

Introduction to Microsoft Teams Training Manual

This training manual is a basic overview of some of the functions and features in Microsoft Teams that you can take advantage of at Saint Mary's University. If you have any questions about any of this content, or if you would like any further support using Microsoft Teams please contact the Software & Application Support Centre via email at sas@smu.ca.

Navigating Teams

Teams has many different functions and abilities. To use Teams to its fullest potential, it is important to understand how to navigate the software. Below are some tips to help you navigate Microsoft Teams.

Settings

There are several different settings you can customize within Teams. Here are some that you might find useful.

Notifications

You can edit the notifications you receive from chats, channels, and calls in Teams. Here is how:

1. Click on your profile icon in the top right corner
2. Select **Manage account** from the drop-down menu. A new window will appear
3. Click on the **Notifications** tab on the left menu. A new screen will display the different types of notification settings you can edit.
4. If you want the notification to make a sound, navigate to the **Appearance and sound** section and toggle the **Play sound for incoming calls and notifications** button to on (green)
5. Navigate to the **Chat** section and click on the **Edit** button
6. You can then choose how you would like your notifications displayed for **@mentions**, **replies**, and **likes and reactions**. Your options are as follows:
 - a. **Banner** - A small notification box will pop up in the corner of your screen
 - b. **Feed** - The chat message will be highlighted in the Chat list pane and you will receive a notification on the **Activity** tab
 - c. **Banner and feed** - Both banner and feed notifications will appear
7. Navigate to the **Meetings** and **People** sections to edit notification settings for meetings and for messages and calls for specific people

Devices

You can choose the audio and video devices that Teams will use for calls. To select your devices:

1. Click on your profile icon in the top right corner
2. Select **Manage account** from the drop-down menu. A new window will appear
3. Click on the **Devices** tab on the left menu. A new screen will display the device settings you can edit.
4. Under **Audio Devices**, select the microphone that you would like to use from the drop-down menu. If you do not see your microphone listed here, check the settings on your device.
5. Under **Cameras**, select the camera you would like to use from the drop-down menu. Once you have selected your desired camera, a preview video displays below. If you do not see your camera listed here or if there is no preview display, check the settings on your device.

Chat

The chat feature on Teams can be used as a one-on-one or group instant messaging tool. It is a good way to ask quick questions or check-in with colleagues while working remotely. Here are some tips for making the most of the chat feature.

Hiding a chat

You can use the **Hide** feature to remove the visibility of chats in your **Chat feed**. Here is how to use the **Hide** feature:

1. Select the **Chat** tab on the **Navigation Bar**
2. In the **Chat feed**, identify the chat you would like to hide and hover your cursor over the chat preview
3. Click on the **More options** button that appears (three dots)
4. A drop-down menu will appear. Select **Hide** from the list

This chat will no longer be visible in your **Chat feed**. If the same person or group sends you a new chat message, the chat will reappear in the **Chat feed**.

If you wish to locate the chat again:

1. Type a name, email address, or keyword used within the chat in the **Search bar** at the top of your **Teams** window
2. Select the desired chat from the options that appear in the search results

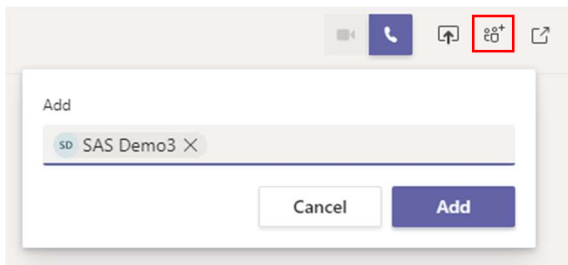
If you then wish to **Unhide** this chat and have it be visible on your **Chat feed**:

1. From the search results, select the **Chat** tab on the **Navigation Bar**
2. The chat will appear in your **Chat feed**. Hover your cursor over the chat preview
3. Click on the **More options** button that appears (three dots)
4. A drop-down menu will appear. Select **Unhide** from the list

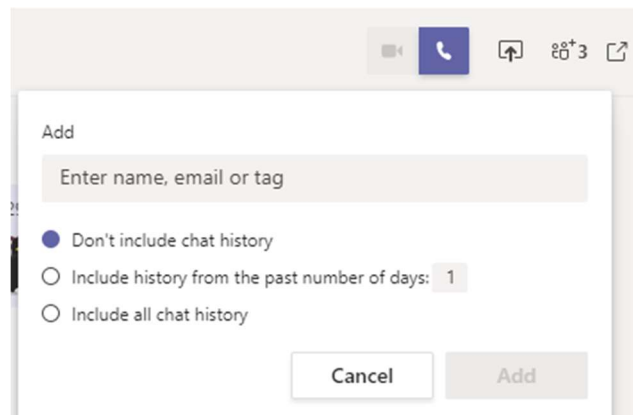
Adding new members to a chat

If you would like to add additional members to a chat:

1. Navigate to the desired chat by selecting the **Chat** tab on the left navigation bar
2. Select the **Participants** icon in the top right corner of the chat



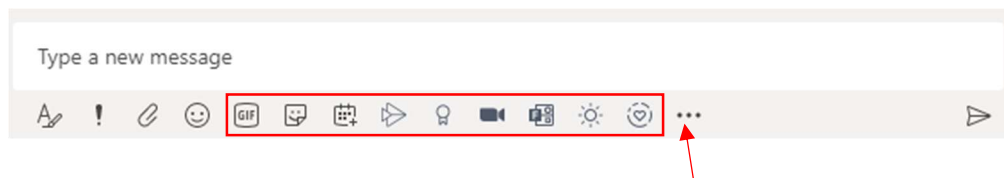
3. Type the name of the person you would like to add in the **Add** text box and click the **Add** button
4. If your chat has three or more participants, you can choose whether you'd like the new member of the chat to see previous chat messages. Select the radio button for the option you would like to choose and repeat step 3.



Using apps in chat


There are many different apps you can use to send specific types of messages within a chat. To access apps in a chat:

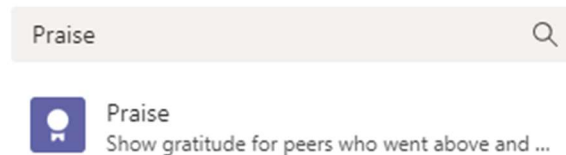
1. Navigate to your desired chat and locate the icons underneath the **Type a message** box. Frequently used app icons will appear under the box.



