****

**A Step-by-step Guide to Microsoft Teams**

[Navigating Microsoft Teams 2](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356606)

[How do I open Microsoft Teams? 2](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356610)

[How do I set my profile picture and availability? 2](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356611)

[What does each icon on the taskbar mean? 5](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356612)

[How do I create or join a team? 8](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356613)

[Communicating in Teams 9](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356614)

[How do I make/answer a phone call? 9](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356618)

[How do I set up a meeting? 10](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356619)

[What functions are available during a video call? 11](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356620)

[How do I post a message or file to a team? 14](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356621)

[How do I mention someone in a comment? 15](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356622)

[Collaborating in Teams 15](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356623)

[How do I upload files? 15](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356627)

[How do I keep my files organized? 16](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356628)

[What are channels used for? 16](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356629)

[How do my colleagues and I work on a document at the same time? 17](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356630)

[Additional Resources 18](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356634)

[Planner/Tasks 18](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356635)

[Wiki 21](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356636)

[OneNote 21](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356637)

[Stream 22](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356638)

[Microsoft 365 Support Links 25](file:///T:\TRA\T\Cawley\Microsoft%20Teams%20Reports%20Guide.docx#_Toc54356639)

# **Navigating Microsoft Teams**

# **a. How do I open Microsoft Teams?Navigating Microsoft Teams**

**a. How do I open Microsoft Teams?**

# **b. How do I set up my profile picture and availability?a. How do I open Microsoft Teams?Navigating Microsoft Teams**

# **a. How do I open Microsoft Teams?Navigating Microsoft Teams**

## **How do I open Microsoft Teams?**

To Open Teams, click into the **search icon** on the taskbar at the bottom of the screen and type in **Microsoft Teams**.

A picture containing logo

Description automatically generated

The **Microsoft Teams** Icon will appear.

A screen shot of a computer

Description automatically generated

To pin the icon to your taskbar or to the Start menu, search **Microsoft Teams** in the search bar. From there you will see options to **Pin to Taskbar** or **Pin to Start**.

[Table of Contents](#_top)

## **How do I set my profile picture and availability?**

Once Teams is open, you will see your **avatar**, or profile, in the top right corner of the window. By clicking on your avatar, you can:

1. Change your profile picture
2. Set your status to let others know your availability
3. Set a status message for when you are out of the office
4. Find and learn keyboard shortcuts to navigate Teams quickly and efficiently

Graphical user interface, text, application

Description automatically generatedGraphical user interface, text, application

Description automatically generatedTo change your profile picture:

Click on your **avatar** on the top navigation bar.

Change your picture by clicking **Change picture** under your name.

Click **Upload picture** to choose a picture from your device.

When you have the image you would like, click the **Save** button.

***Pathway: Avatar > Change picture > Upload picture***

To set your availability:

Hover over **Available** and your options for availability will appear. These options include:

* + 1. Graphical user interface, text, application

       Description automatically generatedAvailable
    2. Busy
    3. Do not disturb
    4. Be right back
    5. Appear away

Your availability automatically changes to **Busy** when you are in a meeting or on a call.

If you go a certain amount of time without moving your cursor, your availability will change to **Appear away**.

You can manually change your availability or let Teams automatically set it based on your activity.

Graphical user interface, application

Description automatically generatedIf you are going to be out of the office for an extended amount of time and would like to leave an out of office reply:

1. Click on your **avatar**
2. Select **Set status message**
3. Type your message into the text box and set the end date for your message
4. Graphical user interface, text, application

   Description automatically generatedYou can also select whether you would like to be notified when someone tries to message you while you are away by clicking this box

Graphical user interface, application

Description automatically generatedTo learn keyboard shortcuts to help navigate, manage meetings and make calls click on your avatar and click on **Keyboard shortcuts**.There you will see the list of shortcuts available organized by category.

[Table of Contents](#_top)

## **What does each icon on the taskbar mean?**

Graphical user interface, application

Description automatically generated

**Activity**

Here you can track and manage your activity within teams.

Use the **filter icon** to change how much information you can see in your feed.

A picture containing text

Description automatically generatedTo search for what specific activity you want to see type into the search bar or click on the three dots and select a filter.

Graphical user interface, application, Teams

Description automatically generated

**Chat**

To start a new chat, click on the new **chat icon** on the top right of the chat stream. Type in the name of the person you would like to chat.

