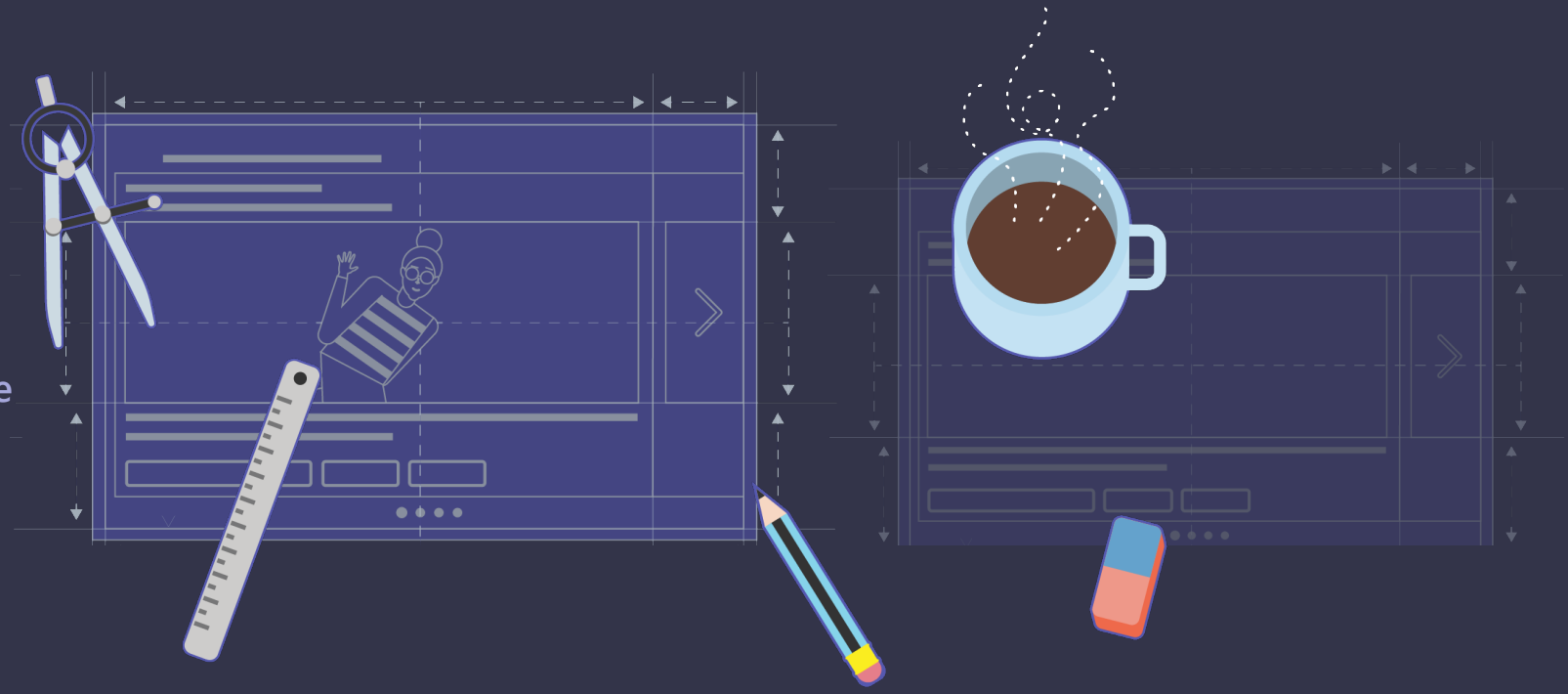
Best Practices

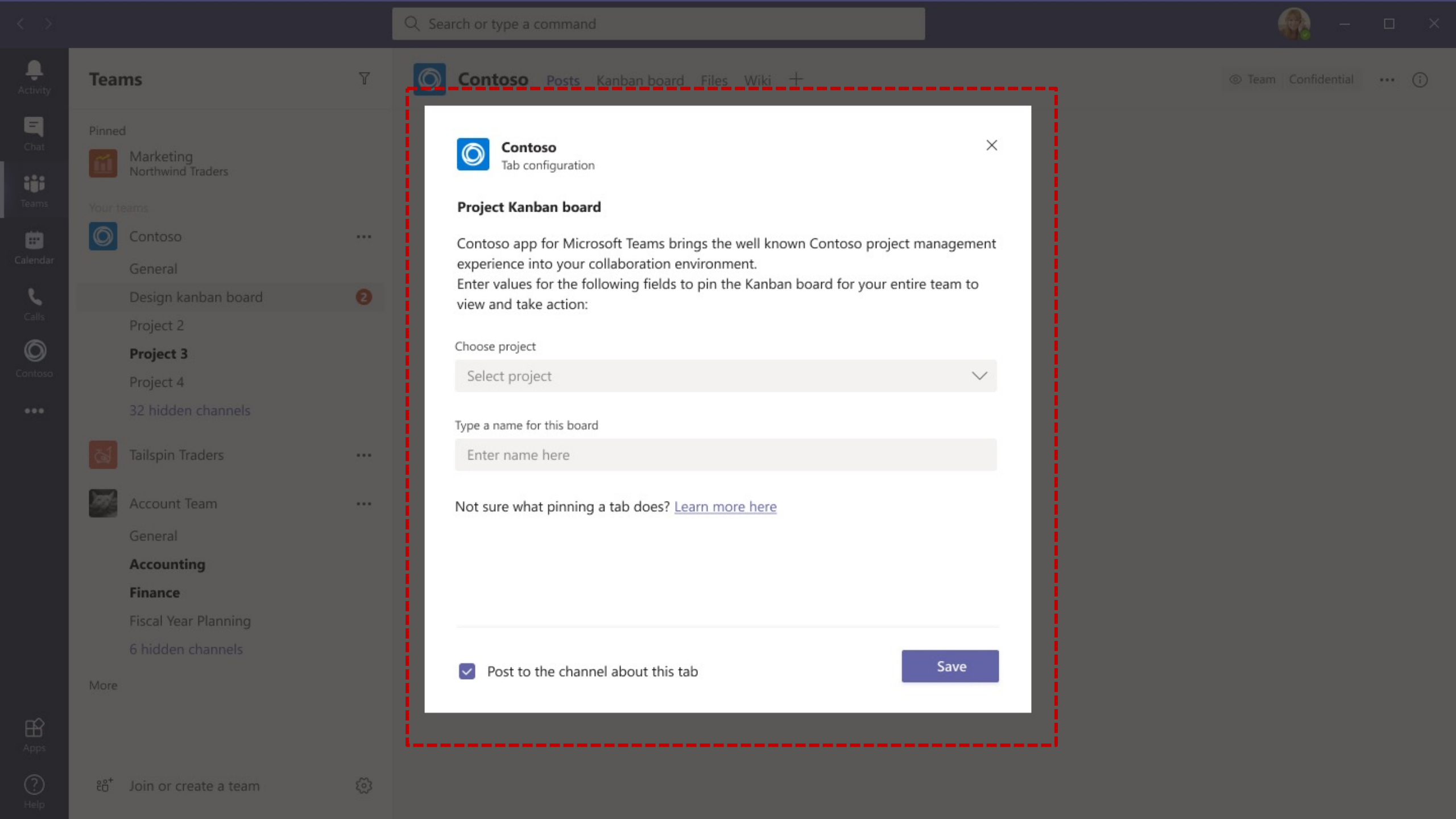
First Run Experience in Collaborative Scope



Microsoft Teams Ecosystem

1. Tab Configuration Page

Tab configuration page is the first landing page that gets exposed to customers when they are adding any app to a group or channel. This page should give a snapshot of the overall tab experience of the app; however, it should not be very verbose as to minimize the attention load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Design kanban board
Project 2
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Project 4
32 hidden channels
Tailspin Traders
Account Team
