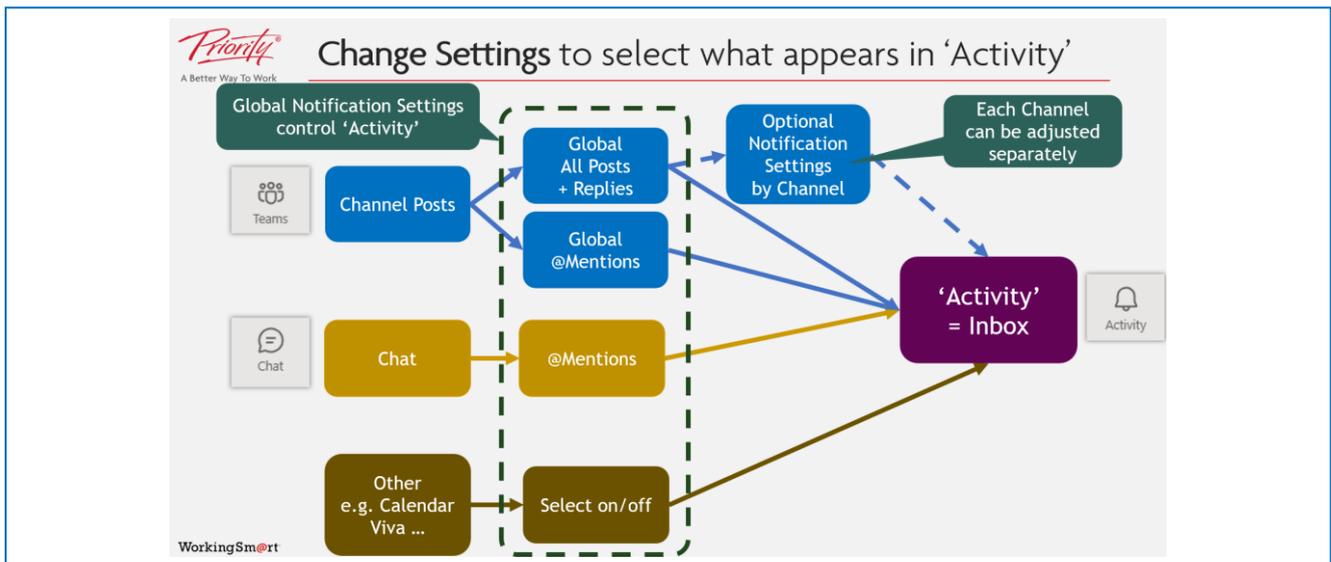
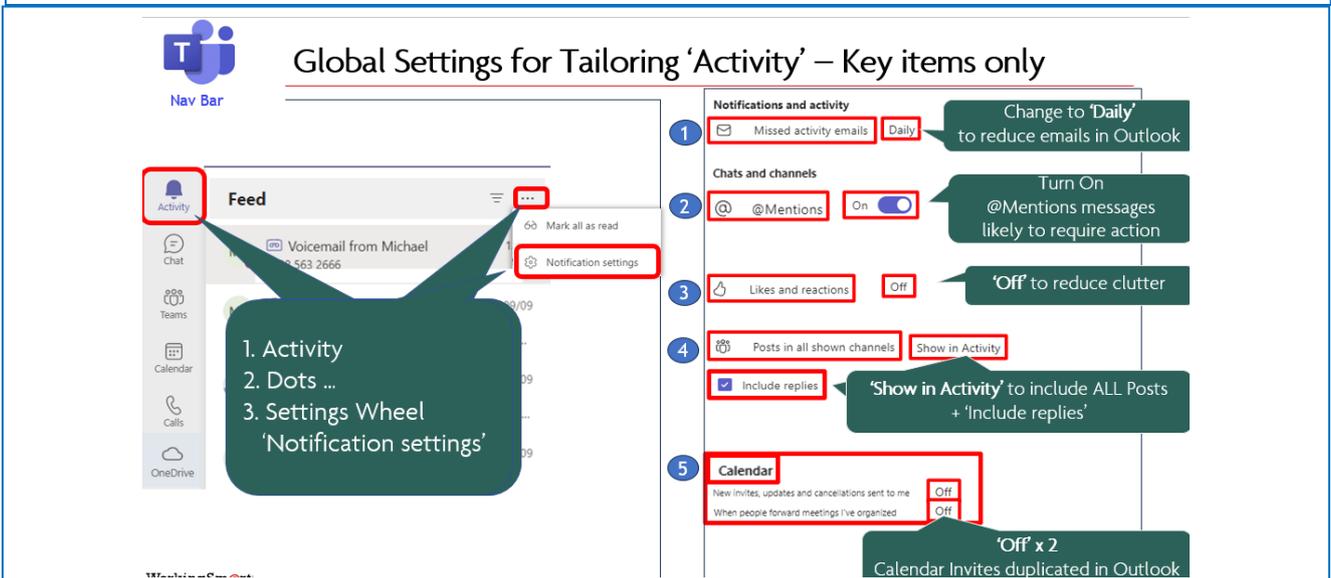


WorkingSm@rt with Microsoft TEAMS After-Training Supplement

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1. Settings to change 'Activity' into a virtual TEAMS 'Inbox'

