



# A GUIDE TO MICROSOFT TEAMS FOR BEGINNERS: 101



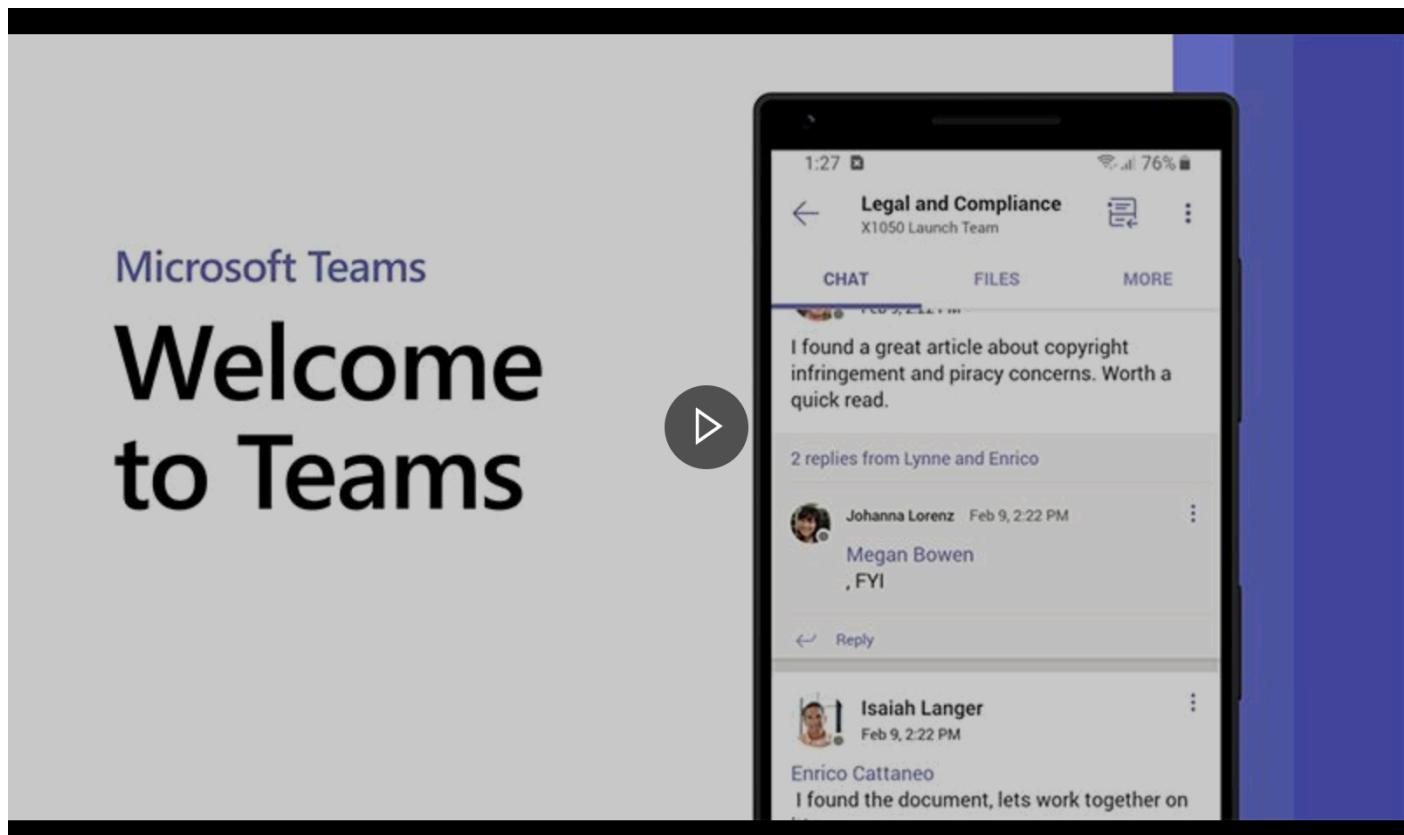
# Overview

In this Microsoft Teams for Beginners article we'll be sharing everything you need to know to setup teams, channels and get started in Microsoft Teams.

Click on a topic to learn more:

- [Welcome to Microsoft Teams](#)
- [What is Microsoft Teams](#)
- [Getting your team up and running](#)
- [Working in Channels](#)
- [Creating chats and group calls](#)
- [File Sharing and collaboration](#)
- [How to manage meetings](#)
- [Microsoft Teams training resources](#)

# Welcome to Microsoft Teams



# What is Microsoft Teams?

Think of Microsoft Teams as a collaboration hub that helps your team stay organized and have conversations, meetings, and share files - all in one place.

6 modules and a command box form the core functionality of Microsoft Teams, we've included a description of each module below, so you can get clear on what they do. But if reading isn't your thing, [this quick interactive demo](#) is a great way to get a guided tour and try out the basics for Microsoft Teams beginners.



## Quick Start Guide

New to Microsoft Teams? Use this guide to learn the basics.

**Move around Teams**  
Use these buttons to switch between Activity Feed, Chat, your Teams, Calendar & Files.

**View and organize teams**  
Click to see your teams. In the teams list, drag a team name to reorder it.

**Find personal apps**  
Click to find and manage your personal apps.

**Add apps**  
Launch Apps to browse or search apps you can add to Teams.

**Every team has channels**  
Click one to see the files and conversations about that topic, department, or project.

**Start a new chat**  
Launch a one-on-one or small group conversation.

**Add tabs**  
Highlight apps, services, and files at the top of a channel.

**Use the command box**  
Search for specific items or people, take quick actions, and launch apps.

**Manage profile settings**  
Change app settings, change your pic, or download the mobile app.

**Manage your team**  
Add or remove members, create a new channel, or get a link to the team.

**Add files**  
Let people view a file or work on it together.

**Compose a message**  
Type and format it here. Add a file, emoji, GIF, or sticker to liven it up!

**Join or create a team**  
Find the team you're looking for, join with a code, or make one of your own.

## Activity

Your activity feed is where you can get a quick at-a-glance catch up on all your unread messages, @mentions, replies, and channel activity.

## Chat

Want to talk 1:1 or in a group? This is where chats come in, you can create private one-on-one chats or group conversations here.

## Teams

The teams module is where the majority of the magic happens, it displays all of the teams that you're a member of and the Channels that make up your teams. You can have several Channels within a Team and can create them by topics, projects, departments or just for fun. Inside the Channels is where you can hold on-the-spot meetings, have conversations, and share all important GIFs.

## Calendar

Clicking the Calendar icon will show you everything you've got lined up for the day, week or month. It syncs with your Outlook calendar, so you don't have to keep switching between Microsoft Teams and Outlook to book appointments.

## Calls

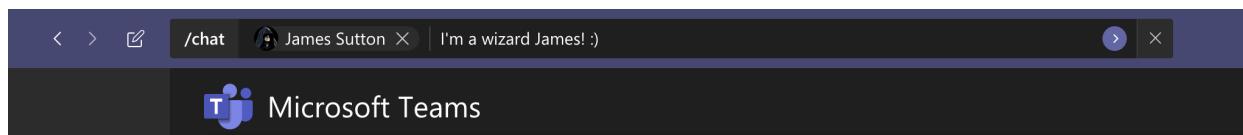
If your organisation has it set up, you can call anyone from Teams, even if they're not using Teams. You can also organise your contacts into groups for easy lookup and view your call history too.

## Files

The files module shows you all of the files that have been shared in your Channels, the recent files that you've been working on, and your OneDrive files that you can access directly through Teams.

## Command Box

Use the Command Box at the top of Microsoft Teams to search for specific items, people, and perform quick actions that make you feel like a Microsoft Teams wizard. Try it for yourself now:



1. Head over to Teams and hit CTRL+E to activate the Command Box
2. Type /chat and hit ENTER
3. Enter someone's name and hit ENTER
4. Type a message and hit ENTER to send

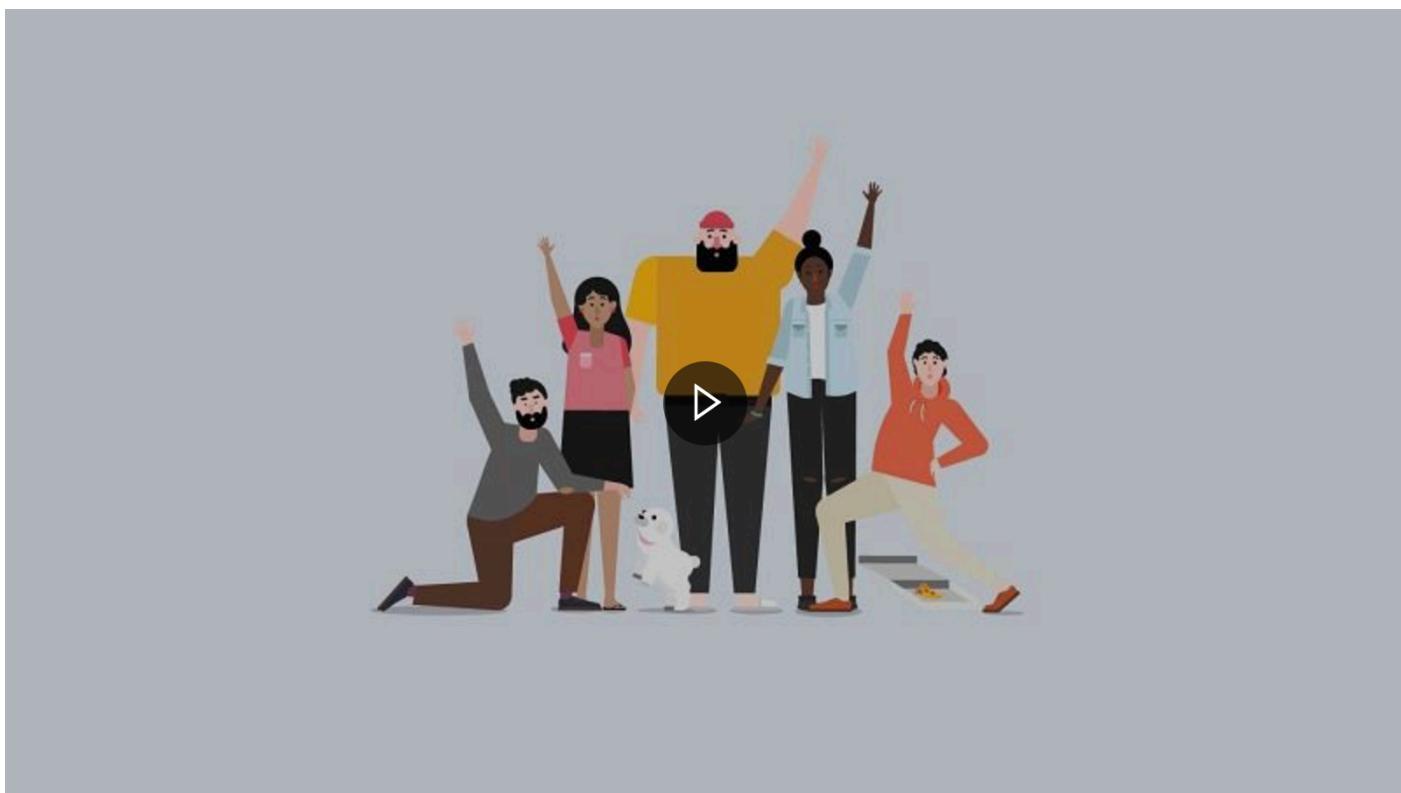
There's a bunch of extra quick actions that you can use too, just type the / symbol in the Command Box to explore and play around with the options.