To set your contacts click the arrow next to chat and select **Contacts**. Here you can set your favorites (individuals you contact frequently). Their names will be in your stream so you can easily access them.

To send an attachment in chat, click on the **paper clip icon** underneath the text box.



From here you will have the option to upload an attachment from OneDrive or your device.

**Graphical user interface, application

Description automatically generatedTeams**

The teams you are a part of appear in a list on the left-hand side.

Each team has a general feed by default. Specific channels can be set up by clicking the **three dots (More options)** to the right of the team name and selecting **Add channel**.

Graphical user interface, application

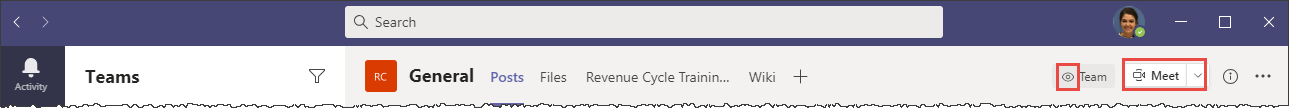
Description automatically generated

A picture containing graphical user interface

Description automatically generatedEach team has its own feed. Post in the feed by selecting **new conversation** and type your message in the text box or attach your material.

At the top of the team feed is the **navigation bar**. This is where posts in the feed and files are organized. Other tabs and apps can be added to the team navigation bar as well.

The **eye icon** denotes that only members of this team can see the feed.



To meet with your team click **Meet** and select **Meet now** or **Schedule a meeting**.

**Graphical user interface, application

Description automatically generated**Graphical user interface, application, Teams

Description automatically generated

**Calendar**

Calendar is synced to your Outlook calendar.

To create a calendar event or schedule a meeting click on **New meeting > Schedule meeting**.

Graphical user interface, application, Teams

Description automatically generatedInput your meeting details and click **Save** to invite guests and add to your calendar.

Graphical user interface, application, Teams

Description automatically generated

**Files**

To upload a file anywhere in Teams, look for the icon.

Graphical user interface, application, Teams

Description automatically generatedOr click on **Files > OneDrive > Upload**.

To find a file in Teams click on **Files** and apply a filter.

Graphical user interface, application

Description automatically generated

The **Recent** filter shows you files that you recently worked on or viewed.

The **Microsoft Teams** filter shows you all files in all your channels.

The **Downloads** filter shows you files that you have downloaded.

Graphical user interface, application, Teams

Description automatically generated

**Icon

Description automatically generatedMore apps**

Select **More options** to view other apps available to use.

You can pin any of these apps to your icon bar by clicking on the app you want to pin, right clicking, and selecting **Pin**.

[Table of Contents](#_top)

## **How do I create or join a team?**

Graphical user interface, application

Description automatically generated

To create or join a team click **Teams > Join or create a team** and select the **Create a team** or **Join a team with a code** tile.

Once you select **Create a team**, you will have the option to create **From scratch** or **From a group or team**.

You will then have the option to make your team **Private** so that members need permission to join or **Public** so that anyone within the organization can join the team.

Graphical user interface, text, application, email, Teams

Description automatically generatedGraphical user interface, application

Description automatically generated

[Table of Contents](#_top)

## **How do I make/answer a phone call?**

# **Communicating in Teams**

# **II. Communicating in Teams**

# **II. Communicating in Teams**

# **II. Communicating in Teams**

Graphical user interface, application, Teams

Description automatically generated

To make a call click the **More options** tab on the icon bar.

Select **Calls**.

From there, you can set your contacts to include colleagues you frequently call by selecting **Contacts** or you can search for someone’s name by selecting **Make a call**.

**History** will show you recent calls.

**Voicemail** allows you to check on missed messages.

Graphical user interface, text, application, chat or text message, Teams

Description automatically generatedYou can set up speed dials for colleagues or groups of colleagues you frequently call by selecting **Speed Dial > Add speed dial** or **New group**.

To make a call from chat:

Open the chat of the specific person or group you want to call.

Select **Video call** or **Audio call**.

Graphical user interface, text, application

Description automatically generated

To make a call to a team:

From the **Teams** tab, click on the team channel you would like to call. Make sure you are in the **posts** feed.

Graphical user interface, application

Description automatically generatedIn the top right corner, click **Meet**. Choose the audio and video functions you would like to be available for the call, give the meeting a title, and then click **Join**. This will begin a meeting immediately.

