

# Microsoft Teams Training

Presented by the Infrastructure & Economic  
Development IT Delivery Center

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*Note: There is no audio on this slide. We will  
begin shortly!*

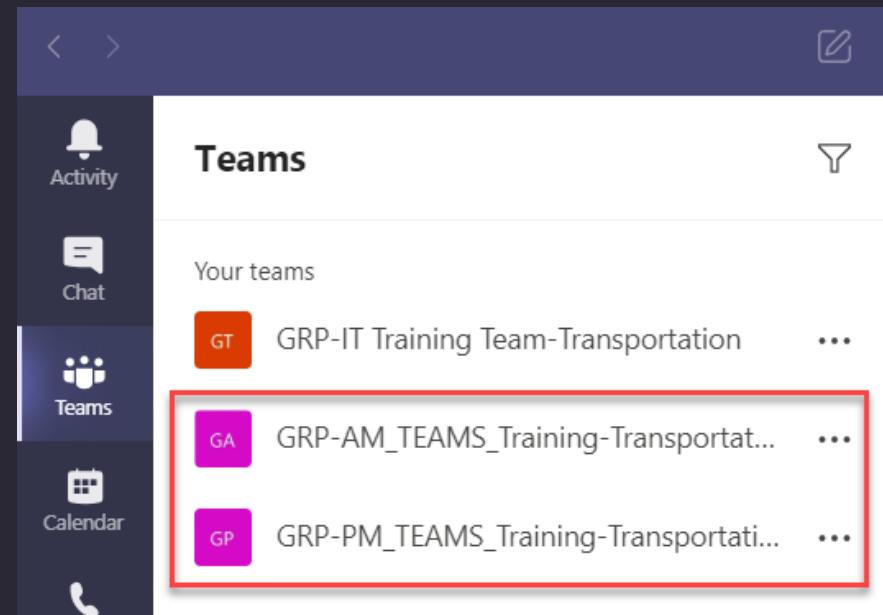
Please open Microsoft Teams from your Start  
Menu if you have not already, and if prompted,  
sign in with your CWOPA credentials

# *Housekeeping*

- You will receive a copy of this presentation after class to keep for your reference.
- We will take a break about halfway through class.
- Please keep your microphone muted unless you are speaking.
- If you have connection/audio issues, try disconnecting from VPN &/or leaving the meeting & signing back in.
- Type questions in the meeting chat at any time. We'll also pause for questions every few slides.
- You'll have a chance to practice throughout the training.

# *Let's get started...*

- Open Microsoft Teams from your Taskbar, Desktop, or from your Start Menu.
- We'll be using the **GRP-AM\_Teams\_Training** or **GRP-PM\_Teams\_Training** environments for all exercises



# Objectives

- Intro to Teams
- Teams Overview
- Channel Activity
- Chat Overview
- Files
- Calls Overview
- Meetings
- Wikis
- Apps
- Tools & Settings

# Teams Fundamentals

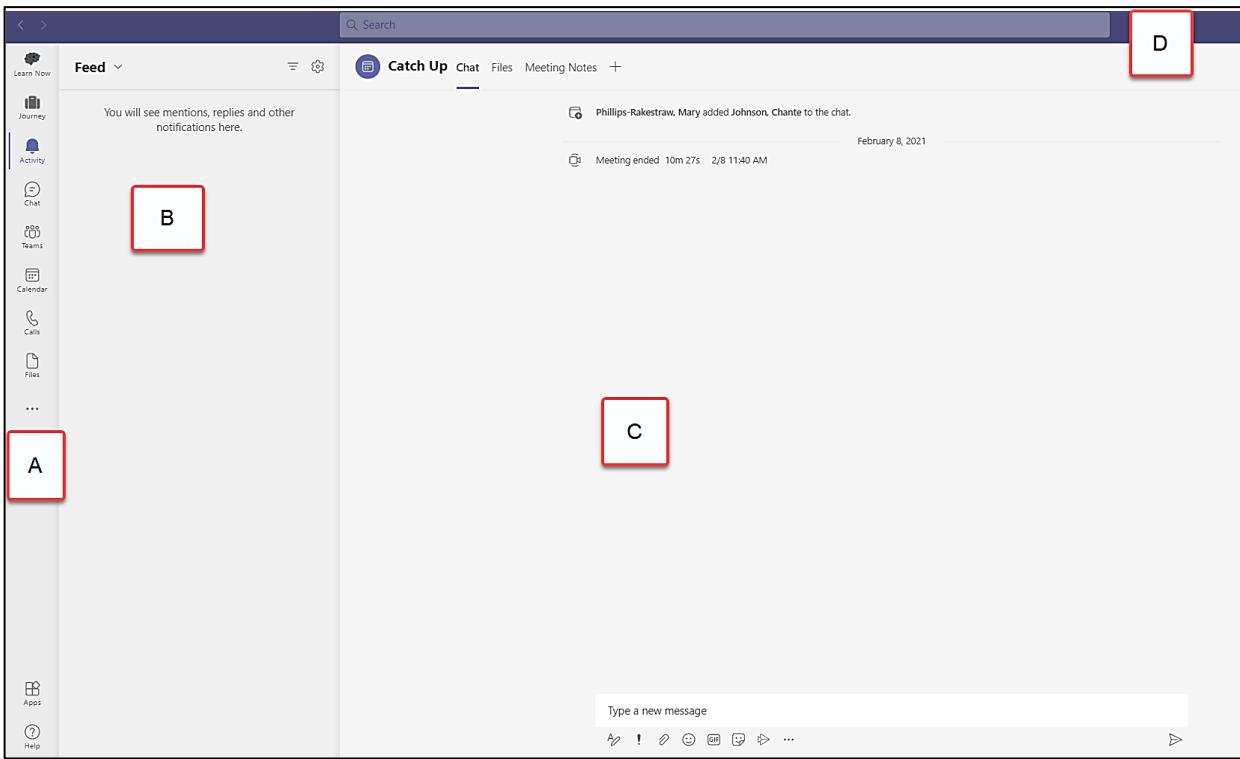
# What is Microsoft Teams?

Microsoft Teams is a chat-based collaboration tool that you can use to work with other people on your team.

In Teams, you can utilize features like **document collaboration**, **one-on-one chat**, **team chat**, **file sharing**, and more.



The Teams window has several main screen elements that you can use, no matter which view you're in.



<b>A</b>	<b>App Bar:</b> This is where you can switch between the main views (Activity, Chat, Teams, etc.). You can also add other apps to Teams and access them here.	<b>C</b>	<b>Content Pane:</b> This is where your chat conversations and other content (e.g., files, call history) is displayed.
<b>B</b>	<b>List Pane:</b> Depending on which view you're in, this will display a list of teams, chats, contacts, or other categories of information.	<b>D</b>	<b>Command Box:</b> This is where you can search for a contact, team, meeting, or anything else in Teams.

# App Bar

The **App bar** allows you to easily navigate Teams.

It contains options and commands for quickly accessing important resources in Teams.

Your App bar lists the same options and commands, regardless of where you are in Teams. Whether you're in a channel, a tab, or a document library, quickly get to where you need to go via the App bar.

Let's take a look at some of the commonly used icons on the App bar.

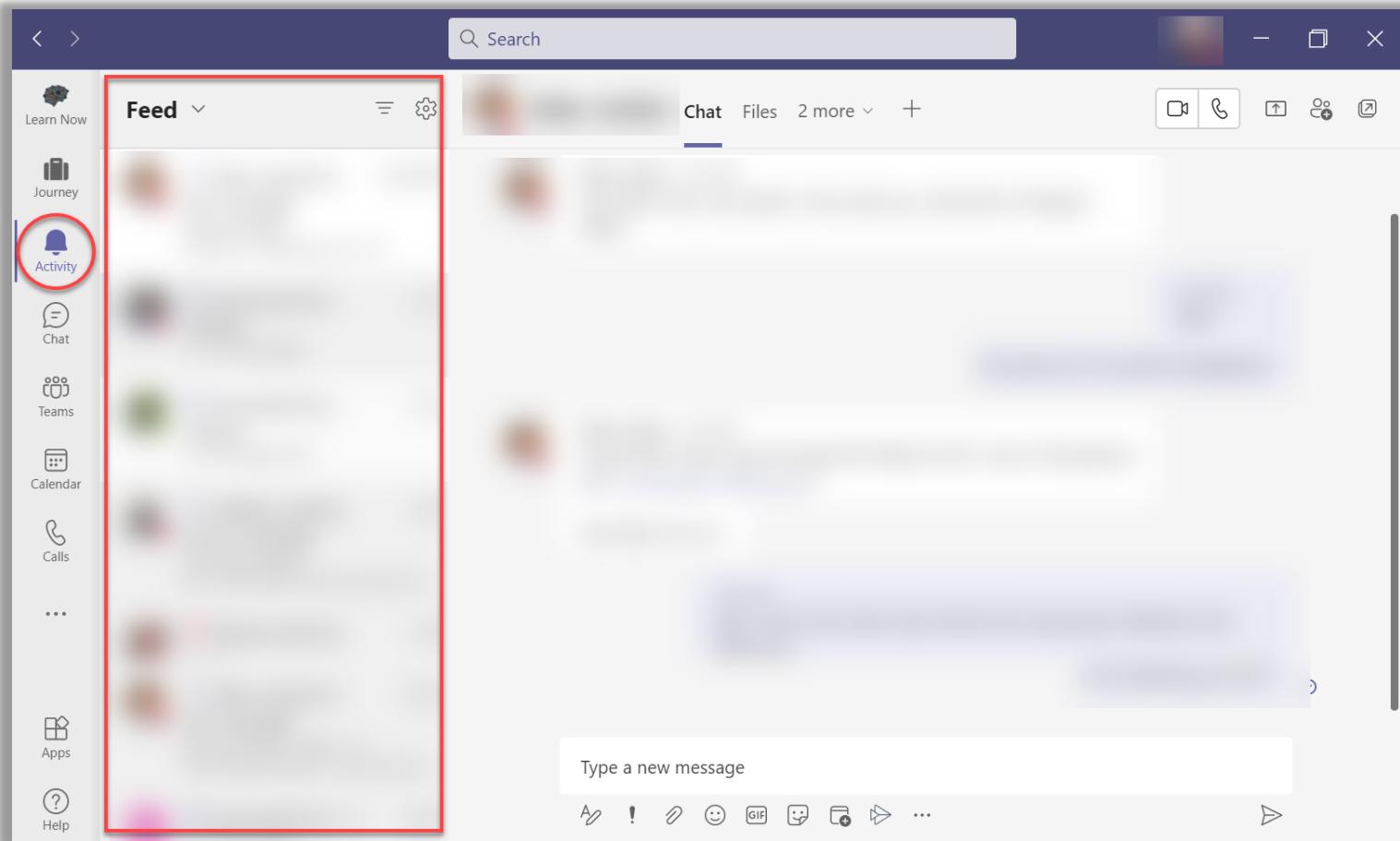
# App Bar

**NOTE:** If you don't see all of the icons we discuss on the following slides, check under the three dots (...).

Some apps may be “hidden” due to lack of space if you do not have your Teams window fully expanded or if you are working on a device with a smaller screen size.

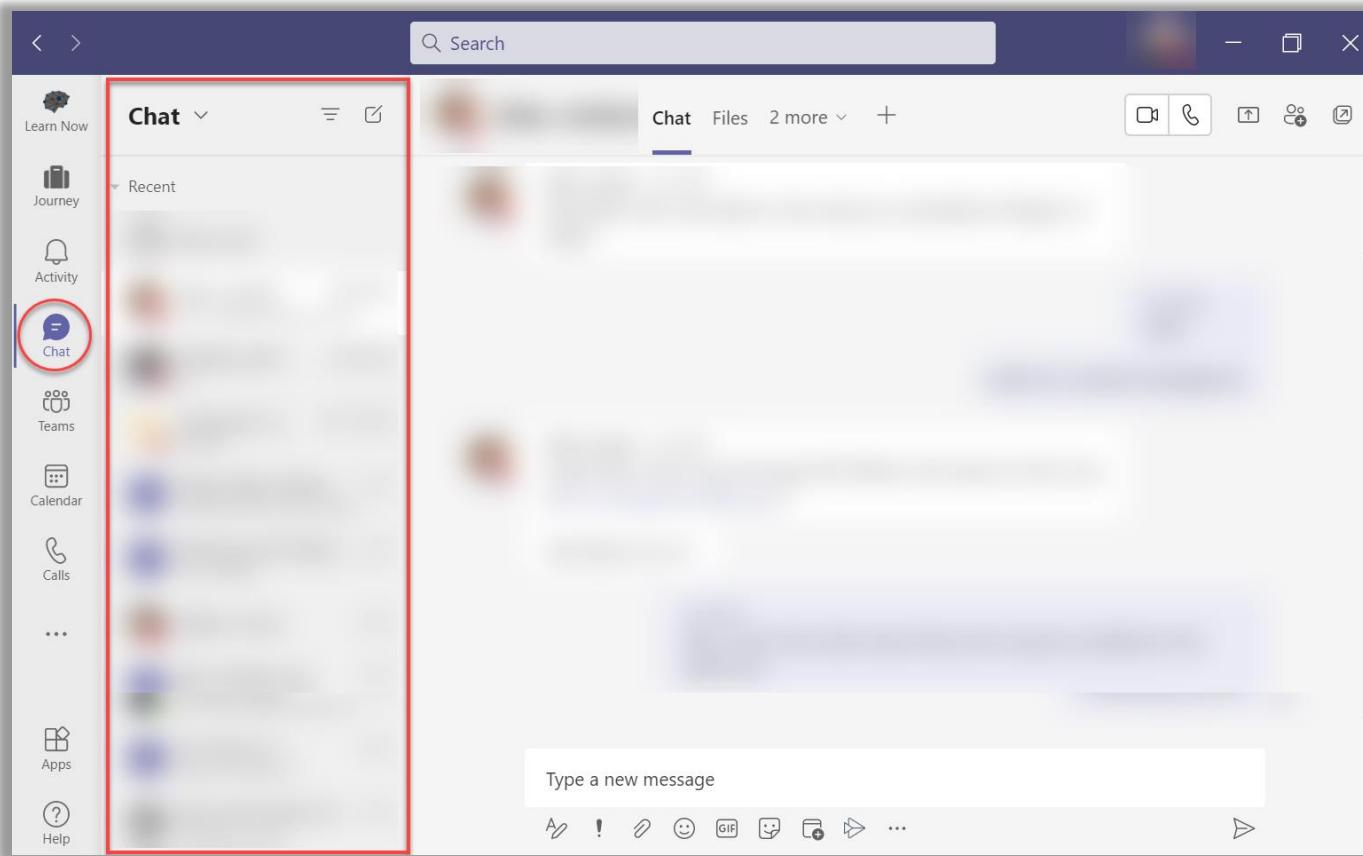
# App Bar

The **Activity Feed** shows all of your recent activity from across teams. See your voicemails, @mentions, replies to posts, and more. Filter your activity or set up activity notification options in the feed.



