

TRAINING OVERVIEW

Microsoft Teams

APPS IN TEAMS

Activity

See recent activity you're part of in Teams, from mentions to voicemails.

Chat

Send and participate in private IM conversations or upgrade to audio or video calls.

Teams

Collaborate with your Team: file sharing, group conversations, meetings, and more.

Calendar

View your calendar and schedule online meetings with colleagues or for a Team.

Calls

With Enterprise Voice, place calls and check voicemail.

Files

See recent Office 365 files you've worked on and edit them directly in Teams.

Ellipsis

Access other Office 365 services like Planner, OneNote, Stream, and more.

Apps

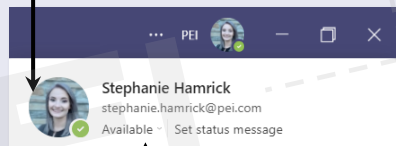
Add third-party apps or other Office 365 services to your Teams.

YOUR AVATAR

Your avatar indicates if you're able to communicate. It appears next to your posts and on contacts lists. Click on your avatar in the top right corner to edit it.

Change Picture

You can change your picture by clicking on it.

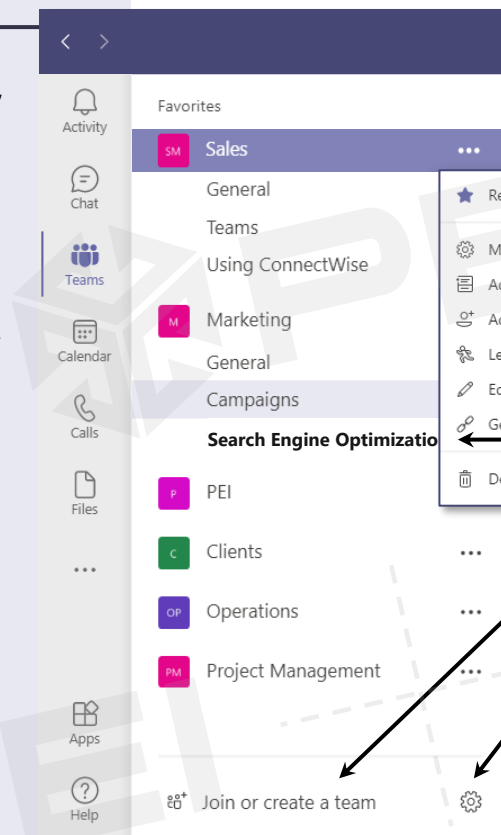


Presence

Let your team know if you're available to communicate.

Set Status Message

Let people know what you're working on. Your message is shown on your contact card, which appears when someone hovers over your avatar.



NAVIGATING THE TEAMS CLIENT

Your Teams

See Teams you're part of and their corresponding Channels. Bolded Channels indicate new activity.

Team Options

Use the Ellipses Icon to access Team Options. You will not have all of these options if you are not a Team Owner.

Add Channels

Anyone can add a Channel to a Team they're part of. Use Channels to organize the group conversation.

Bolded Channels

These indicate new activity has happened in this channel since the last time you've visited.

Join or Create a Team

See public Teams in your organization you can join or create a new Team for your needs.

Manage Teams

See Teams you're a part of and edit them if you're a Team Owner.

SETTING YOUR PRESENCE STATUS

Use the dropdown next to your Presence Status to change your presence manually. People who have added you as a contact will be able to see your status.

Available, Busy, Away

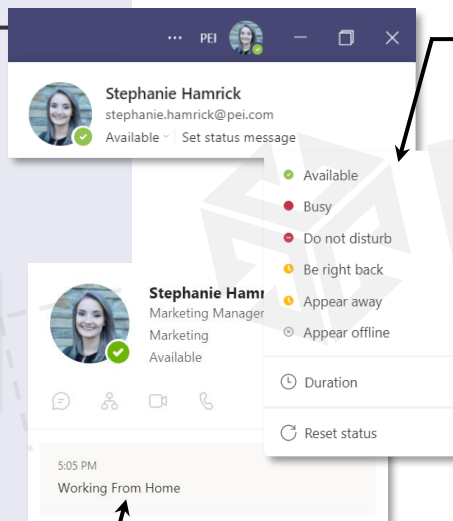
Let your team know if you're **available** for a conversation; **busy**, but can chat if necessary; or if you're **away** from your desk.

Do Not Disturb

Teams will silence notifications from conversations you don't initiate. IMs or Calls will still appear as missed messages in your Conversation History.

Reset Status

Teams changes your status automatically according to your Outlook calendar. If you have a meeting scheduled, your status will change to **In a Meeting**, etc. Changing your status manually will override this feature. Choose **Reset Status** to let Teams determine your status automatically again.



Interested in more guides like this one or content on Meetings and Files? We offer a range of Teams Training options!

www.pei.com

info@pei.com

303-786-7474

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INSTANT MESSAGING IN MICROSOFT TEAMS

Use Instant Messaging for fast-paced communication that's less formal than a phone call and saves time over waiting for an email response. You can IM coworkers one-on-one or invite any number of others into the conversation.