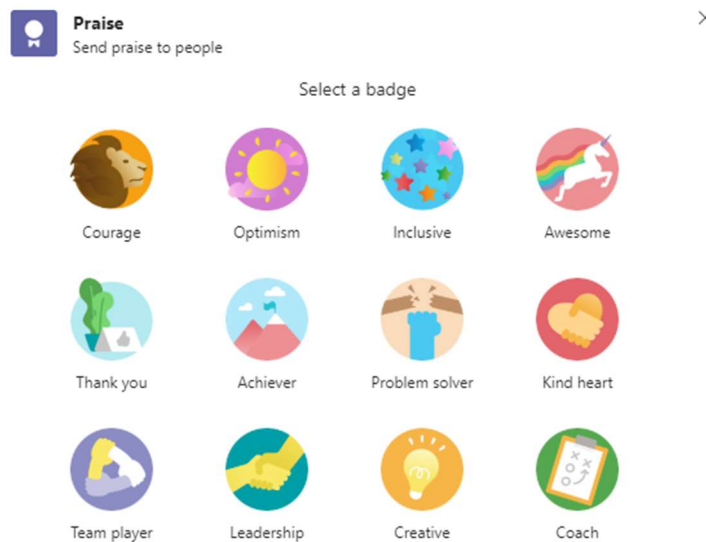
2. Click on the **More apps** button (three dots) to access more app options. You can browse from a list of apps or search for a specific app in the **Find an app** search bar.

One fun app to use in chats is **Praise**. You can send **Praise** to colleagues from within a chat or the activity feed of a channel. Here is how:

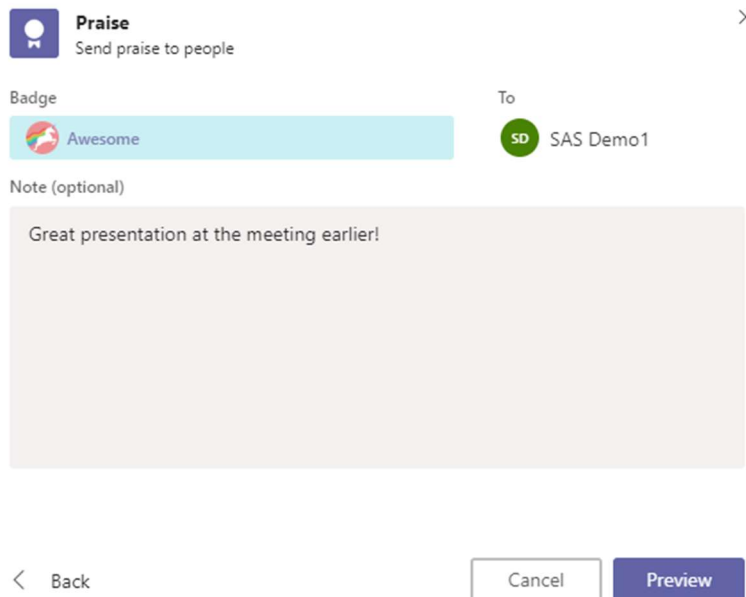
1. Click on the **Ribbon**  **Icon** right below the text box in a chat or in the activity feed of a channel
2. If you don't see the ribbon icon, you can click on the **More apps** button (three dots) and search for **Praise** in the **Find an app** search bar



3. Once you open **Praise**, select the **Badge** you would like to send from the options displayed




4. Type someone's name in the **To** box (if you are in a one-on-one chat this box will auto-fill). You must type in a name for the **Praise** to send
5. Add a message in the **Notes** field if you would like



6. Click **Preview** to see what your **Praise** will look like
7. Click **Send** if you are satisfied with your **Praise**, or click **Back** to edit

Another app you can use within the **Chat** function is **Forms**. You can send a multiple-choice **Form** to colleagues from within a chat or the activity feed of a channel. Here is how:

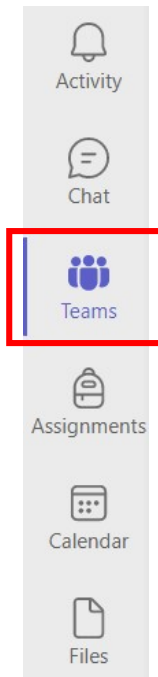
1. Click on the **Forms** icon right below the text box in a chat or in the activity feed of a channel 
2. If you do not see the **Forms** icon, you can click on the **More apps** button (three dots) and search for **Forms** in the **Find an app** search bar
3. The **Forms** pop-up window will appear. Write your question in the **Input your question** text box and enter your desired responses in the **Option** text boxes.
4. Select the **+ Add option** button to add another response option. You can add up to six response options.
5. If you would like the responses to your **Form** to remain anonymous, select the **Keep responses anonymous** check box. If you would like to share the results of the **Form** within the chat, select the **Share results automatically after voting** check box.
6. Click **Save**. A preview of your **Form** will appear. If you are satisfied with the **Form**, click **Send**. If you would like to edit your **Form**, select **Edit** and repeat steps 3-5 as desired.

7. Your **Form** will be sent in the chat. To vote, select the radio button of your desired response and select **Submit Vote**. You can see the percentage of responses for each option below the **Form**.

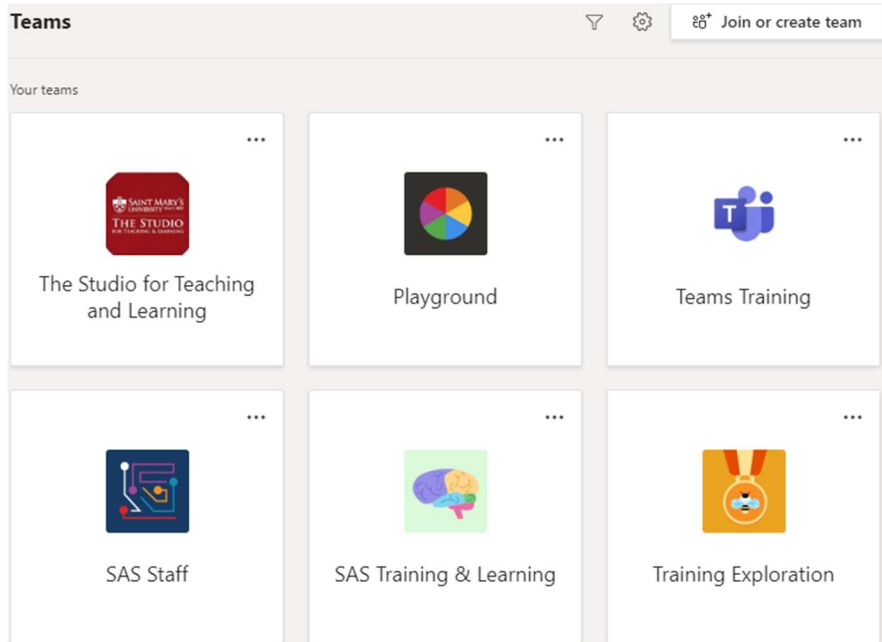
Accessing a Team

A **Team** is a group of individuals who are working together. Each **Team** consists of at least one **Channel**, where members of the **Team** can have conversations, share files and links, and connect to other Microsoft apps. Each **Team** has at least one **Owner** who can control access to the **Team** and set various permission levels for **Members**. Here is how to access a **Team**:

1. Click on the **Teams** icon from the left navigation bar



2. Select your desired **Team** from the list of icons that appears



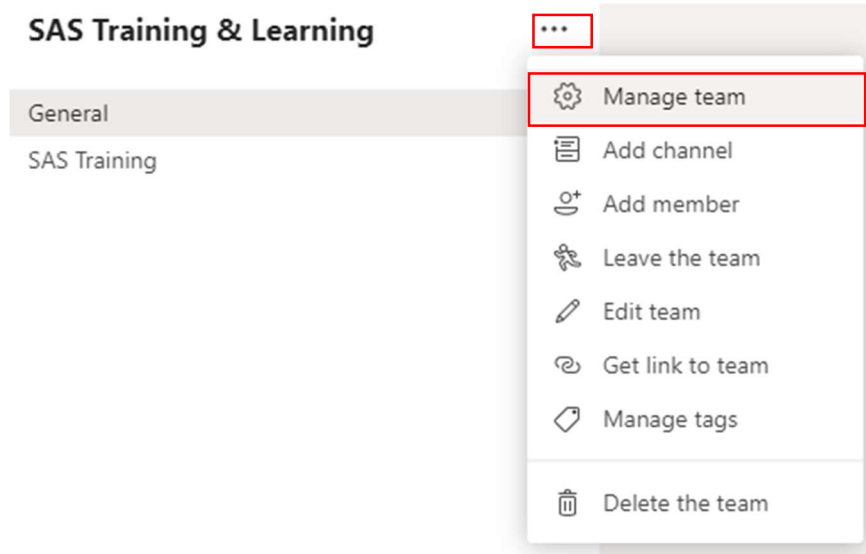
Managing a Team's settings and members

Team owners and Team members have different levels of permission to access Team settings, but both members and owners can view members of the Team.

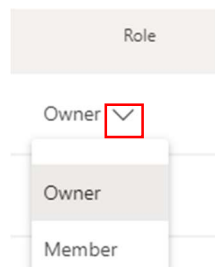
To view a Team's members:

1. Select the **More options** button next to the Team name in the **Channel navigation panel**

- From the drop-down menu, select **Manage team**



- Navigate to the **Members** tab. Team owners will be listed under the **Owners** section, and members under **Members** section. If your team has guests from outside organizations, they will be listed under the **Guests** section
- By default, Team owners can edit the permission levels of both Team owners and members. To do so, select the arrow next an individual's permission level in the **Role** column.
- The **Role** drop-down menu will appear. Select the desired permission level for that individual and their permissions will immediately change.



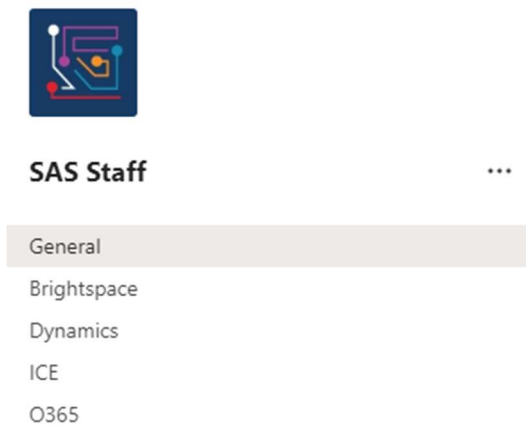
- Team owners are also able to edit a variety of settings for the Team. To explore these options, select the **Settings** tab

Members Pending Requests Channels Settings Analytics Apps

- | | |
|---------------------------------|--|
| ▶ Team picture | Add a team picture |
| ▶ Member permissions | Enable channel creation, adding apps, and more |
| ▶ Guest permissions | Enable channel creation |
| ▶ @mentions | Choose who can use @team and @channel mentions |
| ▶ Team code | Share this code so people can join the team directly - you won't get join requests |
| ▶ Fun stuff | Allow emoji, memes, GIFs, or stickers |
| ▶ OneNote Staff Notebook | Manage notebook sections and preferences |
| ▶ Tags | Choose who can manage tags |

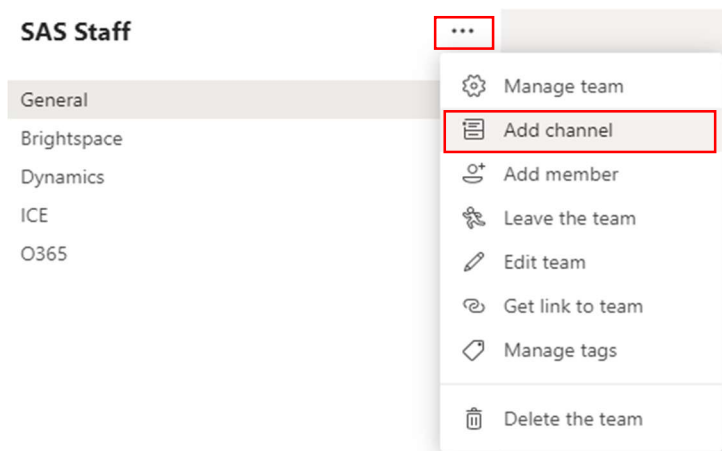
Creating a channel

Channels are where the activity in a Team takes place. You can navigate between your channels using the **Channel navigation panel**. When you navigate to a specific channel, it will be highlighted (see below). By default, all Teams have a **General** channel.



To add a new channel:


1. Select the **More options** button next to the Team name in the **Channel navigation panel**
2. From the drop-down menu, select **Add channel**



- The **Create a channel** pop-up window will appear. Type a name for your channel in the **Channel name** text box, and a short description of the channel in the **Description** text box. If you would like the channel to be accessible to everyone on the Team, select **Standard** from the **Privacy** drop-down menu.

Create a channel for "Teams Training" team



Channel name

Training Development 

Description (optional)

This channel will be used for developing training materials for Microsoft Teams.

Privacy

Standard - Accessible to everyone on the team  

Automatically show this channel in everyone's channel list

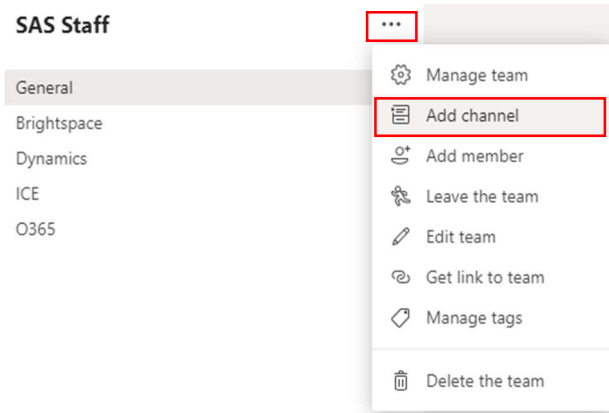
- Click the **Add** button

Creating a private channel

A private channel lets you create a focused space for collaboration among specific members of your Team. Only members of the private channel can access the channel, though Team owners are able to see the name of the private channel. Follow these steps to create a private channel:

- Select the **Teams** tab from the left navigation bar
- Select the appropriate **Team** from your list of Teams
- Select the **More options** button next to the Team name in the **Channel navigation panel**

- From the drop-down menu, select **Add channel**



- The **Create a channel** pop-up window will appear. Type a name for your channel in the **Channel name** text box, and a short description of the channel in the **Description** text box.
- In the **Privacy** drop-down menu, select **Private – Specific teammates have access**

Create a channel for "Me" team

Channel name

Training Development

Description (optional)

This channel will be used for developing training materials for Microsoft Teams.