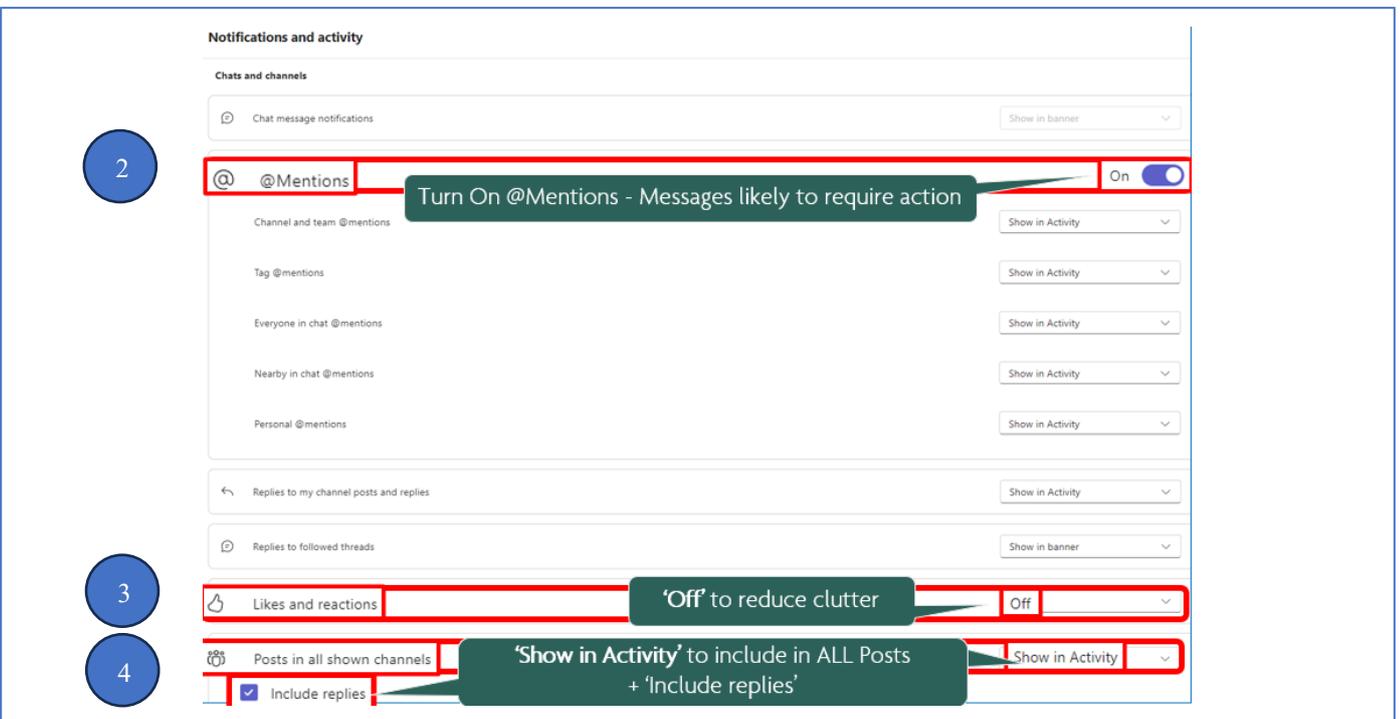
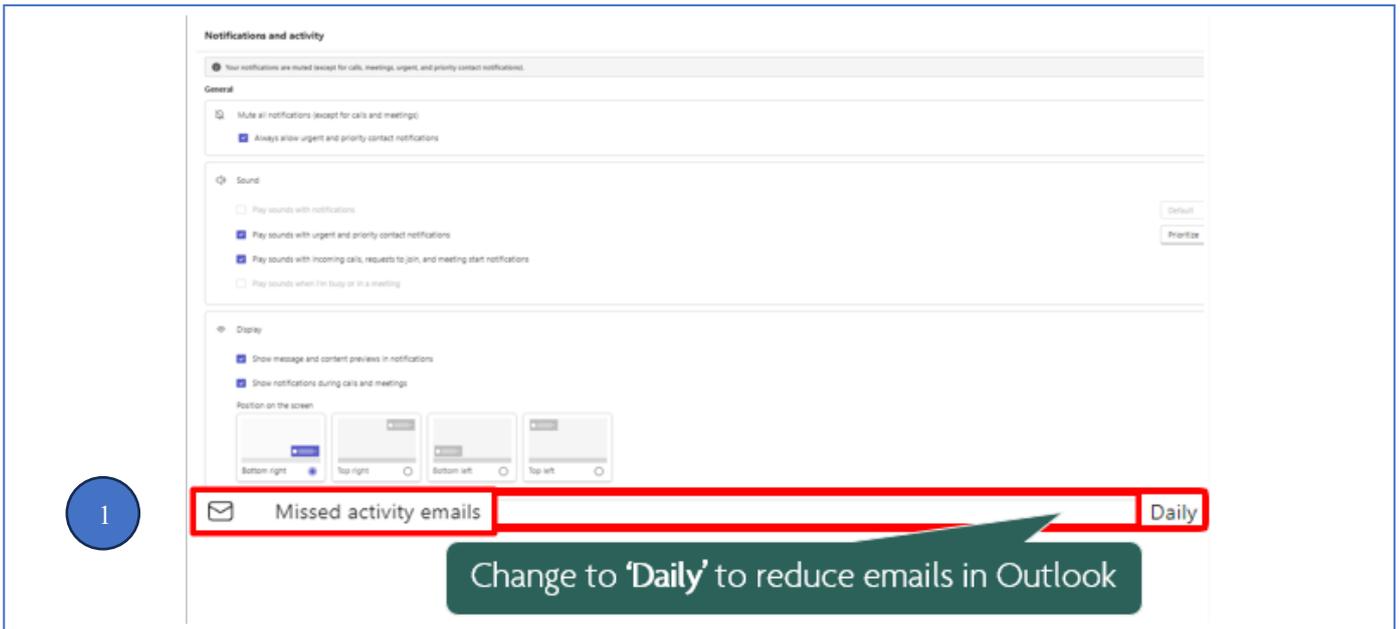
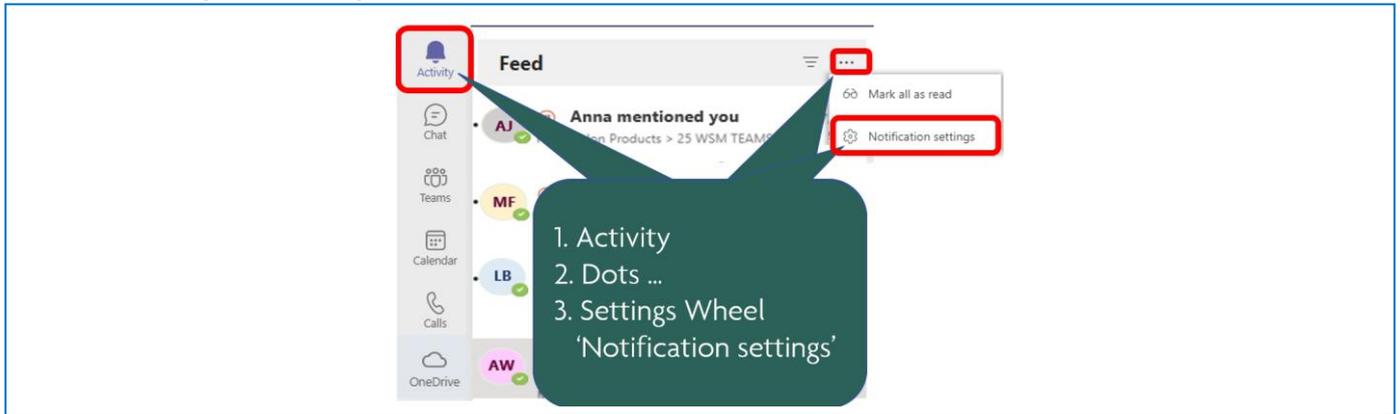