Graphical user interface, application

Description automatically generatedGraphical user interface, text, application, chat or text message

Description automatically generatedTo schedule a meeting for a later date or time, click the drop-down arrow next to **Meet** and select **Schedule a meeting**.

Using the keyboard shortcut to make a call:

In the command bar at the top of the window type **/call** and the name of the person you would like to reach.

Hover over their profile avatar and select **audio call** to start the call.



[Table of Contents](#_top)

## **How do I set up a meeting?**

Graphical user interface, application, Teams

Description automatically generated

To schedule a meeting from your calendar, select the **Calendar** icon on the left icon bar.

Graphical user interface, application, Teams

Description automatically generatedClick on **New meeting** **> Schedule meeting**.

Type your meeting details into the invitation and click **Save** to invite your guests.

Graphical user interface, application, Teams

Description automatically generatedTo meet with a team in a channel you can schedule a meeting within that channel.

Select **New meeting > Schedule meeting > Add channel**. A drop-down menu will appear for you to select which channel you will meet with.

This allows you to schedule a meeting for specific team members without inputting names in the required attendees box.

Graphical user interface, application, Teams

Description automatically generated

[Table of Contents](#_top)

## **What functions are available during a video call?**

Recording a meeting:

Any meeting in Teams can be recorded to capture video, audio, and screen sharing.

To record the meeting after joining go to the meeting controls and select **More options** **> Start recording**.

You will select **More options >** **Stop recording** to end the recorded portion of the meeting.

All participants in the meeting are notified when the recording begins. The meeting recording will be accessible in **OneDrive** and **SharePoint**. It is also posted in the **Chat** stream for seven days after the meeting.

A picture containing graphical user interface

Description automatically generatedGraphical user interface, application, Teams

Description automatically generated

Present during a meeting:

Meeting participants and organizers can present materials on their screen during a meeting.

**Graphical user interface, application

Description automatically generated**Once in a meeting, select the **Share content** icon from the taskbar at the top of the video window.

Graphical user interface, application, website

Description automatically generatedFrom there you will have the option to select which screen or window you would like to present.

If you are sharing a video presentation with the meeting participants, you must select **Include computer sound** so that all participants will be able to hear the audio during your presentation.

To stop presenting your screen, select the same **Share content** icon at the top of your window.

A picture containing meter, clock

Description automatically generatedChat during a meeting:

In order to chat during a meeting, the meeting must already be started.

Once in a meeting, you can start the chat by clicking on the **Show conversation** icon.

Type your message in the text box and select **Send**.

The conversation will be available in the **Chat** stream even after the meeting has ended.

Graphical user interface, application

Description automatically generated

Using Breakout Rooms in a meeting:  
Breakout rooms enable participants to split off into groups or smaller meetings, with the ability to rejoin the larger meeting at any point.

Only the meeting organizer can send participants into breakout rooms.

Graphical user interface, application

Description automatically generatedGraphical user interface, application

Description automatically generatedTo set up breakout rooms, select the **Breakout rooms** icon from the taskbar at the top of the video window.

To end a breakout rooms session, select the **breakout room icon > Close rooms**.

Live captions during a meeting:

To turn on **Live captions**, select **More options > Turn on live captions**.

Live captions allow spoken text to appear at the bottom of the meeting screen.

A picture containing graphical user interface

Description automatically generated

Graphical user interface, application

Description automatically generatedCustomizing your background:

Graphical user interface, application, Teams

Description automatically generatedTo add a background effect, select **More options > Apply background effects**. To test out the background effect select the background you like and then select **Preview**. When you decide what background you would like, select the background and then select **Apply.**

Raise your hand:

To raise your hand during a meeting select the **Raise hand** icon.

To lower your hand, select the **Raise hand** icon again.

Graphical user interface, application, Teams

Description automatically generated

[Table of Contents](#_top)

## **How do I post a message or file to a team?**

To post a message to a Team select **Teams** on the left icon bar, the team you want to send a message to, and in the **Posts** tab select **New conversation**.

**Teams >** Your team **> Posts > New conversation**.

To share a file with your team, select **Teams >** Your team **> Files > New** or **Upload**.

From **New** you can create a new folder or document within Teams.

