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| Department of Fisheries and Oceans (DFO) | Ministère de Pêches et Océans (MPO) |
| Microsoft Teams Manual |
| A reference manual on “How To” perform actions in Microsoft Teams |

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| Lim, Natasha – Training and Communications Officer | Agente de Formation et de Communication  **Fisheries Management & Corporate Solutions | Gestion de la Pêche et Solutions Corporatives (GPSC)**  Last Modified: March 27, 2020 |
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MICROSOFT TEAMS



# TRAINING CONTENT OVERVIEW

Self-paced training on Teams will be broken up into the following Modules:

1. Accessing Teams
2. Navigating Teams
3. Customizing Teams
   1. For Members
   2. For Owners
4. Collaborating in Teams & Channels
5. Communicating in Teams
6. Files in Teams
7. Planner in Teams

**Microsoft Teams** is a cloud-based hub for teamwork. With Microsoft Teams you can:

* Create a team
* Communicate with team members over live chat
* Share and edit documents together in real time
* View likes, @mentions and replies with one click
* Add your own notes, websites and applications

# ACCESSING TEAMS

In this module you will learn:

* How to install Microsoft Teams
* How to launch Microsoft Teams

## INSTALL MICROSOFT TEAMS

1. Open the Software Centre
2. Search for Microsoft Teams
3. Select **Install** Microsoft Teams

* If you are not connected to the VPN go to [**https://teams.microsoft.com/go#**](https://teams.microsoft.com/go)to download the application

## LAUNCH MICROSOFT TEAMS

1. Open the Microsoft Teams app from your desktop
2. You will be prompted to sign in to your account with an automatically populated email address – **THIS MUST BE EDITED**
3. Enter your email address in the format [**firstname.lastname@dfo-mpo.gc.ca**](mailto:firstname.lastname@dfo-mpo.gc.ca) and sign in
4. You will receive a Script Error Warning – click **Yes** to continue running scripts on the page
5. Re-enter your credentials to **Sign in** to your DFO account
6. Select a method to receive your **Sign in code**
   1. Via **text** to your mobile
   2. Via **email**
7. Enter your **Sign in code** to verify your account and **Sign in**

# NAVIGATING TEAMS

In this module you will learn:

* How to navigate the Microsoft Teams interface
  + Left rail tabs
  + Start a new chat
  + Search/command
  + Profile and Settings

The main tabs found on the left hand side are:

* **Activity** – view all your notifications (messages, @mentions, replies etc.)
* **Chat** – chat with an individual/group or share files over chat
* **Teams** – find teams/channels to join or create your own, have conversations, share files, or hold on-the-spot meetings
* **Calls** – call anyone within DFO, view your call history, or access your voicemail
* **Files** – view files that have been shared on Teams or uploaded to your OneDrive cloud

## VIEW YOUR NOTIFICATIONS & MANAGE YOUR ACTIVITY FEED

When someone @mentions you, likes your post, or replies to your thread, you will receive a notification in your **Activity**feed.

1. Click **Activity ​**
2. Your **Feed** shows you a summary of everything that’s happened in the channels you follow
   * Click **Filter**to show only certain types of notifications
   * Select **Feed** then **My Activity** from the dropdown menu to see a list of your activity

## VIEW YOUR RECENT CHATS & CONTACTS

All of your chats and contacts can be accessed from the **Chat** tab. Chats in Microsoft Teams are also **persistent/continuous** so you can continue a previous chat with a group/individual or a chat from a meeting.

1. Click **Chat ​**
2. Select a chat conversation
3. Type your message in the message box and click **Send**

## START A NEW CHAT

1. Click **New Chat** at the top of the screen on the left side of the search/command bar
2. Type the name of the person/people you want to chat with in the **To** field**​**
3. Type your message in the message box and click

## TEAMS AND CHANNELS

A **team** is a collection of people, conversations, files and tools. Teams can be for specific departments, projects, events or social activities. Teams are made up of channels.