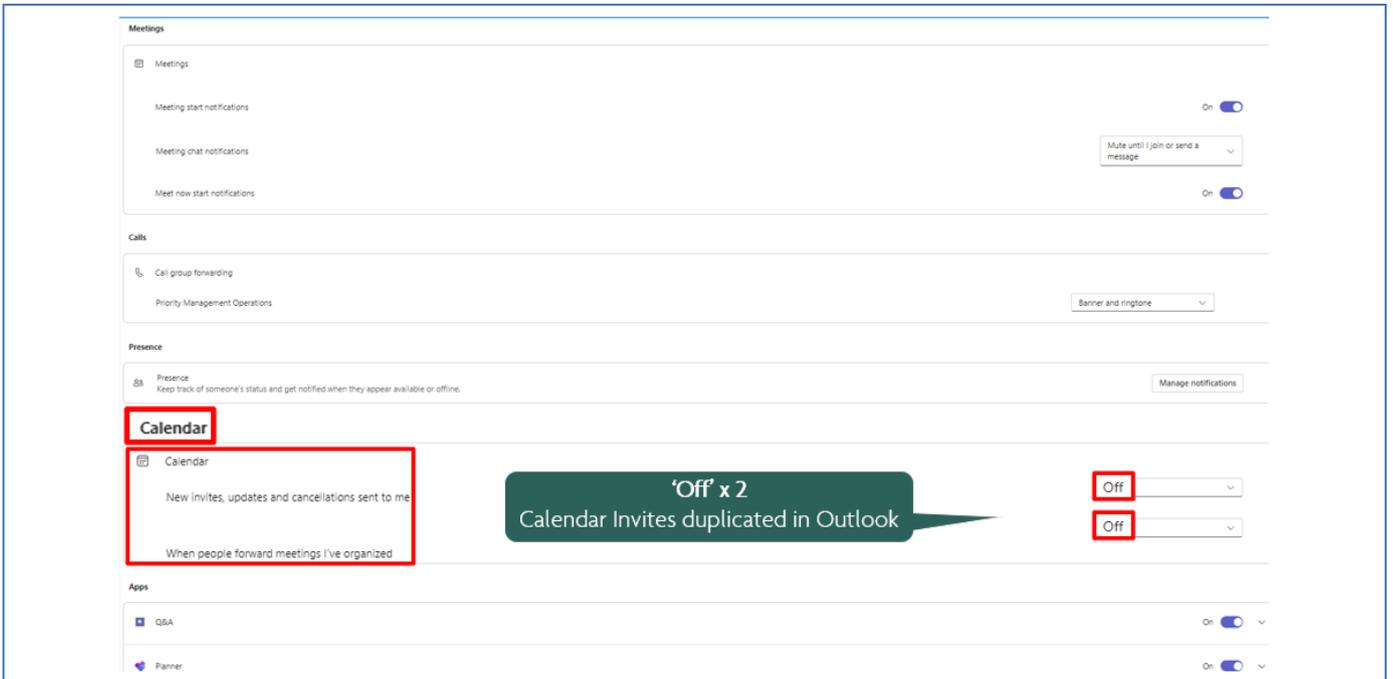
Global Settings for Tailoring 'Activity' – Key items only

This section shows a screenshot of the Microsoft Teams interface with the 'Activity' feed visible on the left and the 'Notifications and activity' settings on the right. Red boxes highlight specific settings, and green callout boxes provide instructions:

- 1. Activity**: Points to the 'Activity' icon in the left-hand navigation bar.
- 2. Dots ...**: Points to the three-dot menu icon next to the 'Activity' icon.
- 3. Settings Wheel 'Notification settings'**: Points to the gear icon for notification settings.
- 1. Missed activity emails: Daily**: Points to the 'Daily' dropdown menu in the 'Notifications and activity' settings. Callout: **Change to 'Daily' to reduce emails in Outlook**.
- 2. @Mentions: On**: Points to the 'On' toggle switch for '@Mentions'. Callout: **Turn On @Mentions messages likely to require action**.
- 3. Likes and reactions: Off**: Points to the 'Off' toggle switch for 'Likes and reactions'. Callout: **'Off' to reduce clutter**.
- 4. Posts in all shown channels: Show in Activity**: Points to the 'Show in Activity' dropdown menu. Callout: **'Show in Activity' to include ALL Posts + 'Include replies'**.
- 5. Include replies: [checked]**: Points to the checked checkbox for 'Include replies'.
- Calendar: Off x 2**: Points to the 'Off' toggle switches for 'New invites, updates and cancellations sent to me' and 'When people forward meetings I've organized'. Callout: **'Off' x 2 Calendar Invites duplicated in Outlook**.

