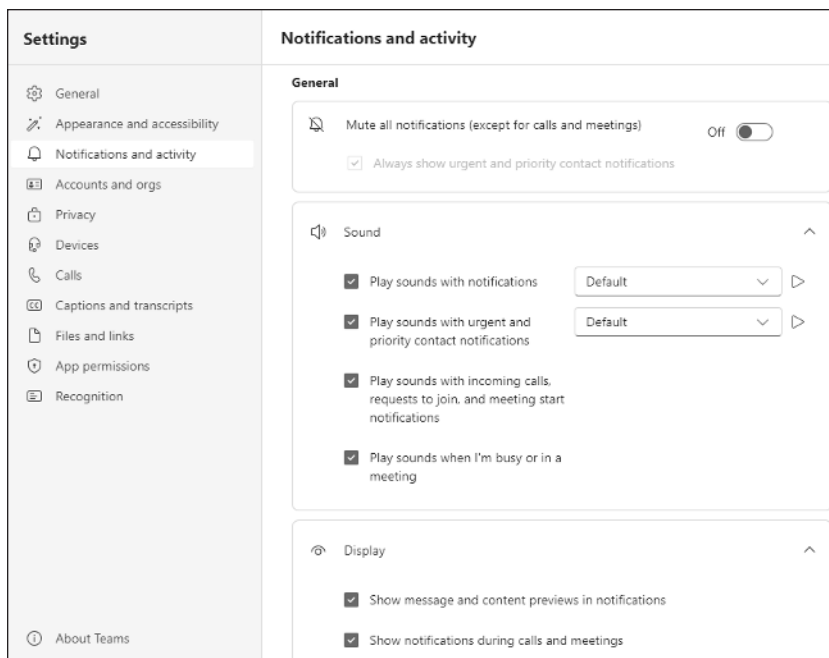
Modifying notification settings

Notifications are likely to be the first thing you want to configure. The move to Teams can lead to more total notifications across Outlook and Teams and, well, it doesn't have to be that way. Follow these steps to manage these notification settings:

- ■ ■ **1. Click Settings and More (shown in the margin) to the left of the Account Manager button.**
Teams unpacks the Settings and More menu.
- 2. Click Settings.**
Teams brings in the Settings pane.
- 3. Click Notifications and Activity.**
The Notifications and Activity window appears, as shown in Figure 1-4.
- 4. If you prefer not to be bothered at all with notifications, click the Mute All Notifications (Except For Calls and Meetings) switch to On.**

Note the exceptions here for calls and meetings. Also, by default Teams still allows urgent notifications and priority access notifications. If you'd rather not allow these through, deselect the Always Show Urgent and Priority Contact Notifications check box.

FIGURE 1-4: Choose the notification settings that will help you achieve work-life balance.



5. If you don't mute notifications in step 4, then take your time working through the notification settings in the rest of the window.

Teams offers settings for notification sounds and display, chats and channels, meetings, people, and calendar.



TIP

You can manage notifications for specific channels and conversations in each channel. This can help you pare down the notifications that are relevant to you, hopefully reducing your overall notification count in a way that you could never do if you continued working in Outlook exclusively. Head over to Book 7, Chapter 2 for details about channel and conversation options.

Enabling dark mode or high-contrast mode

Dark mode is one of the most popular features for apps in the modern world, and an app like Teams wouldn't be complete without it. Teams offers both dark mode and high-contrast options in the form of a theme. Follow these steps to manage your theme in Teams:

- ... 1. **Click Settings and More (shown in the margin) to the left of the Account Manager button.**

Teams unloads the Settings and More menu.

- 2. **Click Settings.**

Teams asks the Settings pane to step forward.

- 3. **Click Appearance and Accessibility.**

The Appearance and Accessibility settings appear.

- 4. **Use the Theme drop-down list to select Dark or High Contrast.**

If you've configured Windows to use dark mode, then Teams will follow suit if you select Follow Operating System Theme in the Theme drop-down list.

