

MS Teams: Working with files



Please remember that information or files you post on a Teams site may be available to other team members. Teams is for communication related to your job role and should not be used for personal chat not related to your work. Information you record on Teams could be disclosed in response to a freedom of information request or to someone you refer to in Teams chat. Consider the appropriateness of what you record; only record what is relevant and necessary; and do not share anything that impacts on the privacy of individuals. If you are unclear about how and where to appropriately record information, please contact the Information Governance Team at dpa@abdn.ac.uk.

Note: The file storage area for Teams, SharePoint and OneDrive for Business is in the Microsoft 365 cloud and is completely separate from the shared network drives.

Files in a Team Channel

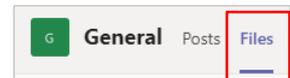


Behind every Microsoft Team is a dedicated SharePoint site. All files you upload to a Team Channel are effectively stored in that site. You can create a structure of folders in your Team Channel, and these are reflected in the dedicated SharePoint site.

Only Team members can view files within the Team and every Team member has the same permissions to open, edit or delete a file. This includes any external guests you may have added to the Team.

The Files tab

By default, every Team Channel has a separate **Files** area. This appears as a 'tab' on the Channel navigation bar.



You cannot remove or rename this tab.

The **Files** area corresponds to a folder in the underlying dedicated Team SharePoint site.

How to access the Files tab

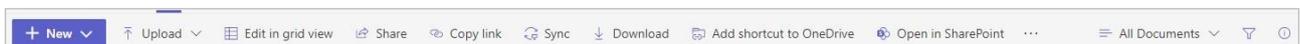
Click on the **Files** tab to see the list of folders and files in a Channel.

You can choose to view this area in different ways. Click **All Documents** on the far right of the Files command bar to view by **List**, **Compact List**, or **Tiles**.

- Note that you can also **Edit current view** – for example, to add a 'Created By' column. However, this will open the editing options in the underlying SharePoint site so you should be comfortable using SharePoint before attempting to do this.

How to use the Files tab

The Files tab command bar – shown below – allows you to work on files in different ways.



From left to right:

- Click **+ New** to create a folder or file (see drop-down menu of file types).
- Click **Upload** to locate a file or folder on your PC or network drive and upload it. Alternatively, **drag and drop** a file, multiple files, or a folder from This PC or Windows Explorer onto the Files pane.
- Click **Edit in grid view** to easily edit file or folder names and add columns.

- Select a file or folder from the list and click **Share**. You will have the option to Send link via Outlook or Copy link. The default option for both is 'People you specify can view'. If you want people to be able to suggest changes or edit, click People you specify can view, adjust link settings and click Apply. To send a link: start typing the name of the person you want to share with, select their name from the drop-down list, add a message if required and click Send.
- Select a file or folder from the list and click **Copy link**. To choose who will have access, click on the text to the left of the Copy button, adjust link settings and click Apply. Then click Copy to get a *direct link* to the file.
- Click **Sync** if you want to sync the files and folders in the Channel to a folder on your computer. This allows you to work directly in File Explorer and access files even when offline. When you go back online, any changes to those files will sync automatically.
- Select a file or folder and click **Download**.



If you don't select a file/folder, you will download a Zipped file of *all* the files stored in that channel.

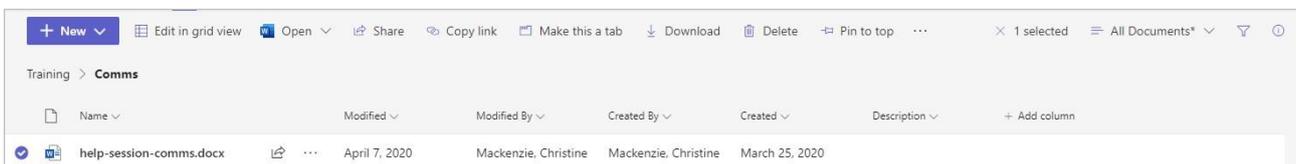
In Teams *desktop app* the downloaded file or folder is automatically saved to your computer's **Downloads** folder. On a PC, you'll find this in File Explorer. On a Mac, you'll generally find it on the Dock.

In Teams *web app*, the way the file is downloaded will depend on the browser and its settings.