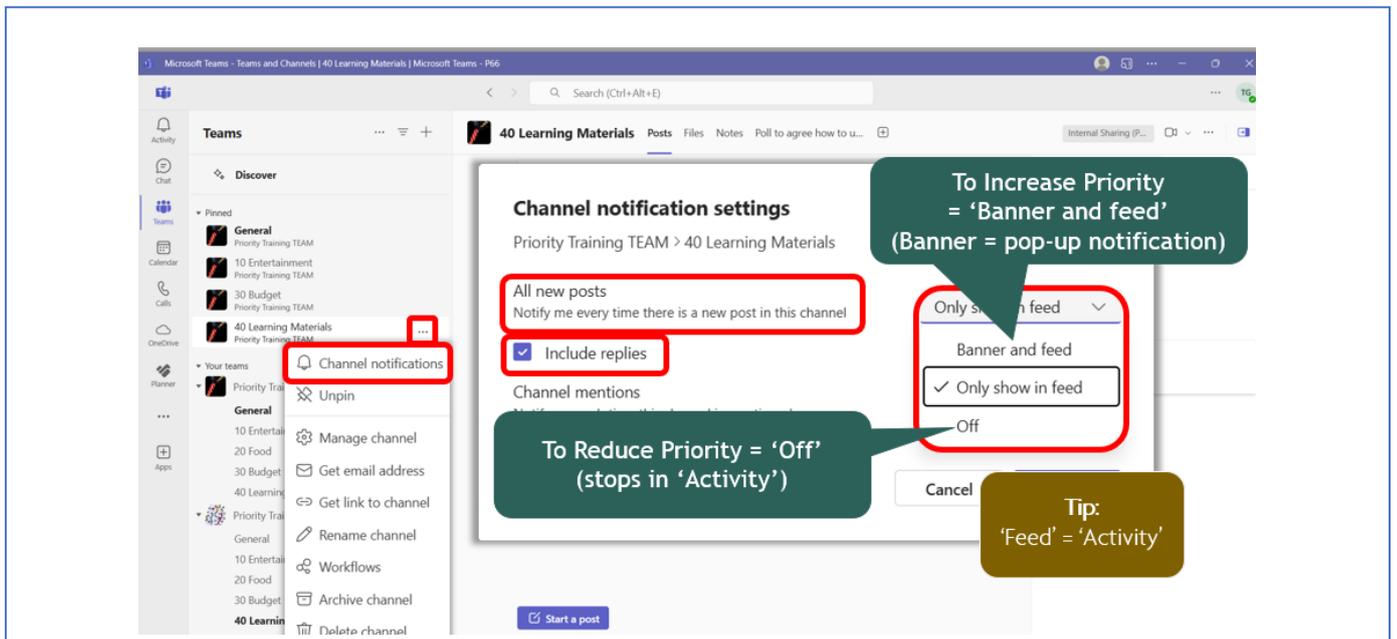
Global Settings to change – in detail





2. Settings for 'Activity' – by Channel

For each Channel, click on the dots next to the Channel name > Channel notifications



3. Channel Types & Set-Up Options

Priority Management
A Better Way To Work

Channel Setup Options

Create a channel

Channel name *
Letters, numbers, and spaces are allowed

Description
Help others find the right channel by providing a description

Choose a channel type *
Select

Layout
Channel owners can change this at any time

Threads
Looks like chat with replies on the side in threads. Good for back-and-forth discussions.

Posts
Posts reorder by most recent reply. Good for forums and announcements.

Note:
Use Standard Channels wherever possible
Tasks do not work in Private or Shared Channels

Standard
Everyone in the Team

Shared
Team + Certain people outside the Team (No Tasks)

Private
Only Specific people in the Team (No Tasks)