Privacy

Private - Specific teammates have access



Cancel

Create

- Click the Create button

8. Type the name of the Team member(s) whom you would like to add to the channel and click **Add**

Add members to the Training Development channel

This is a private channel, so only the people you add here will see it.

SD SAS Demo2 x Add

9. From the **Membership** drop-down menu, select if you would like the Team member(s) to be a **Member** or an **Owner** of the new private channel

Add members to the Training Development channel

This is a private channel, so only the people you add here will see it.

Start typing a name Add

SD SAS Demo2 SASDEMO2

Member v x
 Owner
 Member

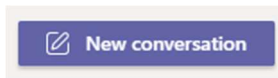
10. Click the **Done** button

Channel feed

The **Channel feed** (also called the **Posts tab**) is the main activity feed of a Channel in Teams. The **Channel feed** is where all activity that takes place within the Channel is recorded.

To start a chat in the **Channel feed**:

1. Click the **New conversation** button at the bottom of the **Channel feed**



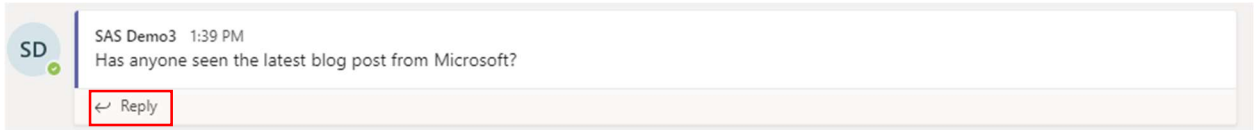
2. Type your message into the **Text box** and click the **Send** button

Start a new conversation. Type @ to mention someone.

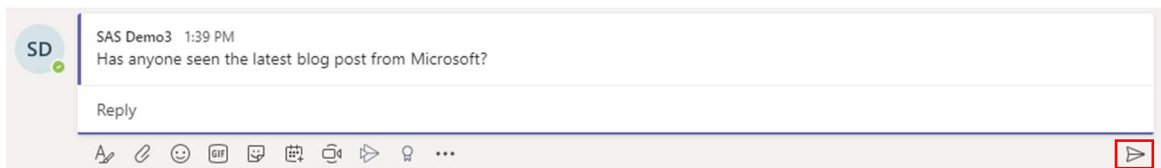


To reply to a post made in the **Channel feed**:

1. Click on the **Reply** button underneath the relevant message



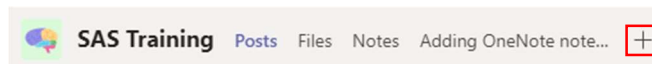
2. Type your message into the **Text box** and click the **Send** button



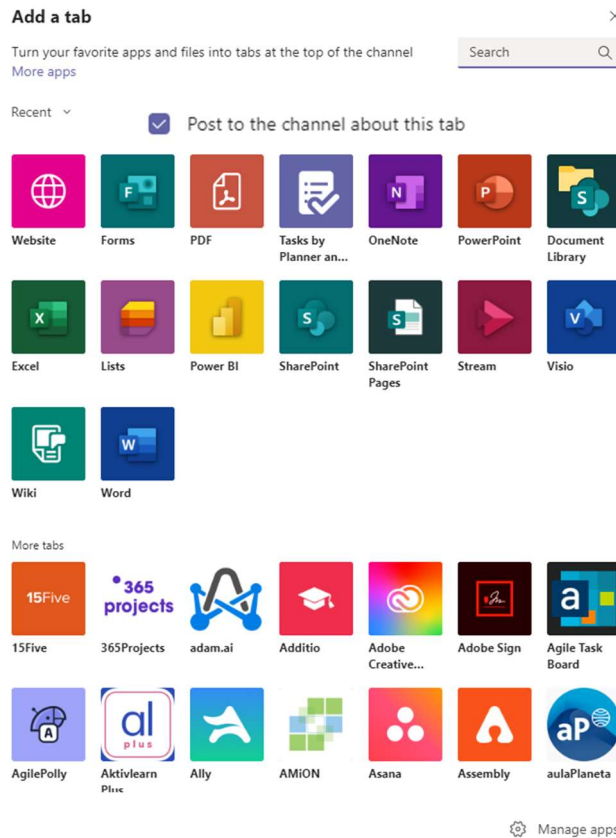
Tabs & Integrated Apps

You can add specific files or apps as **Tabs** within a channel. **Tabs** are different sections of a channel where Team Members can access specific files, websites, or **integrated apps** directly within Teams. **Tabs** can be accessed along the **Tabs bar** across the top of every channel. **Tabs** are unique to each channel, and can be added, removed, and edited. Here is how:

1. To add a tab, click on the **+** button on the **Tabs bar**



- The **Add a tab** pop-up window will appear. Select what **integrated app** you would like your **Tab** to provide access to. If you don't see your desired app on the list, type its name in the **Search bar**



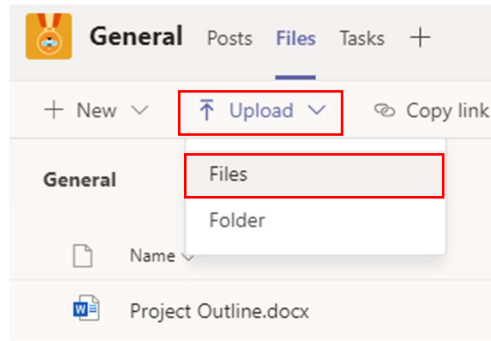
- If you select the **Post to the channel about this tab** check box, a post will be made in the **Channel feed** about the new tab. If you de-select the check box, a post will not be made
- Select the necessary options for your **Tab** and click **Save** (see below for detailed instructions on how to add **Office files**, **OneNote** notebooks, **Forms**, and **Websites** as tabs to your channel).