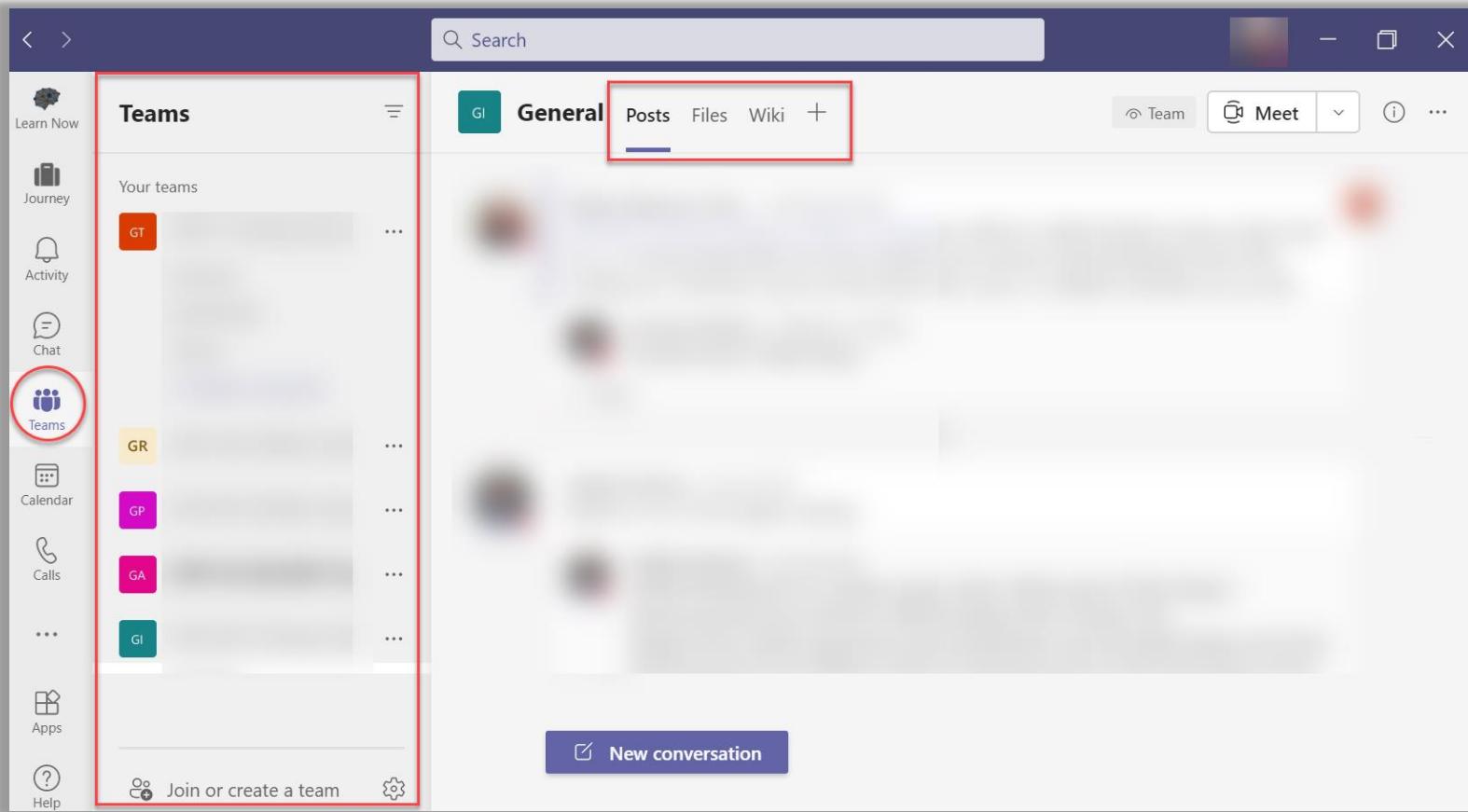
# App Bar

The **Chat** button opens all of your recent chats in the **list pane**. Here, you can also see meetings that took place outside of a channel. Click on a chat in the list pane to open it up in the **content pane**. Now, you can review your chat history or pick up where you left off with a new message!



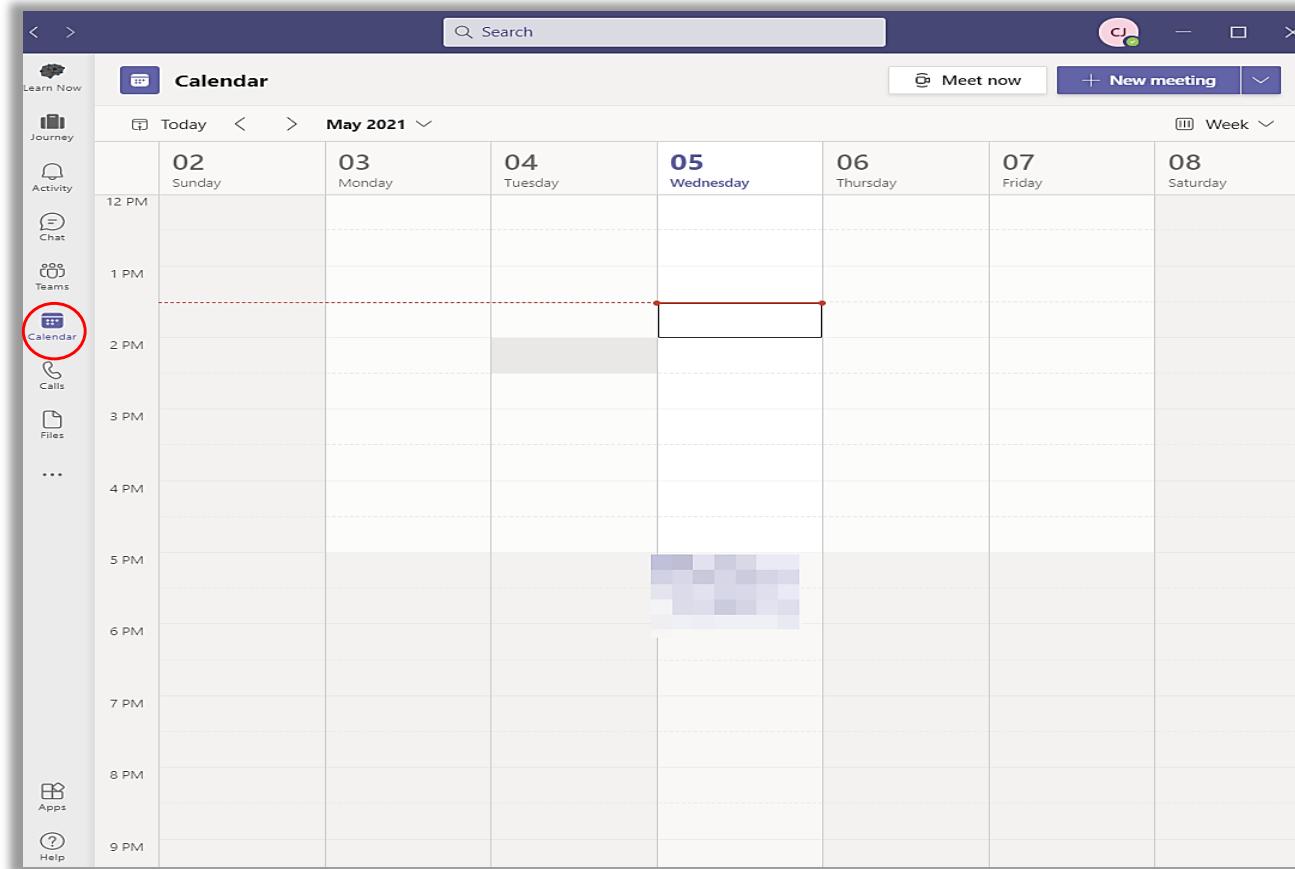
# App Bar

The **Teams** button shows your teams and channels in the **list pane**. Here, you can easily navigate to a different team or channel to view the content for that channel. Clicking on a channel opens that channel's posts in the **content pane**. Use the **tabs** at the top of the pane to navigate to different resources, or start a channel conversation.



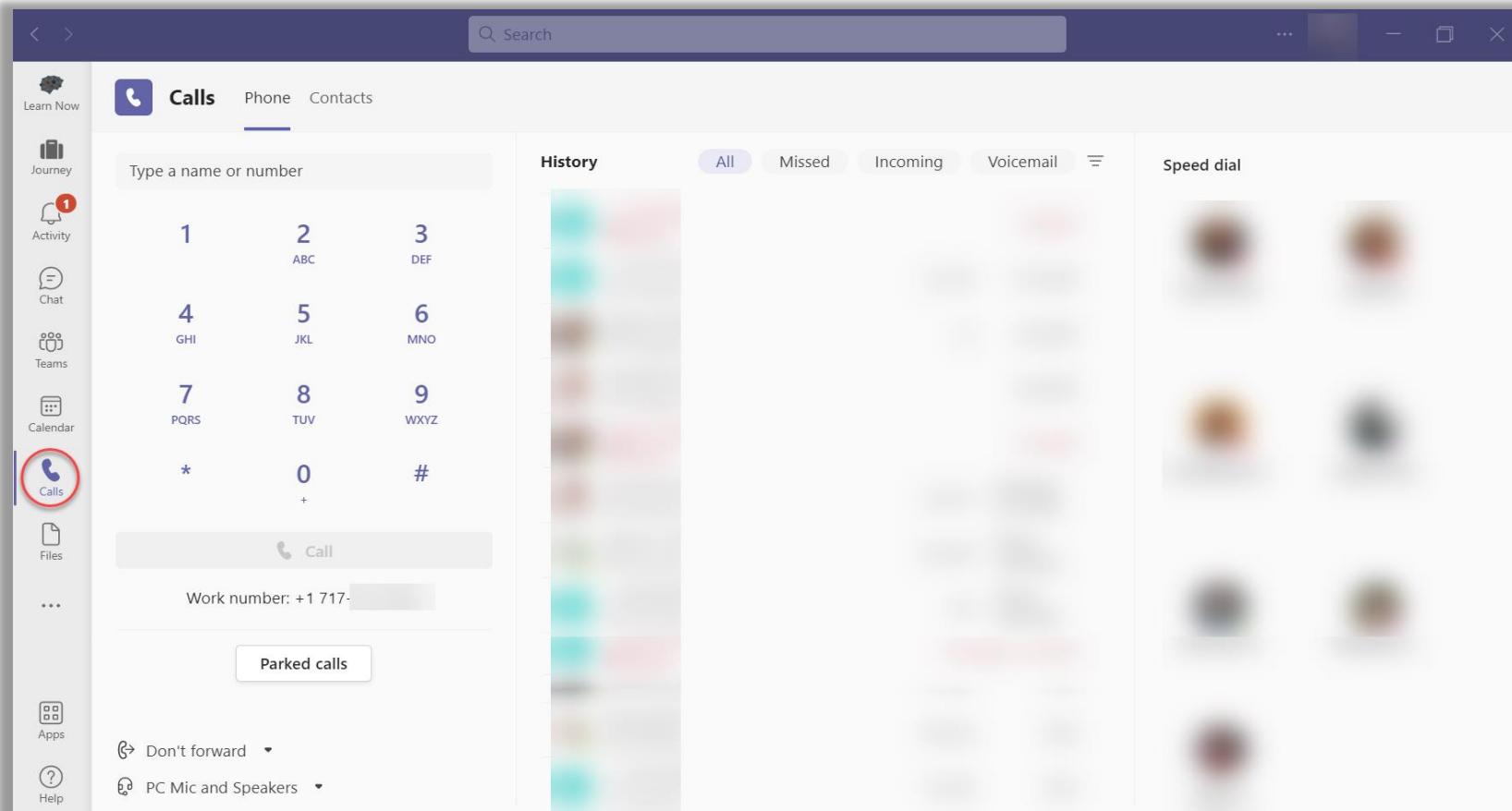
# App Bar

The **Calendar** button shows you all of your upcoming meetings for the week. The Teams calendar syncs with your Outlook calendar; here, you can see all scheduled events, whether they're scheduled to occur in Teams or not. Easily schedule a new Teams meeting from your calendar, too.