Setting up and testing your audio and video devices

Another critical area in your settings is your device listing. Meetings are an essential element of Microsoft Teams, and you want to ensure that your audio and video work correctly before you join a meeting, not *as* you join it. Not only can you use your settings to select your devices, you can also run a test call to ensure that the audio and video are working as expected. Follow these steps to manage your devices:

- ... 1. **Click Settings and More (shown in the margin) to the left of the Account Manager button.**

Teams unveils the Settings and More menu.

- 2. **Click Settings.**

Teams requests the presence of the Settings pane.

- 3. **Click Devices.**

The Devices window appears.

- 4. **Under Audio Settings, use the Speaker list to select your speaker and the Microphone list to select your microphone.**

- 5. **Feel free to adjust the other audio settings, as needed.**

- 6. **Under Video Settings, use the Camera list to select the camera you want to use.**

7. Go right ahead and mess around with the other video settings, if you feel like it.
8. Scroll back up the screen to find the Make a Test Call button and click it to run your devices through a mock call.

This feature starts a call with Teams Echo. You hear a request to record a message. The request shows you how well your speakers sound. Your recording indicates how good your microphone sounds to someone else. Listen for background noises or other distracting sounds, and do your best to minimize them for the best experience in meetings.



TIP

Whenever you need to run a test call again, you can do so quickly by using a slash command. In the Teams Search box, type `/testcall` and then press Enter. (The “Saving time with slash commands” section, later in this chapter, tells you more about slash commands.)

Noticing Notifications

While you’re busy doing your work, Teams is busy monitoring activities such as the following:

- » You get mentioned in a conversation.
- » You get added to a team.
- » Someone replies or reacts to one of your messages.
- » You miss a call.
- » You get a voice message.

To help keep you in the loop, Teams alerts you when any of the above activities take place. These alerts appear as two types of notifications:

- » **Banner:** A pop-up message that shows up temporarily in the Teams app.
- » **Activity feed:** These are messages that appear in the Activity app. They also generate indicators in Teams, such as badges and icons that appear in the navigation bar and elsewhere.

Figure 1–5 points out examples of these notifications. (If you’re scratching your head over what on Earth an “@mention” might be, stop scratching: You learn all about @mentions in Book 7, Chapter 3.)