Files Tab

Every channel will automatically have a **Files tab**. The **Files tab** contains all files associated with a channel. Any files shared in the **Channel feed** will be automatically saved to the **Files tab**. To upload a new file to the **Files tab**:

- From the **Channel navigation panel** within the appropriate Team, select the channel that contains your file
- Select the **Files** tab of the channel

3. Click the **Upload** button along the top menu bar
4. Select **Files** from the drop-down menu



5. Select the desired file(s) from your device and click **Open** or **Upload**

Office Files

You can edit Office files within Teams and collaborate on the files in real time with members of your Team. Word Documents, PowerPoint Decks, and Excel Workbooks can be simultaneously edited by multiple users within Teams. To access files within a particular Teams channel, please follow these steps:

1. From the **Channel navigation panel** within the appropriate Team, select the channel that contains your file
2. Select the **Files** tab of the channel
3. To create a new File, select **New**. You can then create a Folder, Word document, Excel workbook, PowerPoint presentation, or OneNote notebook
4. To upload a file or folder from your computer to the channel, select **Upload**.
5. To download a file, select the File and click **Download**.
6. To make a file a **Tab** within the channel, select the file and click **Make this a tab**.

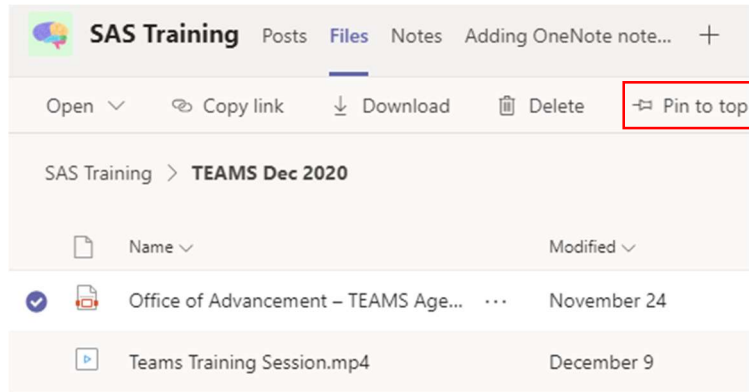
Note: If you download a file, a new version of the file will be downloaded to your device and any changes you make to this version will **NOT** sync to the version saved to the channel.

Pinning files

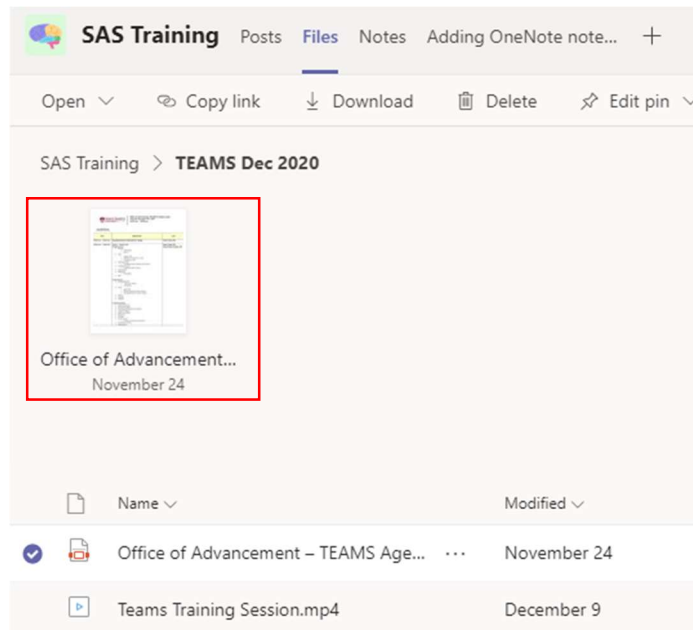
Pinning a file lets you add a specific file to the top of the **Files** tab so it can be easily accessed by everyone who is a part of the channel. To pin a file, please follow these steps:

1. From the **Channel navigation panel** within the appropriate Team, select the channel that contains your file
2. Select the **Files** tab of the channel

3. Select your desired File
4. Select the **Pin to top** option from the menu bar



5. The file will now be pinned to the top of the **Files** tab for all members of the Channel



Conversation feature

To facilitate asynchronous document collaboration, Teams supports a **Conversation** feature that allows Team members to have a conversation associated with any file within a channel. Here is how to use the **Conversation** feature:

1. Select the Channel your File is present in.
2. Select the **Files** tab of the Channel.

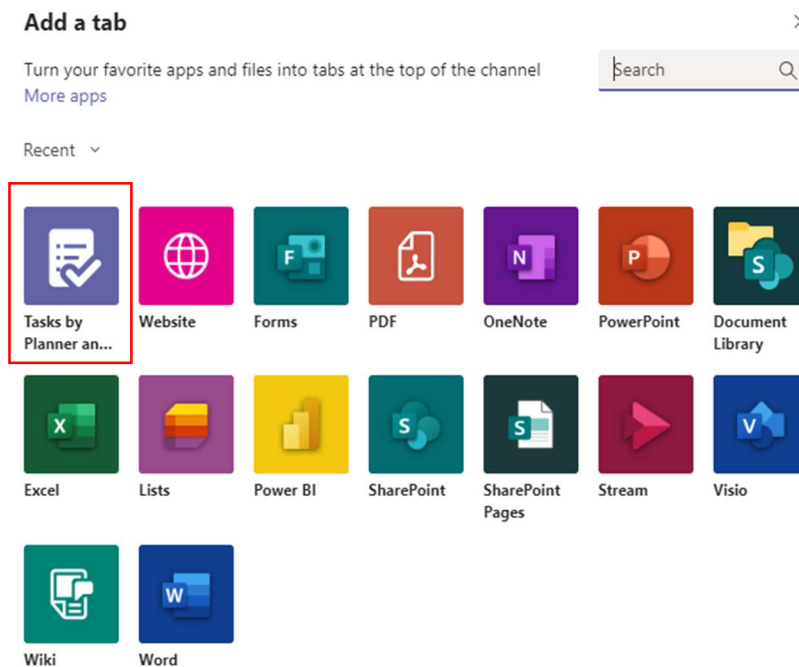
3. Select your desired File.
4. On the top right of the file, you will find a **Conversation** button, click that to start a Conversation.

Note: Once a conversation associated with a File has been closed, the conversation is still accessible in the **Channel feed (Posts tab)**.

Planner

You can add an existing Plan associated with a Team or create a new Plan from Planner and add it as a tab to your channel.

1. Navigate to the appropriate channel
2. Click the + icon along the top toolbar
3. The **Add a tab** window will appear. Select **Tasks by Planner and To Do** from the list of applications



4. To create a new plan:
 - a. Select the **Create a new plan** radio button



- b. Type the name of your new plan into the **Tab name** text box

Create a new plan

Tab name

Feedback plan

- c. Click **Save**
5. To use an existing plan from the Team:
 - a. Select the **Use an existing plan from this team** radio button
 - b. Select your desired plan from the drop-down menu

Use an existing plan from this team

Looks like this team has existing plans. Select an existing plan to add it as a tab

Training Plan

- c. Click **Save**

OneNote

You can add an existing OneNote Notebook or Section as a tab to your channel or create a new Notebook or Section as a tab to your channel. To do so:

1. Navigate to the appropriate channel
2. Click the **+** icon along the top toolbar
3. The **Add a tab** window will appear. Select **OneNote** from the list of applications
4. A list of Notebooks that you have permission to access will appear. Hover your mouse over each Notebook to see where the Notebook is saved.