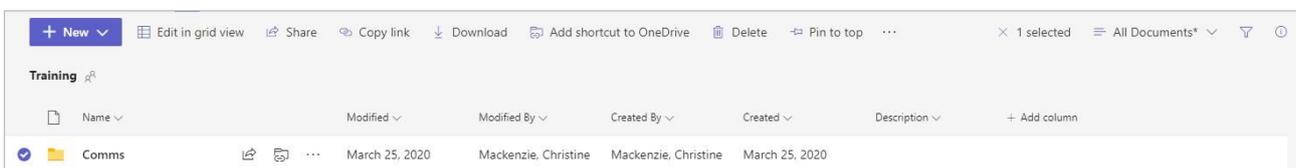
- Click **Add shortcut to OneDrive** to add a shortcut to the Team channel folder on your OneDrive.
- Click **Open in SharePoint** to view your files and folder structure in the Team's dedicated SharePoint site.
- Click **+ Add Cloud Storage** to add any other University SharePoint site to your folder structure. The permissions on the SharePoint site you add remain in place, so only those in your Team who have the correct permissions will have access.

Working with files in a Team Channel

To select a file in the list, hover your cursor over the file and click in the circle to the left of the file name. Selecting a file changes the options in the command bar to: **Edit in grid view; Open; Share; Copy link; Make this a tab; Download; Delete; Pin to top; Rename; Open in SharePoint; Move to; Copy to; Properties and Check out.**



As with files, you can select a folder by clicking in the circle which appears to the left of the folder when you hover over it. Selecting a folder changes the options in the command bar to: **Edit in grid view; Share; Copy link; Download; Add shortcut to OneDrive; Delete; Pin to top; Rename; Open in SharePoint; Move to; Copy to and Properties.**



You can also select a file or folder and click the **Open the details pane** icon  at the top right. The details pane includes information such as who has access and item properties.

You will see mostly the same options when you click the ellipsis (...) next to a file or folder name. From that menu you will also get the **Manage Access** option, and **Preview** for files.

Collaborating on files in a Teams Channel

It is possible to collaborate on a file concurrently, and in real time, with other Channel members.

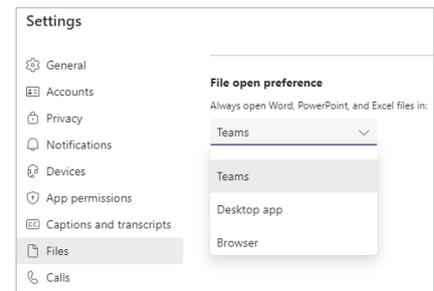
Go to the Team Channel Files area where the file you want to collaborate on is located and click on the file name to open it. What happens next depends on the file type and your default settings.

You can open **Word, PowerPoint** and **Excel** files:

- In Teams
- In the desktop app
- In the browser

You can set how these file types open by default in Teams Settings. To do this, click the ellipsis (...) in the top right of the Teams window and select **Settings**. Click **Files** on the left-hand menu and use the drop-down menu to select your default method.

To open a file in a different way from your default method, click the ellipsis (...) next to the file name, click **Open** and select one of the options (eg Edit in Teams or Open in browser).



Regardless of which of these methods you and other Team members choose for editing, you will all be working in Microsoft 365. This means any changes you make are saved automatically.



We recommend opening Word, PowerPoint, and Excel documents in the **desktop app** to allow full editing and reviewing options

Once you have opened your file for editing:

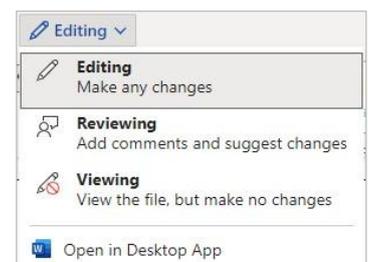
1. When multiple people are working on a document concurrently, you will see coloured and initialled icons at the top of the document. These allow you to identify the editors.



Hover over an icon to find out who the editor is. View each editor's activity within the document by watching the associated coloured and initialled flag, and view changes as they happen.

2. If you are editing in the desktop app, you can Review, Track changes and add Comments in the usual way.

In the web app, select Editing, Reviewing, or Viewing from the drop-down menu, as appropriate.



Collaborating on a file with individuals outwith your Team Channel

It is also possible to collaborate on a file with individuals who are not in your Team or Team Channel by sharing the file with them and giving them editing access.