A **channel**is a discussion WITHIN a team, dedicated to a particular department, project, or topic. Channels are where conversations happen, where files are shared, and where apps are added. Channel conversations are public, whereas **chats**are just between you and another individual or group. At the top of each channel, you'll find tabs - these are links to the channel's posts, files, apps, services and sites.

## CALLS

The Calls tab in Microsoft Teams allows you to:

* Make calls from your **speed dial**
* Manage or call your **contacts**
* View your **call history**
* Access your **voicemail**

## FILES

The Files tab in Microsoft Teams allows you to view your:

* **Recent** files
* **Microsoft Teams** files
* **Downloads**
* **OneDrive** cloud files and folders

## HELP

The Help tab in Microsoft Teams allows you to:

* Review certain Teams **topics**
* Watch Microsoft’s Teams **training** videos
* Check out **new** features
* **Suggest a feature**
* **Give feedback**

## SEARCH & COMMAND

Searches in Teams cover all of the Teams and Channels you are a part of within the organization.

1. Type what/who you’re looking for in the search bar at the top of the page and press Enter
2. Select the **Messages**,**People**, or **Files**tab to narrow your results
   * You can also click **Filter**to further refine your results

This box can also be used to **command** quick action within the application:

* Type **/** in the box for a list of quick actions to perform
* Type **@** in the box to send a message directly to a contact without having to leave your window

## PROFILE & SETTINGS

From your **Profile** menu you can:

* Select/update your **status**
* Set your **status message**
* View your **saved** items
* Manage your **settings** and notifications
* **Sign out** of Teams

# CUSTOMIZING TEAMS

Legend for this section:

* Operations that appear in **RED** have been limited to **SYSTEM ADMINS**
* Operations that appear in **BLACK** can be performed by **MEMBERS & OWNERS**
* Operations that appear in **GREEN** can be performed by **OWNERS ONLY**
* **NOTE: some operations permissions for members within a team may vary depending on the team settings designated by team owner(s)**

In this module you will learn how to:

* Create a team
* Join a team
* Request to add a team member
* Add/remove a team member
* Change member roles
* Add a channel
* Add a channel tab
* GCdocs folder
* Customize your interface
* Pin a channels
* Hide a team/channel
* Show a team
* Show a channel
* Reorder your teams
* Manage your team’s channels
* Customize your settings
* Status
* Channel Notifications
* All Notifications
* Manage your team’s settings
* Add/manage apps
* Archive a team

## CREATE A NEW TEAM

1. Click **Join or create a team**
2. Then **Create a new team**
3. Select **Build a team from scratch** OR **Create from** an existing Office 365 group/team
4. Select the permissions type of the team
   * **Private** – people need permission to join
   * **Public** – anyone in the organization can join
   * **Org-wide** – everyone in your organization joins automatically
5. Add the team name and description
6. Select **Create**
7. Add team members using their e-mail addresses
8. Select **Add**

## JOIN A TEAM

1. Click **Teams** to access your **Teams list**
2. At the bottom of the Teams panel select **Join or create a team**
3. To join with a **team code**
   1. Enter the **team code**
   2. Click **Join team**
4. To join without a team code
   1. Search for the **team name** in the **Search teams** box
   2. Select the team you want to join
   3. Click **Join team**

## REQUEST TO ADD A TEAM MEMBER

To request that someone be added to a team that you are a member of:

1. In the Teams list, click the three dots **⋯** beside the team name for **More Options**
2. Select **Add member**
3. Type the **name or email address** of the person you want to add in the **search box**
4. Click **Send request**
   * The team owner(s) will receive an alert that they have a pending request and then they can accept/refuse the member addition

## ADD TEAM MEMBERS

There are several ways a team owner can add a team member:

Method 1:

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the team name
2. Select **Add members**
3. Type in the name or e-mail address of the person you want to add
   * NOTE: if the person is outside of the organization you have to use their e-mail address
4. Click **Add**
5. Close the window

Method 2:

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the team name
2. Click **Manage Team**
3. Select the **Members** tab
4. Click **Add Member**
5. Type in the name or e-mail address of the person you want to add
   * NOTE: if the person is outside of the organization you have to use their e-mail address
6. Click **Add**
7. Close the window