# How to get your team up and running

To get your team up and running, you'll need to:

1. Create your team,
2. Invite members, and
3. Add channels

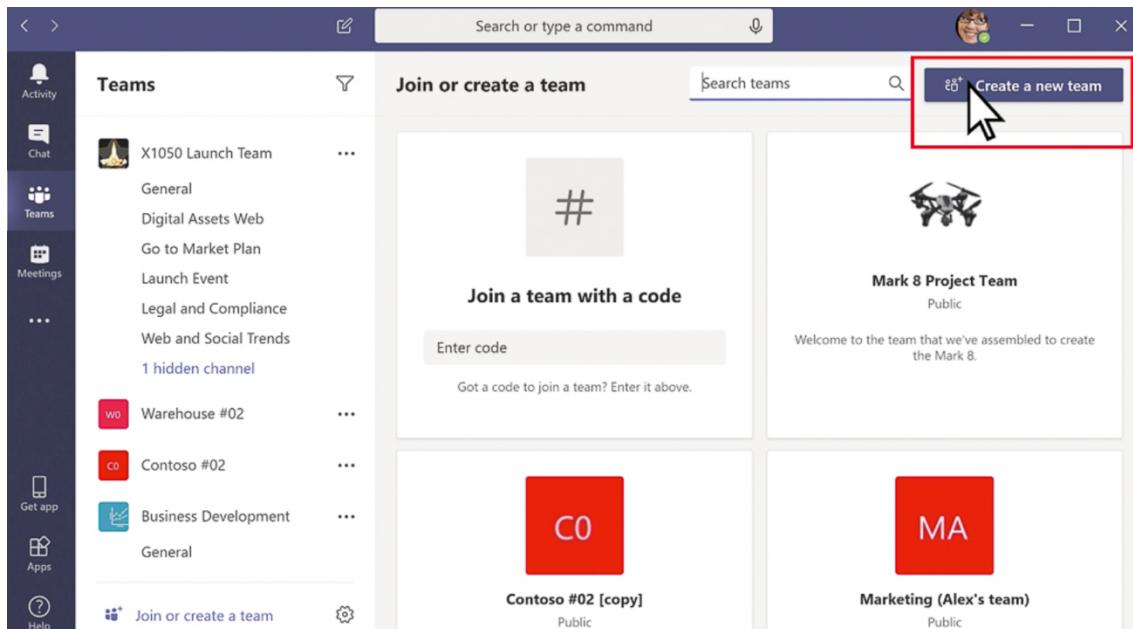
Here's a video that walks you through all three steps, so you can follow along and setup your virtual workplace in record time.



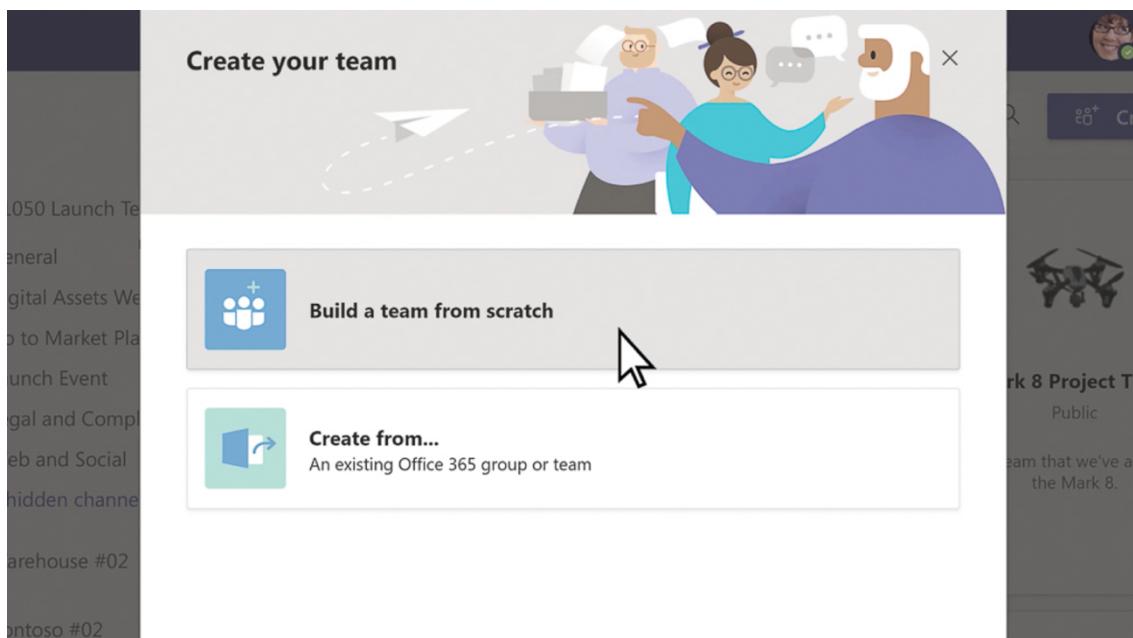
**Note:** For more information on the technical roll out of Microsoft Teams this [Microsoft Teams Implementation article](#) provides more information.

## Step #1 Creating a team

1. Navigate to the Teams module and click on **Create a new team**

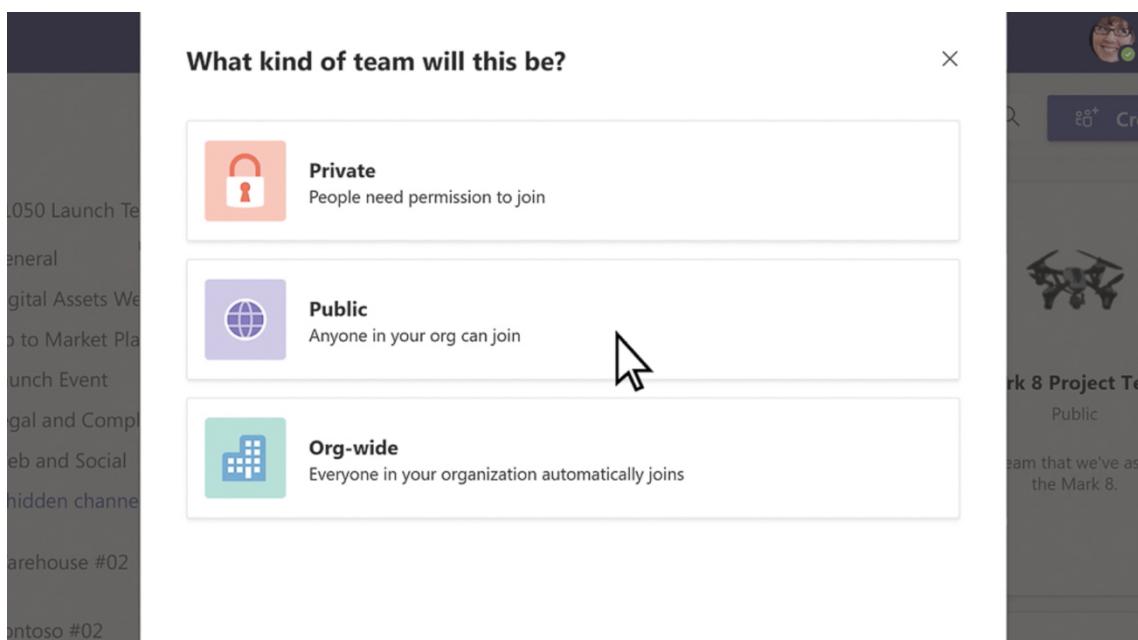


2. Select **Build a team from scratch**

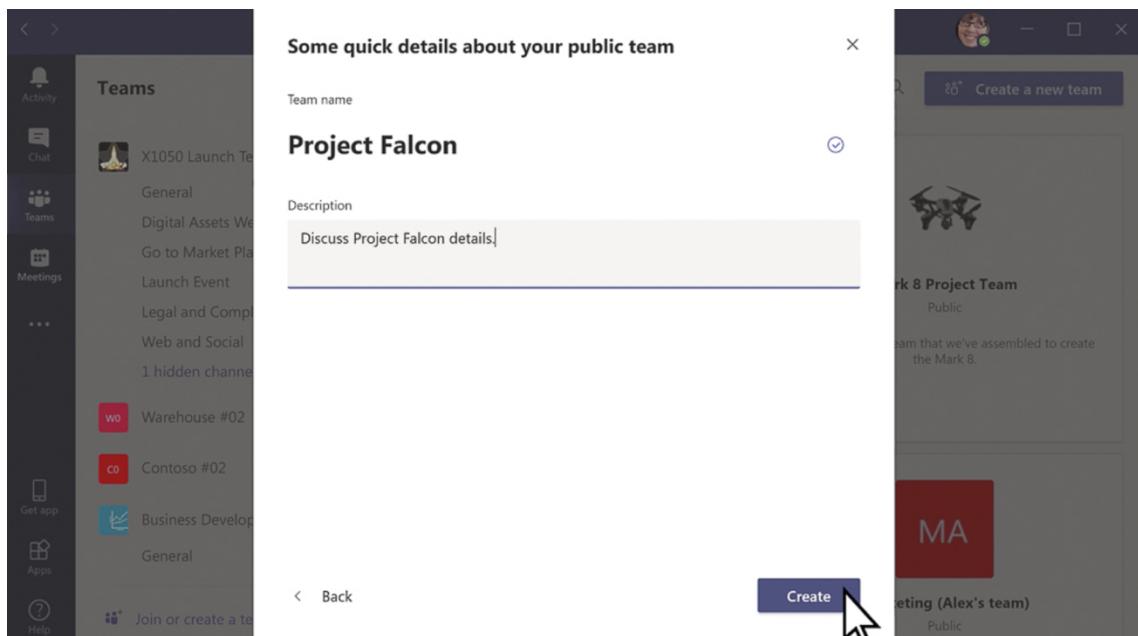


3. Choose whether you'd like your team to be:

- A. **Private** (meaning people would need permission to join the team),
- B. **Public** (Anyone in your organisation can join), or
- C. **Org-Wide** (Everyone in your organisation automatically joins the team)