1. From Teams, open your file in the browser or desktop app, as described above.
2. Click on **Share** (towards top right corner of window) 
3. Select **who** you want to share the file with by entering names or email address/es.
4. Click **People you specify can view**, click the drop down menu under **Other settings**, select **Can edit**. Then click **Apply**.
5. Click **Send**. This sends an email to the individual/s you shared the file with. They can click on a link in the email to open the file for editing.

File versions

As a Team is built on a SharePoint site, previous versions of files are retained.

To revert to a previous version of a file:

1. Go to the Team **Files** tab and choose **Open In SharePoint** (you may need to click the 3 dots on the command bar to see that option).
2. Select the file and click on its **Show actions** ellipsis (...).
3. Choose **Version History**.
4. Click on the **drop-down** menu next to the version you want and choose **Restore**.

File deletion and recovery

If you delete a file from a Team it will move to the Recycle Bin and remain there until it is **permanently deleted after 93 days**.

To restore a file deleted in error:

1. Go to the Team **Files** tab and choose **Open In SharePoint** (you may need to click the 3 dots on the command bar to see that option).
2. Click on **Recycle Bin**.
3. **Select** the file and choose **Restore**.

Files as part of a Conversation

Every **Team Channel** and every **Chat** has a **Files** tab.

In a Team Channel

- When you attach a file to a **Post** in a Team or Channel conversation, the file you attach is automatically uploaded to the **Files** area of that Team or Channel, *outwith* any folders you have set up. You can however move the file into a folder afterwards.

In a Chat

- If you attach a file within a private chat (ie not within a Team Channel) the file will sit in *your OneDrive for Business* – in a dedicated *Microsoft Teams Chat Files* folder – and will also be listed in the **Files** tab for that conversation.

In a Teams Meeting

If you attach or share a file via the Chat pane during a Teams Meeting, the file will sit in *your OneDrive for Business* – in a dedicated *Microsoft Teams Chat Files* folder.

You can also access the file from the Meeting Chat history or the Meeting Files tab:

- Click **Chat** on the app bar and find your meeting in your Chat history (meetings can be identified by a calendar icon). Select the meeting, then access your file from the meeting Chat or Files area.

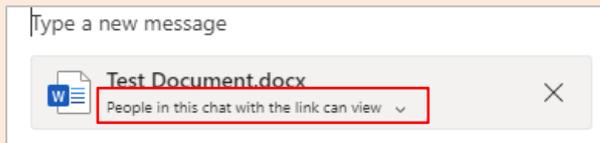


Note: File versions, deletion and recovery work in the same way in OneDrive for Business as they do in a Team. You can view a file's version history and restore a previous version. If a file is deleted it can be restored from the OneDrive Recycle Bin for up to 93 days, after which it is permanently deleted.



When you add a **file** to a private chat or a Teams Meeting chat, the default **permissions** on the file are displayed, ie *People in this chat with the link can view*.

If you want to change the permissions, click the drop-down arrow to view other options.



If you give others editing access then you can collaborate on documents with them concurrently, in a similar way to [Collaborating on files in a Teams Channel](#).

Find out more about [How to control file permissions in Microsoft Teams chats](#).

Finding and filtering files

Click **Files** on the app bar to view recently accessed files.

These files may be in Teams, OneDrive for Business, or other SharePoint sites.

You can filter these to see only the files in:

Microsoft Teams (this will include files that other Team members, from Teams that you are a Member of, have been working on)

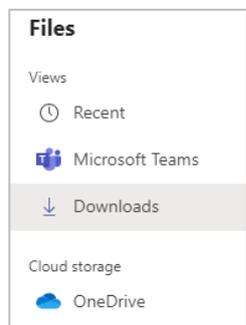
OneDrive (this is *your* OneDrive for Business)

Note: You can choose **Open in OneDrive** to view the files in your OneDrive online instead of in Teams.



You can also access **Downloads** (only visible in the desktop app, not the web app).

Click **Open Downloads folder** to locate the files you have downloaded.



Open Downloads Folder

Immersive Reader, Translation and Read Aloud

- In Word or Word online you can use [Learning Tools including Immersive Reader](#).
- In most Microsoft 365 applications you can [translate text](#) and read aloud.

Microsoft resources on working with files

- [Microsoft Support with files in Teams](#)
- [Upload and share files](#)
- [Search and filter people and files](#)
- [Work on a file together](#)
- [Collaborate on files in Teams](#)
- [Co-authoring Office files](#)

Help and Support

See [Guides and Links](#) in our MS Teams resource on Toolkit or contact the IT Service Desk: myit.abdn.ac.uk.