## GENERATE A TEAM CODE

To generate a **team code** to share with people trying to join your team:

1. Click **Teams**
2. Click the **three dots ⋯** for **More Options**beside the team name
3. Select **Manage Team**
4. Select the **Settings tab**
5. Click on **Team code** to drop down the section
6. Click **Generate team code**

## REMOVE TEAM MEMBERS

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the team name
2. Click **Manage team**
3. Select the **Members**tab
4. Click the **X** to the far right of the name of the person you want to remove

## CHANGE MEMBER ROLES

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the team name
2. Click **Manage team**
3. Select the **Members** tab
4. Under the **Role** column, select the drop-down arrow beside the name of the person you want to change the role of
5. Change role from **Member**to **Owner** or from **Owner** to **Member**

## ADD A CHANNEL

Recall that Teams are made up of channels, which are dedicated to specific topics, departments, or projects. By default, a *General* channel is created for every team, which is great for information/announcements. To add a channel:

Method 1:

1. Click on the three dots **⋯** for **More Options**beside the team name
2. Select **Add channel**
3. Enter a **Channel name**
4. Enter a **Description** for the channel
5. Select the **Privacy** of the channel
   * **Standard** – accessible to everyone on the team
   * **Private** – only accessible to members invited by team owners
6. Select whether or not the channel is automatically visible in everyone’s channel list
   * NOTE: if you do not select this option, the channel will appear as a hidden channel in the members’ team list and users will have to “show” the channel to view it
7. Click **Add**

Method 2:

1. Click on the three dots **⋯** for **More Options**beside the team name
2. Click **Manage Team**
3. Select the **Channels** tab
4. Click **Add channel**
5. Enter a **Channel name**
6. Enter a **Description** for the channel
7. Select the **Privacy** of the channel
   * **Standard** – accessible to everyone on the team
   * **Private** – only accessible to members invited by team owners
8. Select whether or not the channel is automatically visible in everyone’s channel list
   * NOTE: if you do not select this option, the channel will appear as a hidden channel in the members’ team list and users will have to “show” the channel to view it
9. Click **Add**

Teams can have **Standard** or **Private Channels**

* **Standard Channels** are open to all members and anything posted is searchable by others
  + By default, all members of a team can create Standard Channels. Owners can change these permissions.
* **Private Channels** are for discussions that shouldn’t be open to all members so individuals must be invited to join within a team
  + By default, any team owner or team member can create a private channel and add members, but guests cannot. The admins/owners can change these permissions and limit private channel creation.
  + Wikis, apps and bots, and scheduled channel meetings are not currently supported in private channels

## ADD A CHANNEL TAB

At the top of each channel, you'll find tabs - these are links to the channel's posts, files, apps, services and sites. Each channel automatically comes with a **Posts** tab, a **Files** tab, and a **Wiki** tab by default. To add a channel tab:

1. Click on the **channel** you want to add the tab to
2. Click the **+** sign at the top of the channel
3. Select the type of tab you want to add such as:
   * An Excel spreadsheet
   * A OneNote notebook
   * A Planner project plan
   * A PowerPoint presentation
   * A Work document
   * A website (ex. relevant GCdocs folder)
4. To add a website (ex. relevant GCdocs folder), select **Website**
   * Enter a **Tab name** (ex. GCdocs Folder)
   * Go to the GCdocs folder in your web browser and copy the URL
   * Go back to Teams and **paste the URL**
   * Select whether or not you want to post the addition to your channel feed
   * Click **Save**

## PIN/UNPIN A CHANNEL

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the Channel name
2. Select **Pin** to add the channel to your pinned section
   * NOTE: To Unpin a pinned channel, follow the same instructions and select **Unpin**

## HIDE A TEAM OR CHANNEL

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the Team or Channel name
2. Select **Hide** to hide the team or channel

## **SHOW A TEAM**

1. Select **Hidden Teams**at the bottom of your Teams list
2. Move your cursor over the Team you'd like to Show
3. Click **Show**