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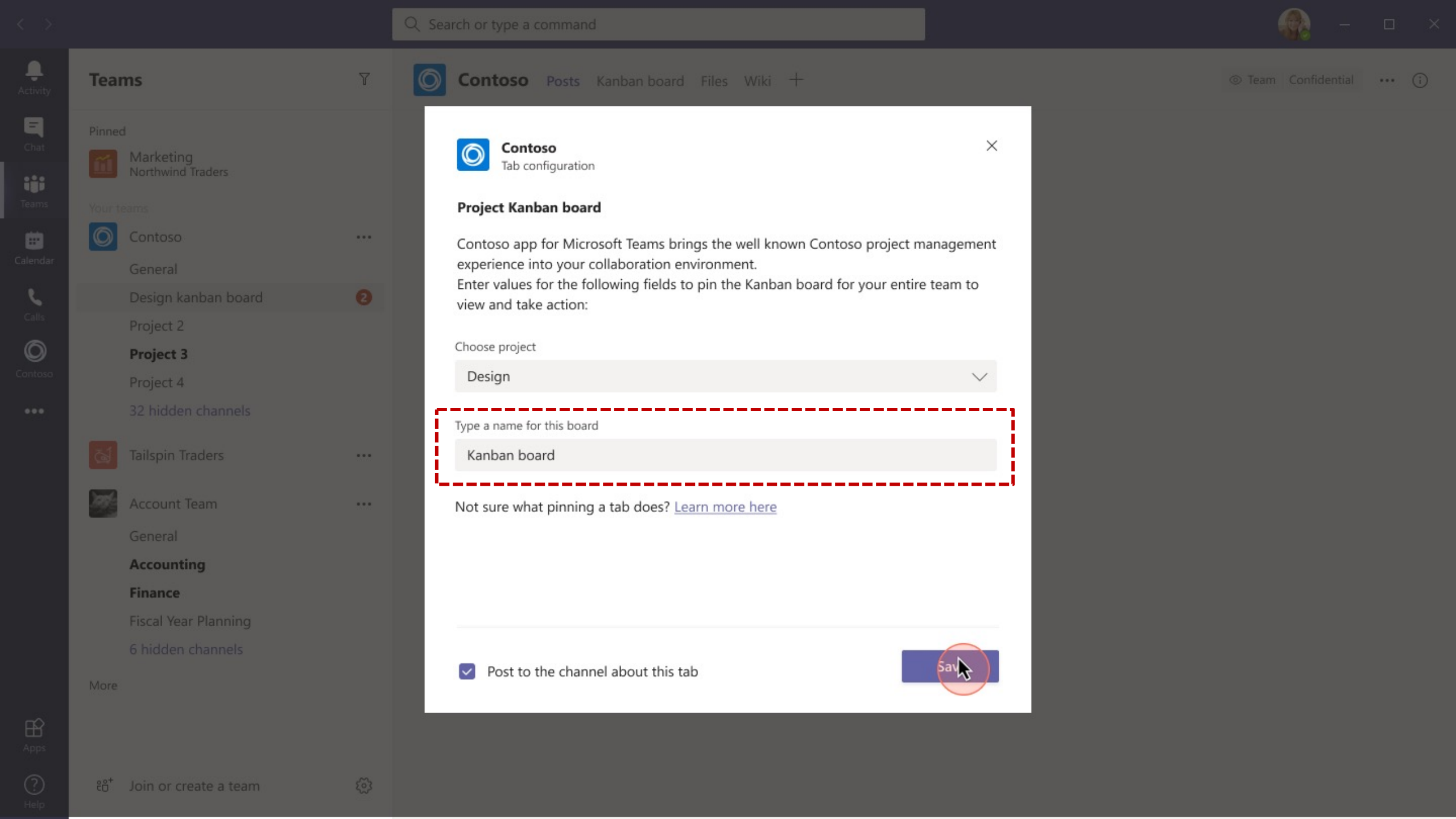
Fiscal Year Planning
6 hidden channels
More
Apps
Help
Join or create a team
Contoso
Posts
Kanban board
Files
Wiki
Team
Confidential
Contoso
Tab configuration
Project Kanban board
Contoso app for Microsoft Teams brings the well known Contoso project management experience into your collaboration environment.
Enter values for the following fields to pin the Kanban board for your entire team to view and take action:
Choose project
Select project
Type a name for this board
Enter name here
Not sure what pinning a tab does? Learn more here
Post to the channel about this tab
Save