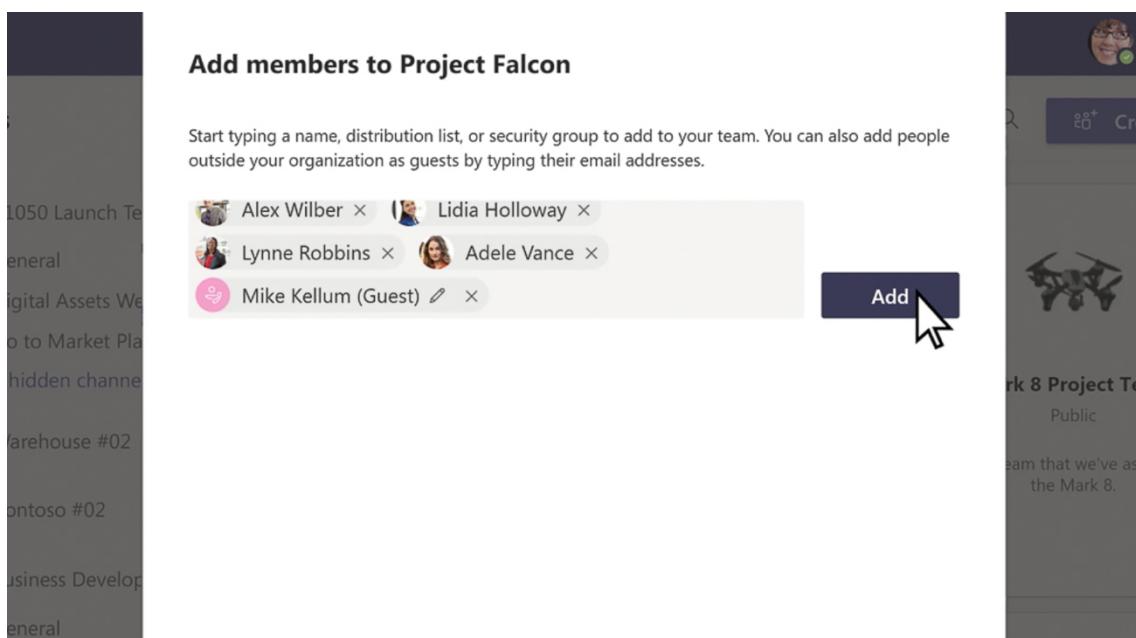


#### 4. Give your team a name and a description

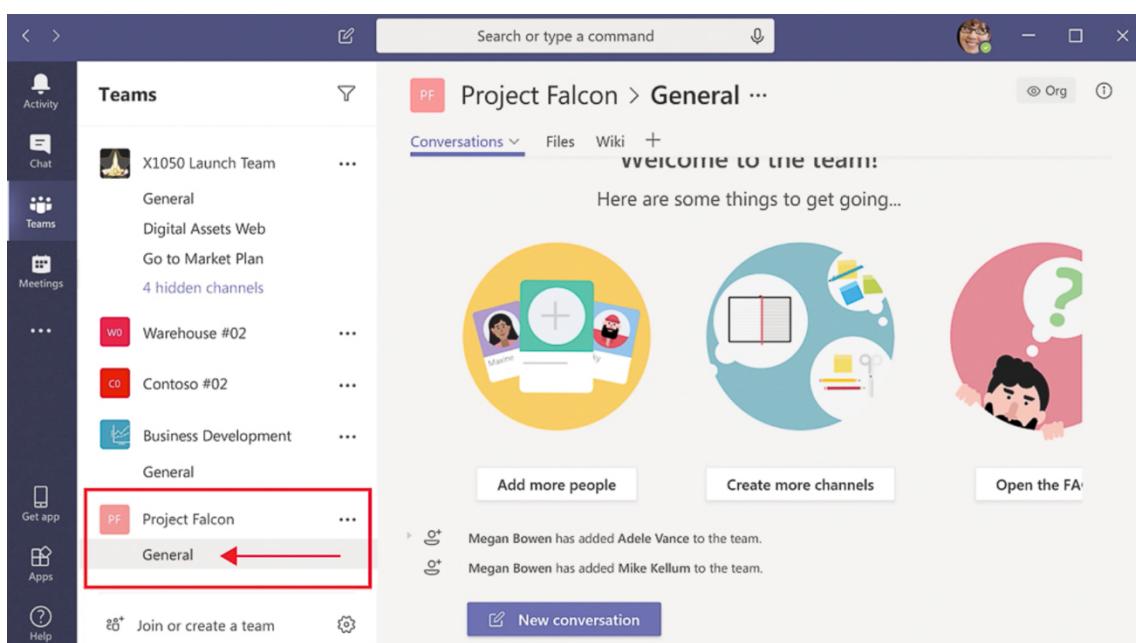


## Step #2 Inviting members

1. Add members to your team. **Note:** you can also add guests (people from outside your organisation) too. To do so, just type in their email address and click **Add**.

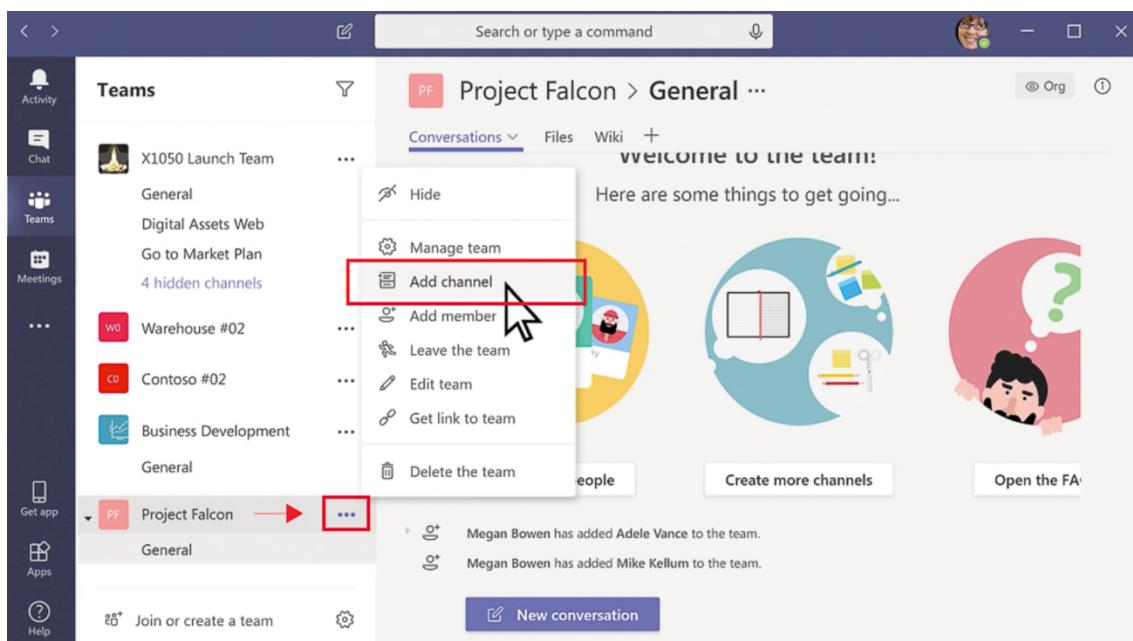


**Note:** By default, your team will be created with the **General** channel. This is a good channel for announcements and information that the whole team needs to see.

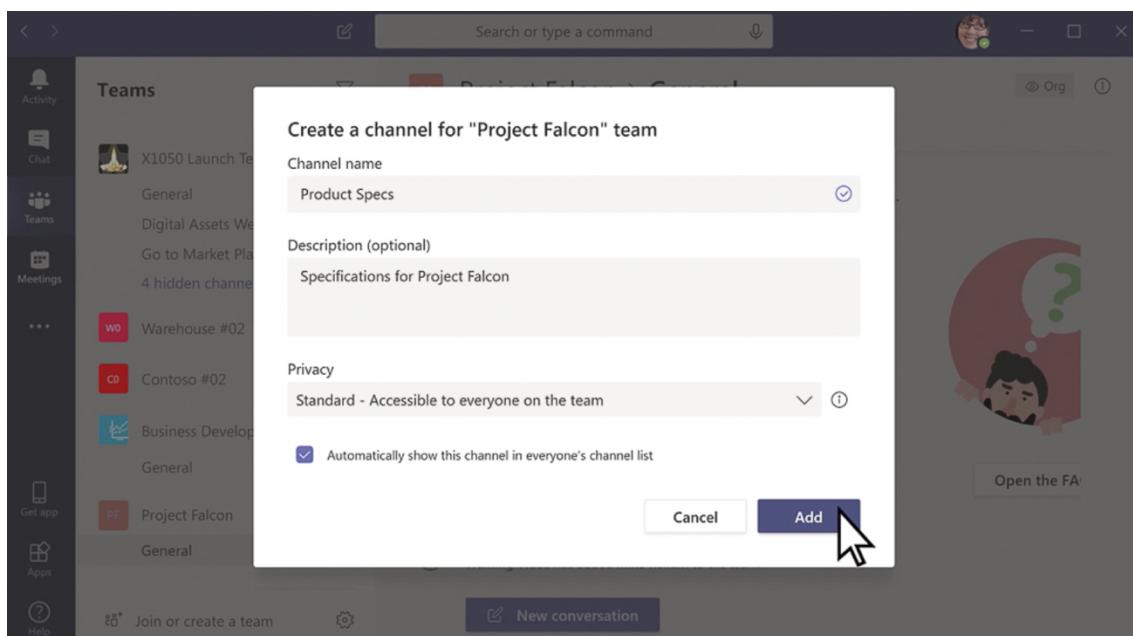


## Step #3 Adding channels

- To add additional channels to your team, click the **more options icon (3 dots)** next to your team name and select **Add Channel**.