SENDING AN INSTANT MESSAGE

1. Select the **Chat** app from the app pane and, select the **New Chat** button.
2. In the chat window, search for your desired recipient(s) by name or email address.
3. Type your message in the message box and hit the **Enter** or the **Send** icon to send your message.

Chat Tab

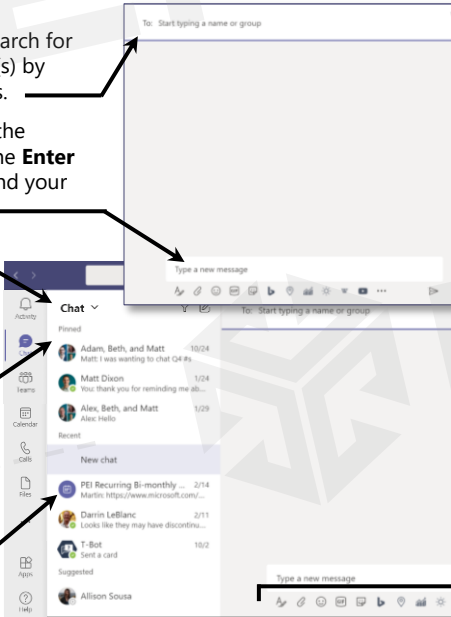
Jump back into your most recent conversations.

Pinned List

Hover over a chat in the **Recent** list and use the **Ellipsis** icon to pin the conversation to the top of your list.

Meetings

Private meetings you have will be added to the chat tab.



WORKING IN THE CHAT TAB

Contacts Tab

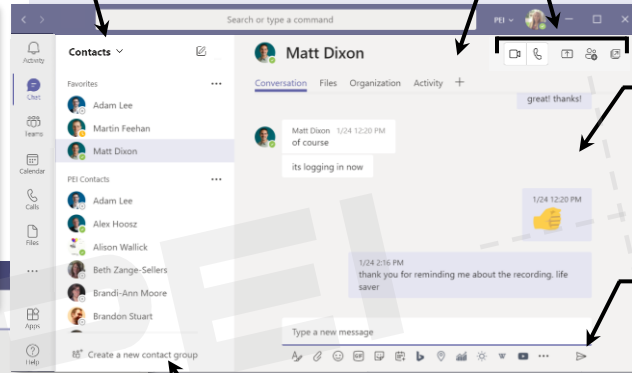
Organize your contacts into a list for easy access. Click a contact to start a chat.

Tabs

See shared files, org. charts, and activity in shared Teams.

Upgrade Conversation

Add participants, share your screen, or upgrade to an audio or video call.



History

Chat history is always saved in Teams, so you don't lose important info.

Send

Send your message with the send icon.

Create a Group

Create a new contact group for yourself using the **New Group** option. Add Contacts or edit your groups using the **Ellipsis** icon next to your group name.

Message Options

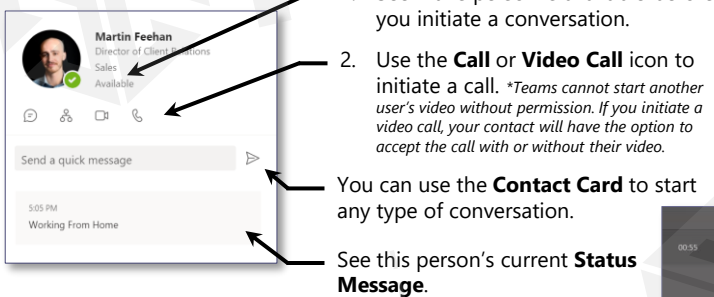
Format your message text, attach files, include emojis or stickers, schedule a meeting with conversation participants, and more.

AUDIO AND VIDEO CALLING IN MICROSOFT TEAMS

Use audio or video calls for more involved conversations. Call a coworker one-on-one or pull others in for an ad-hoc conference call.

CALLING USING THE CONTACT CARD

Anywhere you see someone's avatar in Teams, you can hover over it to bring up their contact card.



1. See if this person is available before you initiate a conversation.
 2. Use the **Call** or **Video Call** icon to initiate a call. **Teams cannot start another user's video without permission. If you initiate a video call, your contact will have the option to accept the call with or without their video.*
- You can use the **Contact Card** to start any type of conversation.
- See this person's current **Status Message**.

UPGRADING A CHAT TO A CALL

Use the **Audio Call** or **Video Call** button in the upper right corner of your chat window to upgrade your conversation to an audio or video call. Doing this in a group conversation will start an ad-hoc conference call with current members of the conversation.

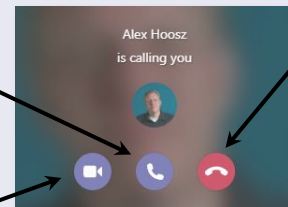
ANSWERING INCOMING CALLS

Incoming calls will pop up as alert notifications in the bottom right corner of your screen.