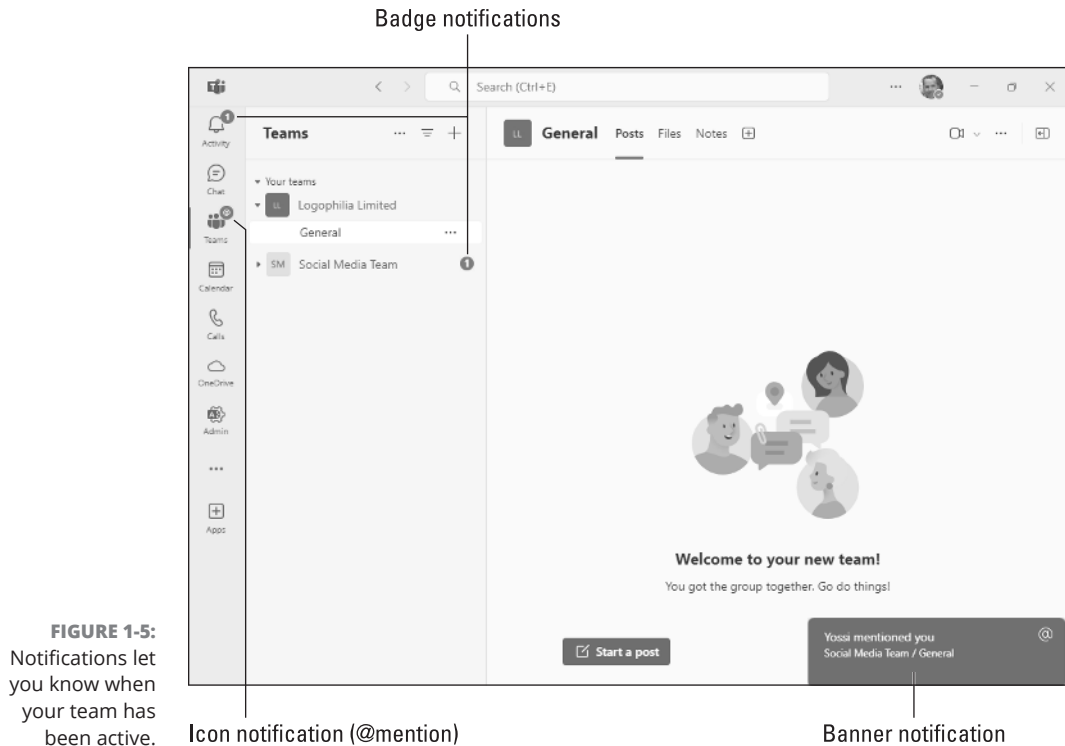


FIGURE 1-5: Notifications let you know when your team has been active.

Filtering and Searching

Depending on the size of your team and how many extroverts it contains, Teams can become a very active place. Lots of activity is usually a good thing because it implies interest and engagement, but that doesn't mean that *you* will be interested in or engaged with everything your team generates. Your Teams feeds will consist of both “signal” — content that's relevant to you — and “noise” — content that falls below your threshold of relevance. One of the secrets of Teams success is to reduce the noise so that the signal comes in loud and clear.

One powerful noise reduction method is to *filter* your Activity feed to display only what interests you. You can also drill down directly to the content you need by conducting powerful searches using the Teams Search box.

Filtering your Activity feed

The Activity app is your one-stop shop for monitoring what's happening within your team — channels, conversations, chats, files, and so on. As shown earlier in

Figure 1-5, a badge on the Activity app icon lets you know when you have unread or missed notifications.

The Activity feed presents actions that you can take in the channels in which you participate. Many people start their workday by checking out what's up on the Activity feed, where you find mentions, replies, and other notifications. Think of it as your Teams Inbox.

However, just as your Outlook Inbox can quickly become overwhelmed with irrelevant messages, your Teams Activity feed can easily become overrun with items that don't interest you or aren't all that important to your work. To make your activity feed more manageable, you can filter it to focus on the information you need. Here are the steps to follow to filter the Activity feed:

1. **Click Activity in the navigation bar.**

Your Activity feed displays in the rail.

2. Filter the feed by clicking one of the following:

- **Unread:** Toggles the feed between showing just the items you haven't read yet and showing all the items.
- **@Mentions:** Toggles the feed between showing just the items that mention you and showing all the items.
- **Filter:** Click this icon (it's shown in the margin; you can also press Ctrl+Shift+F), then type a word or phrase in the text box that shows up. Teams filters the feed to show just those items that include the word or phrase you typed.



Searching for a post, message, or other content

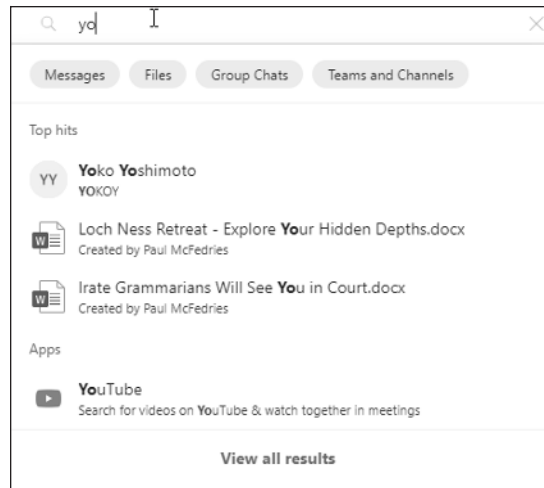
How do you find the file your manager mentioned in passing last week? Or recall the name of the movie a colleague suggested during a private chat three months ago? Follow these steps to search Teams for a specific post, message, or file:

1. **Click inside the Search box at the top of the Teams window.**

2. **Start typing a search term.**

The Search box immediately suggests results, as shown in Figure 1-6. Notice that Teams also displays several filter buttons below the Search text box: Messages, Files, Group Chats, and Teams and Channels.