2. Pre-fill Input Fields

Some tab configuration pages might require a certain number of fields to be filled by the customer before the right experiences can be shown to all the channel or group members. If this is the case, you will save some time for the users by pre-filling input fields and thereby provide hints about the fields as well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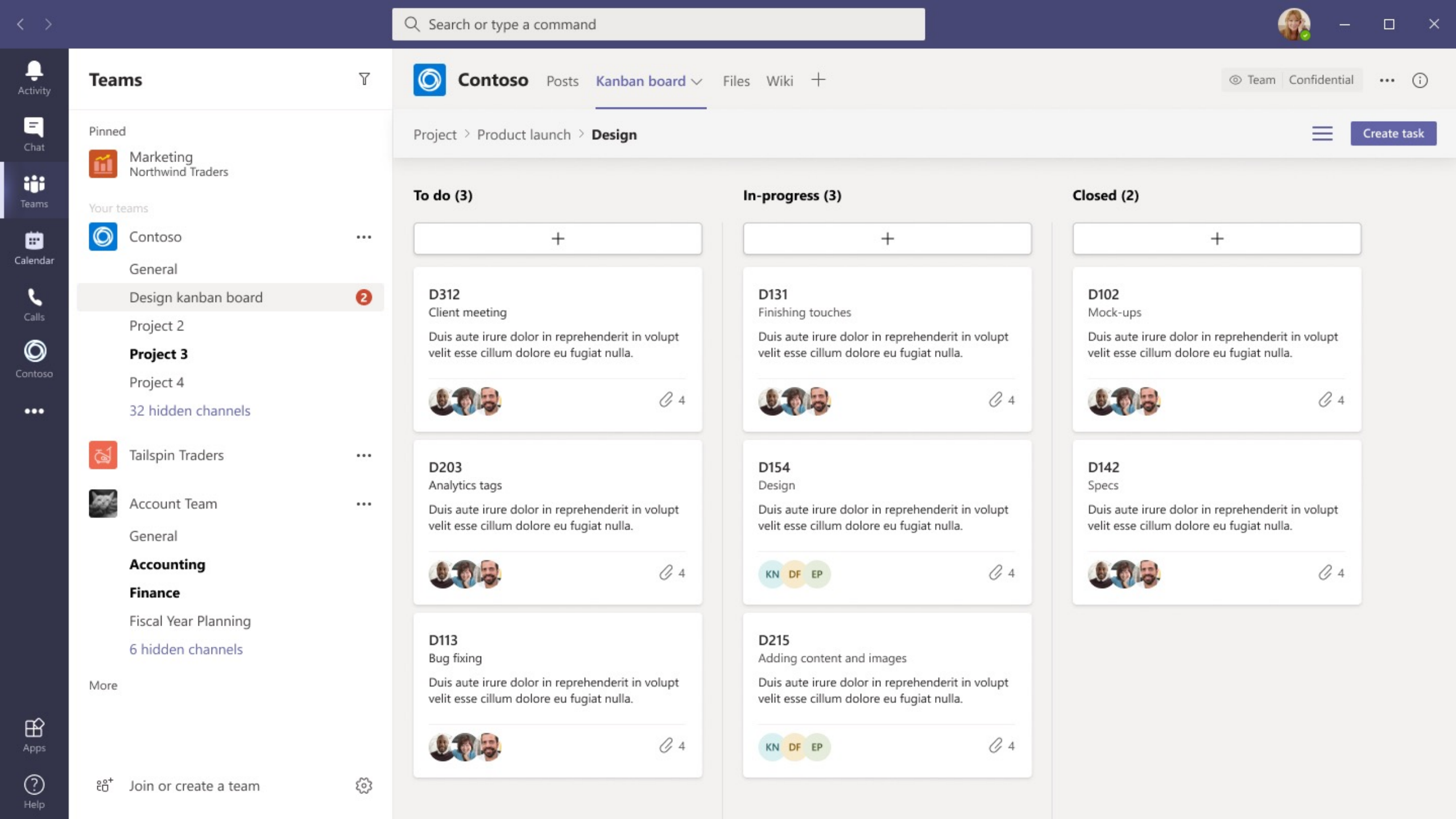
3. Default Name of the Tab