**Upload** will allow you to upload a folder or document from your computer to Teams.

[Table of Contents](#_top)

## **How do I mention someone in a comment?**

Any comment you make in Teams can be sent to a colleague by using the **@** symbol and typing the person’s name. Whether you are commenting in a team chat or feed post, during a meeting, or on a document, that person will get a notification in their **Activity** feed that a comment has been directed toward them.

# **Collaborating in Teams**

# **III. Collaborating in Teams**

# **III. Collaborating in Teams**

# **III. Collaborating in Teams**

## **How do I upload files?**

To upload any files into Teams, you must be in the **OneDrive** tab.

To get there, select **Files > OneDrive**. Graphical user interface, application, Teams

Description automatically generated

From there you have the option to create a new folder or document in Teams by selecting **New**, upload a document from your device by selecting **Upload**, sync your files on your device to OneDrive by selecting **Sync**, or open documents in OneDrive by selecting **Open in OneDrive**.

**Graphical user interface, text, application

Description automatically generated**

[Table of Contents](#_top)

## **How do I keep my files organized?**

Graphical user interface, application

Description automatically generatedFiles are stored in **OneDrive**, **Downloads** and **Teams** all of which can be accessed on the left-hand **Files** menu.

**Graphical user interface, application, Teams

Description automatically generated**To create a folder to organize your files, select **OneDrive** and then the drop-down arrow next to **New** and then **Folder** to name and create your folder.

In the same drop-down menu, you can also create new documents in Teams by selecting Word, Excel, PowerPoint, etc.

[Table of Contents](#_top)

## **What are channels used for?**

Channels are specific to each team that you are a part of and can be used to as mode of communication for a smaller or specific sub-team within the team and a place to collaborate and store files and documents.

Graphical user interface, application

Description automatically generatedEvery team has a **General** channel where members can post in the feed and access **Files**, **Wiki**, and other apps.

To add another channel, select **More options (three dots)** next to the team name and then **Add channel**.

This is also where you would go to add members to the team or get a link to the team channel to invite members to the team.

Graphical user interface, application

Description automatically generatedOnce a channel has been created, clicking **More options** next to that channel allows you to set notification preferences, get the email address to the channel to share materials and resources efficiently and more.

[Table of Contents](#_top)

## **How do my colleagues and I work on a document at the same time?**

To share a link to a document within a team select the channel you want the link to be accessible.

From there, select **New conversation** and attach the file.

A picture containing graphical user interface

Description automatically generated

Once the file is attached your colleagues can edit the file by selecting **More options > Edit in teams**.

Graphical user interface, application

Description automatically generated**More options** also gives your colleagues the opportunity to open the file on their desk top, download the file, or make it a tab so that it is easily accessible from the top of the channel navigation bar.

Use the **Comment** button on the document toolbar to make comments on a specific piece of the document to your colleagues.

If you use **@** and your colleague’s name in your comment, they will receive an email alerting them of the comment.

If two colleagues are working in the document at the same time, they can chat in real time by clicking **Conversation** on the toolbar.

Graphical user interface, application

Description automatically generated

[Table of Contents](#_top)

## **Planner/Tasks**

# **Additional Resources**

# **IV. Additional Resources**

# **IV. Additional Resources**

# **IV. Additional Resources**

Graphical user interface, application, Teams

Description automatically generatedA picture containing graphical user interface

Description automatically generatedPlanner is an app that allows you to organize your tasks and monitor projects with your team.

To access Planner, click on **More apps > Planner**.

To create a Task List for yourself, select **Tasks** and click on **New task**.

Type a title for your task, such as the name of the project you are working on and hit enter to create the task.

Graphical user interface, text, application, email

Description automatically generatedOnce the task has been created, you can **edit the name of the task**, **mark as done**, **set the priority**, **due date**, **write a description** and **add tasks** within the task by clicking on the title of the task in your tasks list.

Graphical user interface, application, Teams

Description automatically generated

Graphical user interface, application

Description automatically generatedTo create a plan for a team, select **New list or plan**.

This allows you to name your task list or shared plan and choose a team and channel to assign the plan or task list to.

Once the plan is created add tasks, set the priority and due date, and assign specific tasks to team members.

A picture containing graphical user interface

Description automatically generated

Graphical user interface, application

Description automatically generated

For each specific task, share notes, attachments, or create task lists for the task by selecting the task title from the **List** tab.

Color tabs will appear on the right side of the window.

Assign each color a label and use it to classify each task.