FIGURE 1-6: Start typing and Teams immediately displays search results that match what you've typed so far.



3. (Optional) To filter the search results, click the appropriate filter button.

For example, if you know that the item you're looking for is a file, click the Files filter to ask Teams to only display files in the search results.

4. If you don't see the item you want, click View All Results to display the complete list of matching items.

5. Click the item you want.

Teams takes you to the item.

SEARCH TIPS FOR TEAMS AND OFFICE 365

Search is a major topic of discussion, if not a bone of contention, in many organizations. But you can get better results by knowing some key search skills. These tips aren't just for Teams, either — you can use them in the Office 365 home page Search box, any SharePoint Search box, and pretty much anywhere there's a Search box in any app in Office 365. Oh, and they work in Google, too:

- **Filter your results:** Use refiners when available to remove extraneous and irrelevant content. In Teams search, you can filter messages and files using various filters below the Search box, as shown earlier in Figure 1-6.
- **Use quotation marks:** Add quotation marks around a phrase to return results with exactly that phrase. Without quotes, your results will include the terms, but not

(continued)

(continued)

necessarily together in the document or message where it was found. For example, *"laptop sales"* will return different results than *laptop sales* with no quotation marks.

- **Use - or NOT:** Filter your results by removing a certain term using a hyphen or the word *NOT* in all caps. If you search *revenue report q1*, you may get results for Q2, Q3, and Q4. Instead, search *revenue report q1 -q2 -q3* or search *revenue report q1 NOT q2 NOT q3*. Hyphens and *NOT* can be used interchangeably, even in the same search query, but you can't use a space after a hyphen whereas you must use a space after *NOT*.
- **Use *:** An asterisk — in this context, called a *wildcard* — at the end of a portion of a word will return results with various forms of the word. The search term *rep** returns *report*, *repayment*, *Repo Man*, and other variations on that word. You can use the asterisk only at the end of the word, not the beginning or middle.
- **Put them together:** Go searching for *revenue rep* "laptop sales" q1 -q2 -q3 -q4* and then filter your results using the available refiners. You should notice better or more appropriate results.

Saving time with slash commands

Everyone loves a shortcut, and Teams provides a list of unique ones called *slash commands*. Enter a slash command into the Teams Search box and you can directly kick off the action for that command. For example, you can set your status by typing */brb* (for be right back), */dnd* (for do not disturb), or */offline* (meaning you can't be reached). Or you can quickly call someone by entering */call* and providing a name.

Slash commands are especially popular with computer programmers who use Teams, but everyday people can equally benefit.

Follow these steps to use a slash command:

1. **Click inside the Search box at the top of the Teams window.**
2. **Type / (forward slash).**
A list of available slash commands appears, as shown in Figure 1-7.
3. **Type the command you want to use and press Enter.**

You can also click the command in the menu.

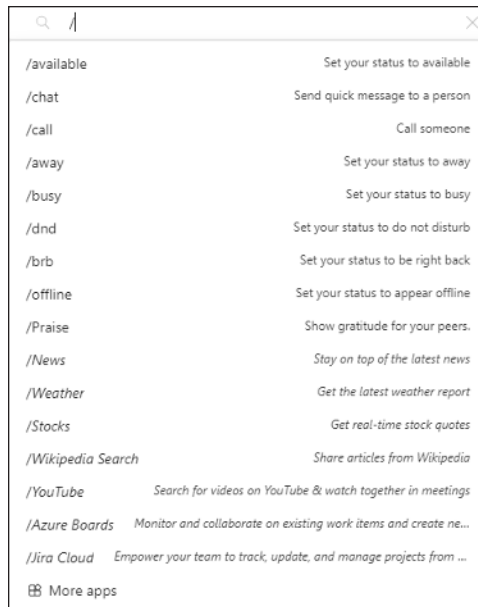


FIGURE 1-7:
In the Search
box, type / to
display the slash
commands that
are at your beck
and call.