Note: If the file path starts with **sites/** it is a Notebook within the Team; if it starts with **personal/** it is within your individual OneDrive

Adding an existing Notebook or Section

1. To add an entire Notebook as a tab to the channel, select the Notebook then click **Save**
2. To add a specific Section from within the Notebook as a tab to the channel, click on the arrow next to the Notebook and select the Section, then click **Save**

Creating a new Notebook or section

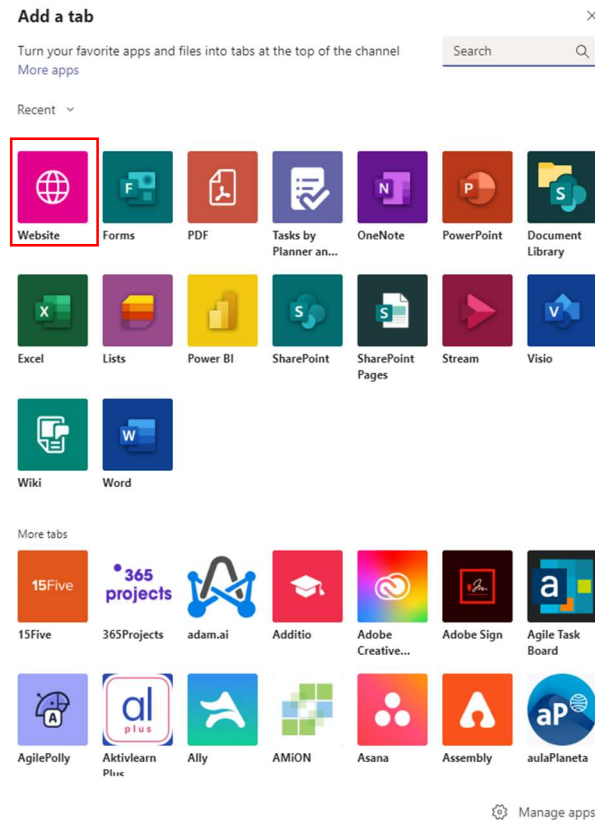
1. To create a new Notebook to add it as a tab to the channel, select **Create New Notebook** from the top of the list of Notebooks, type in a name for your notebook, then click **Save**
2. To create a new Section within an existing Notebook to add as a tab to the channel, click on the arrow next to the Notebook and select **Create New Section**, type in a name for your section, then click **Save**

The Notebook or Section will now be added to the channel toolbar as a tab. If you don't see the title of your Notebook or Section, click on the arrow next to the **more** button to display your full list of channel tabs.

Websites

You can add a website as a tab to your channel. To do so, please follow these steps:

1. Navigate to the appropriate channel
2. Click the **+** icon along the top toolbar
3. The **Add a tab** window will appear. Select **Website** from the list of applications



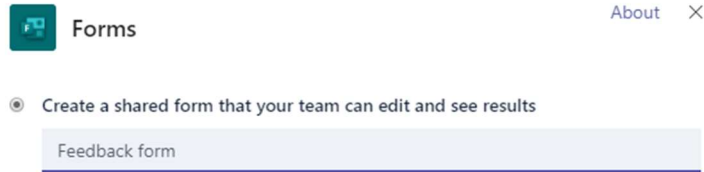
4. Enter the name you would like for your **Tab** in the **Tab name** text box
5. Paste the URL of your desired website in the **URL** text box
6. Click **Save**.

Forms

You can add a new Form as a tab to your channel, or add an existing Form as a tab to either share its results or collect responses. To do so:

1. Navigate to the appropriate channel.
2. Click the **+** icon along the top toolbar.
3. The **Add a tab** window will appear. Select **Forms** from the list of applications.
4. You can now either create a new form, or add an existing form as a tab. To create a new **Form**:

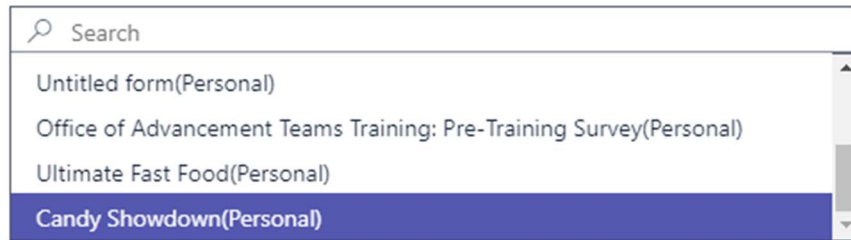
- a. Select the **Create a shared form that your team can edit and see results**



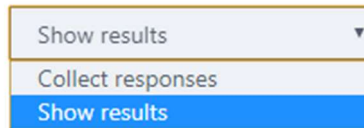
option

- b. Enter a name for your new Form
 c. Click **Save**
5. To add an existing form, select the **Add an existing form** option
- a. Search the for the Form you would like to use in the search bar or choose it from the drop-down menu. If the Form was created using your individual Office 365 account, the name of the Form will end with (Personal)

- **Add an existing form**



- b. If you would like to use the Form to collect responses from the other members of the channel, select the **Collect responses** option from the drop-down menu. If you would like to share the results of your Form with the members of the channel, select **Show results**.



- c. Click **Save**

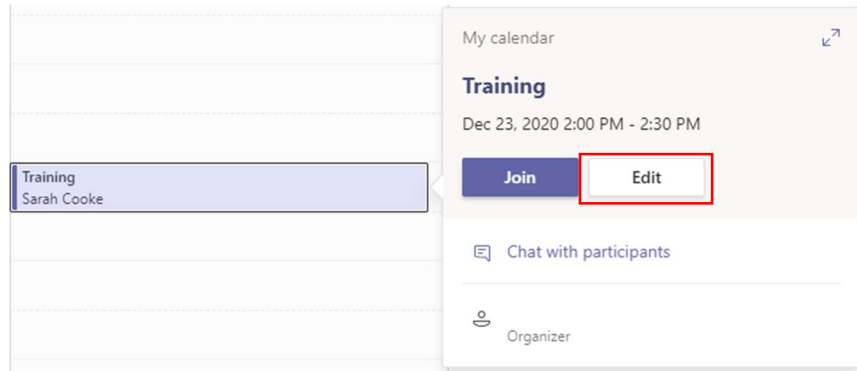
In-Meeting Features

Meeting options

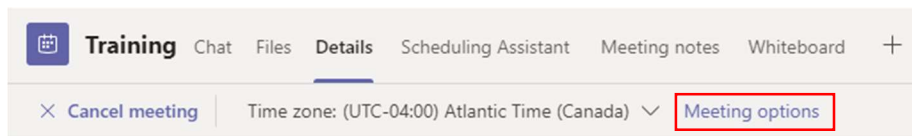
Meeting options allows you to change settings so that your meeting is more secure and easier to facilitate, especially if the meeting is a large one. After a meeting has been scheduled in your calendar, follow these steps to change your **Meeting options**:

1. Navigate to the **Calendar** tab on the left navigation bar
2. Select the meeting that you would like to edit

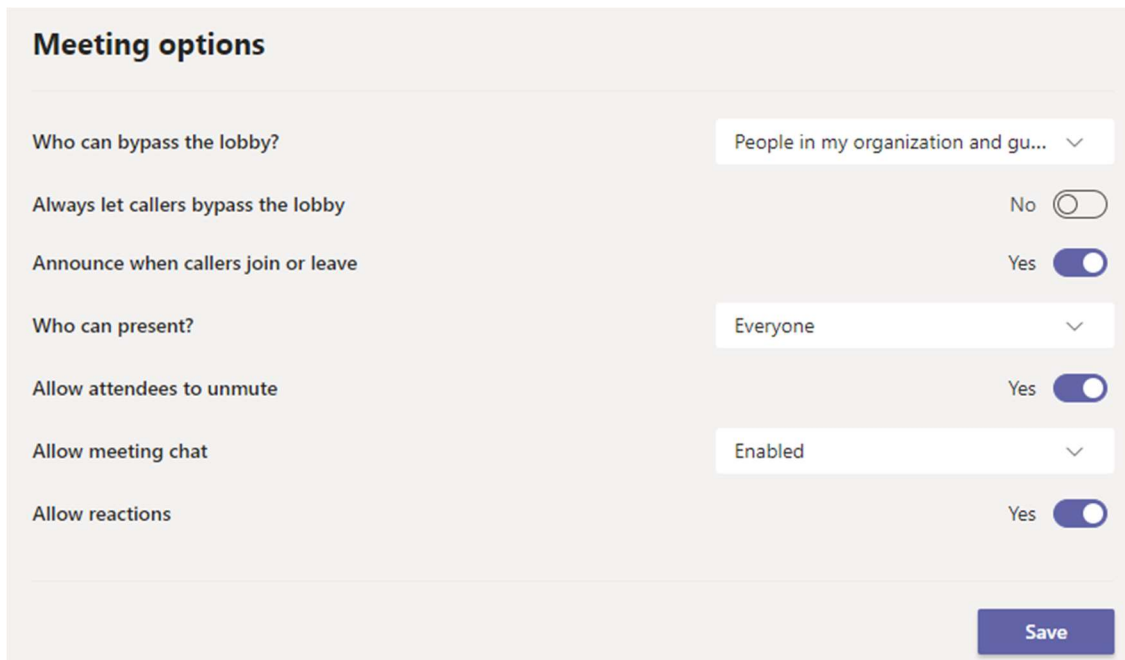
3. Click **Edit**



4. Select **Meeting options** from the top menu bar



5. A new tab will open in your internet browser that outlines the various options you can set for your meeting





Lobby permissions

The **Who can bypass the lobby?** drop-down menu allows you to create a lobby for your Teams meeting and select which participants will need to wait in the lobby and which participants can join the meeting directly. Below is a list of the options:

Everyone – Select this option if you want all meeting participants to be able to join the meeting directly

People in my organization, trusted organizations, and guests – Select this option if you want anyone with an @smu.ca email address and any Guests invited to your meeting to be able to join the meeting directly

People in my organization and guests – Select this option if you want anyone with an @smu.ca email address and any Guests invited to your meeting to be able to join the meeting directly

Only me – Select this option if you want all meeting participants to wait in the lobby

Note: Due to SMU's Office 365 administrative settings, the **People in my organization, trusted organizations, and guests** and **People in my organization and guests** options function the same.

Presenting permissions

The **Who can present?** drop-down menu allows you to control which participants are able to share their screen in your meeting.

Everyone – All meeting participants are able to share their screen

People in my organization – Only people with an @smu.ca email addresses can share their screen

Specific people – The meeting organizer can choose which participants can share their screen. Participants must already be invited to the meeting to be selected.

Only me – Only the meeting organizer can share their screen. Participants can still request control of the meeting organizer's screen, but are unable to share their own screen.

Attendee options

The **Allow mic for attendees** switch allows you to control whether or not attendees can unmute themselves if they've been muted by the meeting organizer.

The **Allow meeting chat** drop-down menu allows you to select whether or not there is a meeting chat, and if so, if participants are able to post in the chat preceding and proceeding the meeting.



The **Allow reactions** switch allows you to control whether or not participants can share reactions in the meeting.

Muting participants

To mute participants on a call, follow these steps:

1. Click on the **Participants** button located on the **Meeting control bar**
2. Click on the three dots next to the name of the participant you would like to mute
3. Select **Mute Participant**

Note: You need at least three participants on a call to mute a participant. You can also select the **Mute All** option on top of the list of participants to mute everyone on the call.

Removing participants from meeting

To Remove Participants on a call, follow these steps:

1. Click on the **Participants** button located on the **Meeting control bar**
2. Click on the three dots next to the name of the participant you would like to remove from the meeting
3. Select **Remove from Meeting**

Note: You cannot remove the organizer of the meeting.

Using live captions

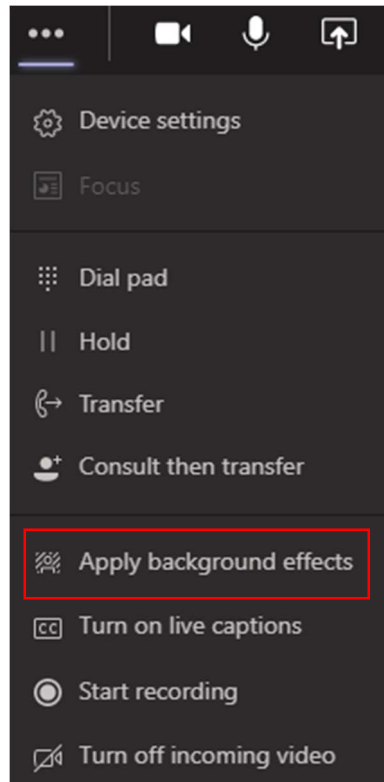
Live captions on Teams have speaker attribution and are only visible to the user that turns them on. To turn on live captions:

1. Click the **More options** button (three dots) from the **Meeting control bar**
2. Select **Live captions** from the drop-down menu