The **Board** view from the top right-hand navigation bar allows you to see each project laid out as tiles, organized by **buckets** such as to do tasks.

Graphical user interface, application

Description automatically generated**To do** shows each task that has been planned or assigned.

Once a task has been completed, click the circle next to the task name and it will move to **Show** or **Hide completed** below.

To create a new bucket, select **Add new bucket**.

Graphical user interface, application

Description automatically generated**Charts** tracks the progress of each task.

Charts shows several different graphs to represent the progress of the whole project (**Status**).

**Bucket** displays progress of each task.

**Priority** shows what tasks have been done at each priority.

**Members** shows which members of the team have completed tasks.

[Table of Contents](#_top)

## **Wiki**

Graphical user interface, application, Teams

Description automatically generatedWiki is a way to keep notes within a team.

Each Team comes with a Wiki tab included.

To access a wiki tab from a team, select the team and then select **Wiki** from the tab bar at the top.

Graphical user interface, application, Teams

Description automatically generatedAll Wikis are organized by pages and each page is organized by sections.Type your content under the title page and add a new section by hovering your mouse over the left side of the page and selecting **+ add new section here**.

To converse with a colleague who is in the Wiki, select the **Show section conversation** icon on the right.

[Table of Contents](#_top)

## **OneNote**

Graphical user interface, application, Teams

Description automatically generatedGraphical user interface, application, Teams

Description automatically generatedOneNote is a notebook that lets you collaborate on digital content with your team.

To access OneNote, select **More options > OneNote**.

From there, a new notes page will open.

Title your note and click onto the page where you want to insert text and a textbox will appear.

The tabs at the top of the page show you **Recent** notes in Teams and **Teams** that have created notes.

Notes are automatically saved to OneDrive.

Graphical user interface, text, application, email

Description automatically generated

[Table of Contents](#_top)

## **Stream**

Graphical user interface, application, Teams

Description automatically generatedA picture containing icon

Description automatically generatedStream allows you to create and share videos company-wide or within a team or stream live events.

To access Stream, select **More options > Stream**.

Once Stream opens, it will take you to the Watchlist homepage.

Graphical user interface, application

Description automatically generatedTo access all of Stream’s features, select **Microsoft Stream** on the top right.

Graphical user interface, application

Description automatically generatedThis will take you to the Stream website where you can, **Discover** new channels, videos, groups, and people, manage your videos under **My content**, and **Create** live events, groups, channels, record your screen, and upload videos from the navigation tabs on the top of the webpage.

Graphical user interface, website

Description automatically generatedTo upload a video from your device, select **Create** on the navigation bar and then **Upload video**.

From there, you can upload a file from your computer.

To schedule a live stream event, select **Create > Live event**.

Graphical user interface, text, application

Description automatically generatedGraphical user interface, application

Description automatically generatedFrom there, you will set a default language, event details, permissions, and options for comments, captions, and subtitles.

Graphical user interface, text, application, chat or text message

Description automatically generated

Graphical user interface, application

Description automatically generatedYou can create a group to help colleagues keep up with your video content by selecting **Create > New group**.

Title your group, give it a description, and determine the settings before creating the group.

Graphical user interface, text, application, email

Description automatically generatedLike groups, you can create a **Channel** to organize your videos by selecting **Create > Channel**.

The **Record your screen** function is useful if you are creating instructional material or showing a demonstration of an online process.

To record your screen, select **+ Create > Record screen**.

You have the option to turn your webcam on or off during your recording as well as your microphone by selecting the **webcam** and **microphone icons** at the bottom left of the screen.

Graphical user interface, text, application

Description automatically generatedIf you choose to leave both of these on, your video will appear in a small box at the bottom right of the video screen and viewers will be able to see and hear you as you narrate the steps of your demonstration.

To begin your recording, select the red **Start recording** button in the bottom center of the window.

There is a 15-minute time limit on screen recordings.

[Table of Contents](#_top)

## **Microsoft 365 Support Links**

Microsoft Support website: <https://support.microsoft.com/en-us/office/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7?wt.mc_id=otc_home>

Microsoft Planner support: <https://support.microsoft.com/en-us/office/sign-in-to-microsoft-planner-fe43c972-5a95-4071-86d4-423a64a3b21e>

Microsoft Stream support: <https://docs.microsoft.com/en-us/stream/overview>

[Top of Page](#_top)