## **SHOW A CHANNEL**

1. Click the **drop-down** arrow beside the team name to expand the team’s channels
2. Select **Hidden Channels**at the bottom of your team’s list of channels
3. Move your cursor over the channel you'd like to Show
4. Click **Show**

## REORDER YOUR TEAMS

1. In the Teams list, click on the Team you'd like to move
2. Drag the Team to where you'd like it to appear in your Teams list

## MANAGE YOUR TEAM’S CHANNELS

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the team name
2. Click **Manage team**
3. Select the **Channels** tab
4. Select whether you want any channels you want to automatically show up for yourself and members
   * NOTE: You can favorite up to 10 channels for your team

## CUSTOMIZE YOUR STATUS

1. Click on your **Profile**
2. Hover over your **Status**
3. Move cursor over to select your desired status
   * Available
   * Busy
   * Do not disturb
   * Be right back
   * Appear away
   * Reset status

## CUSTOMIZE CHANNEL NOTIFICATIONS

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the Channel name
2. Select **Channel Notifications**
3. Choose the settings you want for post notifications or Channel mentions
4. Click **Save**

## CUSTOMIZE ALL YOUR NOTIFICATIONS

1. Click on your **Profile**
2. Click **Settings**
3. Select the **Notifications** tab
4. Choose the settings you want for all types of notifications
   * @mentions
   * Messages
   * Meetings
   * Other
5. Exit the settings window and your selections will be saved automatically

## MANAGE YOUR TEAM’S SETTINGS

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the team name
2. Click **Manage team**
3. Select the **Settings** tab
4. From here you can:

* Set a team picture
* Set your member permissions (allowing members to create, update, or delete channels and tabs)
* Set guest permissions
* Enable team @mentions in a channel
* Enable usage of GIFs, emojis and stickers

## ADD AND MANAGE APPS

1. In the Teams list, click on the three dots **⋯** for **More Options**beside the team name
2. Select **Manage team** to manage team members, channels, settings and apps
3. In the **Apps**tab, you can manage the apps your team uses
4. Select **Go to store** to find and install new apps

## ARCHIVE A TEAM

1. Select the **manage** icon at the bottom of the team list
2. Click on the three dots **⋯** for **More Options**beside the team name
3. Select **Archive Team**
   * NOTE: Once you archive a team, the conversations and files within that team become **read-only**

# COLLABORATING IN TEAMS & CHANNELS

In this module you will learn how to:

* Add a Channel
* Add a Channel Tab
* Post a New Conversation/Announcement in a Channel
* Reply to a Thread
* @mention a Person/Channel/Team
* Edit a Post
* Like or React to a Post
* Save a Post
* Collaborate on a File

In Microsoft Teams, **Teams** are a collection of people brought together for work or projects. Teams are made up of channels and each team automatically comes with a General channel by default. Each **channel**is built around a particular department, project, or topic. Channels are where conversations happen, where files are shared, and where apps are added. At the top of each channel, you'll find tabs - these are links to the channel's posts, files, apps, services and sites. Each channel automatically comes with a **Posts** tab, a **Files** tab, and a **Wiki** tab by default.

## ADD A CHANNEL

Recall that by default, a *General* channel is created for every team, which is great for information/announcements. To add a channel:

Method 1:

1. Click on the three dots **⋯** for **More Options**beside the team name
2. Select **Add channel**
3. Enter a **Channel name**
4. Enter a **Description** for the channel
5. Select the **Privacy** of the channel
   * **Standard** – accessible to everyone on the team
   * **Private** – only accessible to members invited by team owners
6. Select whether or not the channel is automatically visible in everyone’s channel list
   * NOTE: if you do not select this option, the channel will appear as a hidden channel in the members’ team list and users will have to “show” the channel to view it
7. Click **Add**

Method 2:

1. Click on the three dots **⋯** for **More Options**beside the team name
2. Click **Manage Team**
3. Select the **Channels** tab
4. Click **Add channel**
5. Enter a **Channel name**
6. Enter a **Description** for the channel
7. Select the **Privacy** of the channel
   * **Standard** – accessible to everyone on the team
   * **Private** – only accessible to members invited by team owners
8. Select whether or not the channel is automatically visible in everyone’s channel list
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* **Private Channels** are for discussions that shouldn’t be open to all members so individuals must be invited to join within a team
  + By default, any team owner or team member can create a private channel and add members, but guests cannot. The admins/owners can change these permissions and limit private channel creation.
  + Wikis, apps and bots, and scheduled channel meetings are not currently supported in private channels

## ADD A CHANNEL TAB

At the top of each channel, you'll find tabs - these are links to the channel's posts, files, apps, services and sites. Each channel automatically comes with a **Posts** tab, a **Files** tab, and a **Wiki** tab by default. To add a channel tab:

1. Click on the **channel** you want to add the tab to
2. Click the **+** sign at the top of the channel
3. Select the type of tab you want to add such as:
   * An Excel spreadsheet
   * A OneNote notebook
   * A Planner project plan
   * A PowerPoint presentation
   * A Work document
   * A website (ex. relevant GCdocs folder)
4. To add a website (ex. relevant GCdocs folder), select **Website**
   * Enter a **Tab name** (ex. GCdocs Folder)
   * Go to the GCdocs folder in your web browser and copy the URL
   * Go back to Teams and **paste the URL**
   * Select whether or not you want to post the addition to your channel feed
   * Click **Save**

## POST A NEW CONVERSATION/ANNOUNCEMENT IN A CHANNEL

1. At the top of the Channel, click on the **Posts** tab
2. Click in the **start a new conversation** box at the bottom
3. Type your message in the box and select any of the following options:
   * **Post as** a
     + **New conversation**
     + **Announcement**
   * Post in **multiple channels**
   * Add a **Subject** heading
   * **Format** the message
     + Font formatting
     + Bullet points
     + Numbered lists
     + Hyperlinks
     + Insert a table
     + Mark as important
   * Add **Attachment(s)**
   * Add emojis, GIFs or stickers
4. Once you are satisfied with your message click the **Arrow to send**

NOTE: Channel conversations are organized by date and then thread and visible to all channel members

## REPLY TO A THREAD

To reply to a conversation thread:

1. Find the conversation thread you want to reply
2. At the bottom of the post, click on the **Reply bar**
3. Type your message in the box and select any of the following options:
   * **Format** the message
     1. Font formatting
     2. Bullet points
     3. Numbered lists
     4. Hyperlinks
     5. Insert a table
     6. Mark as important
   * Add **Attachment(s)**
   * Add emojis, GIFs or stickers
4. Once you are satisfied with your message click the **Arrow to send**

## @MENTION COLLEAGUES

An **@mention** is a way to get someone’s attention in a channel conversation or a chat. They can also be used to get the attention of an entire team or channel in a channel conversation (but cannot be done in a chat). **@mention notifications** will show up in the recipient’s **Activity**feed. To @mention an individual, channel, or team:

1. In the message box, type **@** then the name of the person/channel/team you would like to @mention
2. Select the correct person/channel/team
3. Once you have completed your message click the **Arrow to send**

## EDIT A POST

1. Hover over the top right hand corner of the post (this can only be done for your posts)
2. Click the three dots **⋯** for **More Options**
3. Select **Edit**
4. **Make the desired revisions**
5. **Click the checkmark to update the post**

## LIKE OR REACT TO A POST

1. Hover over the top right hand corner of the post
2. Click the reaction you would to use:
   * **Like**
   * Heart
   * Laugh
   * Surprised
   * Sad
   * Angry

## SAVE A POST

1. Hover over the top right hand corner of the post
2. Click the three dots **⋯** for **More Options**
3. Select **Save**
4. **View your saved items from your Profile**

## COLLABORATE ON A FILE

Working on files with a colleague, or an entire team, is easy in Microsoft Teams. Files can be shared in channel posts (stored in SharePoint), the files tab (stored in SharePoint), or in chat conversations (stored in OneDrive). To work on a shared file:

1. Click on the file to open it directly in Teams OR click on the three dots beside the file name to:
   * Edit in Teams
   * Open in Desktop App – THIS WILL NOT SYNC/SAVE CHANGES AUTOMATICALLY
   * Open in Browser
   * Download
   * Get link
   * Make this file a tab
2. Make any additions or changes as desired
3. Select **Conversation** to continue the conversation/discuss the file while viewing or co-editing without having to leave the file
4. All updates will be automatically synced and saved (in SharePoint or OneDrive depending on how the file was shared)

# COMMUNICATING IN TEAMS

In this module you will learn how to:

* Start a New Chat with a Person or Group
* Edit a Message
* Like or React to a Message
* Save a Message
* Translate a Message
* Add a Conversation Tab
* Make an Audio/Video Call from a Chat/Group Chat
* Make an Audio/Video Call from a Channel
* Share Your Screen in a Chat
* Start a Group Chat from a 1-on-1 Chat
* @Mention Colleague(s) in Group Chats
* Add a Contact to a Contact Group
* Add a Contact Group
* Hide a Chat
* Schedule a Meeting from Outlook

## START A NEW CHAT WITH A PERSON OR GROUP

1. Click **Start new chat**
2. Enter the **recipient(s)**
3. Type your message in the box and select any of the following options:
   * **Format** the message
     + Font formatting
     + Bullet points
     + Numbered lists
     + Hyperlinks
     + Insert a table
     + Mark as important
   * Set **Delivery Options**
     + **Standard** – message will be sent as usual
     + **Important** – message will be marked as important
     + **Urgent** – sends the recipient a notification every 2 minutes for 20 minutes
   * Add **Attachment(s)**
   * Add emojis, GIFs or stickers
4. Once you are satisfied with your message click the **Arrow to send**

## EDIT A MESSAGE

1. Hover over the top right hand corner of the message (this can only be done for your messages)
2. Click the three dots **⋯** for **More Options**
3. Select **Edit**
4. **Make the desired revisions**
5. **Click the checkmark to update the post**

## LIKE OR REACT TO A MESSAGE

1. Hover over the top right hand corner of the message
2. Click the reaction you would to use:
   * **Like**
   * Heart
   * Laugh
   * Surprised
   * Sad
   * Angry

## SAVE A MESSAGE

1. Hover over the top right hand corner of the message
2. Click the three dots **⋯** for **More Options**
3. Select **Save**
4. **View your saved items from your Profile**

## TRANSLATE A MESSAGE

1. Hover over the top right hand corner of the message
2. Click the three dots **⋯** for **More Options**
3. Select **Translate to translate the message to the language you have set for your Teams interface**

## ADD A CONVERSATION TAB

At the top of each chat conversation, you'll find tabs. Each chat automatically comes with a **Conversation** tab, a **Files** tab, and a **Activity** tab by default. To add a conversation tab:

1. Click on the **conversation** you want to add the tab to
2. Click the **+** sign at the top of the chat
3. Select the type of tab you want to add such as:
   * An Excel spreadsheet
   * A OneNote notebook
   * A Planner project plan
   * A PowerPoint presentation
   * A Work document
   * A website
4. Click **Save**

## MAKE AN AUDIO/VIDEO CALL FROM A CHAT/GROUP CHAT

1. Click on the chat you’d like to call
2. At the top of the window on the right, to have an **impromptu meeting** click on either:
   1. Video call (*for users with access*) OR
   2. Audio call OR
   3. Share your screen

## MAKE AN AUDIO/VIDEO CALL FROM A CHANNEL

1. At the bottom of the channel conversations board, below the message box, there is a row of icons
2. Click on **Meet Now** to have an **impromptu meeting** with the channel members

## START A GROUP CHAT FROM A PRIVATE CHAT

1. In the chat window, at the top the right, click on **Add a member**

* Once you add another member it will automatically create a new group chat
* If you are adding a fourth person or more and there is conversation history, you can select whether you want to include
  + Include no chat history
  + History for X number of days
  + Include all chat history