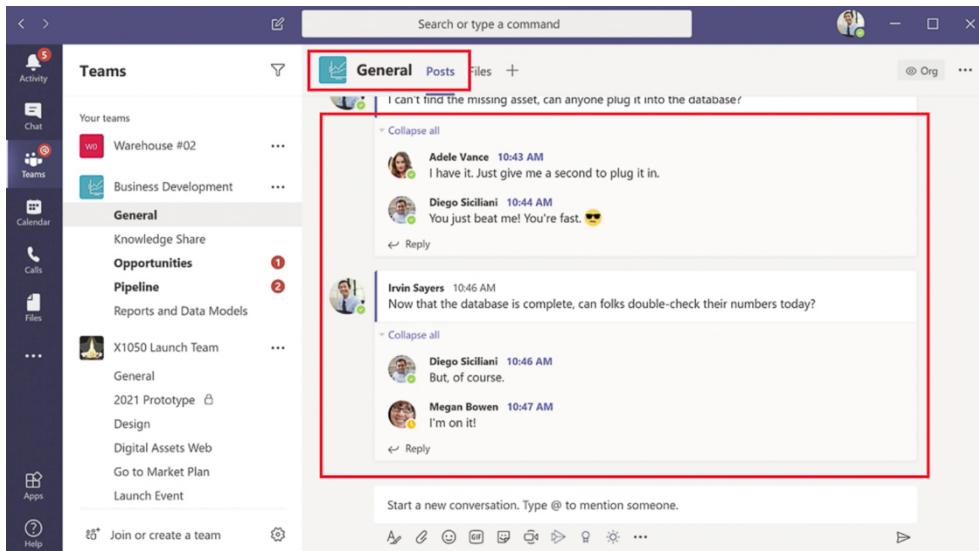


- Give your new Channel a name, a description and check the **Show this channel in everyone's channel list**, then hit **Add**



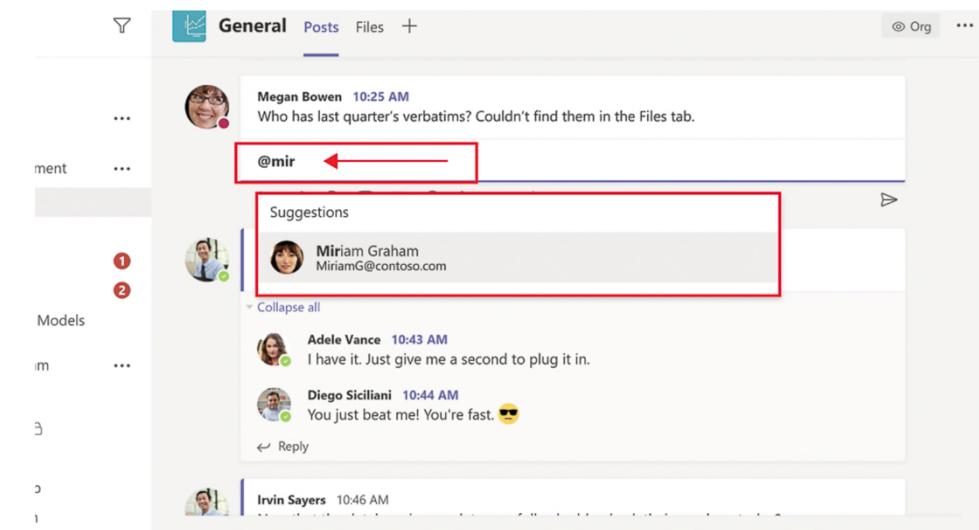
# Working in Channels

Channels are where your team members collaborate, share files and engage in discussions. Every channel has a **Posts** tab, this is where you can post your messages. All of the channel conversations are stored in the Posts tab, so all channel members can view the discussion history to stay up to date on the latest goings on.



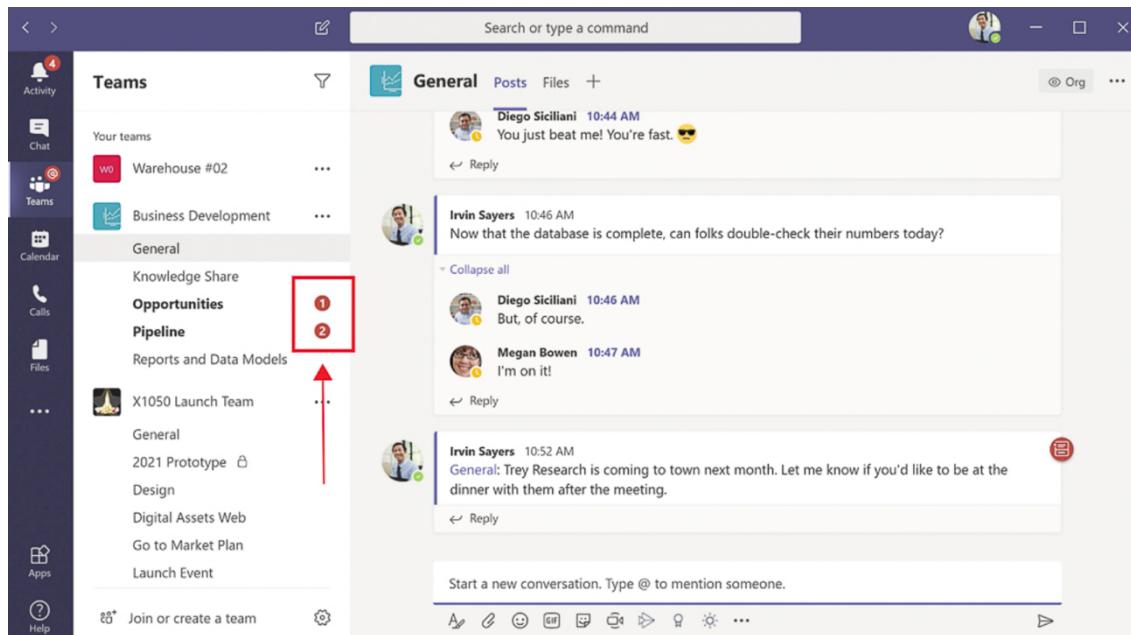
## Getting attention with @Mentions

If you want to get someone's attention in a channel, you can use @mentions. Simply type the @ symbol followed by the person's name and the person will receive a notification that they have been mentioned in your post.



Want to get everyone's attention? You can @mention entire channels too. **Note:** this feature will need to be enabled by the Team owner.

When you have been mentioned in a post, you will receive a notification in your Activity feed letting you know who mentioned you and in what channel it occurred. You'll also get a little red circle next to the channels indicating how many times you've been @mentioned in that channel.



## Managing Notifications

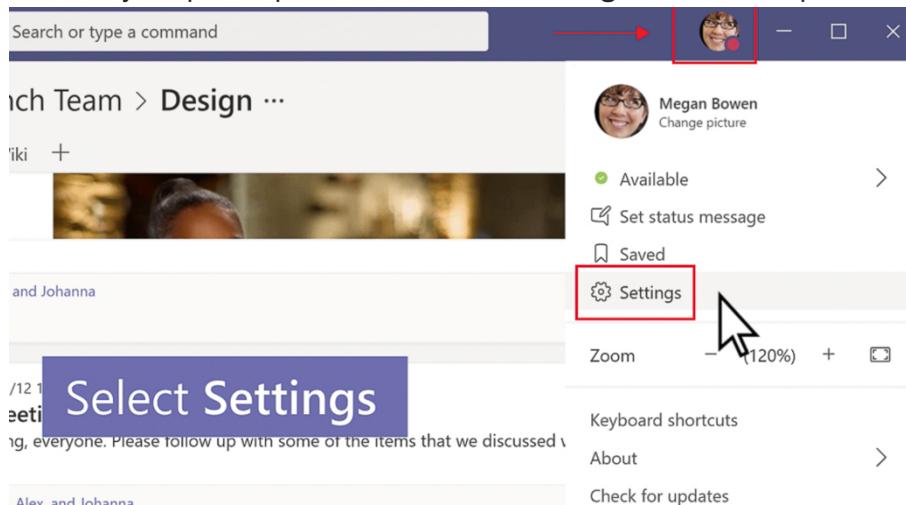
When you're working on an important task focus is key - especially when you're working from home. After all, with email notifications, reminders, and now Teams notifications popping up all over your desktop, it's not just the dog or kids that are fighting for a sliver of your attention.

**The good news:** You can manage your Teams notifications, so you only get notified on the things that matter most.

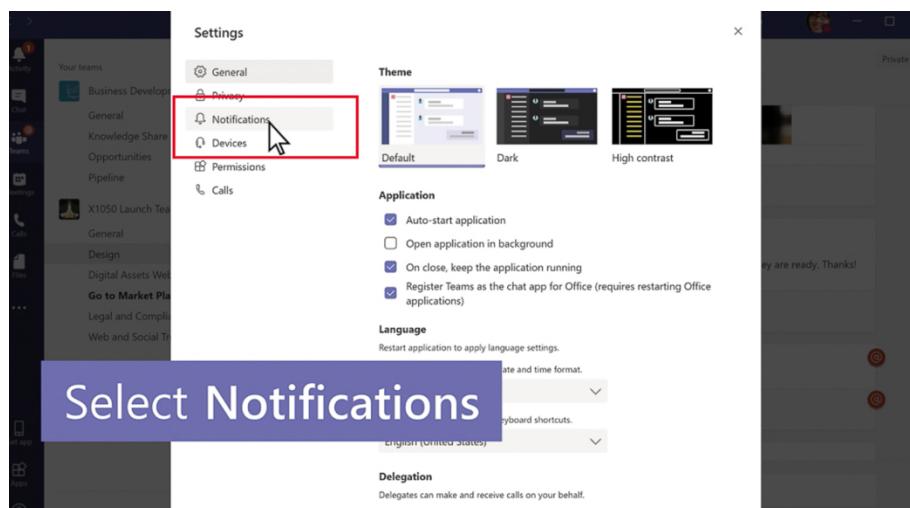
**The bad news:** The same can't be done for the kids (both the human and fur variety).