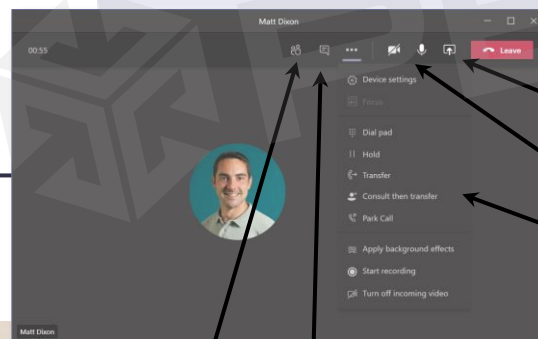
Use the **Phone** icon to answer the call.

Use the **Video** icon to answer the call with your video on.

Use the **Reject** icon to reject the call.



NAVIGATING THE CALL WINDOW



Your call will open in a new window.

Share your screen or a window.

Start or stop your audio or video devices.

Call Options
Use the **Ellipsis** icon to see more options including video background effects, recording, and call controls.

Open the chat window.
Add participants to the call.

If you are not a Teams Voice customer, you will not have all of these options.

WORKING IN THE TEAMS TAB

Use the **Teams** tab for large-scale collaboration with your colleagues.

NAVIGATING THE TEAMS TAB

Your Teams

Teams you're a part of will show here.

Channels

Each Team has a General channel and more can be added to suit your needs. Bolded channel names indicate new activity.

More Channels

See hidden channels in the more channels link.

POSTING A MESSAGE

Press the **New Conversation** button at the bottom of the Teams window to bring up the message options.

Click the **Format** icon to expand the message box and gain access to formatting options.

Use the other message options to **upload a file**; **include an emoji, gif, or sticker**; **start a meeting**; and more!

FOLLOWING THE CONVERSATION

Each channel has a **Posts** tab, where you can communicate with your Team, share files, revisit meetings, and more.

Messages

Team members can post messages in the conversation to keep the group updated.

Reply

Reply directly to a message to keep the conversation organized.

React

Hover over a message for the option to react using an emoji. Use the **Thumbs Up** emoji to let coworkers know you've seen an important message.

Team Activity

Activities like added tabs and channel meetings are noted in the conversation tab.

MENTIONING COLLEAGUES OR TEAMS

Use the **Mention** feature to send colleagues notifications about your message and get their attention. You can mention a person, a channel or an entire Team.

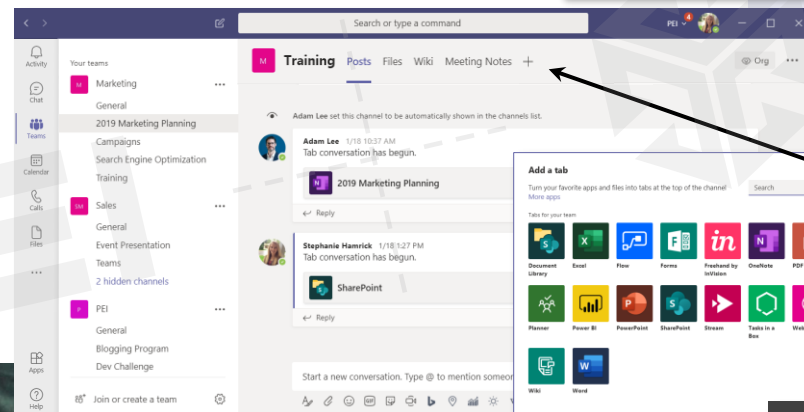
When you've been mentioned in Teams, **your name will appear in orange** and you'll see the **orange mention symbol** on the right of the message.

1. Type an @ symbol in the message box.
2. Start typing the name of the person you want to mention.
3. Select the correct contact from the **Suggestions** box.
4. When you've correctly mentioned someone, their name will appear in purple.

You can **save messages** to easily access later with context or **edit messages** you've posted if you need to make a change.

SAVING AND EDITING MESSAGES

1. Hover over a message to bring up the **Reaction** bar.
2. Select the **Ellipsis** icon to see more message options.
3. Select **Save this Message**. Access saved messages by clicking on your **Avatar** and selecting **Saved**. You'll see the messages you've saved and any surrounding messages for context.
4. OR If you're the message author, you can select **Edit** to edit the message.



ADDING A TAB TO A CHANNEL

All channels will have a **Files** tab and a **OneNote** (Wiki) tab. You can add more tabs to keep all your favorite apps at your fingertips.

1. Select the **+** button to the right of the tab list in the Team and Channel for which you want to add a new tab.
2. Select the app you'd like to add to your channel. You can choose an Office 365 app or popular third-party apps.
3. Follow the prompts (these will vary by app) to complete the process. Third-party apps may require you to create an account before adding them to your channel.