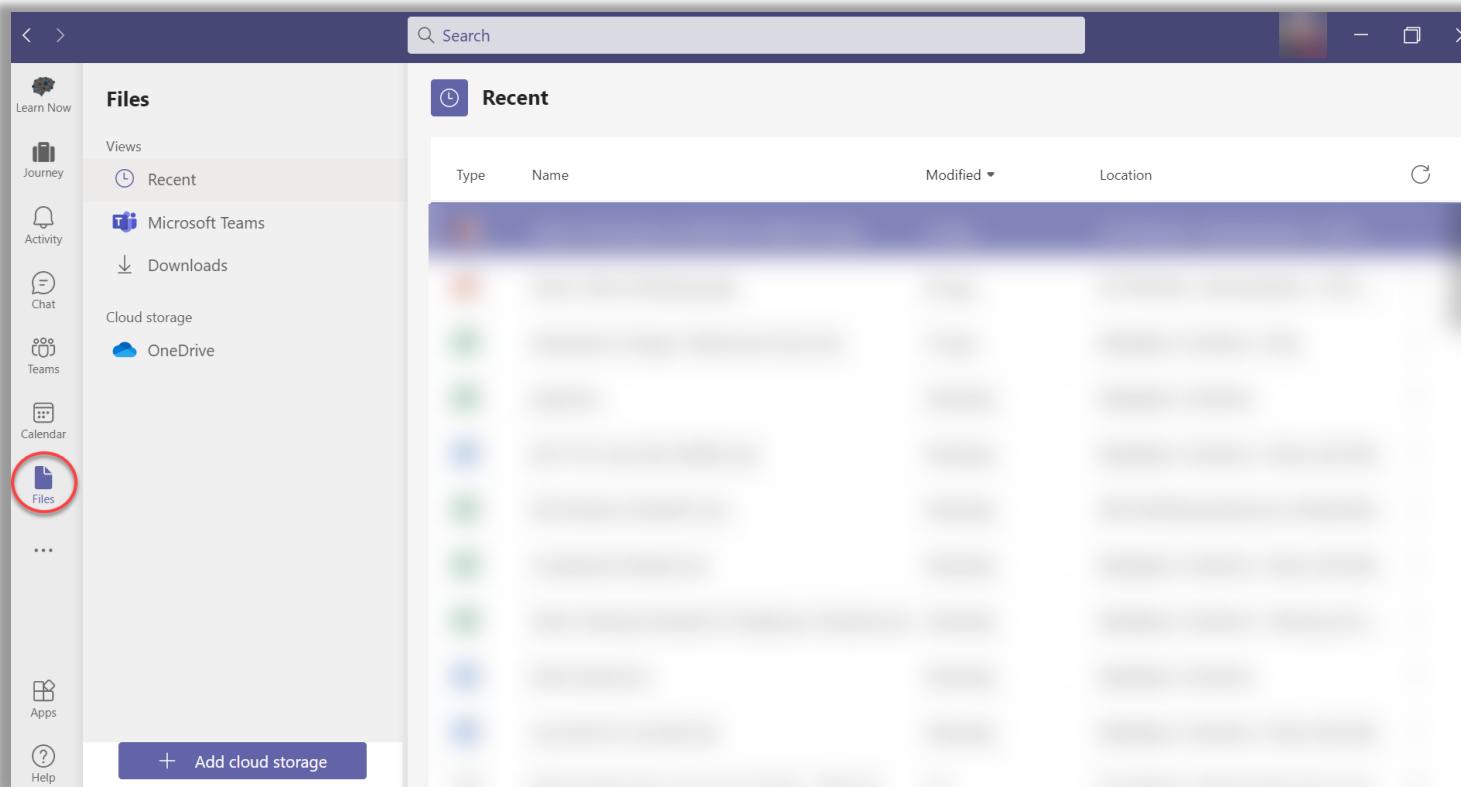
# App Bar

The **Calls** button opens up all of your calling tools. You'll be able to see your speed dial contacts, other contacts, call history, and voicemail; you'll also be able to make calls from here using the integrated keypad.



# Viewing Your Personal Files in the App Bar

The **Files** button gives you quick access to your recent cloud files. Here, you can see files from your team, your own OneDrive, and other SharePoint sites. These files are different from channel files. While you may see some of your team's files in this pane, you will likely not see all of them. We'll talk more about files later in the presentation.

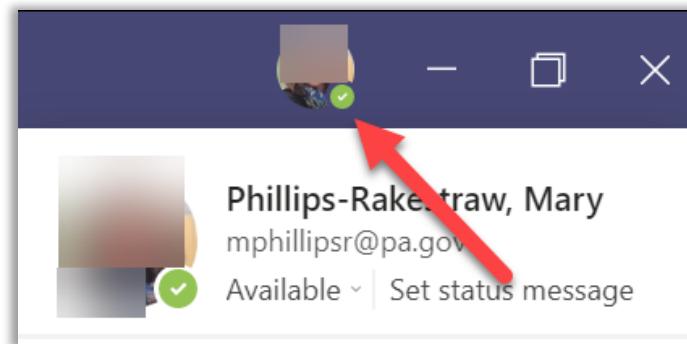


# Public or Private?

Teams Element	Public/Shared	Private
Activity feed		✓
Chats		✓
Teams and channels	✓	
Calendar		✓
Calls (including contacts and voicemail)		✓
Files (App bar)		✓
Files (channel tab)	✓	
Wiki	✓	
Planner (App bar)		✓
Planner (channel tab)	✓	
Other channel tabs	✓	
Channel posts and channel activity	✓	

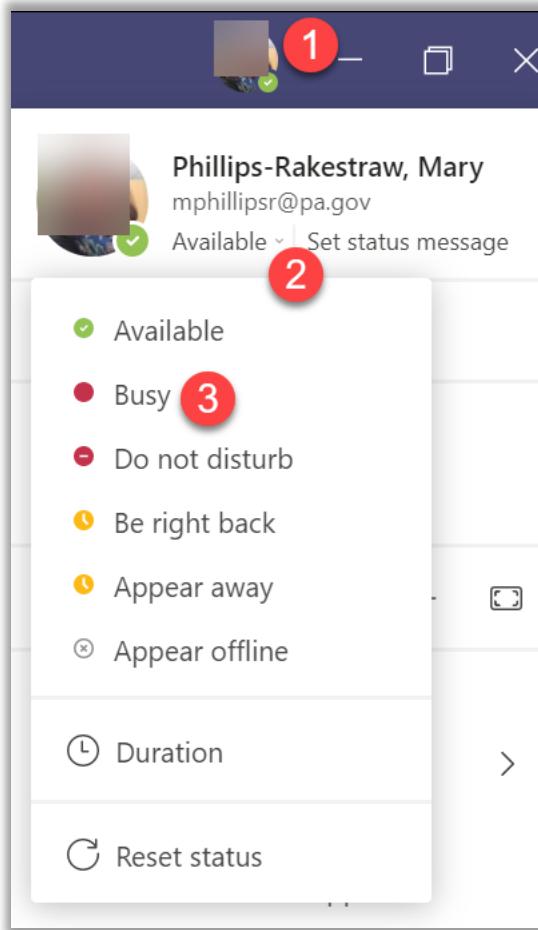
# Availability Status

- Your **status** gives other users an at-a-glance indication of whether you're available to chat, busy in a meeting, or just temporarily away for a few minutes.
- You can see your current status represented by an icon next to your profile picture in the upper-right corner. By default, your status is listed as "Available." Teams will automatically change your status when you're idle, in a meeting, or on a call.



# Set a New Status

While Teams will automatically change your status when you're busy or away, you can also manually set it.



Click your profile picture  
in the upper right



Click your current  
status, displayed under  
your name



Select a new status

## Exercise

- ✓ Open Microsoft Teams and sign in.
- ✓ Familiarize yourself with the screen and the App bar.
- ✓ Identify your availability status in Teams and change it to a different status.
- ✓ Set a status message in Teams.
- ✓ View the teams and channels you belong to in the list pane.



# Team Overview

# What is a Team?

- A **team** is a group of people within your organization working together for something specific. You may have a team for a specific project, for your entire department, or maybe even your entire organization. You can be a member of any number of teams.
- Teams are made up of **channels**, which are conversations on specific aspects of what the team is working towards. For example, a training team may have one channel for each topic that they're training on.
- A team can have up to 200 channels, including the default **General** channel. Everything that happens in a team—conversations, file sharing, or meetings—takes place in a channel.

# Joining a Team

Most of the time, you won't need to join a team yourself. The majority of users will be added to a team by a team owner, or by IT when the team is built.

- When you're added to a team, you'll receive an email in Outlook telling you that you've been added to a team, with the link to view the team.

Teams can be **private** (the default in the commonwealth) or **public**.

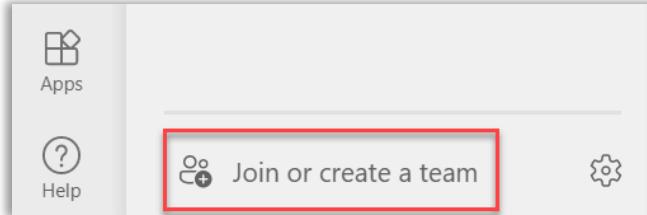
- You can join a private team if you're given a **code** by a team owner.
- You can join a public team with a code, or by searching for it. Users won't be able to see private teams in search results.

# Joining a Team

Join with a code

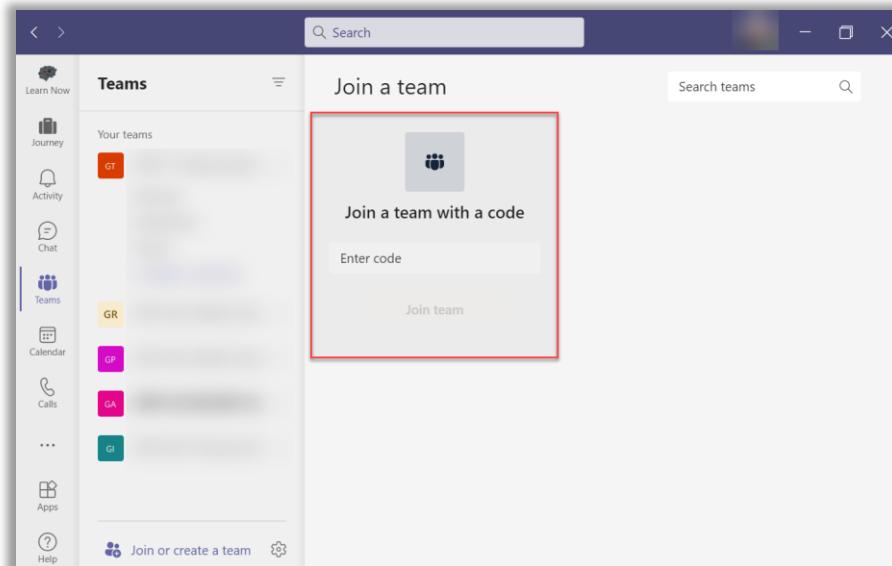
To join a team,

1. Click on the **Teams** button on the App bar (left side of screen).
2. Click the **Join or create a team** button (lower-left corner).



3. If you were given a code to join the team, enter it in the code box.
4. Click **Join Team**.

Only **team owners** can generate a code to share. This is done in the **Manage Team** section.

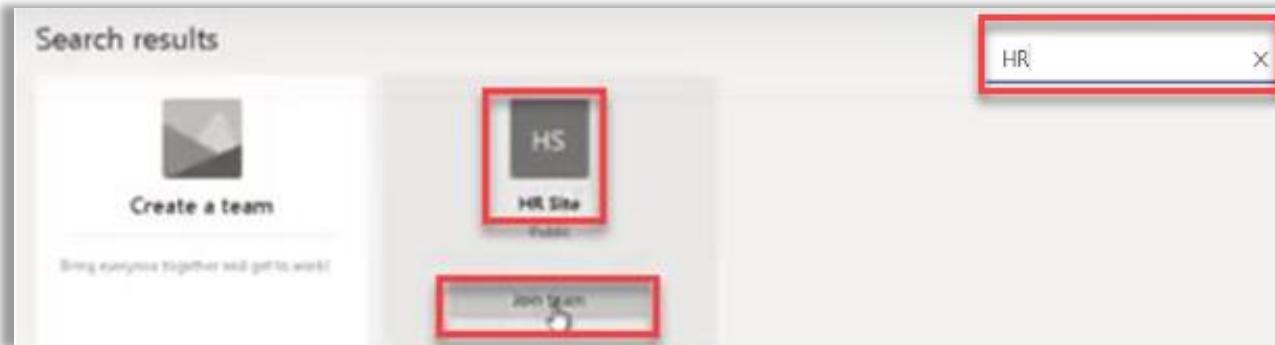


# Joining a Team

Search for a team

If the team you wish to join does not show up on the screen with the code, or if you don't have a code:

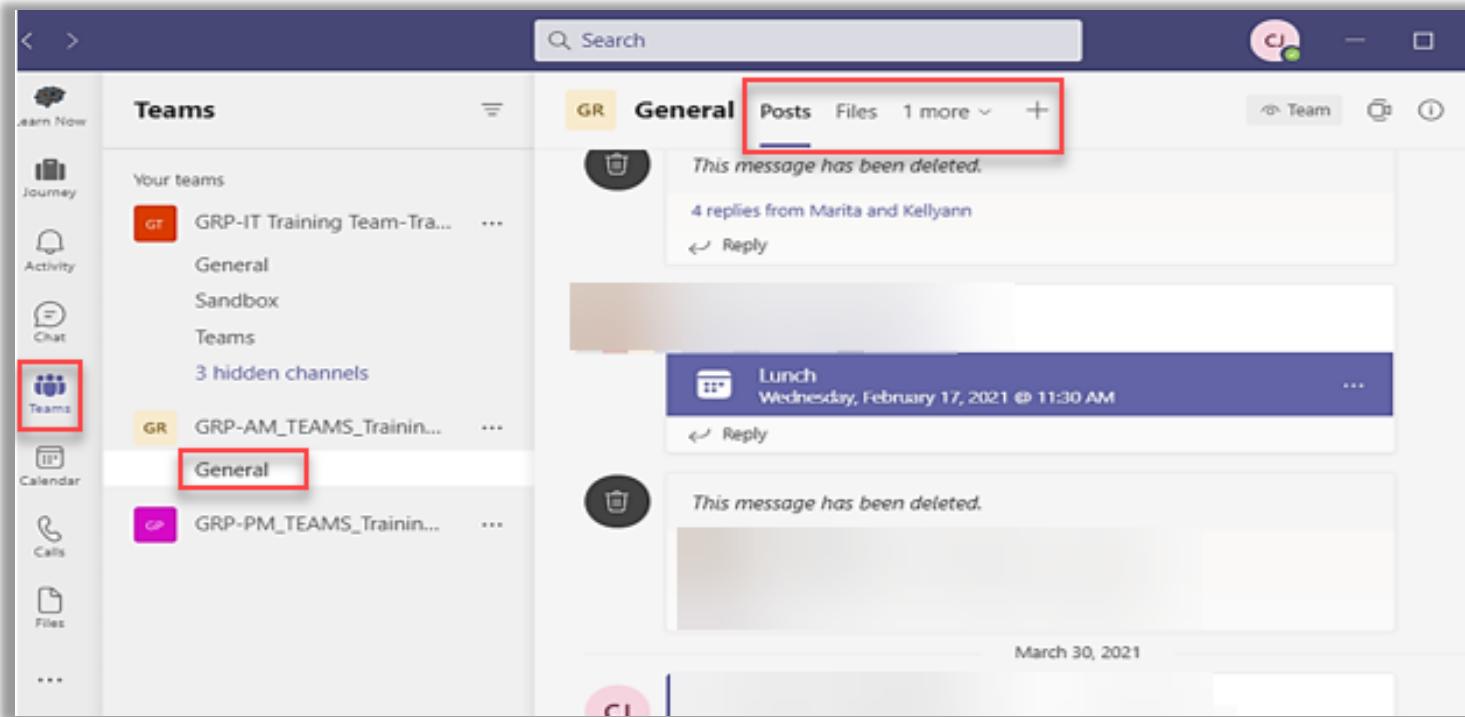
1. Click in the **Search teams** field (upper-right corner) and type any part of the team name you wish to join.
2. When you see the team name appear on the screen, click the **Join Team** button under the team box.



**Note:** You'll only see results for teams that are **public**.

# Joining a Team

- You will see the team appear in the **List Pane**, with all the channels that it contains. A **General** channel is automatically created for every team.
- You will also see tabs at the top of your window, which are associated with the highlighted channel. Each channel comes with default tabs including **Posts** and **Files**.



# New Teams

*Need a new Team built?*

*...contact the IT Service Desk  
(717-783-8330), or submit an  
RFS!*

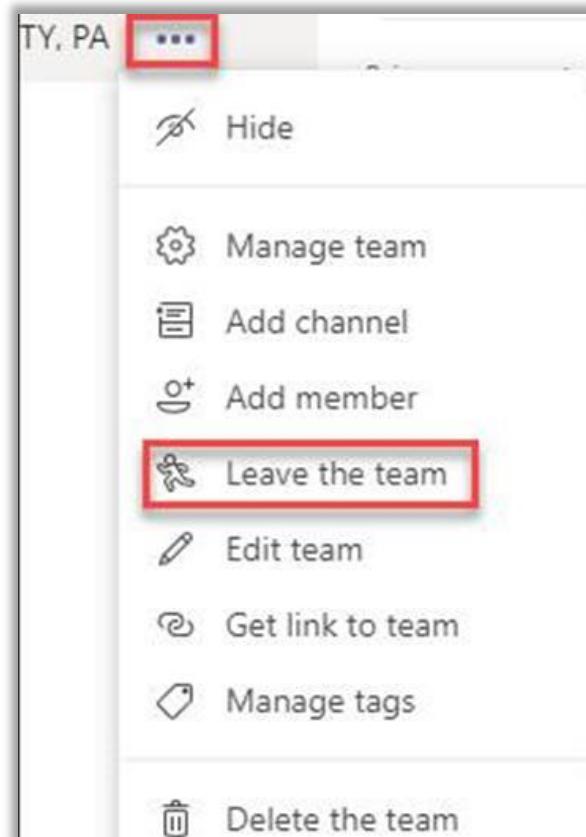
**Be prepared to provide:**

- A name for your team
- The name of an owner or owners (we recommend having two or more owners)
- A list of members to add to the team (or have your team owners add members after the team is created)

# Leave a Team

If you no longer want to be a part of a specific team,

1. Click on the **More options** button (...) next to the team you wish to leave.
2. Click on the **Leave the team** command.
3. Click the **Leave the team button**. The team will disappear from your Teams List Pane.



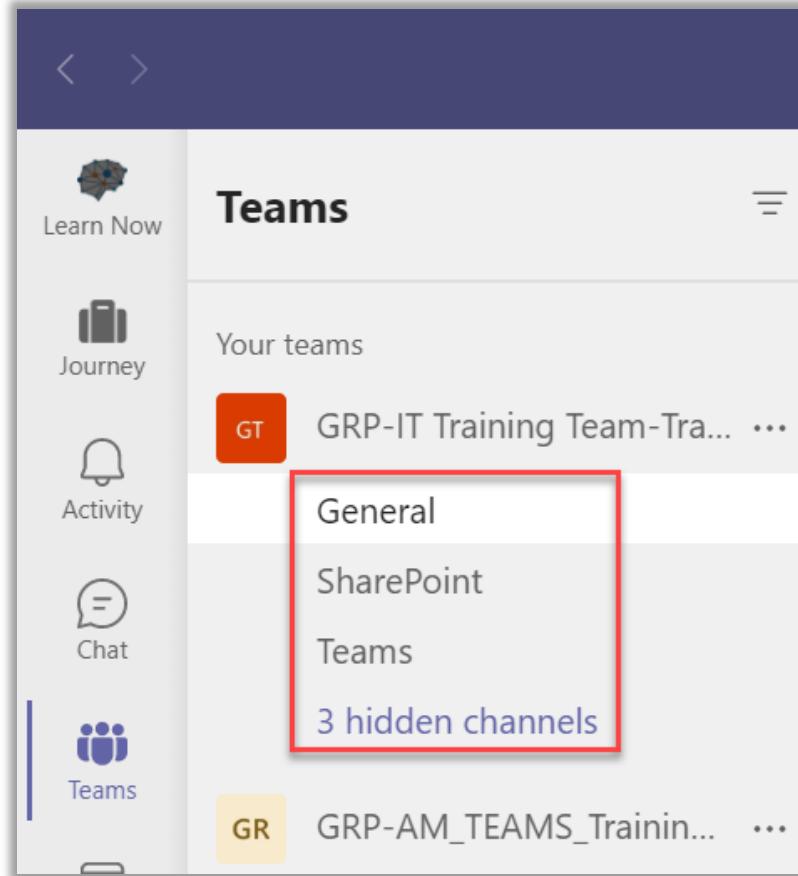
# Channels

# What is a Channel?

Almost everything that you do in Teams happens in a **channel**.

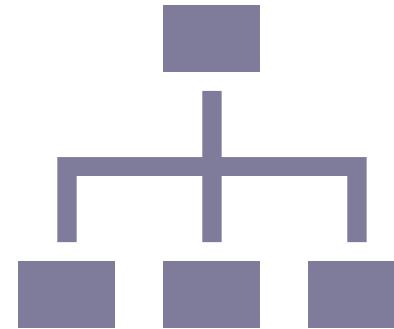
Channels fall underneath of teams. By default, every team is created with a **General** channel.

Click the **Teams** icon in the App bar to view your channels in the List Pane.



# What is a Channel?

Think of a **channel** in Teams as a department within an organization or a specific project that some team members are working on together. A team can contain as many channels as you want, up to 200.



Channels allow teams to separate the work for different projects they're working on. For instance, a training team might have a channel for each topic they train on. When you're finished with a project, it's easy to delete the channel you no longer need.

# Creating a Channel



When might you want to create a new channel?

- At the start of a new project
- To help organize an event
- To organize your team's work by topic
- To organize your bureau by divisions/sections

Anyone on a team can create a new channel if needed.

1. Click the **More options** button (...) next to the team under which you wish to create a new channel.
2. Click **Add channel**.
3. Enter the channel name and description, then click **Add**.
4. The new channel appears under your team in the List Pane.

# View a Team Channel

Viewing a channel is easy – just click its name in the List Pane under the **Teams** tab. By default, you'll see the **Posts** tab, where teammates can converse, share, and post updates. Think of this tab as being similar to a bulletin board.

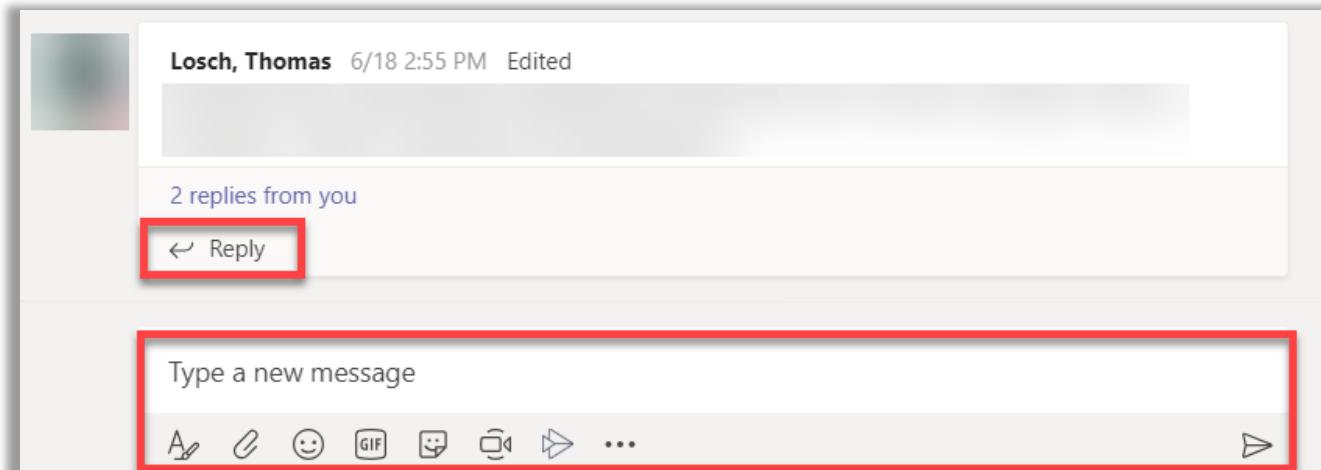
The screenshot shows the Microsoft Teams application window. On the left, there's a vertical navigation bar with icons for Learn Now, Journey, Activity, Chat, Teams (which is highlighted with a red box), Calendar, Calls, and Apps. Below these are buttons for 'Join or create a team' and 'Help'. The main area has a dark header with a search bar and tabs for 'General' (highlighted with a red box) and 'Posts'. Under 'General', there are three posts:

- Post by Phillips-Rakestraw, Mary (August 25, 2020):** Johnson, Chante Losch, Thomas Apparently you can check out files in Teams right from Teams, now, without having to go into SharePoint. 3 replies from you, Losch, Thomas, and Chante. [Reply](#)
- Post by Losch, Thomas (September 4, 2020):** https://support.microsoft.com/en-gb/office/team-owner-member-and-guest-capabilities-in-teams-d03fdf5b-1a6e-48e4-8e07-b13e1350ec7b also put this link here - Privileges for Owners & Members in MS Teams in MS Teams-related Wiki. [Reply](#)
- Post by Microsoft Office (September 15, 2020):** Team owner, member, and guest capabilities in Teams Guests in Microsoft Teams can participate in channels, conversations, chats, and meetings; they can share files in channels, add new channels, and use Wiki. support.microsoft.com [Reply](#)

At the bottom, there's a blue button labeled 'New conversation'.

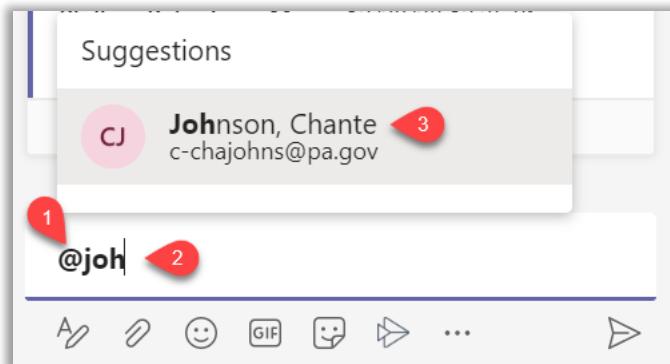
# Channel Conversations\*

- The **Posts** channel tab makes it easy to interact with your teammates.
- Unlike private chats, channel posts are visible by everyone on your team, making it simple to communicate important information to multiple people, get feedback from your whole team, and set up meetings with your colleagues.
- To start your own channel conversation, simply begin typing in the **compose** box at the bottom of the **posts** tab.
- Join an existing conversation or reply to a post by clicking the **Reply** button underneath of an existing post.



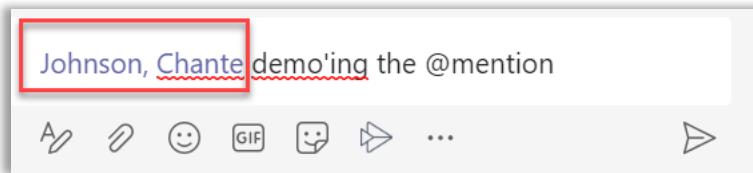
# @mentions

- An **@mention** “tags” a user. @mentions aren’t exclusive to Teams, but they can be used heavily throughout Teams.
- Use @mentions to target specific people in many areas of Teams.
- @mentions aren’t necessarily private – for example, if you @mention someone on a channel Posts tab, everyone in the team can see the post. The @mention just sends a separate notification to the tagged person so that they know you mentioned them. This makes it more likely that the person being mentioned will notice your message and won’t accidentally miss it.
- To @mention someone, type @, then begin typing their name (without typing a space). Choose their name from the suggestions. Begin typing your message.