4. Enter any additional information needed, depending on the slash command you use.

For example, if you want to send a private chat message to someone, after you type **/chat** and press Enter (Steps 2 and 3), a drop-down list of names appears. If the person you want isn't in the list, type the name in the Person Search box above the drop-down list, then click the person when they appear in the search results. Then you can enter the message and press Enter to send it.

Using Teams to Know Your Colleagues Better

Teams is all about interacting with others, so when you need to know about someone else, the app has your back. The following pages cover how to display a person's profile card and how to find out where they sit in the organization chart (if you have one).

Viewing a person's profile card

Profile cards abound in Office 365. You can hover over someone's profile photo or initials in almost every app and get more information about them, and Teams is

no exception. Teams offers a lot of shortcuts actions through its profile card, too. Figure 1-8 provides a view of the profile card.

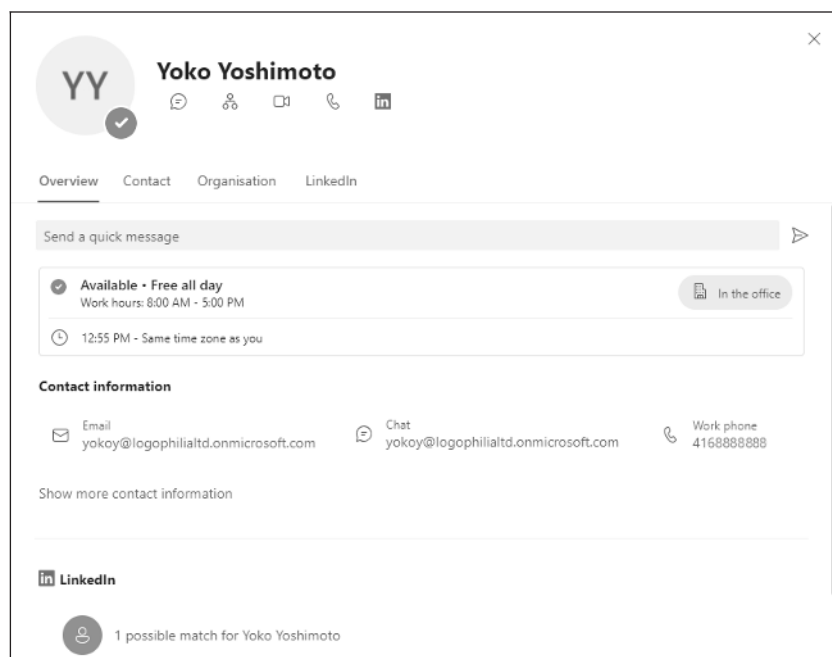


FIGURE 1-8:
You can
garner lots of
information
about a person
from their
profile card.

The Teams profile card shows a number of standard facts about the person (as long as the information is provided), including name, job title, organization, phone number, email address, manager, profile photo, and status. Additional information might be included by your organization. But that's not all: Through a profile card, you can also send a private chat message, open an email draft, and start an audio or video call to the person.

Follow these steps to access and use the profile card:

1. Hover your cursor over another person's photo or initials.

When you hover over one of these items, the person's contact information is displayed in the card that pops up.

2. (Optional) To open the full profile card, click Show More.

3. Perform one of the following tasks from the profile card:



- *Send a quick message:* Enter your message in the Send a Quick Message box and click Send (shown in the margin).



- *Start (or continue) a chat with that person:* Click the Start a Chat button (shown in the margin).



- *Start an email message addressed to that person:* Click the person's email address.



- *Start a video call with that person:* Click the Start a Video call button (shown in the margin).

- *Start an audio call with that person:* Click the Start an Audio call button (shown in the margin).

Start an Audio and Start a Video both make a Teams call, but the latter starts with your video on. You can disable your video after connecting a video call; likewise, you can enable your video after you start an audio call.