Usually, the app name is taken as the de-facto name of the channel or group tab. A smart approach over here would be to provide a default name to the tab that also elucidates subtly about the functionality of your app in collaborative scope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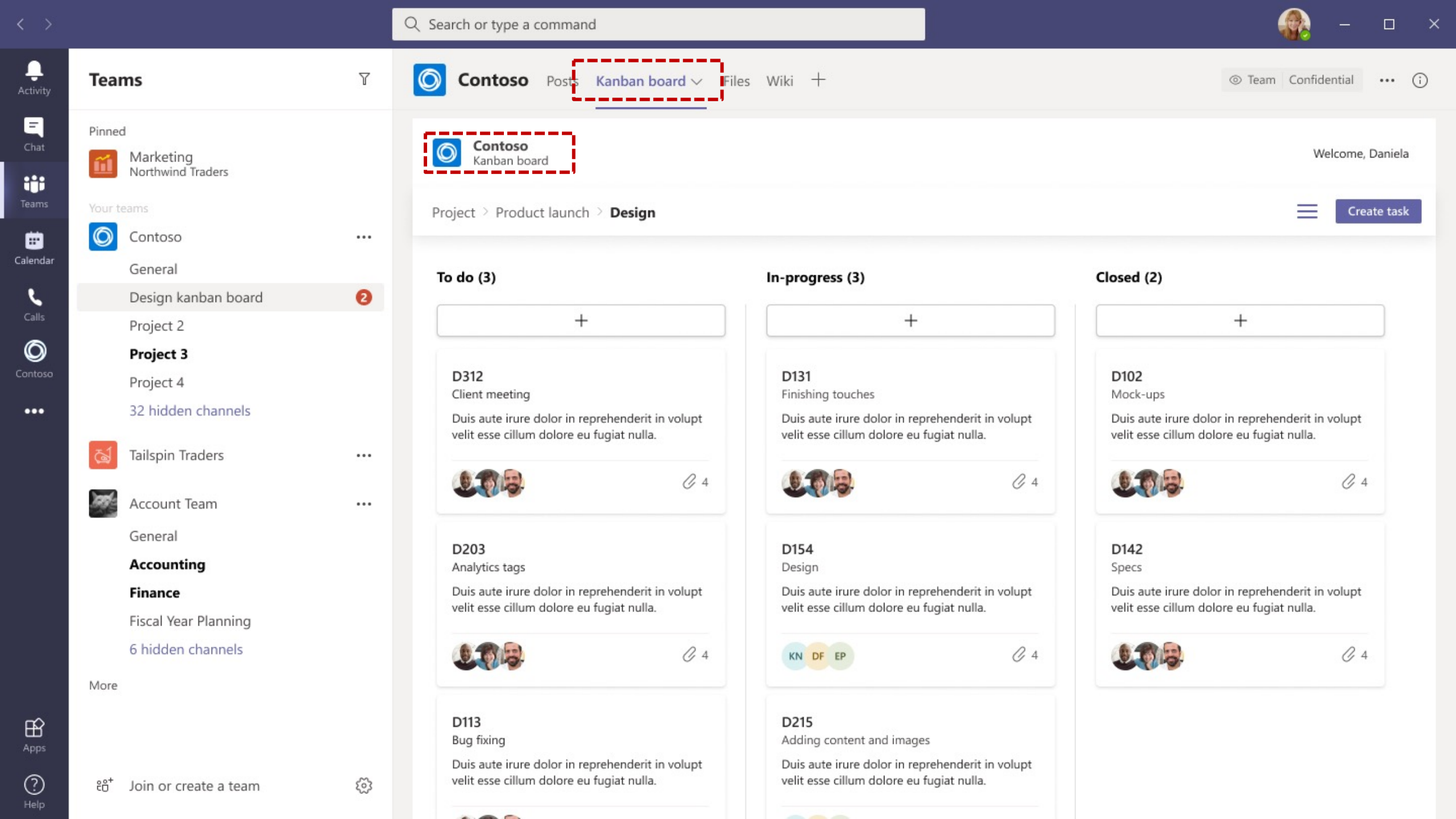
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4. Welcome Message

If your app has a bot then it is always recommended to have the bot post a welcome message in the channel or group that delivers features of the app that aids collaboration

Search or type a command

Activity
Chat
Teams
Calendar
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Contoso
...
Apps
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Marketing
Northwind Traders

Your teams

Contoso
- General
- Design kanban board 2
- Project 2
- **Project 3**
- Project 4
- 32 hidden channels

Tailspin Traders

Account Team
- General
- **Accounting**
- **Finance**
- Fiscal Year Planning
- 6 hidden channels

More

Join or create a team

Contoso

Posts | Kanban board | Files | Wiki | +

Team Confidential

4 replies from Maja, Franz, and Miguel

Daniela Mandera 9:18 AM
I'm not confident in recommending option 2 or 5 again and feel that we should cut those options from the deck. We've discussed

Reply

Contoso 10:00 AM

Contoso was installed in General channel!

Now that you have installed Contoso project management app, use it to view tasks in Kanban board and take actions on it

Pin Kanban board to the tab to see the latest update in your project

Go to tab | Learn more

Type a new message

Search or type a command

Activity
Chat
Teams
Calendar
Calls
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Help

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Northwind Traders

Your teams

Contoso
General
Design kanban board 2
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Reply

Contoso 10:00 AM

Contoso was installed in General channel!