Threads (Do not use)
Single Threaded Chat

Only Use Posts
Multi Threaded Posts

Priority Management
A Better Way To Work

The 'Goldilocks' method to building TEAMS & Channels

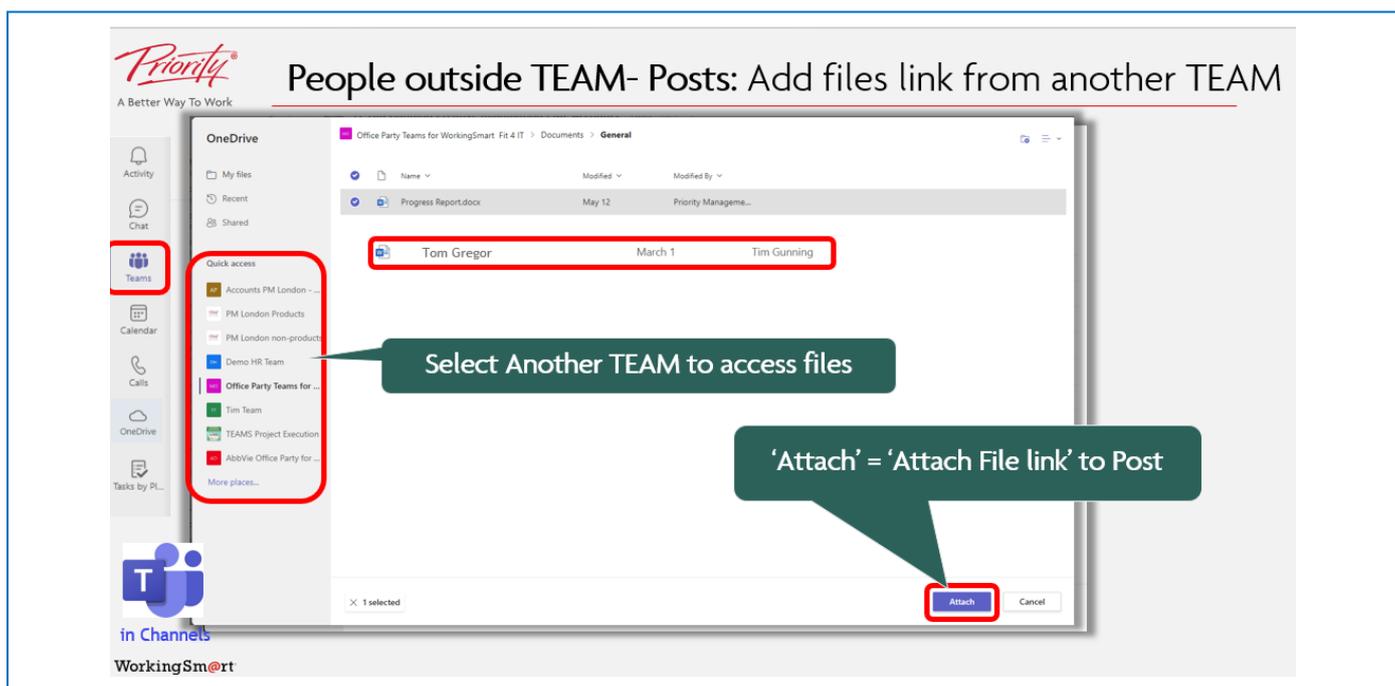
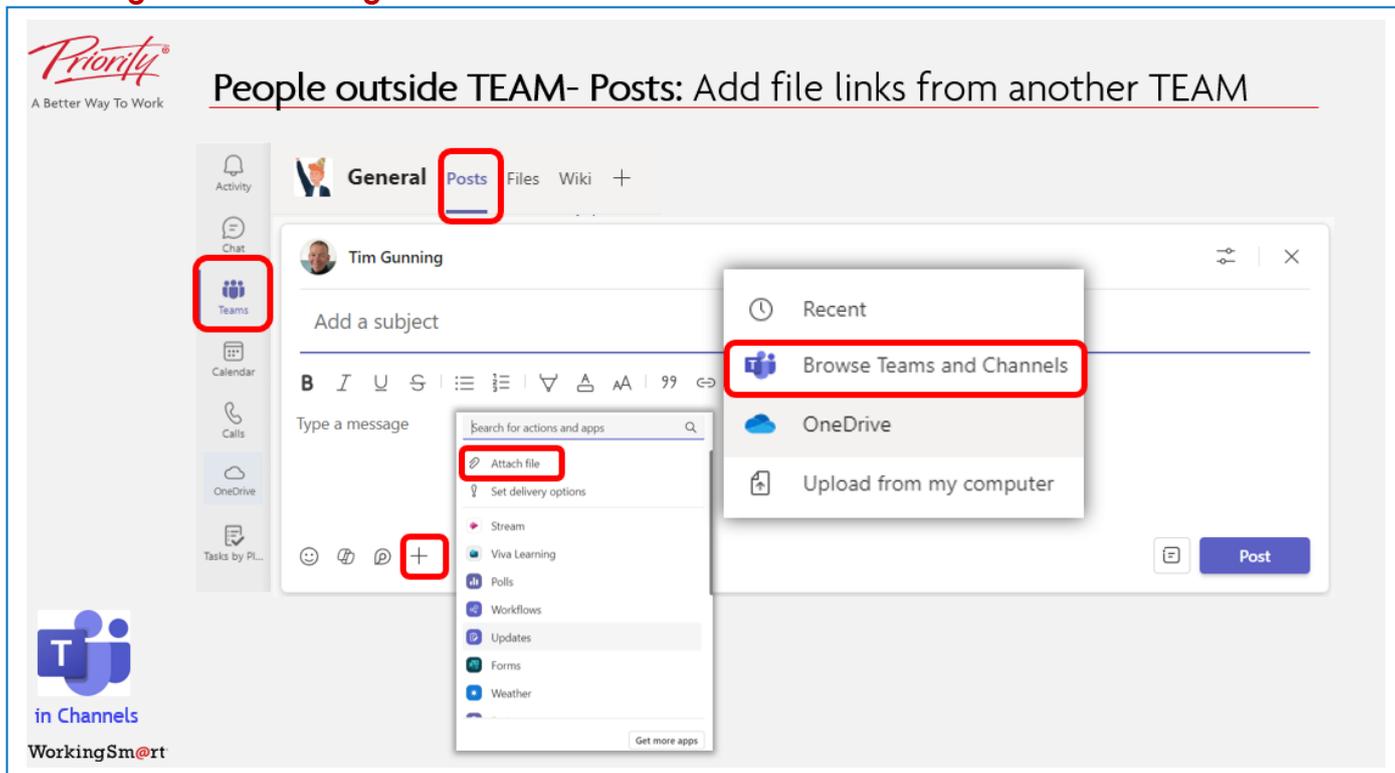
New TEAM
Only invite people who can have access to ALL Standard Channels

Is the TEAM?

- "Too big?"** → Confidential material (Restricted to some people in the TEAM) → Assign Tasks?
 - No → Create PRIVATE Channel
 - Yes → Create another TEAM
- "Too small?"** → Add people not in the TEAM → Assign Tasks?
 - No → Create SHARED Channel
 - Yes → Create another TEAM
- "Just right?"** → We have the right people in the TEAM & can Assign Tasks → Create STANDARD Channel

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4. Linking Files to Messages



People outside TEAM- Posts: Add file link from another TEAM

The screenshot shows a Microsoft Teams post creation window for a user named Tim Gunning. A document titled "Progress Report.docx" is being shared. A "Sharing settings" dialog box is open, showing options to share the link with "Anyone", "People in your organisation", "Only PM London non-products", "People with existing access", and "People you choose". A callout box labeled "Select more options" points to the "More settings" section, which includes "Can edit", "Can review", and "Can view" permissions. Another callout box labeled "File Sharing options" points to the document preview area, which shows "People in your organization with the link can edit".

People outside TEAM- Email: use Attachments

The screenshot shows a Microsoft Outlook email composition window with the "Insert File" dialog box open. The "Attach File" button in the Outlook ribbon is highlighted with a red box. The File Explorer window shows the "Documents - Office Party for WorkingS..." folder, with the "Progress Report.docx" file selected. A callout box provides instructions: "File Explorer opens up > Find Team > Select Channel > Files > Select File". The "Browse This PC..." option is also highlighted in the Outlook window.