TIP

You can hover over various contact information (such as phone number or email address) and click the Copy icon (shown in the margin) that appears to the right of the info to copy this information and paste it elsewhere. This feature is useful if you're authoring an email in Outlook to a bunch of people and want to quickly grab someone's email address to include.

Viewing the org chart



One of the most beneficial features of the profile card is the org chart. Click the Org Chart icon (shown in the margin) or click the Organization tab in the full profile card, and a hierarchal tree appears showing where the person sits in the org chart, along with who reports to the same manager.



WARNING

The org chart works only if each employee's manager is identified in the directory. If an org chart doesn't appear or the connections appear incorrect, reach out to your IT team and suggest that they manage who reports to whom, because it's an incredibly useful piece of information to have in one click.

Enhancing Your Teams Experience with Helpful Extras

A unique feature of Microsoft Teams is the ability to add plug-ins to Teams, chats, meetings, and elsewhere. A *plug-in* is a connection to another app or service, whether it's provided by Microsoft or a third-party tool. An added plug-in in Teams can be a tab in a channel or chat, an app in the Teams navigation bar, and even bots (automated virtual assistants) that interact through natural language chat with you.

A deep dive of Teams apps is beyond the scope of this mini-book, but you should be aware of some of the best apps available out of the box and take some time to investigate whether they'd be useful to you. Available apps include Microsoft-provided ones (to add to the built-in features of Teams) and third-party tools, which bring non-Microsoft tools right into Teams, minimizing the app-jumping fatigue you're likely familiar with.

Using built-in apps

Teams provides apps out of the box that you can make use of without any installation, as long as your IT team has enabled them for your use. If an app doesn't appear after following the steps below, reach out to your IT team and ask for access. Some of these tools are super handy.

Follow these steps to open and use an existing app:

- ... **1. Below your apps in the navigation bar, click View More Apps (the ellipsis shown in the margin).**

Teams pops up a window of apps.

The window is organized with already installed apps above and not yet installed apps below.

- 2. (Optional) In the Search for Apps text box, type some or all of the name of the app you want to add.**

- 3. To add an installed app, click the app.**

If the app isn't installed, then you need to click the Add button that appears to the right of the app name.

Teams adds the app to the navigation bar and selects the app so that it appears in the main area.



TIP

The app is added to the navigation bar only temporarily, meaning that when you navigate to another part of the Teams, the app gets removed from the navigation bar. To have the app remain on the navigation bar full-time, right-click the app's navigation bar icon and then click Pin.

Some of the key apps to consider using include:

» **Approvals:** You can send a request or file through an automated approval request right in Teams. Approvals can be sent to an individual or multiple people, and you can manage all sent and received approval requests right in the Approvals app. Templates and built-in connections to Adobe Sign and

DocuSign are available, and you can customize your approval processes using Microsoft Power Automate, which is likely included with your Office 365 subscription.

- » **Insights:** The Insights app opens Viva Insights, which provides, well, insight into how you spend your time while working and is intended to promote a healthier mental state through break scheduling, virtual commutes, suggested focus time, and other well-being tools.
- » **Shifts:** Manage schedules, reservations, and other aspects of your work with this hourly scheduling feature built into Teams. (Shifts used to be a separate Office 365 app called StaffHub.)
- » **Copilot:** Use Microsoft's AI assistant to perform team-related tasks such as generating text and images, summarizing data, and interrogating your Teams activity, as shown in Figure 1-9.