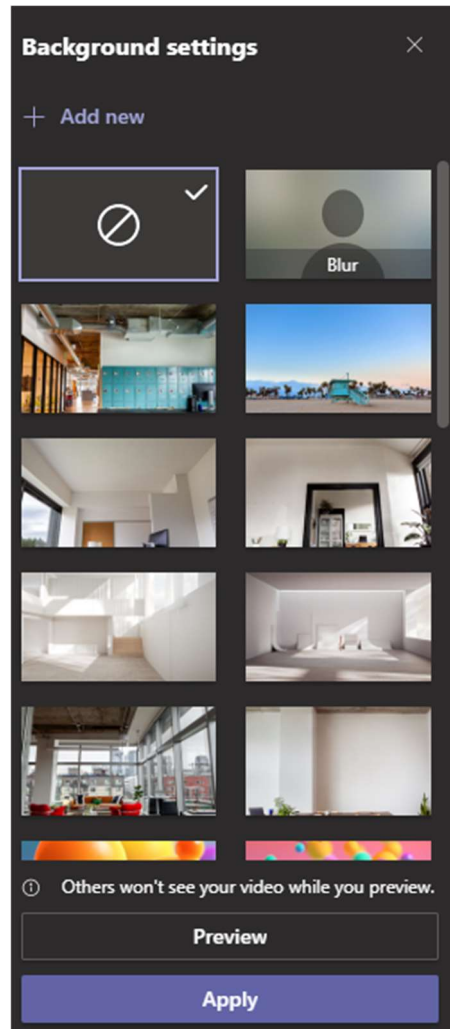
Background effects

1. Click on the **More Options** (three dots) button from the **Meeting control bar**

2. Select the **Apply Background Effects** option



3. Select the background effect you would like to use. Click the **Preview** button to get a preview of your background effect before clicking **Apply** to update your background for other meeting participants.



Note: Background effects are only available on the Desktop app and the iOS (Apple) app.

Raise hand

To raise your hand, click on the **Raise hand** button located on the **Meeting control bar**. This allows you to alert the presenters that you have something to contribute without interrupting the ongoing conversation. Other participants will be able to see an icon next to your name that indicates you have your hand raised. This icon shows up in both the video window and the **Participants** panel.

Spotlight

Spotlight lets you highlight a participant's video for all the participants present on the call. To do so please follow these steps:

1. Click on the **Participants** button located on the **Meeting control bar**
2. Click on the three dots next to the name of the participant you would like to **Spotlight**
3. Select **Spotlight** from the drop-down menu

Pin

Pin lets you highlight a participant's video just for you. To do so please follow these steps:

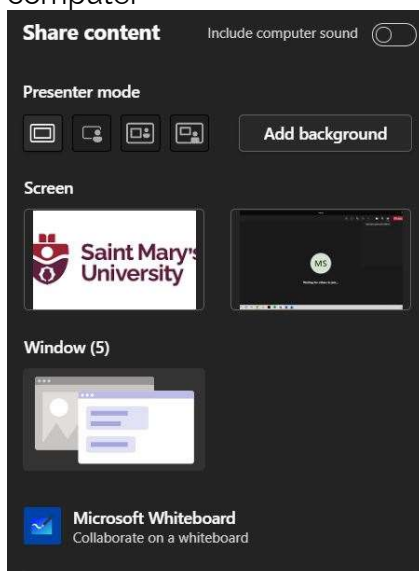
1. Click on the **Participants** button located on the Teams **Meeting control bar**
2. Click on the three dots next to the name of the participant you would like to **Pin**
3. Select **Pin** from the drop-down menu

Screen sharing

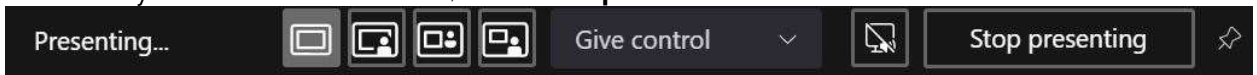
1. Select the **Share content** option from the Meeting Control Bar



2. Select the window you would like to share
3. Toggle the **include computer sound** switch to **on** to share all audio from your computer



- Using the **Sharing control bar**, select a participant from the **Give control** drop-down menu to allow them to navigate your shared window. If you wish to take control of somebody else's shared window, select **Request control**.

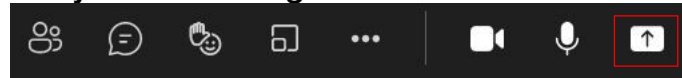


- To end your screen share, select the **Share tray** icon from the **Meeting control bar**

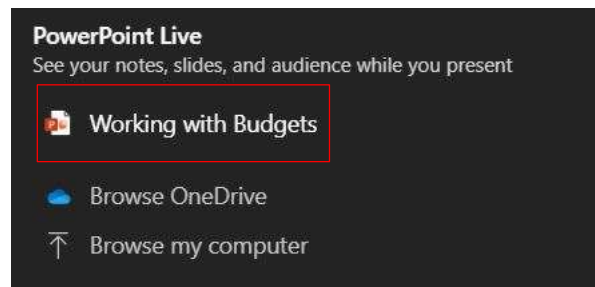


Giving a PowerPoint presentation

- Click on the **Share tray** on the **Meeting control bar**



- Select the PowerPoint deck you would like to present from the options listed under **PowerPoint**



- Click on the eye to enable/disable **Private viewing** so attendees can move through the presentation on their own
- Click on the slide to move forward/trigger an animation
- Click **Stop presenting** to end the presentation



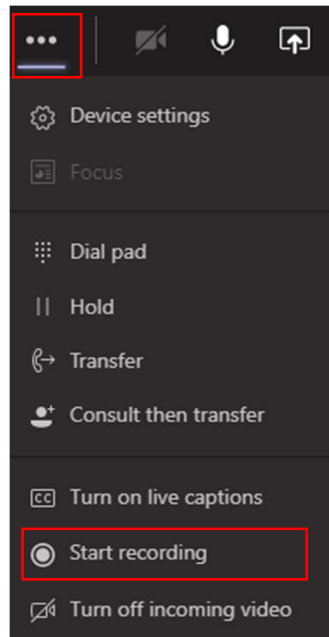
- If you are viewing a PowerPoint presentation, select **Take control** to take over the PowerPoint from the presenter



Recording a meeting

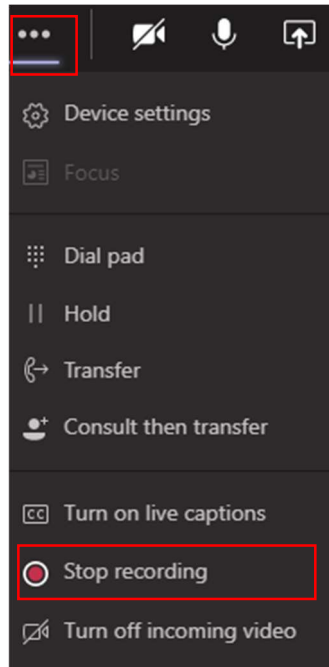
To record a meeting:

1. Click the **More actions** button (three dots) from the **Meeting control bar**
2. Select **Start Recording** from the drop-down menu



When you wish to end the recording:

1. Click the **More actions** button (three dots) from the **Meeting control bar**
2. Select **Stop Recording** from the drop-down menu



The recording will be saved in the **Recordings** folder in the OneDrive of whoever initiated the meeting recording. Depending on who recorded the meeting, different people could have access to the recording.

Please read the [Permissions or role-based access](#) chart from Microsoft to determine who will have permission to access your meeting recording.