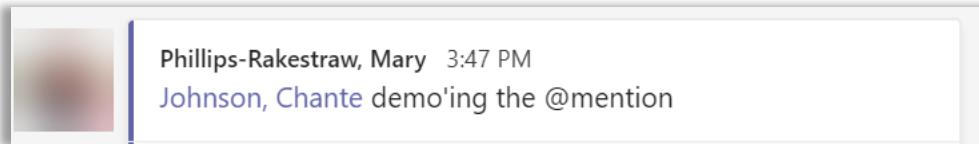


# @mentions

- Once you've clicked their name, begin typing your message. Their name will precede your message in purple, reminding you that you're mentioning that person.



- When you make your post, it will look like this:



- The person who you @mentioned will receive a notification in their activity feed telling them they've been mentioned in Teams.

## Exercise

- ✓ View the Posts and Files tabs within your channel.
- ✓ Start a channel conversation with your fellow teammates.
- ✓ Reply to a channel conversation(s) from someone on your team.
- ✓ Use the @Mention feature to send a notification about your post to one (or several) of your teammates.



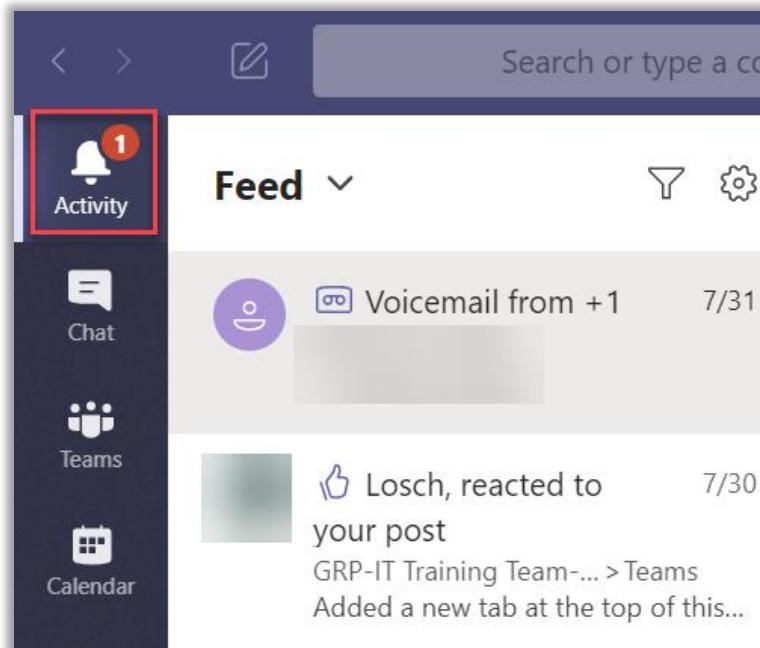
# The Activity Feed

# View the Activity Feed

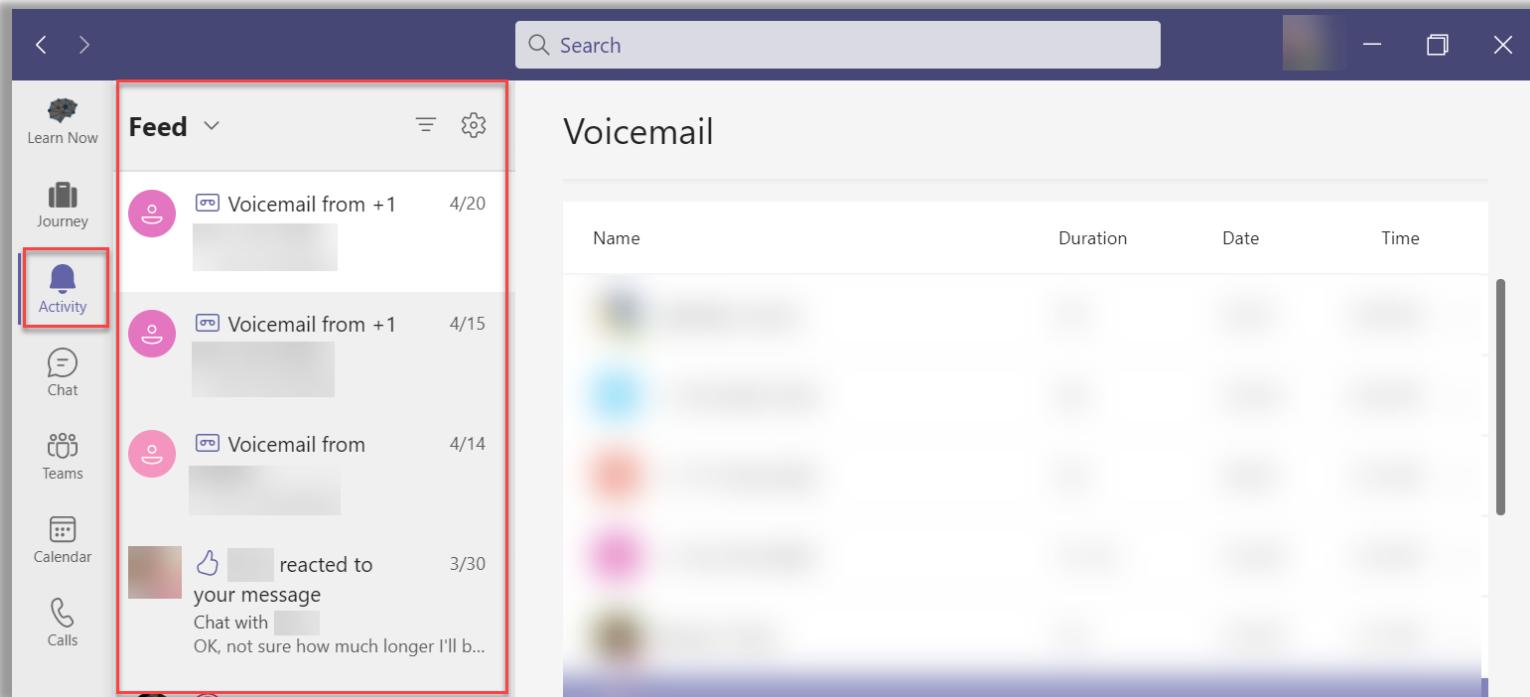
- The **Activity Feed** is one of the views available on the App bar. It's where you can quickly view other people's recent activity that's relevant to you.
- The Activity Feed shows a summary of everything that's happened in the channels that are in your teams list.
- It also displays all sorts of notifications involving you, such as @mentions in team discussions, replies to threaded conversations, likes on messages, and missed calls and voicemails.
- When you select an item in the Activity Feed, that item's chat or channel is displayed in the Content pane.

# View the Activity Feed

When there's new activity for you to review, a number will be imposed over the Activity button. New activity is listed at the top of your feed.



# How to view the Activity Feed

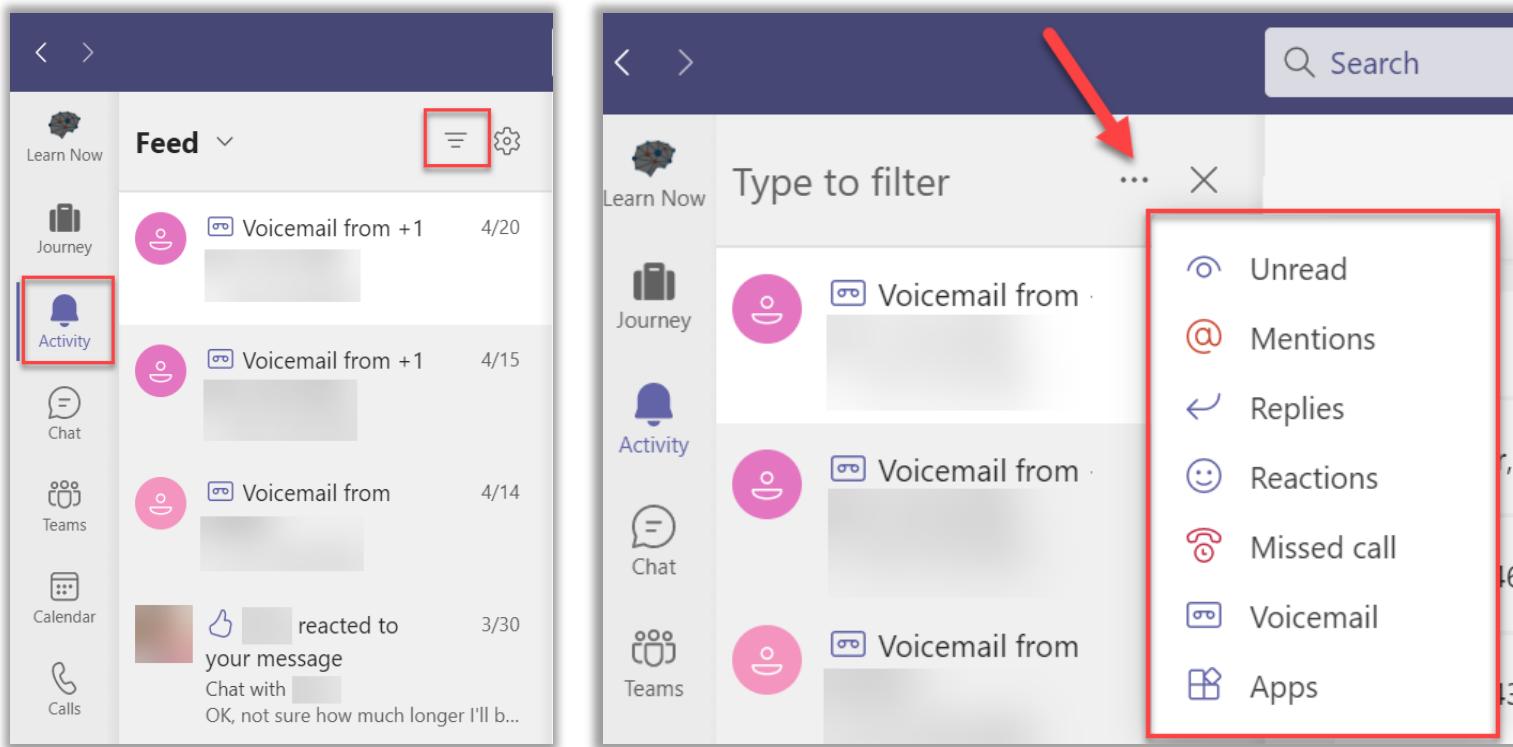


1. Click the **Activity** button on the App bar.
2. Click an item in the Activity feed to display it.

# Filter the Activity Feed

The Activity Feed can be narrowed down by filtering the data.

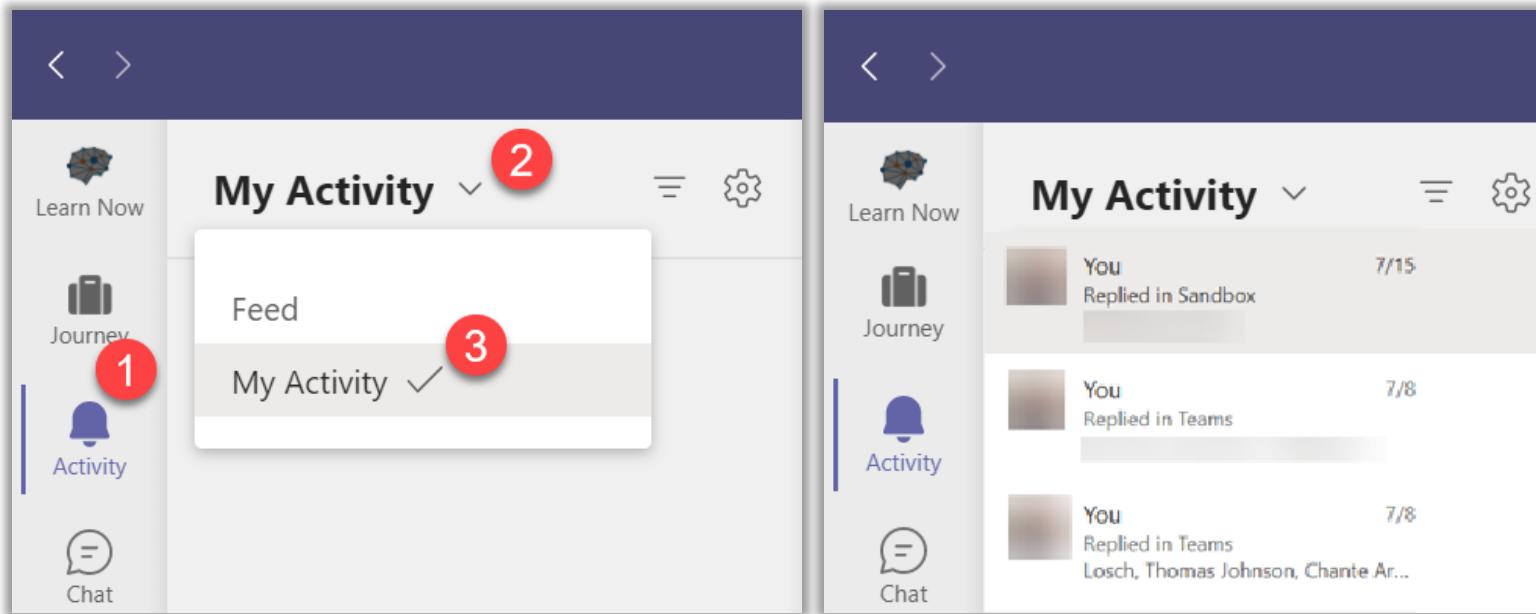
1. Click the Filter icon.
2. Sort by text (name or content) or click more options and select a type of activity.
3. Click the X next to a filter to clear it.