Here's how to manage your Teams notifications

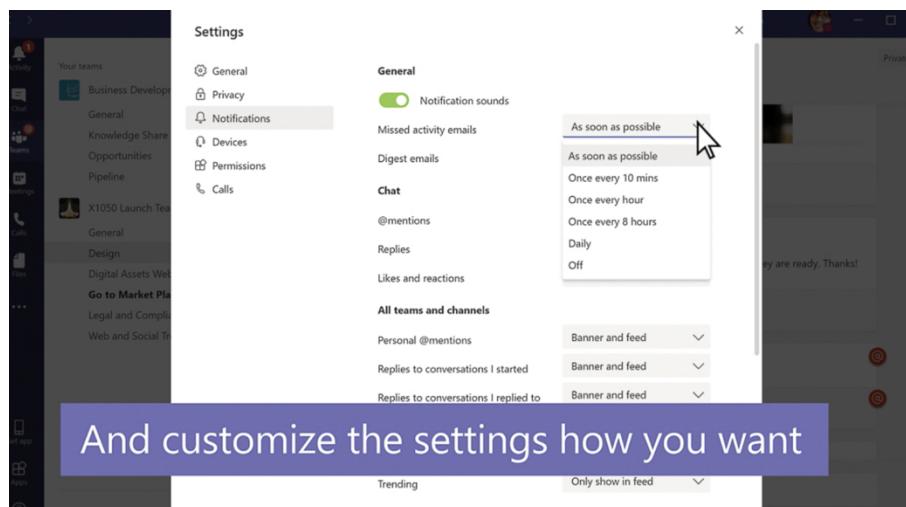
- Click on your profile picture and Select **Settings** from the drop-down menu



- Click **Notifications** from the side bar

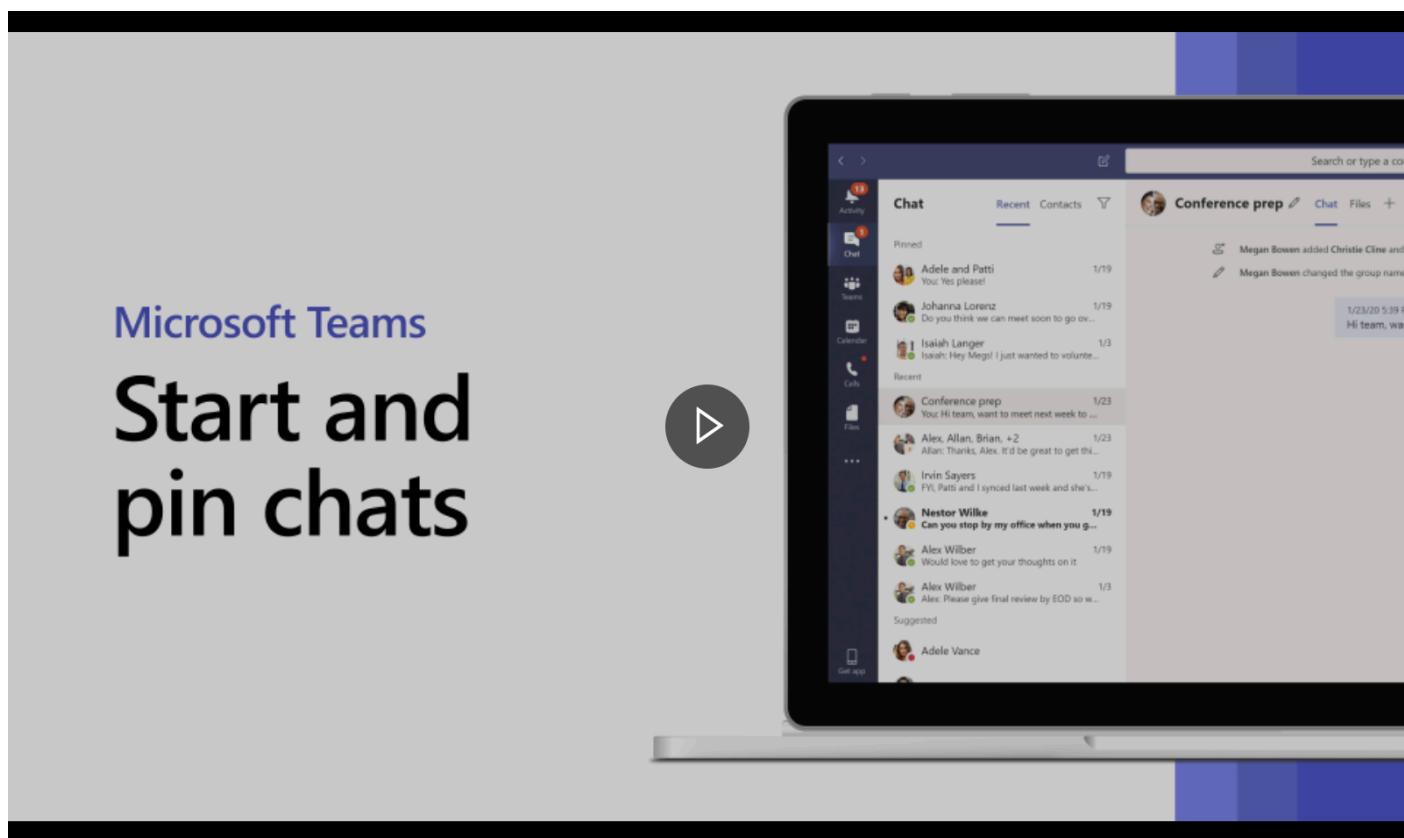


- Customise your notifications



# Chats and Calls in Microsoft Teams

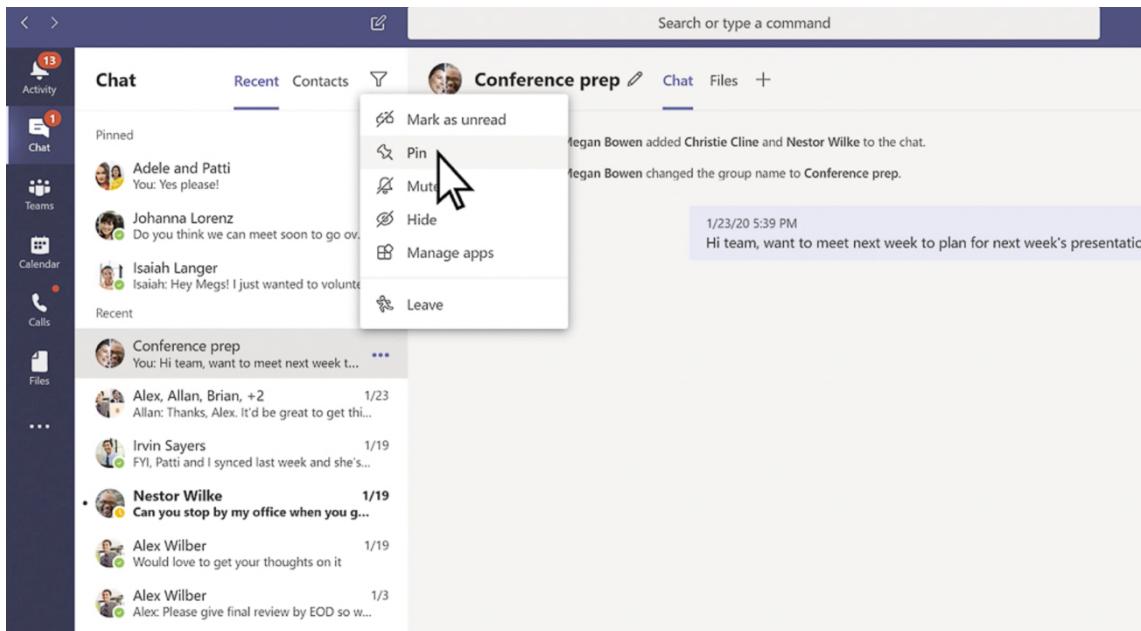
While channels are where most of the magic happens in Teams, sometimes you need to collaborate smaller groups or even talk privately in a 1:1 - enter Chats and Calls.



## How to start a 1:1 or group chat in teams

1. Click on the chat icon to see your private and group chats.
2. To start a new chat, click on the compose new chat icon
3. Type in the name(s) of the people you want to reach out to
4. To make an audio call or video call to the members of the chat – click the corresponding icons in the top right corner of your chat window

**Note:** To make your discussions easier to find, you can pin your chats by clicking the more options (3 dots) icon and selecting Pin. This will keep the chat visible in your pinned list (you can pin up to 15 chats).