Now that you have installed Contoso project management app, use it to view tasks in Kanban board and take actions on it

Create new tasks from your team and assign them to your teammates

Create task | Learn more

Type a new message

Search or type a command

Activity
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Apps
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Reply

Contoso 10:00 AM

Contoso was installed in General channel!

Now that you have installed Contoso project management app, use it to view tasks in Kanban board and take actions on it

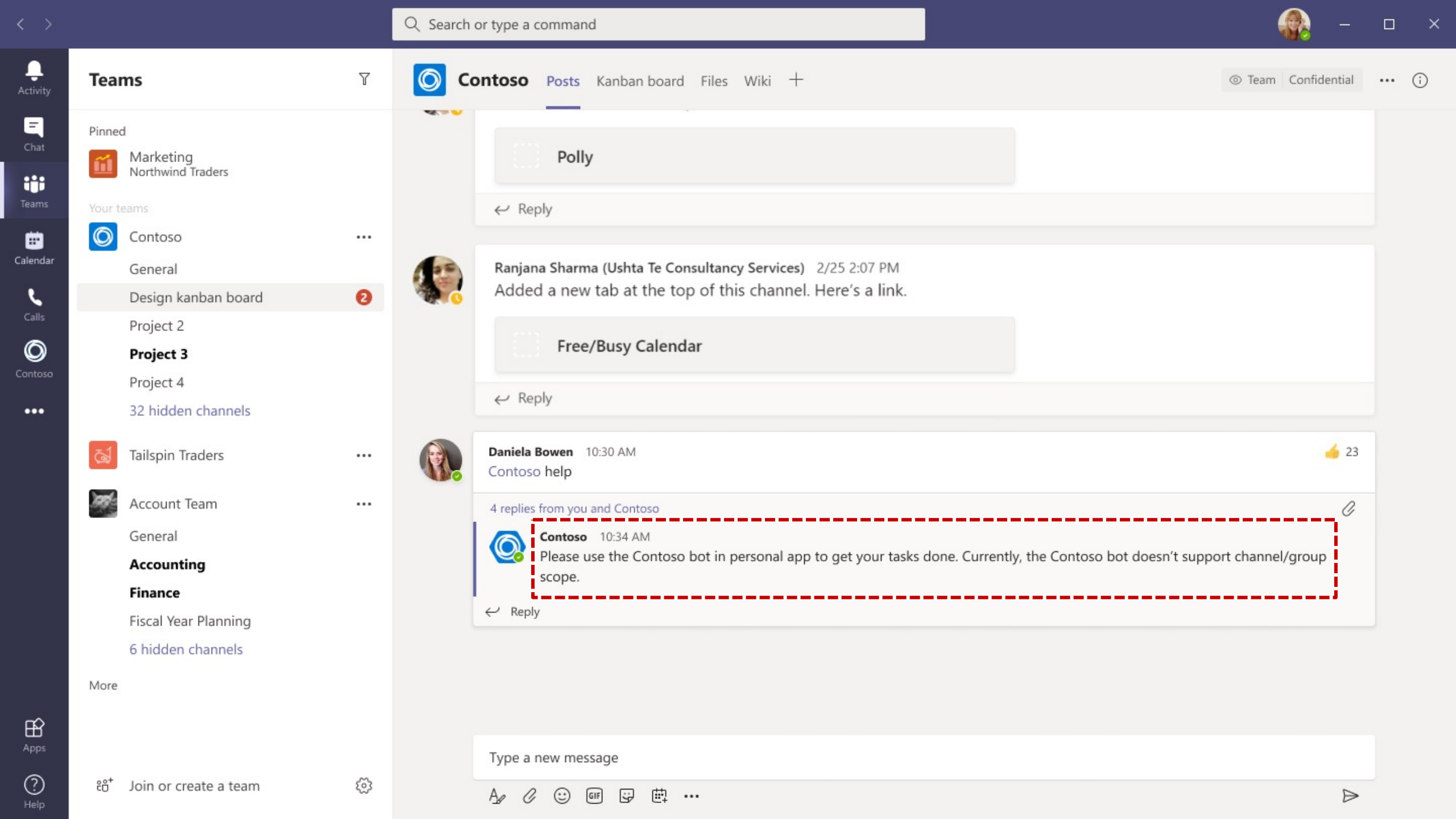
Update task, set a due date and change status from the Contoso tab