# View Your Activity

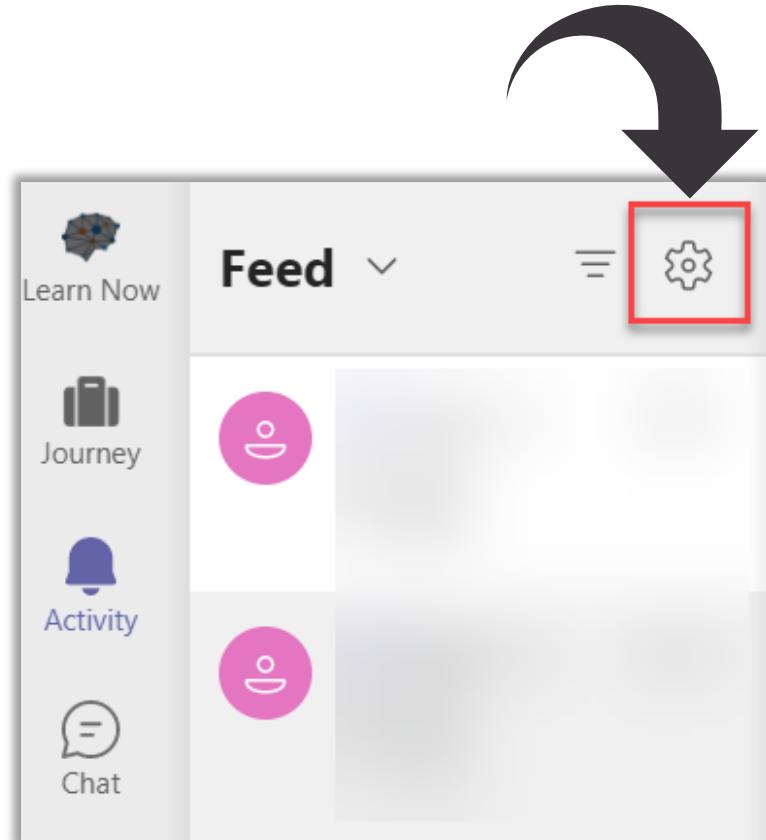
You can also use the Activity view to display only the most recent Teams activity made by you.

Click the Feed list arrow, then select **My Activity** and click an item to display it.



# Activity Feed Options

**Tip:** To manage what kind of notifications you receive for activity in Teams, click the **Options** button at the top of your feed. Update your alerts so you receive them by email, in Teams, or both.



## Exercise

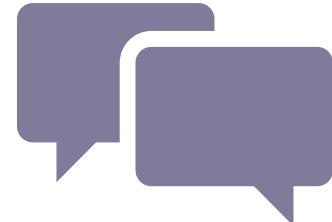
- ✓ Switch to the Activity Feed in Teams.
- ✓ Click on any activity item to view it.
- ✓ Click on the More options (...) button next to various items and observe the choices.
- ✓ Filter the activity feed by @mentions, replies, and unread messages.
- ✓ Clear the activity feed filters.
- ✓ View your activity feed notification options.



# Chat Overview

# Chat Overview

- Use private or group chats to talk individually with certain people, instead of posting a public message to your team's channel posts. Think of Teams chat as being like a text message or IM.
- Chat with your team members or non-team members within your organization.
- Chats can be simple one-on-one conversations or lively group conversations, and can even include emoji, GIFs, and stickers. You can also use chat to share files and links.

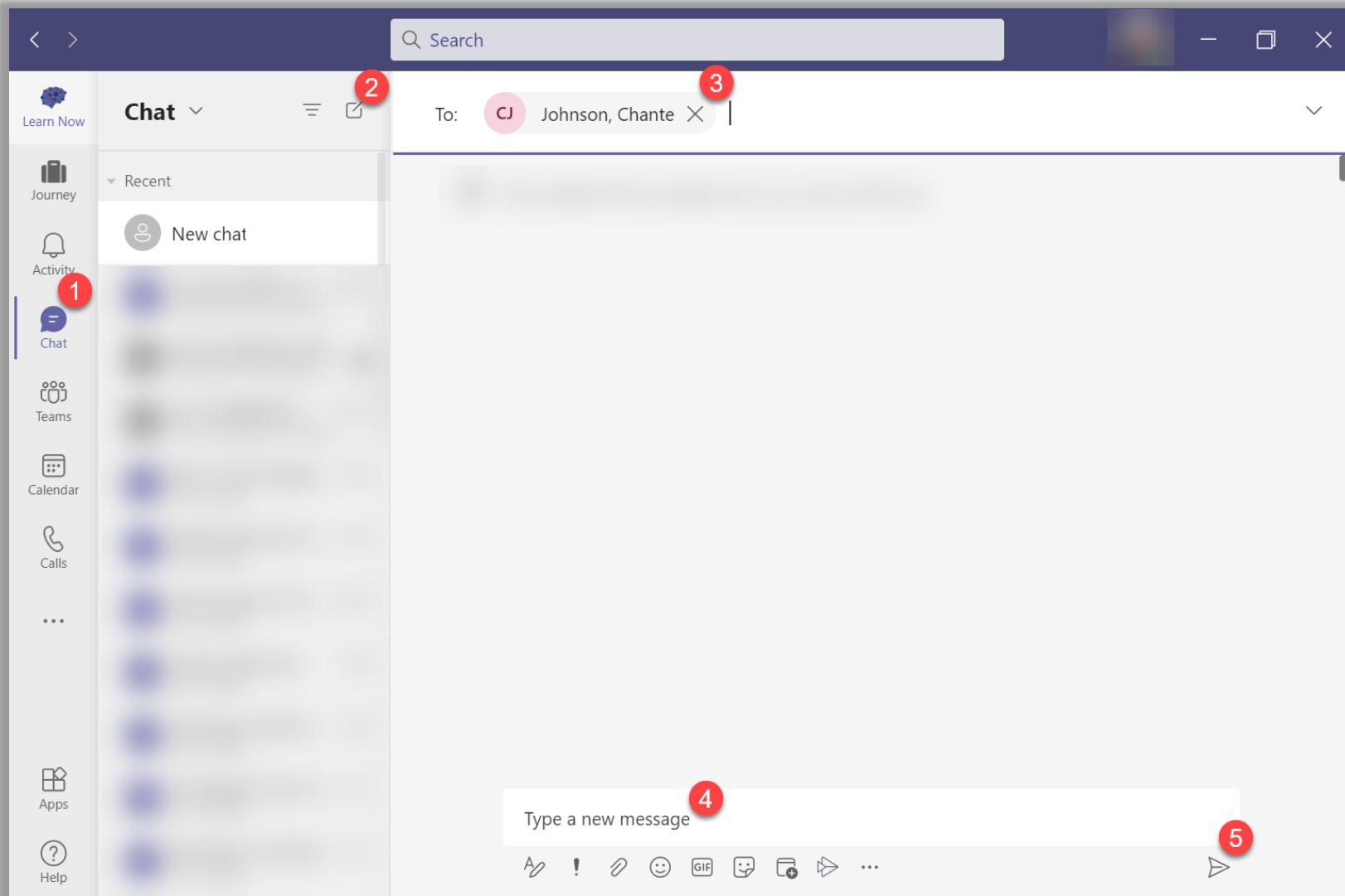


# Start a New Chat\*

*To start a new chat,*

1. Click the **Chat** icon on the App Bar
2. Click the **New Chat** button in the List Pane 
3. Enter the name of the person you want to chat with in the **To** field
4. Enter message in compose box
5. Click **Send**

# Start a New Chat\*

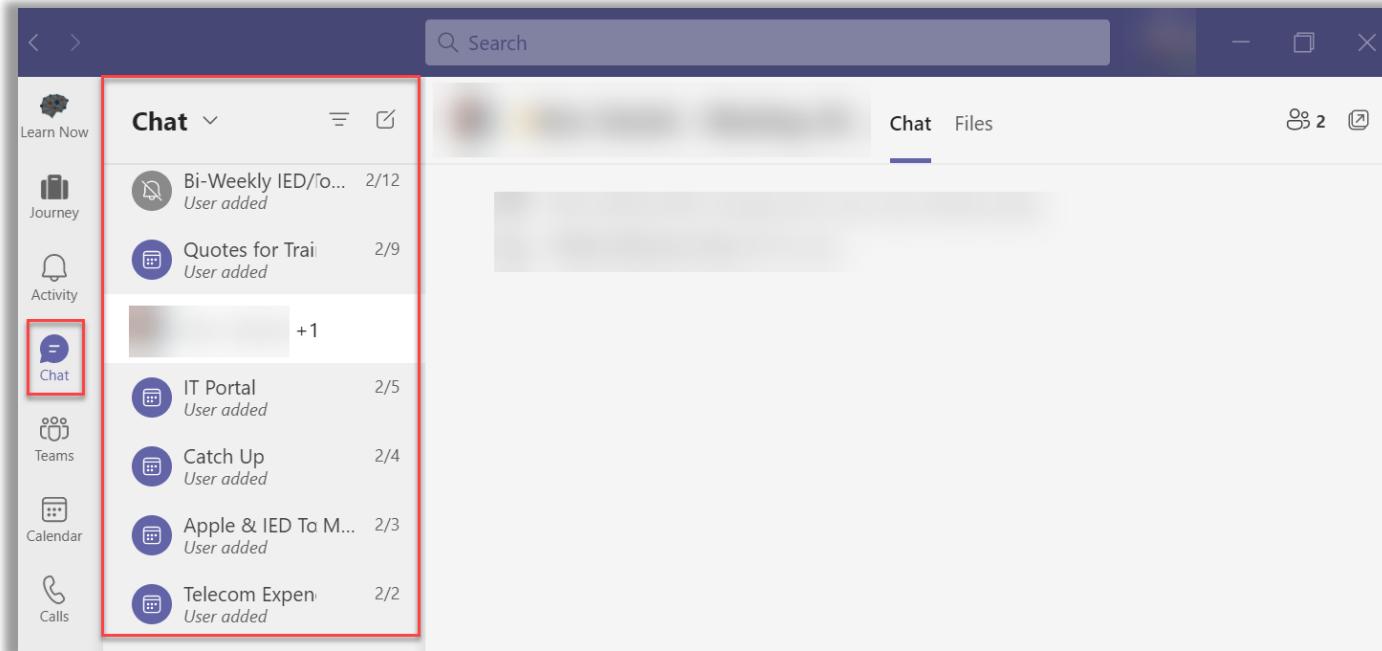


# View a Recent Chat

While you're in Chat view, the List pane displays all the recent chats you've had. This lets you easily manage multiple chats at once and return to a recent chat quickly.

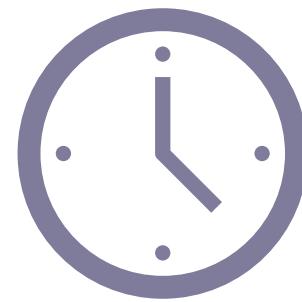
Simply select a chat from the **Recent** list to view it or continue chatting.

**Note:** Meetings held outside of a channel are also stored as chats.



# Teams Chat Retention

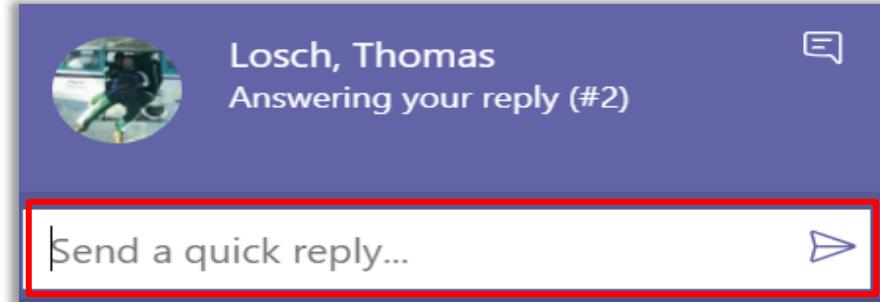
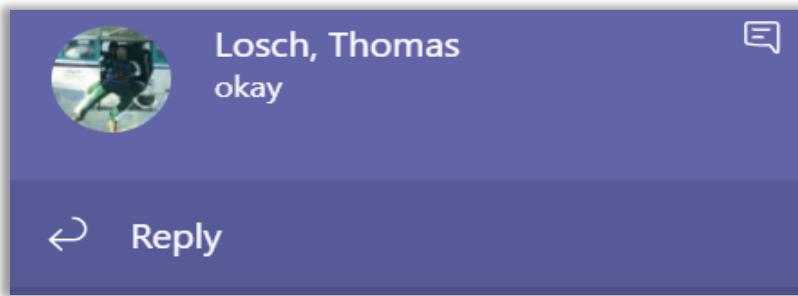
- Teams private chats are saved for **7 days**, after which time they are automatically purged.
- **Important:** Files that you share via Teams private chat will not be accessible in Teams after 7 days! **Files shared in a Teams private chat are accessible after 7 days in OneDrive.**
  - If you shared the file, find it in the **Microsoft Teams Chat Files** folder of your OneDrive.
  - If the file was shared with you, find it in the **Shared** section of your OneDrive.
- Teams private chats **do not** appear in your Outlook Conversation History folder. Make sure you save any important Teams chat conversations before they expire if you will need to access them longer than 7 days!