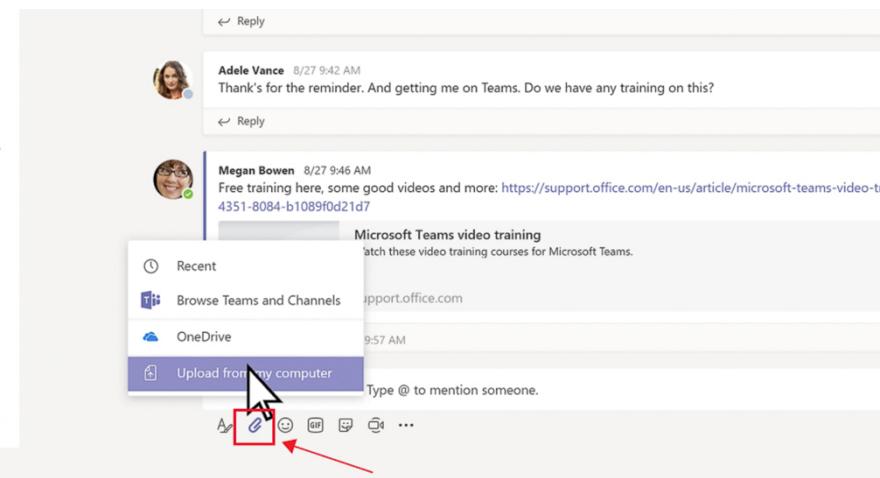


# File sharing in Microsoft Teams

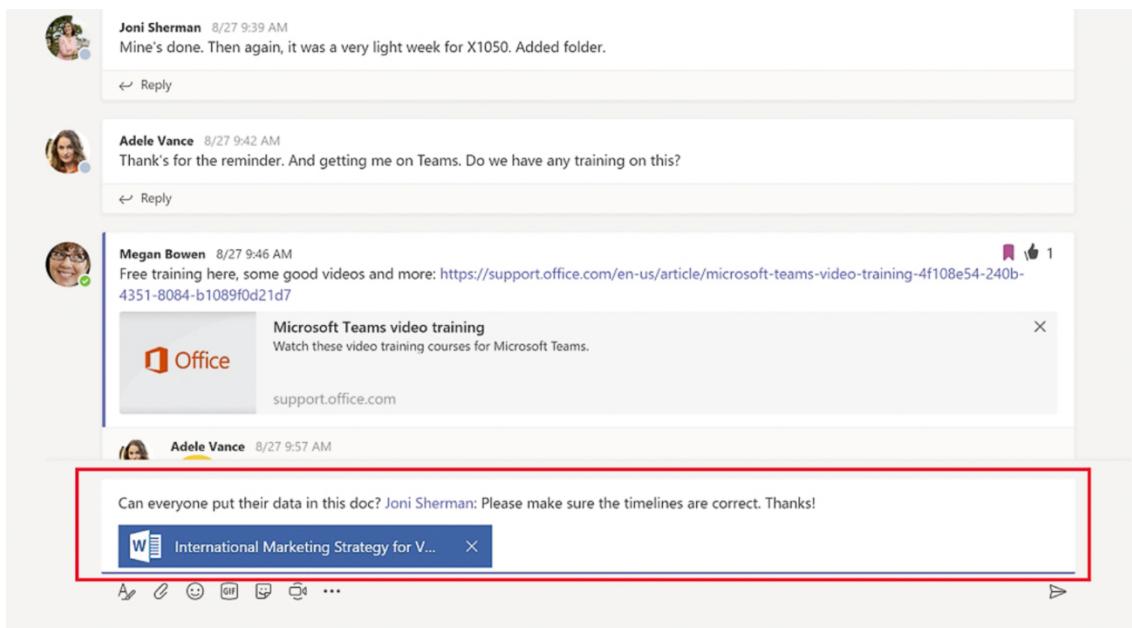
Sharing files in teams is easy. You can share files within chats and channels, so you and your team members can work on the files together at the same time. Better yet, if the files you are sharing are Word, Excel or PowerPoint files your team members can even view, edit, and collaborate on them, right within Teams.

## Here's how to upload and share files in Teams

1. Much like attaching a file to an email, click the attachment paperclip icon in your chat or channel window
2. Select your file



3. (optional) Enter your message or @mention someone to get their attention and feedback.



4. Every chat and channel has a **Files** tab. Here you can see all of the files that have been shared in the chat or channel.

X1050 Launch Team > Design ★ ...

Conversations Files Usability Priorities +

Design

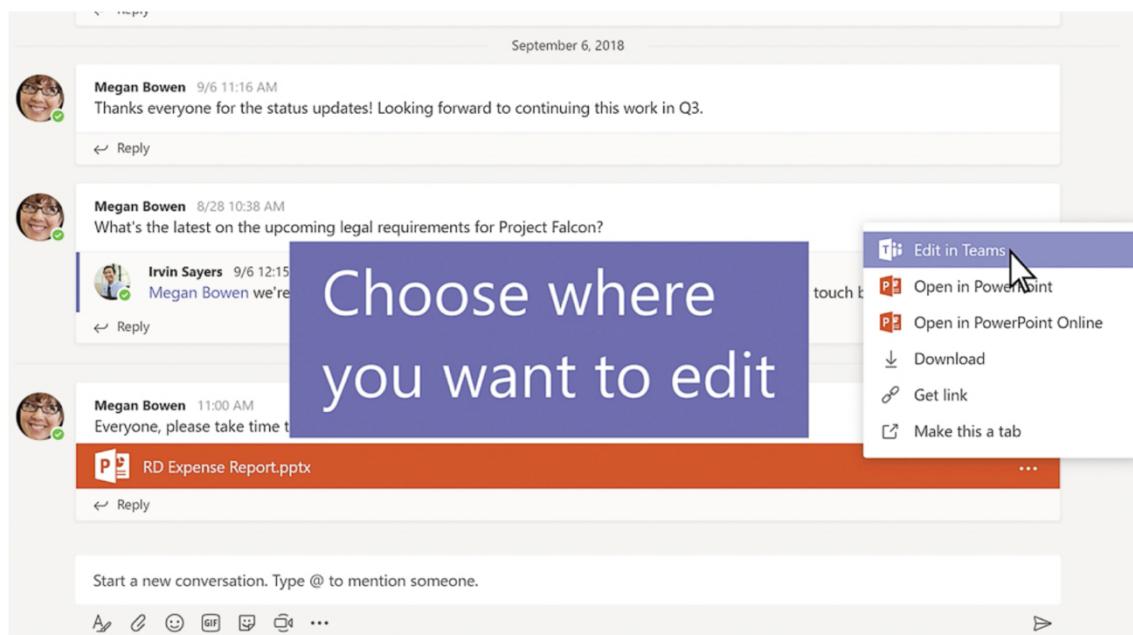
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Every chat and channel has a Files tab

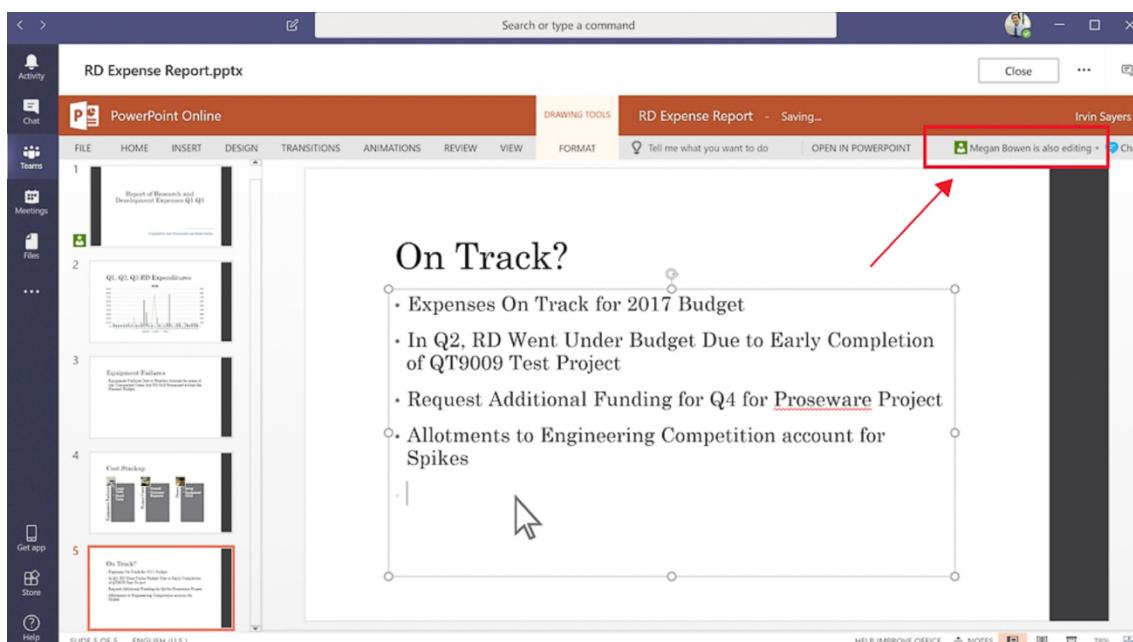
	Modified	Modified by
Design mock-up feedback.docx	8/24/18	Miriam Graham
XT1050 Usability test 2.3.docx	1/11/18	Megan Bowen
XT1050 Marketing Collateral Timelines_V2.docx	1/11/18	Megan Bowen
marketing-initiatives-FY17.xlsx	1/11/18	Megan Bowen
bearing-44DDF-stress-test.xlsx	1/11/18	Megan Bowen
Usability Testing Priorities.docx	1/11/18	Megan Bowen

## Here's how to work on a file together in Teams

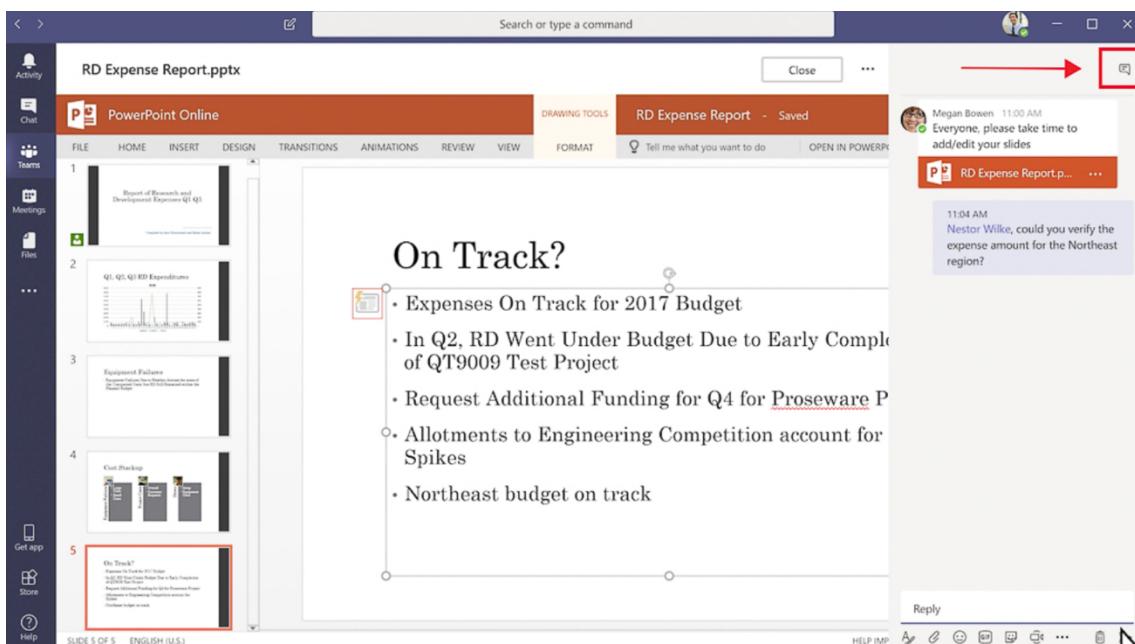
- Select the **more options** icon (3 dots) next to the file that you want to open and choose where you want to edit the file.