People outside TEAM- Chat: use Links to share files

The screenshot shows a Microsoft Teams chat window. On the left, the 'Chat' sidebar is visible with a red box around the 'Share' icon. The main chat area shows a message from John Reece with a file attachment. A red box highlights the 'Attach cloud files' button, and another red box highlights the 'Upload from' button which is crossed out with a red 'X'. A dropdown menu is open, showing various actions with 'Attach file' highlighted by a red box. A green callout bubble points to the 'Attach cloud files' button with the text 'Adds a Link to File'. Another green callout bubble points to the 'Upload from' button with the text 'Tip: Avoid 'Upload' as all files go into same folder in OneDrive'. A red box highlights the '+' icon in the bottom right corner of the chat input area.

File Sharing Options

The screenshot shows the 'Sharing settings' dialog for a file named 'Progress Report.docx'. The dialog is overlaid on a chat window. A green callout bubble points to the 'More settings' section with the text 'Select more options'. A red box highlights the 'More settings' section, which includes options for 'Can edit', 'Can review', and 'Can view'. A red box also highlights the 'Can edit' option in the 'More settings' section. A green callout bubble points to the 'Can edit' option with the text 'File Sharing options'. The background chat window shows a message from Tim Gunning with a file attachment 'Progress Report.docx' and a dropdown menu showing 'People in your organization with the link can edit'.

5. Combined or Separate Chats & Channels

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A Better Way To Work

Turn off new 'Combined Chats and Channels' when it arrives – confusing?

The screenshot shows the Microsoft Teams settings interface. On the left, the 'Settings' menu is open, and 'Chats and channels' is highlighted with a red box. In the main content area, under 'Viewing chats and channels', the 'Separate' radio button is selected and highlighted with a red box. A settings menu is open in the top right corner, with 'Settings' at the top highlighted by a red box. Below 'Settings' are options for 'Cast', 'Help', and 'Feedback'. Further down, there are 'Zoom' controls set to 100%, 'Keyboard shortcuts', and 'Download the mobile app'. At the bottom, there are toggle switches for 'Filters', 'Copilot', and 'Discover', all of which are currently turned on. A 'Hide inactive channels' section is also visible at the bottom with a toggle switch turned off.

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6. Linking TEAMS Files to File Explorer

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Gateway #3: Working offline + familiar access - via File Explorer

- First set-up Links in OneDrive on Nav Bar

The screenshot shows a Windows File Explorer window. The navigation pane on the left shows the 'Your Name - OneDrive' section. Under this section, several links are listed, including '10 Reports', '10 Workshop Local files', 'Apps', 'Attachments', 'Desktop', 'Documents', and 'Documents - Office Party for WorkingSmart MASTER'. The 'Documents - Office Party for WorkingSmart MASTER' link is highlighted with a red box. The main pane shows a list of folders and files with columns for Name, Status, Date modified, Type, and Size. The folders listed include '10 Entertainment', '20 Food', '30 Budget', '40 Guests', 'General', and 'Learning Materials'. The 'Documents - Office Party for WorkingSmart MASTER' link is highlighted with a red box.

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File Explorer: Find TEAMS to Link in OneDrive + 'More Places'



The screenshot shows the OneDrive File Explorer interface. The 'More places...' link is highlighted with a red box. A red arrow points from this link to a zoom control window. The zoom control window shows a minus sign and '(75%)'. A green callout box contains the following text:

Try it now #1:
If cannot see 'More Places'
reveal it:
1. Click 3 Dots
2. Reduce Zoom: '-'

A brown callout box contains the text: **Tip:** Reset to 100%

Another green callout box contains the text: **Try it now #2:**
Click on 'More Places'
= access to ALL TEAMS

File Explorer: 'More Places' = All TEAMS Folders



The screenshot shows the OneDrive File Explorer interface with the 'More places...' link highlighted. The 'Your Teams' section is visible, containing a grid of team folders. A red box highlights the 'Your Teams' header. A green callout box contains the text: **Try it now:**
Find & Click 'Priority Training – Office Party' Team to open

File Explorer: Set-up Links with 'Shortcuts..' to view in File Explorer



Try it now:
Click 'Add Shortcut to OneDrive'

Now in TEAM
with Channels visible

Panel confirms

File Explorer: Colour TEAMS folders PURPLE for visibility



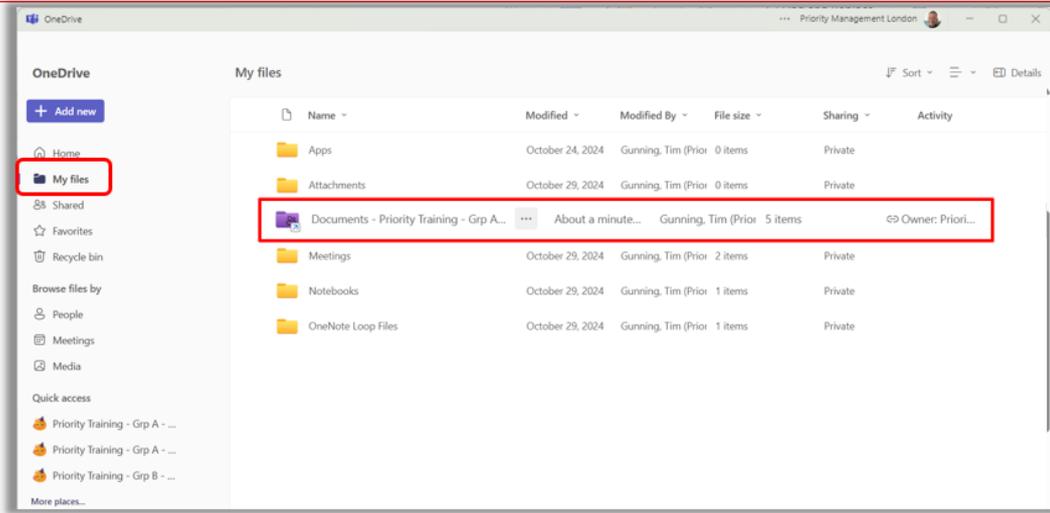
2: Try it now:
Click on 3 Dots 'Documents – Priority Training'