Go to tab | Learn more

Type a new message

5. Limited Bot Scope

Some of the bots are designed for personal experiences and hence, may not have support commands in collaborative scope. In such scenarios, do not forget to mention to the users that they might want to check the personal app to use the pertaining commands.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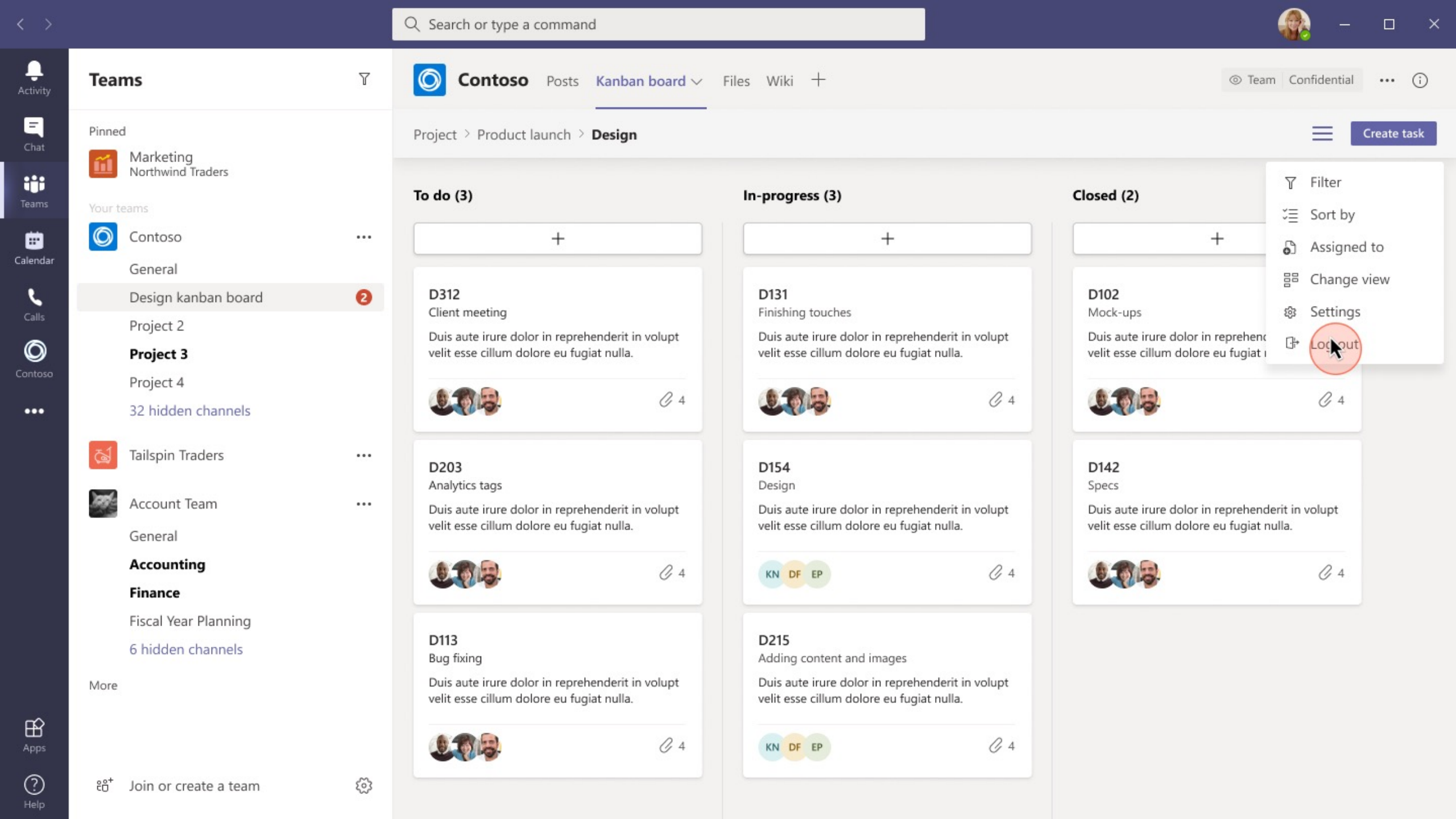
Reply
Ranjana Sharma (Ushta Te Consultancy Services) 2/25 2:07 PM
Added a new tab at the top of this channel. Here's a link.
Free/Busy Calendar
Reply
Daniela Bowen 10:30 AM
23
Contoso help
4 replies from you and Contoso
Contoso 10:34 AM
Please use the Contoso bot in personal app to get your tasks done. Currently, the Contoso bot doesn't support channel/group scope.
Reply
Type a new message