## @MENTION COLLEAGUES IN GROUP CHATS

An **@mention** is a way to get someone’s attention in a group chat. **@mention notifications** will show up in the recipient’s **Activity**feed. To @mention someone in a group chat:

1. In the message box, type **@** then the name of the person(s) you would like to @mention
2. Select the correct person/channel/team
3. Once you have completed your message click the **Arrow to send**

## ADD A CONTACT TO A CONTACT GROUP

1. Click on the three dots for **More Options** beside the name of the contact group
2. Select **Add a Contact to this group**
3. Type the **Name** of the person you’d like to add
4. Click **Add**

## ADD A CONTACT GROUP

1. From the chat window, click on **Add a new contact group**
2. Enter the **Name** you’d like for the new contact group
3. Click on **Create**

## HIDE A CHAT

1. Click on the three dots for **More Options** beside the name of the chat you want to hide
2. Select **Hide**

## SCHEDULE A MEETING FROM OUTLOOK

There are multiple ways to schedule a meeting over Teams in Outlook:

1. From your **Inbox**, by clicking **New Item** then selecting **New Teams Meeting** OR
2. From your **Calendar**, by clicking **New Teams Meeting** OR
3. From your **Calendar**, by selecting the date and time you want to have the meeting, and clicking **Teams Meeting**

* Once you click **Teams Meeting** the location will automatically populate as a Microsoft Teams Meeting and the **Join Teams Meeting** hyperlink will appear in the body of the invitation
* The rest of the process and features are the same:
  + Add the recipients you want to attend the meeting
  + Add a subject (this will appear as the meeting/chat title)
  + Add any desired content to the body of the invitation – ***NOTE: If you plan on using video conferencing in the meeting please provide a statement indicating this in the body of the invitation***
  + Add a room (if applicable)
  + Use the scheduling assistant
  + Make it a reoccurring meeting
  + Use the appropriate time zones
* ***NOTE: Teleconference numbers are not automatically included with your standard Microsoft Teams license. Requests for teleconferencing numbers can be submitted to the IT Service Desk as New Software Procurement requests or through SharePoint site requests****.*

# FILES IN TEAMS

## SHARE A FILE

1. In your channel conversation, click **Attach **at the bottom of the message box
2. Select from:

* **Recent**
* **Browse Teams and Channels**
* **OneDrive**
* **Upload from my computer**

1. Select the file and click **Share a link**

* If you’re uploading a file from your computer, select the file, click **Open** and then **Send **

NOTE: You can see all the files you post to a channel by going to the **Files** tab

## SEARCH FOR MESSAGES, PEOPLE, OR FILES

Searches cover all of the Teams and Channels you are a part of within the organization.

1. Type what/who you’re looking for in the search bar at the top of the page and press Enter
2. Select the **Messages**, **People**, or **Files** tab to narrow your results

* You can also click **Filter ** to further refine your results

1. Select the result you were looking for

## COLLABORATE ON A FILE

Working on files with a colleague, or an entire team, is easy in Microsoft Teams. Files can be shared in channel posts (stored in SharePoint), the files tab (stored in SharePoint), or in chat conversations (stored in OneDrive). To work on a shared file:

1. Click on the file to open it directly in Teams OR click on the three dots beside the file name to:
   * Edit it Teams
   * Open in Desktop App
   * Open in Browser
   * Download
   * Get link
   * Make this file a tab
2. Make any additions or changes as desired
3. Select **Conversation** to continue the conversation/discuss the file while viewing or co-editing without having to leave the file
4. All updates will be automatically synced and saved (in SharePoint or OneDrive depending on how the file was shared)

# PLANNER IN TEAMS

## CREATE A PLAN WITH PLANNER

Microsoft Teams has integrated the Planner application so teams can create a plan, add and assign tasks, track progress, and stay organized. To create a new plan:

1. In a channel, select the **+** sign to **Add a tab**
2. Select **Planner**
3. Select **Create a new plan** (or **Use an existing one)**
4. Enter the **name** of the plan
5. Select whether or not you want to share as a post to the channel
6. Click **Save**