1: Try it now:
Click on 'My Files'

3: Try it now:
Select 'Folder Colour'

4: Try it now:
Select 'Purple'

File Explorer: Identify TEAMS PURPLE Folders



Gateway #3: Working offline + familiar access - via File Explorer

TEAMS Folders are under OneDrive in File Explorer



Priority Management London

10 Reports

10 Workshop Local files

Apps

Attachments

Desktop

Documents

Documents - Office Party for WorkingSmart M

Documents - Practice P66 Office Party

Meetings

Microsoft Copilot Chat Files

Microsoft Teams Chat Files

Microsoft Teams Data

6 items

Documents - Office Party for WorkingSmart MASTER

10 Entertainment

20 Food

30 Budget

40 Guests

General

Learning Materials

Right click file or folder for options including

Always available on this device

Free up space

Status

Available online = Not open

Available on this device = Open

Always available on this device

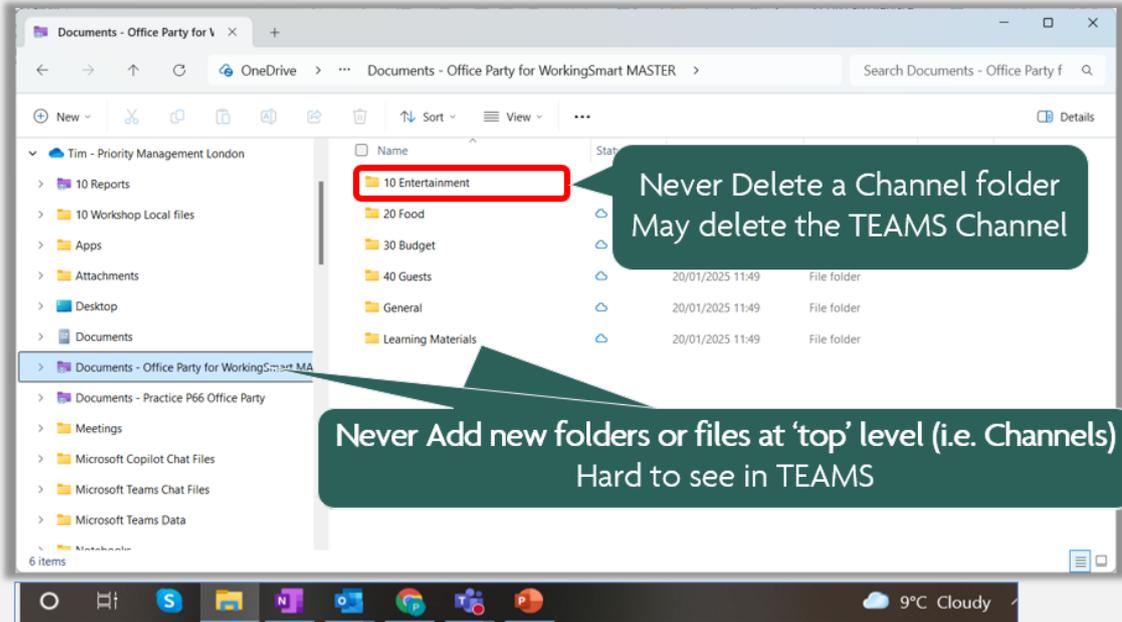
Note: AVOID - Sync issues?