# Reply to an Incoming Chat

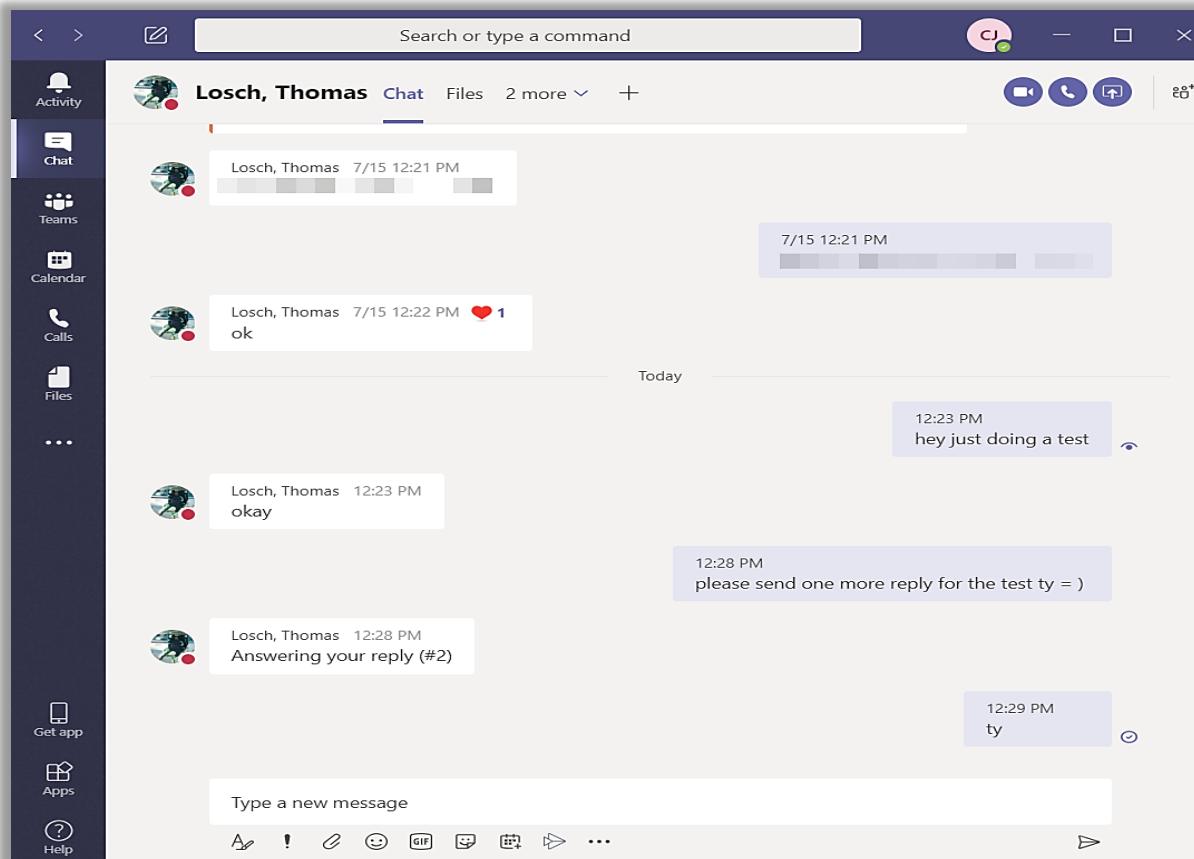
Whenever someone sends you a message, a pop-up notification will appear on-screen. This will show who the message is from, a short preview of the message, and the option to quickly reply.

Click **Reply** in a notification pop-up, enter a reply, and click **Send**.



# Reply to an Incoming Chat

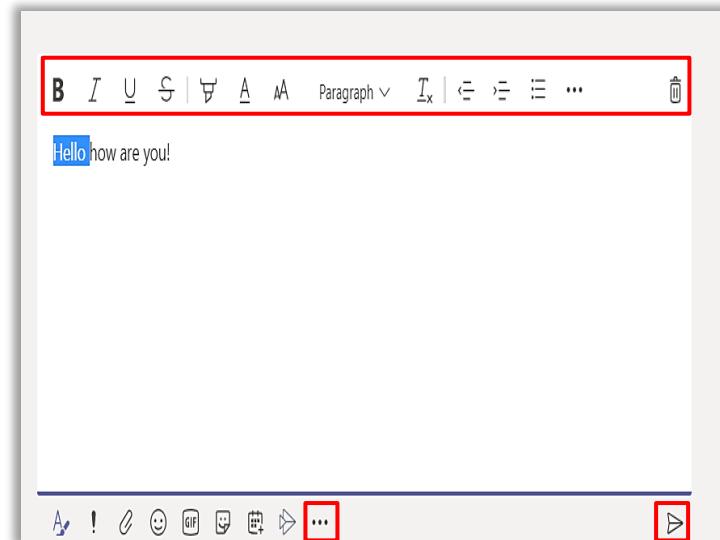
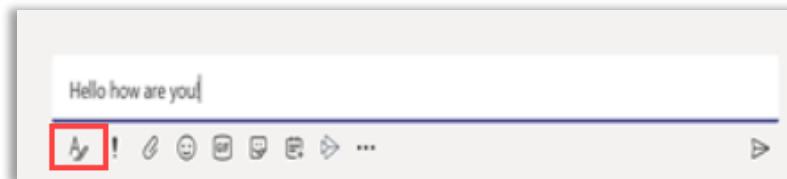
The full chat thread will appear in the Content pane.  
Reply to incoming chats from here, instead of the chat pop-up  
notification, if you wish.



# Format Chat Text

Your chats in Teams are not limited to plain text. You can add style to your chat messages with plenty of formatting options.

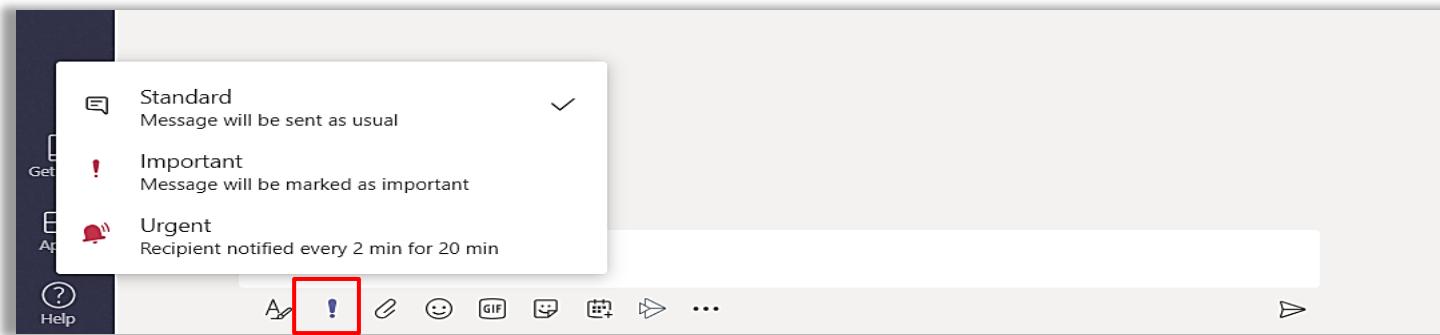
1. Click the **Format** button below the chat message compose box.
2. Select the text you want to format.
3. Click a formatting option.
4. Click the **More Options** (...) button to view more formatting options.
5. Click **Send**.



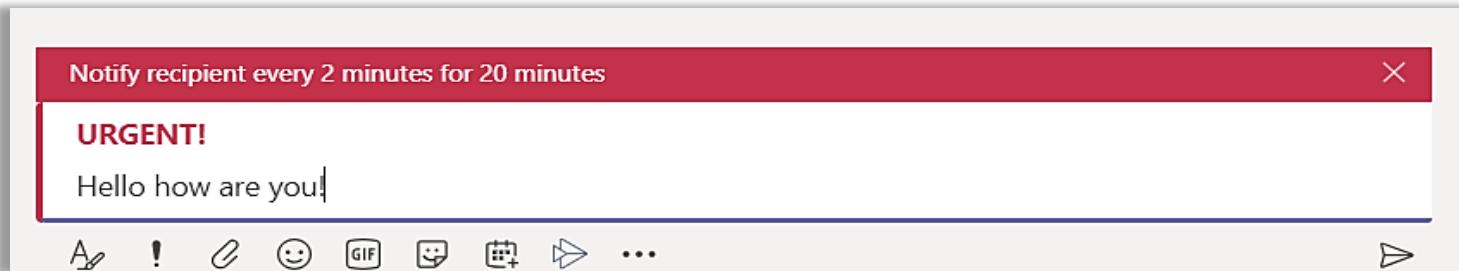
**Note:** When the text formatting pane is open, you cannot use the **Enter** key to send a message. **Enter** tabs to a new line. Click the **Send** button to deliver your message.

# Send Important and Urgent Messages

You can choose to mark a chat message that you send as important or urgent if it's crucial that the recipient see it as soon as possible.



1. Click the **Set Delivery Options** button below the compose box
2. Select an importance level for the message
3. Enter a message and click **Send**.

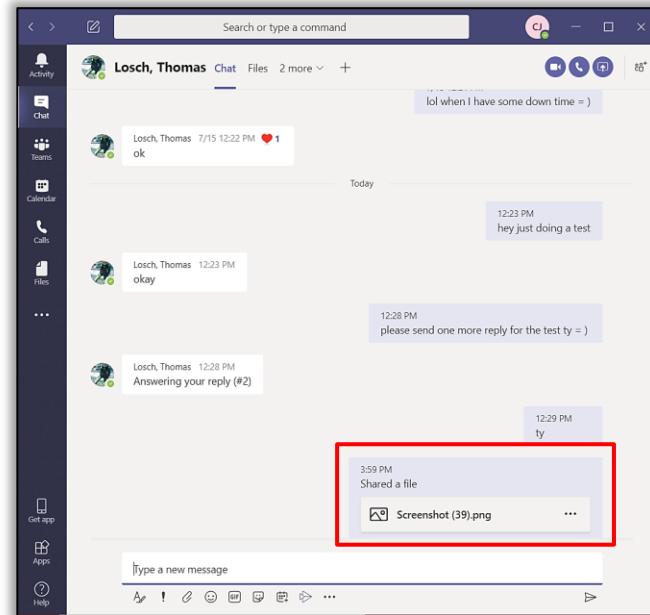
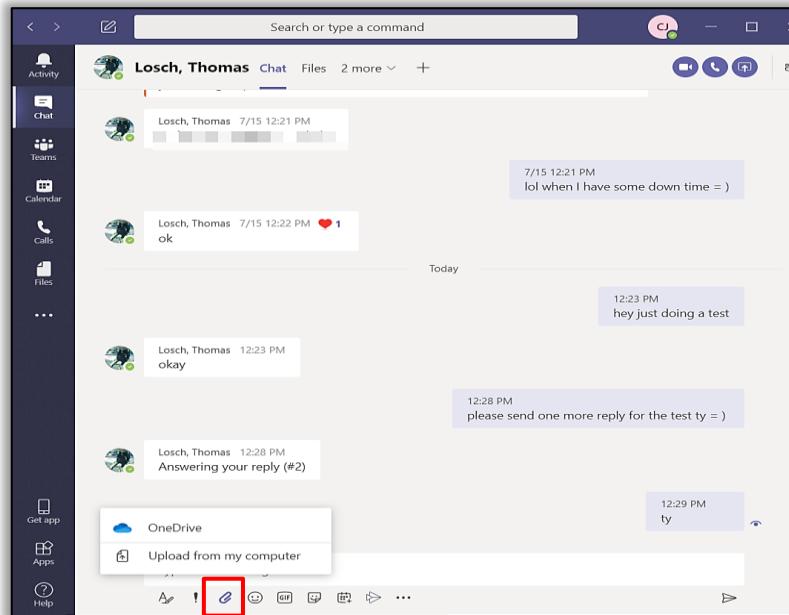


# Share Files in a Chat

To attach a file to a chat message,

1. Click the **Attach** button below the message box.
2. Select a source for a file.
3. Select a file and click **Open**.

The file will appear within the chat.



# Hide a Chat

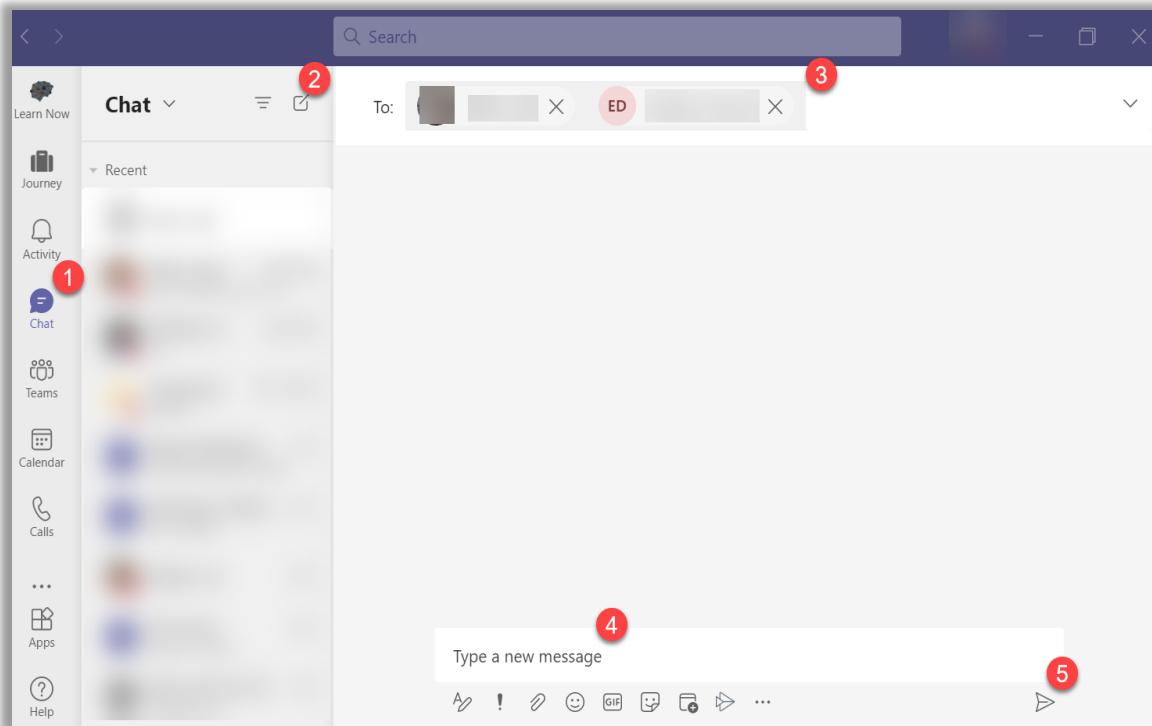
Chat conversations in Teams can't be deleted.