6. Exit criterion for users

In most of the cases, users are required to sign-in to start using the app. Often, we forget to provide a sign-out button to the users to exit the app. This is a critical requirement for app developers and needs attention while designing the tab view.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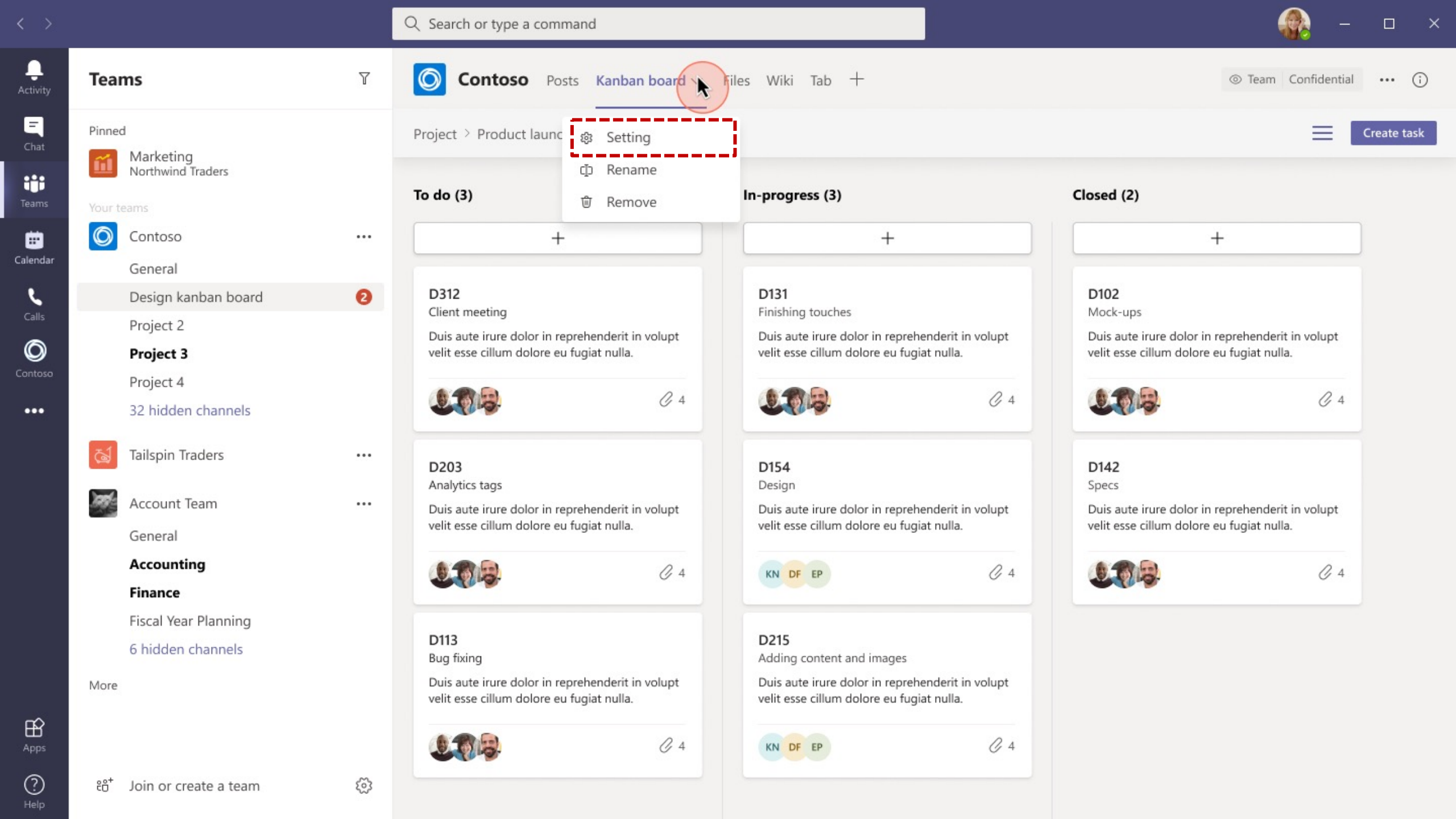
7. Settings option in tab header

Tabs configuration is an evolving process and users are sometimes required to go back to the tab configuration page to reconfigure a few of the input fields. To ease this process, always include the ‘Settings’ option in the tab header.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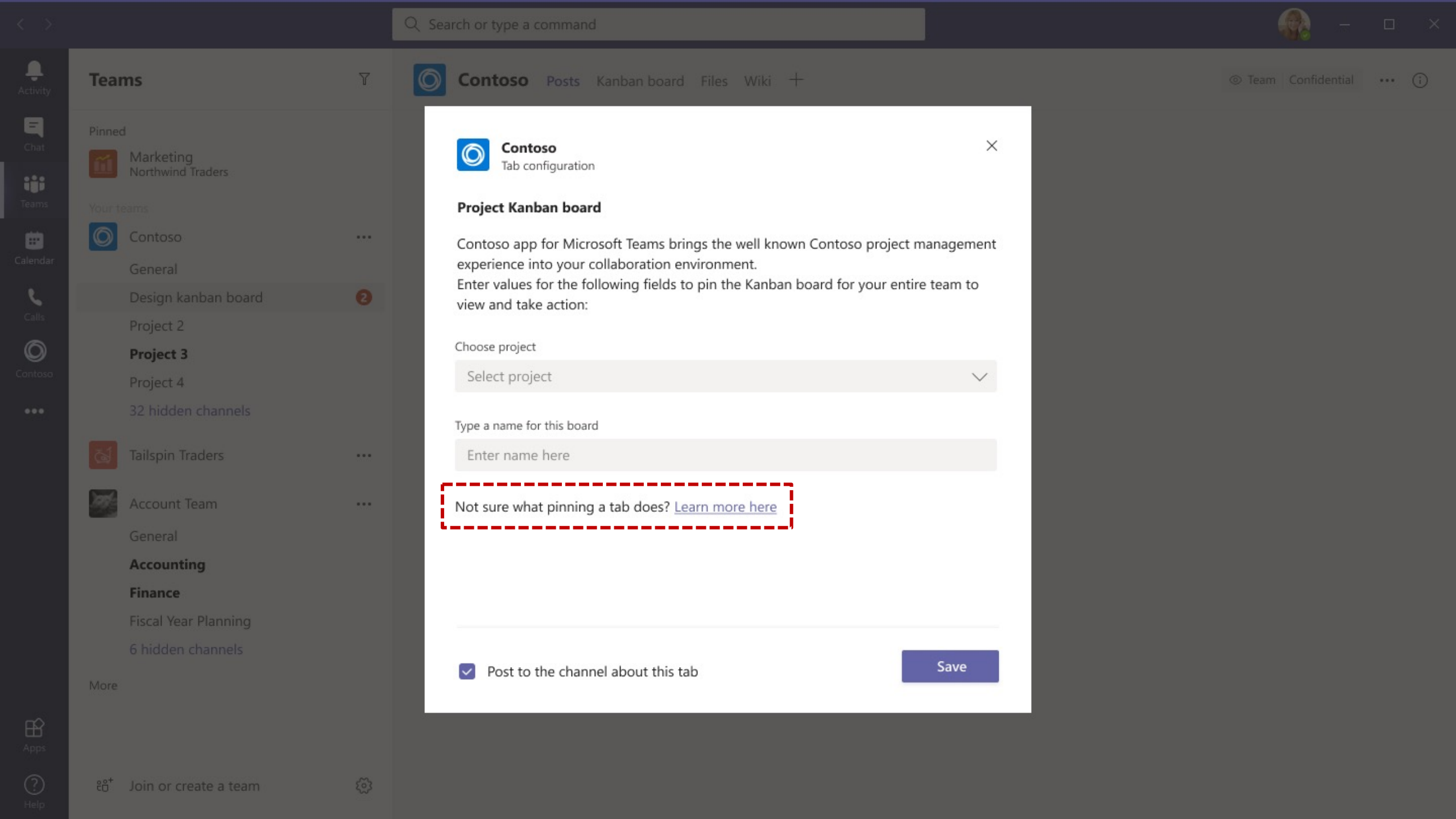
8. Help Thy Users!