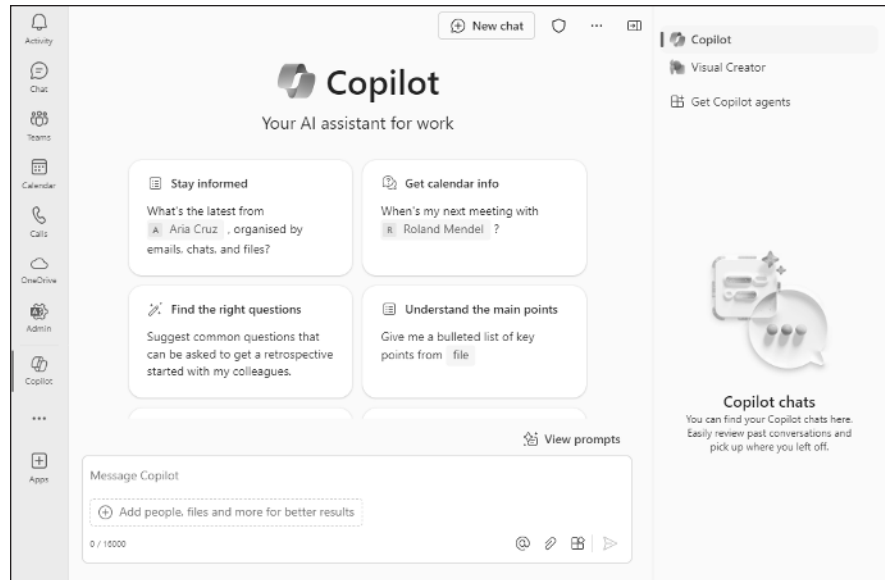


FIGURE 1-9:
The Copilot app.



REMEMBER

You can also find built-in apps available in the toolbar under channel and chat message boxes. For example, when you send a message in a channel or private chat, you can click an app icon under the message box to add content from a given app. Click the ellipsis for more app options. From here, you can send an approval request, link directly to a YouTube video, send a praise badge, and create a poll using Microsoft Forms (included with your Office 365 account).

Using tabs

Apps are useful, but tabs can be even more so because they're so easy to integrate into channels, chats, and meetings. Technically, tabs are also apps, but you typically use the best ones just as tabs, so that's the nomenclature I use here.

Each channel, chat, and calendar appointment includes tabs at the top. There is typically a Posts or Chat tab, a Files tab, a Wiki or Meeting Notes tab, and a big + (plus sign) icon. The + icon is what you want to look for. By clicking this button, you can add an app as a tab so that it's directly accessible in your channel, chat, and meeting with one click.

Teams offers hundreds of tab options for chat and channels. So when would you use a tab? Consider a channel that's being used by a sales team. The team wants to follow their revenue and sales dashboard. They can add a Power BI or Excel tab to display that information from merely one click away (of course, you need to have the dashboard already created).

Or perhaps you have a group chat going with three people with whom you'll be presenting a PowerPoint presentation at a big partner meeting. You can share the PowerPoint file in the chat and then add it as a tab for quick access to edit it right in the chat area. And for your meetings, you can add the agenda as a Word tab so that everyone has quick access; better yet, add the Forms app to create live polls during your meeting.

Follow these steps to add a tab to a channel, chat, or meeting:



- 1. In the Channel, Chat, or Meeting Details pane, click the Add a Tab icon (shown in the margin) at the right end of the tab listing at the top of the main area.**

An unnamed window similar to the one shown in Figure 1-10 appears.

- 2. Click the app you want to add as a tab.**

If you add a Word, Excel, PowerPoint, OneNote, or PDF file as a tab, the file must already exist in the channel or chat's Files tab. (Refer to Book 7, Chapter 4 for more about how to create, organize, and share files in Teams.)

- 3. If the app isn't already installed in Teams, follow the prompts to add the app to your Team or chat (depending on where you're adding the tab).**