TEAMS folders appear in Purple

Open File Explorer

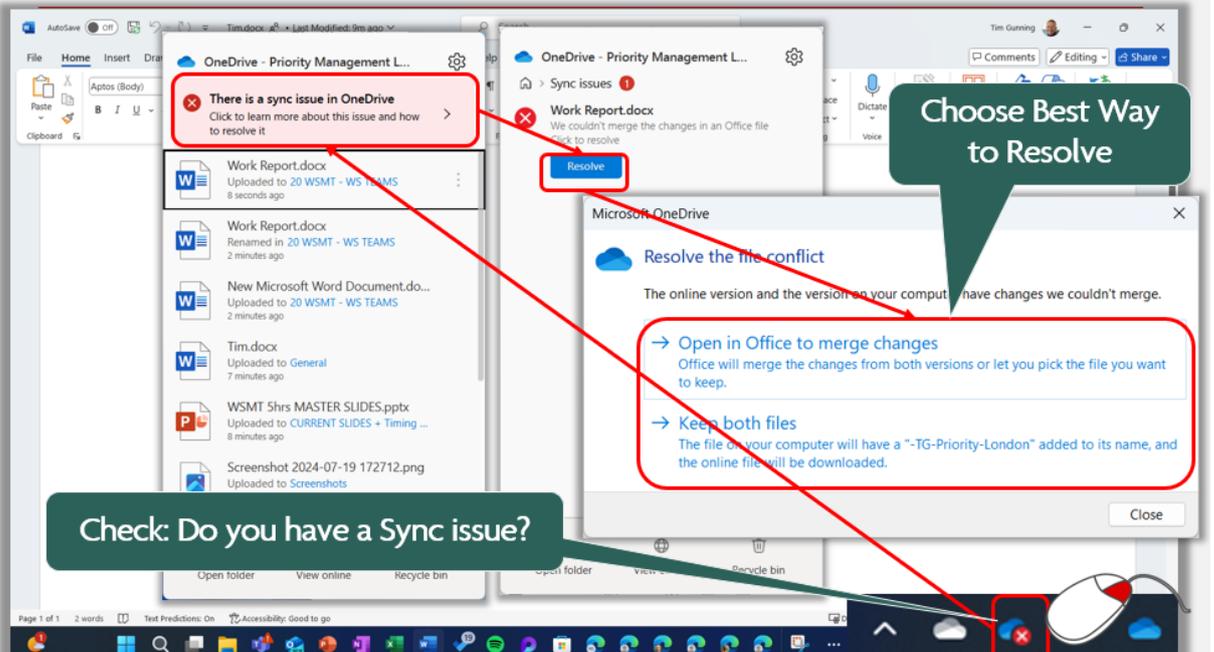


Important Warnings about Sync Issues



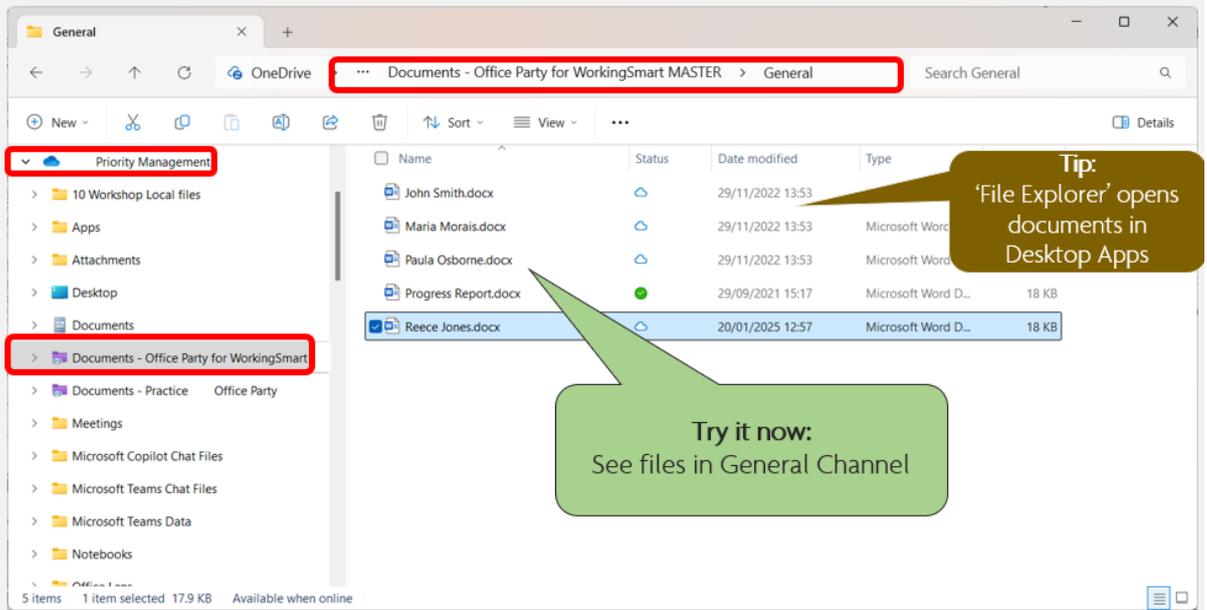
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Resolving Sync Issues

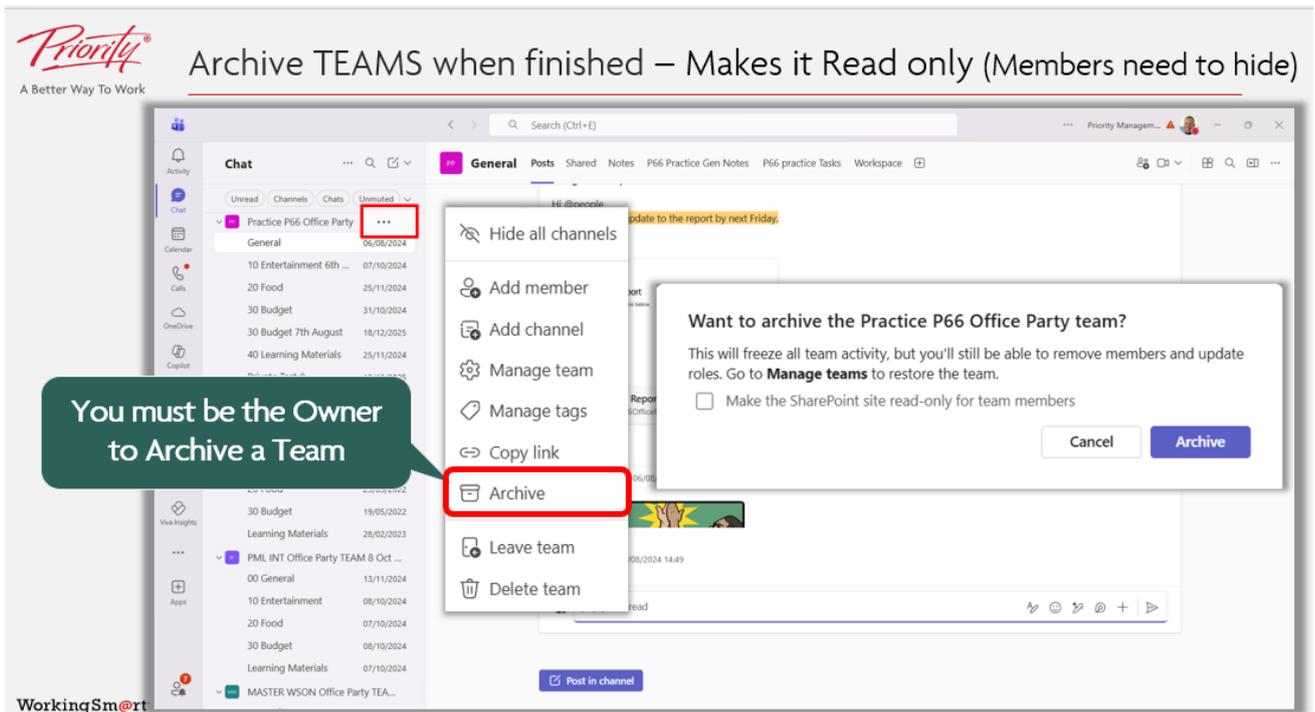


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File Explorer: View files now to confirm Linking is working



7. Archive TEAMS



8. Index for Learning Guide

Index WorkingSm@rt with Microsoft TEAMS Learning Guide



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