- Teams will let you know who else is currently working on the file



- If you need to ask a question about the file or get more information, you can start a conversation from within the file by clicking the chat icon in the top right.



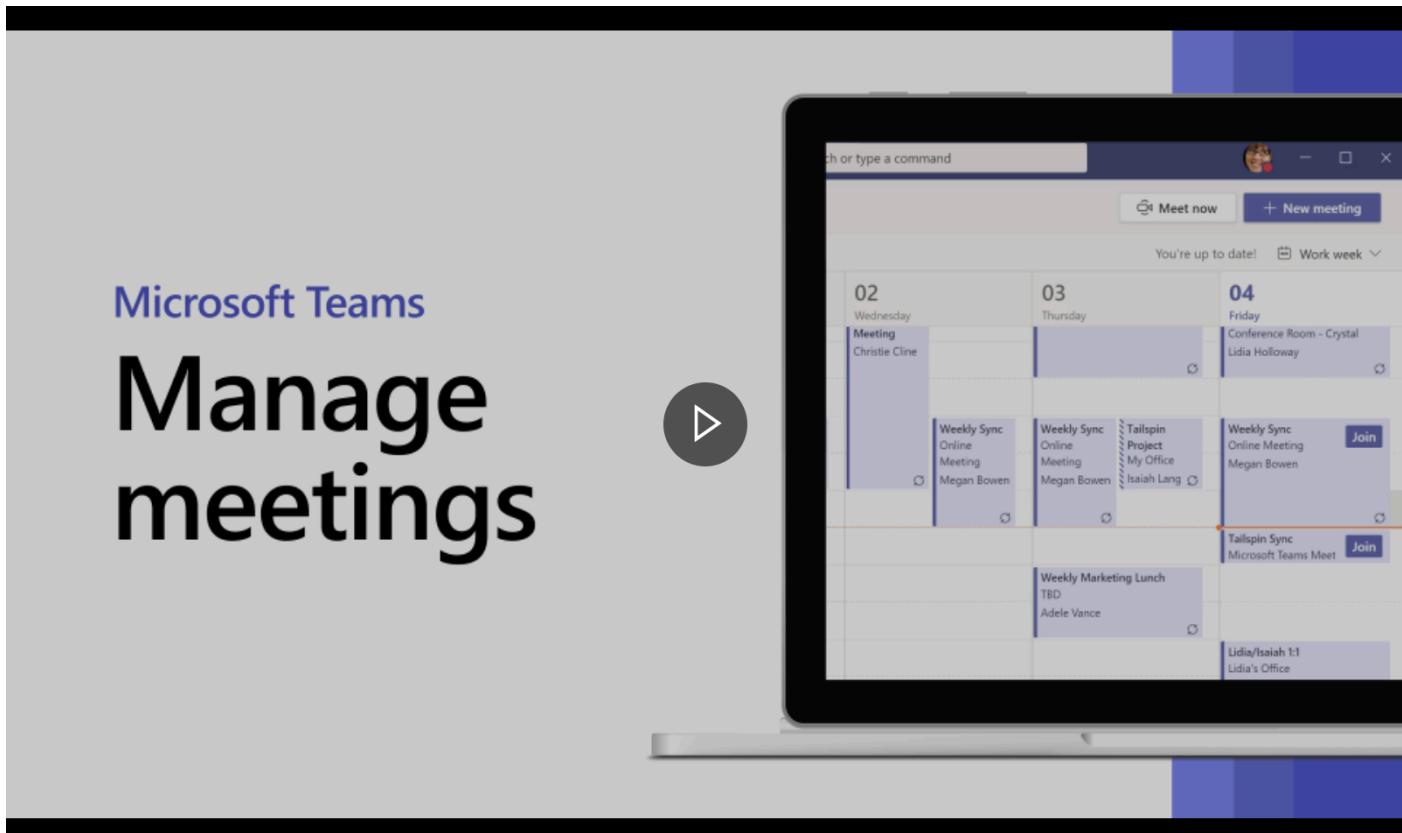
**Note:** Your in-file discussions will stay with the file in your chat or channel thread, neat feature right!?

The screenshot shows a Microsoft Teams file conversation for 'RD Expense Report.pptx'. It displays messages from users like Megan Bowen and Irvin Sayers, illustrating how discussions stay with the file. A large blue box contains the text: 'Messages about the file stay with the file in Teams'.

# Meetings in Microsoft Teams

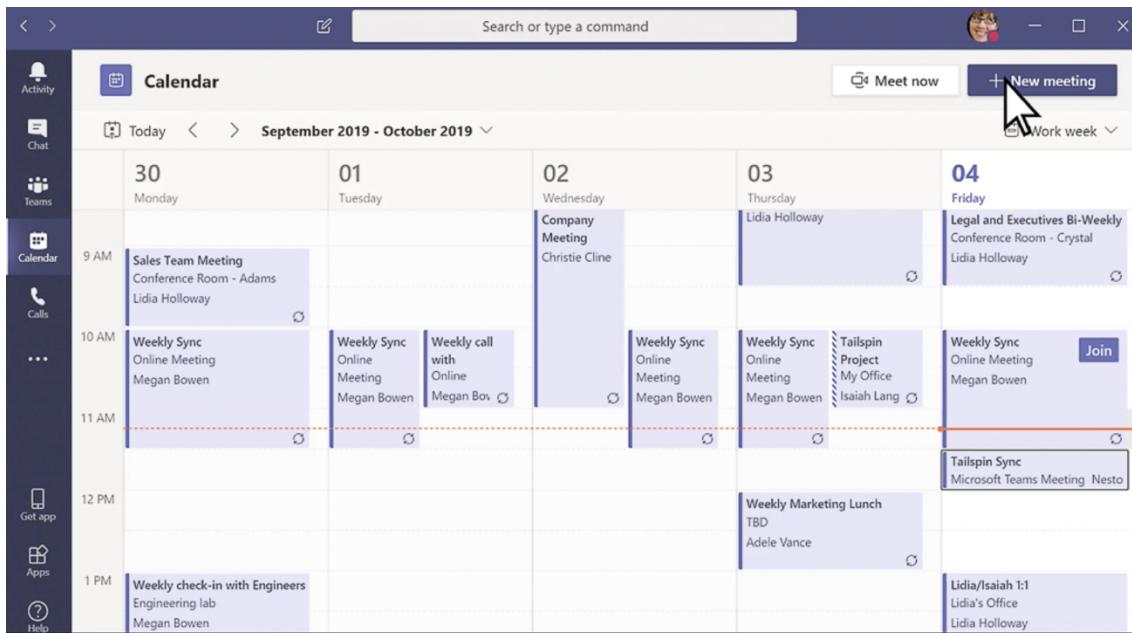
Meetings. Undoubtedly one of Microsoft Teams best features. This is where you can setup 1:1 or group meetings, host meetings in channels and even create live events. But for now, we'll keep this beginner 101 friendly, so head into your teams Calendar module to get started on managing your meetings.

**Note:** Your calendar stays in sync with your Outlook calendar and displays everything you've got coming up, even if you have created an appointment outside of teams.



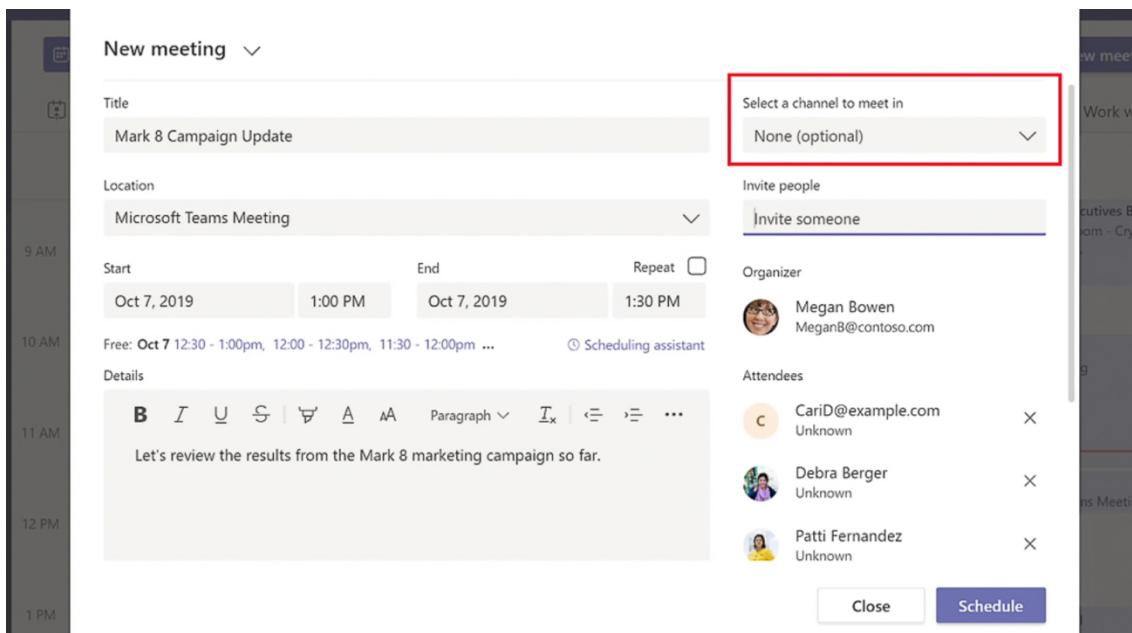
### How to create a new meeting in teams