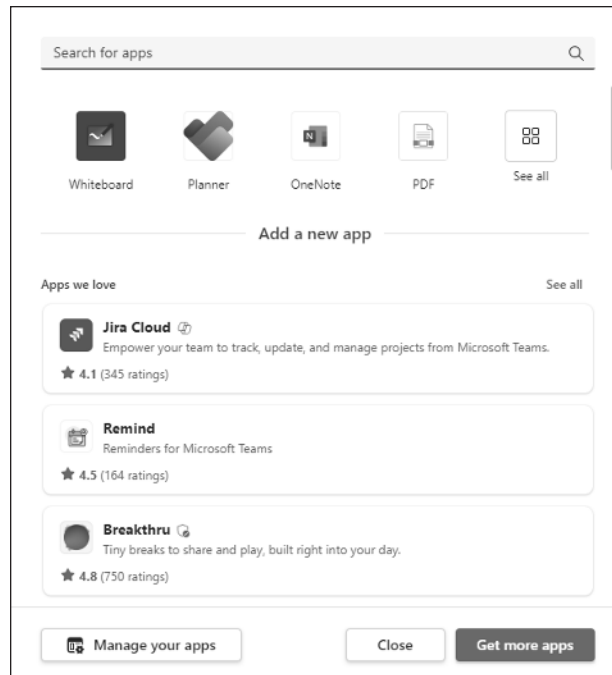


FIGURE 1-10:
Tab options for
a channel (there
are more options
here than in a
chat).

4. Click Add or Install.

Your new tab is now in the tab listing.



If you're not happy with the name of the tab, click the tab's drop-down arrow (shown in the margin), click Rename, type your preferred name, then click Save.

5. Click the tab to open it.

You can click and drag the tab name left or right to rearrange your tabs.



REMEMBER

To get rid of a tab that's no longer useful, click the tab's drop-down arrow, click Remove, and then click Remove when Teams asks you to confirm.

Your IT team controls whether you have access to and can add tabs. If there aren't many apps available to add as tabs, reach out to IT and ask how the tabs can be made available. Also, if you have guests in your Teams, they can't add tabs to channels.

When it comes to tabs, some key apps are more useful than others. Consider the following list when adding tabs to your channel, chat, or meeting:

- » **Office apps:** Word, Excel, PowerPoint, or OneNote files can all be added as tabs. When you open the tab for one of these files, it opens in the web version of the app so that you can edit directly in that tab. Key files can be one click away!
- » **PDF:** As with the Office apps, a PDF can be added as a tab as well. Adding a PDF tab is a useful way to have key information at your fingertips. **Note:** PDFs with form fields cannot be edited in a tab; the contents of the tab are view only.
- » **Website:** Add any website as a tab for quick access to critical information like stock tickers, weather maps, social media feeds, and more. If the website requires you to log in, Teams can't remember that, but in my experience, it asks for your password only about once per day. You can add only websites whose URLs start with https://.
- » **Lists:** Microsoft Lists is a list and tracking app included with Office 365. This tab provides direct access to status, tracking, itinerary, and asset management lists right from your channel. (You can't use Lists in chat.)
- » **SharePoint:** Add any SharePoint page or document library to a channel (not chat, unfortunately) for quick access to the organization home page, a team home page, or other useful web pages in your network. And if the Files tab isn't enough for you, add another document library to your channel. Refer to Book 7, Chapter 4 for more details on adding a library as a tab, and check out Book 8, Chapter 3 for more on SharePoint.
- » **Other Microsoft apps:** If you use other Microsoft apps like Dynamics 365, Power Apps, Power BI, Project, Whiteboard, or Visio, you can have quick access to these through a dedicated tab. Note that some of the apps or features therein come with an additional licensing fee.
- » **Third-party apps:** Be on the lookout for any non-Microsoft apps you may already subscribe to. Some of the big ones include ClickUp, Box, Evernote, Intercom, Jira, Trello, YouTube, and Zendesk. Some integrate better than others. Don't buy licenses to one of these apps just because there's a tab; test it by itself first to make sure it gives you what you need.

Using the Teams App store

The Teams App store is the central place to find all the apps that are available to you. This is helpful because you can experience apps as tabs, connectors, bots, or apps in the navigation bar. But the App store shows you all the apps available in one place.

To access the App store, click the Apps icon in the navigation bar. From here you can view new, featured, and popular apps as well as dozens of app categories and capabilities, as shown in Figure 1-11. If your organization has created custom apps, you find them under a section called Built for Your Org. The Search box is your friend, so make sure to use it! You never know what you might find that could help make you more productive and efficient.

FIGURE 1-11:
The Teams
App store is the
central place to
find useful apps
and install them
for your use.