Another important aspect of tab configuration page is to provide a CTA to the users to access help for understanding the tab experience of the app. This CTA can either deep-link users to the personal help tab or may open a hyperlink in the browser.
PS: Extra points for keeping the users inside Teams!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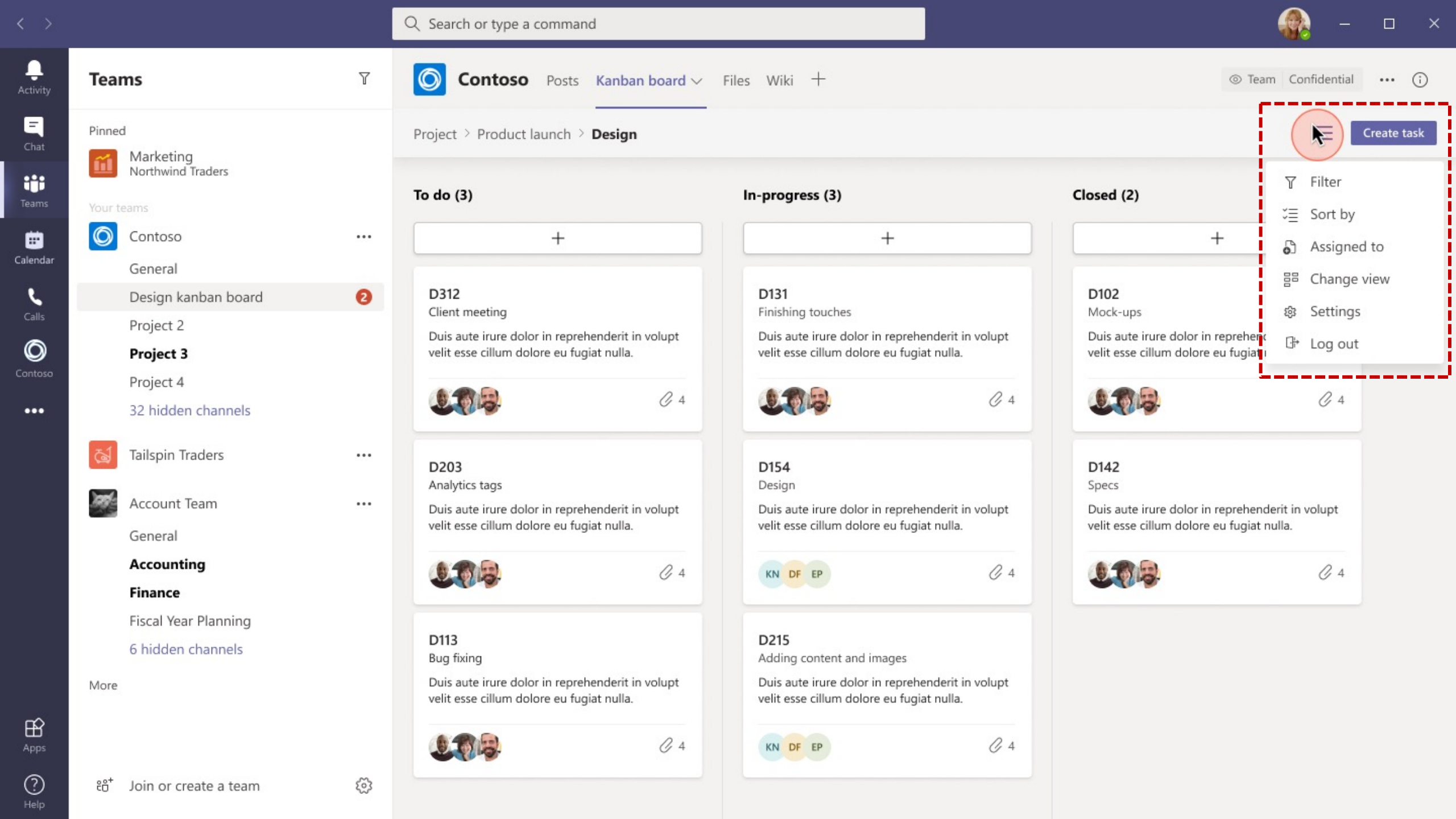
9. In-app Navigation

Some apps display multiple levels of views inside a tab. In such cases, always provide the navigation path to the users in the form of breadcrumb or hamburger menu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Thank You

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