1. Click the calendar icon and select **+New Meeting**



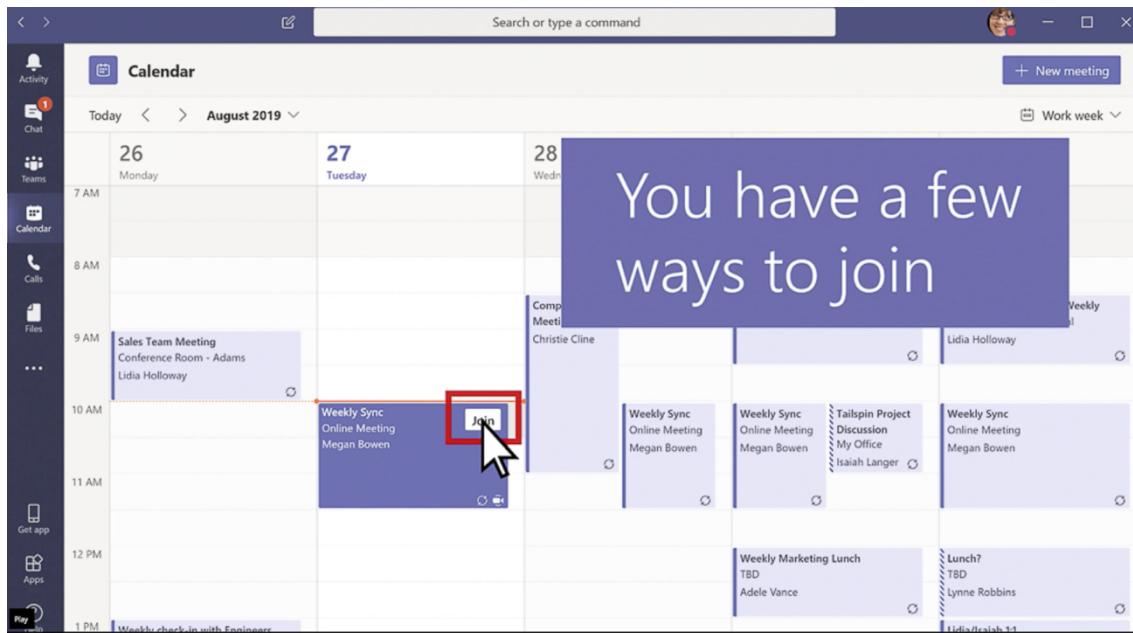
2. Give your meeting a title, select the start and end times, enter a description and invite people.

**Note:** (optional) You can also choose a channel to meet in. If you host your meeting in a channel, everyone in the team will see it in the channels post tab, where they can comment, share files and reply.

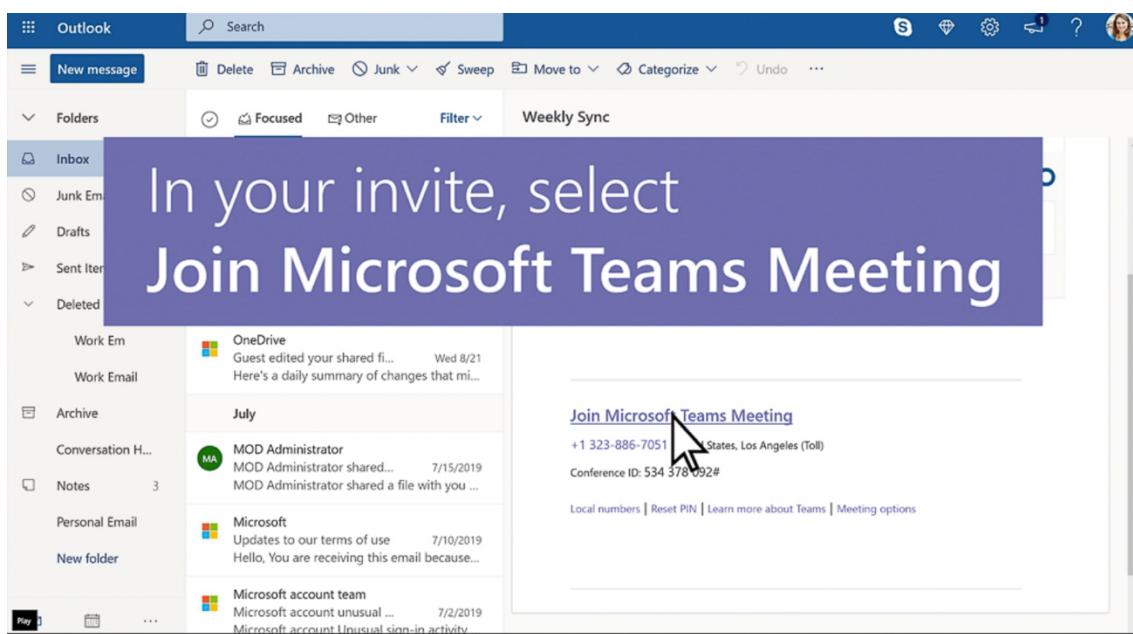


## How to join a meeting, even if you don't use Microsoft Teams

1. If you use teams, you can simply click the **Join** button on your teams calendar appointment.

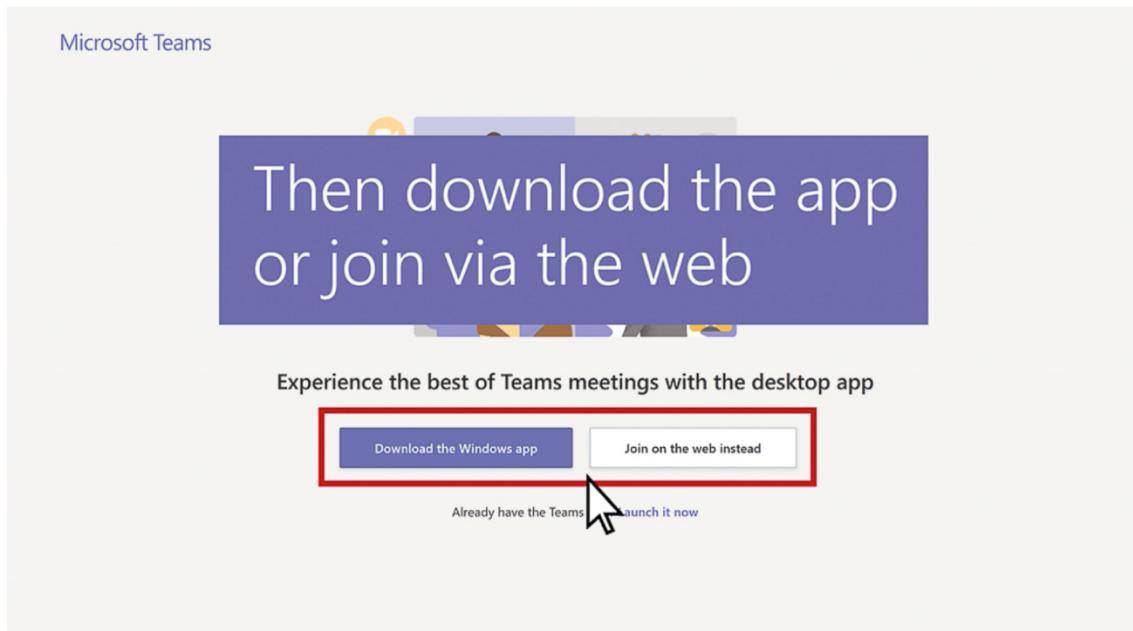


2. If you **don't** use teams, you can click on the **Join Microsoft Teams Meeting** link in your email invitation.

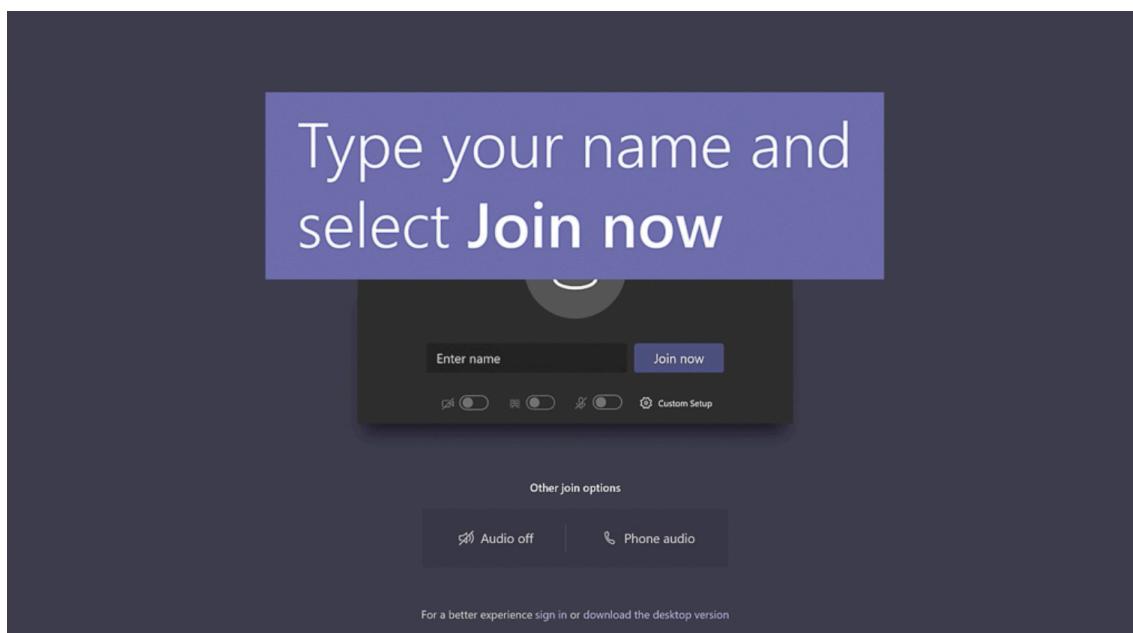


3. You'll be prompted to either:

- o Install the Teams app and create an account, or
- o simply join the meeting using your web browser without having to install or create an account



4. Clicking the latter will take you to the meeting where you can enter your name and click **Join Now**



# Teams Training Resources

Microsoft Teams has a bunch of neat features, like creating live events, hosting Q&A's and integrating your favourite apps to bring your entire work suite into one convenient place. For more training material check out the links below, [drop us a line](#) or leave a comment - we're more than happy to help.

- [Free Microsoft Teams instructor-led online training](#)
- [Microsoft Teams Help](#)
- [Microsoft Teams FAQ](#)