You can hide conversations you no longer need to keep them out of view and reduce visual clutter.

Find the conversation in your chat list, click **More Options (...)**, and click **Hide**.

# Group Chats

If you need to chat with several people about the same topic, you can begin a chat with multiple contacts at once.



- Click the **New Chat** button.
- Enter the name of a person in the group you want to chat with, then select them from the search results.
- Continue entering contacts in the **To** field until you have everyone you need.
- Enter a message for the group and click **Send**.

# Invite People to a Group Chat

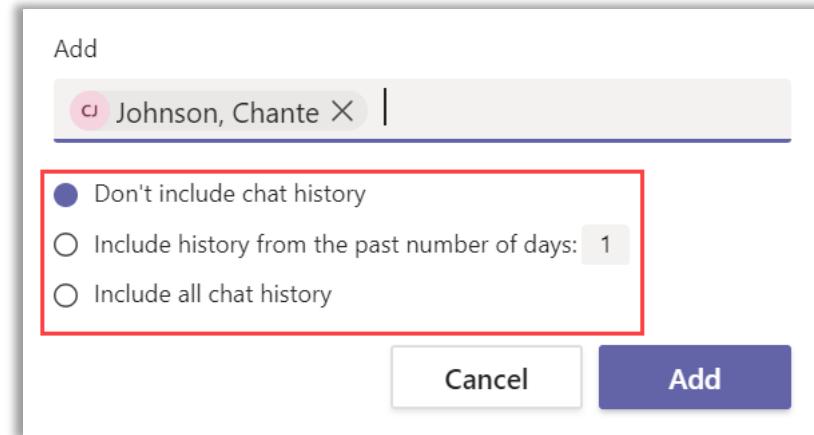
After a group chat has been started, you can continue to add new members as they're needed.

1. Click the **Add People** button at the top of a chat screen.
2. Enter the name of the person you want to add, then select them from the search results.
3. Click the **Add** button.

The screenshot shows a messaging application window. At the top, there's a header with the user 'Losch, Tho...' and icons for Chat, Files, and other options. A red box highlights the 'Chat' icon. To the right of the header are video, phone, and upload buttons, with a red box highlighting the upload button. Below the header, a notification says 'Johnson, Chante added Losch, Thomas and Phillips-Rakestraw, Mary to the c...'. On the left, messages from 'Johnson, Chante' and 'Losch, Thomas' are visible. On the right, a modal dialog titled 'Add' is open. It contains a search bar with 'Johnson, Chante' typed in, a red box highlighting the search bar. Below the search bar are three radio button options: 'Don't include chat history' (selected), 'Include history from the past number of days: 1', and 'Include all chat history'. At the bottom of the modal are 'Cancel' and 'Add' buttons, with a red box highlighting the 'Add' button.

# Invite People to a Group Chat

**Tip:** When adding someone to a group chat, you can select how much (if any) of the previous chat history they're able to view. This allows you to give extra context and history about the conversation, without having to repeat everything anew to the added member!

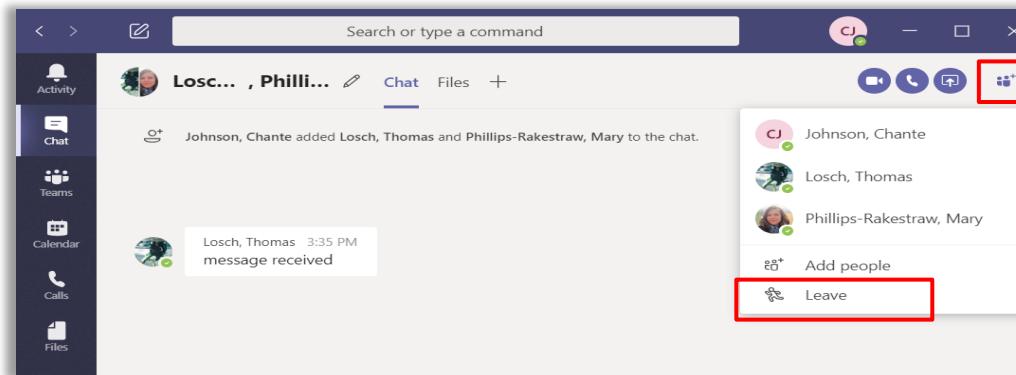


(This *only* works for group chats – at this time, you aren't able to show chat history when adding another team member to an existing one-on-one chat).

# Leave a Group Chat

If you're part of a group chat that you no longer need to be in, you can leave it at anytime. Everyone else in the group will still be able to chat with each other, but you'll no longer be included.

1. Hover your mouse over the number of participants link at the top of the chat.
2. Select **Leave**.
3. Another window will open. Select **Leave** again.



Leave the conversation?

You'll still have access to the chat history.

Cancel

Leave

## Exercise

- ✓ Go to the chat area in Teams.
- ✓ Start a new chat with one or more teammates. Before sending it, try formatting some of the text, attaching a file, and/or inserting an emoji. Repeat these steps with other teammates.
- ✓ Click on an existing chat to view it.
- ✓ Start a group chat and add additional people to a chat.
- ✓ Find one of your existing chats and hide it.



# Working with Files in Teams

# Files in Teams

**There are two main places to view files in Teams: the App bar and channel tabs.**

**You will see different files in each location.**

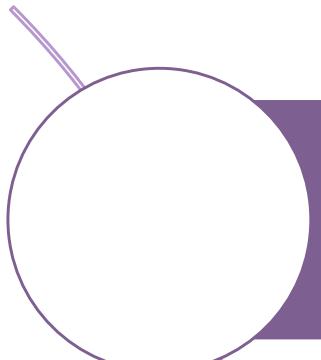
**In the App bar, you will see your own recently-accessed files.**

**This might include some of your team's files.**

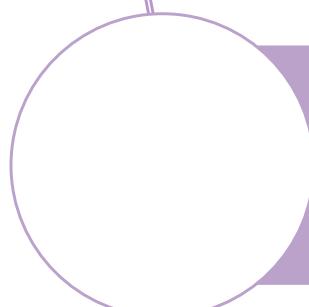
**Only you can access these files (unless you've shared them with other users).**

**In the channel tab, you will see the shared files for your channel. Any member of your team can access these files or create and upload new files.**

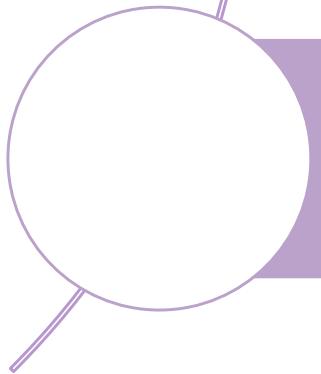
# Files in Teams



Files accessed in the App bar are stored in various cloud locations – your own OneDrive account, a SharePoint site, or Teams.



Files accessed in the channel tabs are stored in a SharePoint site. Each team has its own SharePoint site.



**Important:** Teams does not sync with other file locations. If you upload a file from your OneDrive to a Teams channel, you upload a copy – changes to the file in Teams will not sync to your OneDrive.

# Sharing Files in Teams

## Private Chat

- To share a file in a private chat, click the **Attach** button under the compose box.
- The file will only be shared with the user(s) in the chat conversation.
- Private chat files are stored in your personal OneDrive in the **Microsoft Teams Chat Files** folder.

## Channel Posts

- To share a file in a channel post, click the **Attach** button under the compose box.
- The file will be shared with all of the users in your team.
- Channel post files are stored in your team's SharePoint site and are accessible on the channel's **Files** tab.

## Channel Folders

- To share a file in a channel folder, go to the channel where you want to share the file and click the **Files** tab. Create a new file or upload an existing file.
- Files you share via the channel file folder are stored in your team's SharePoint site and are accessible on the channel's **Files** tab.

# Channel Files

## Create a New File

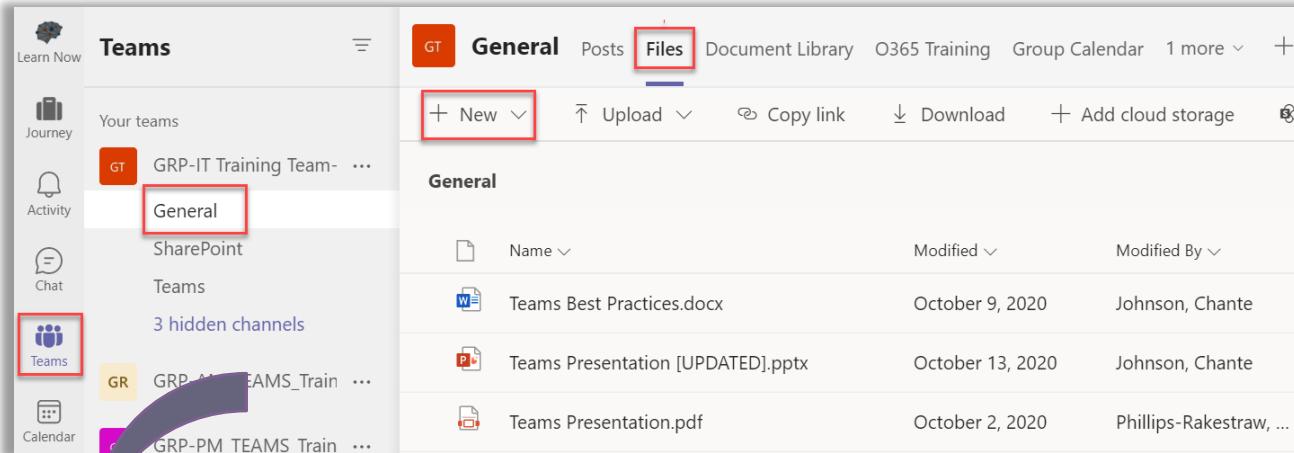
To create a new channel file in Teams,

1. Click the **Files** tab in the channel where you want to create the new file.
2. Click **New**.
3. Select the type of file you wish to create (Excel, Word, or PowerPoint).
4. Enter a name for the file and click **Create**.
5. The new file opens. Make your edits in Teams, or click **Open in Desktop App** to open the file in the desktop version of the Office app.
6. When you are finished making edits, click **Close** to return to your files folder.

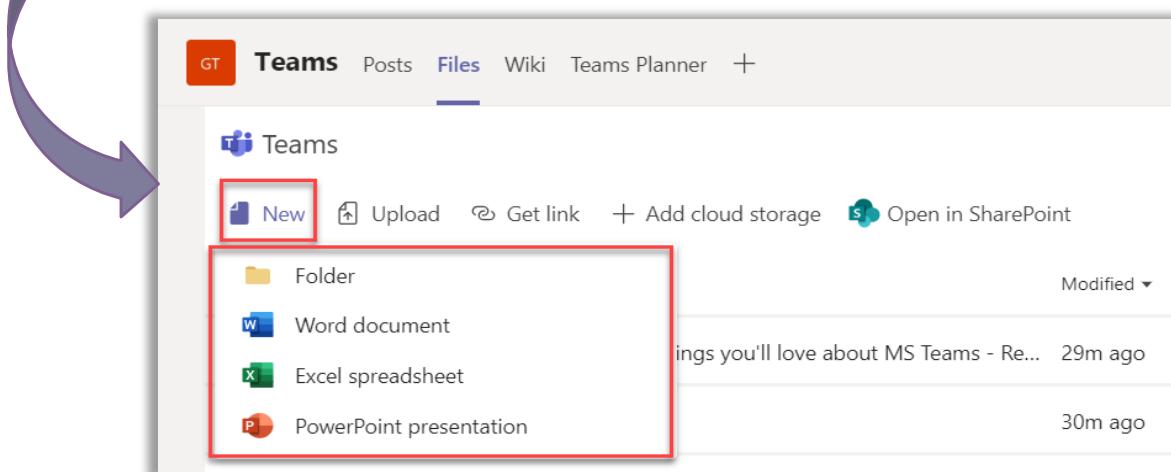
# Channel Files

## Create a New File

Creating a new Office 365 document/folder in a Teams channel is simple. Once a document is saved, anyone who is a member of that team can view and edit the document.



The screenshot shows the Microsoft Teams interface with the 'General' channel selected. The ribbon at the top has 'General' and 'Files' tabs, with 'Files' being the active tab. Below the ribbon, there's a toolbar with 'New', 'Upload', 'Copy link', 'Download', and 'Add cloud storage'. A red box highlights the 'New' button. On the left, a sidebar shows 'Your teams' with 'GRP-IT Training Team-' and 'General' selected. Other channels like 'SharePoint', 'Teams', and '3 hidden channels' are listed. A red box highlights the 'General' channel in the list. The main area displays a list of files: 'Teams Best Practices.docx' (Modified: October 9, 2020, by Johnson, Chante), 'Teams Presentation [UPDATED].pptx' (Modified: October 13, 2020, by Johnson, Chante), and 'Teams Presentation.pdf' (Modified: October 2, 2020, by Phillips-Rakestraw, ...).



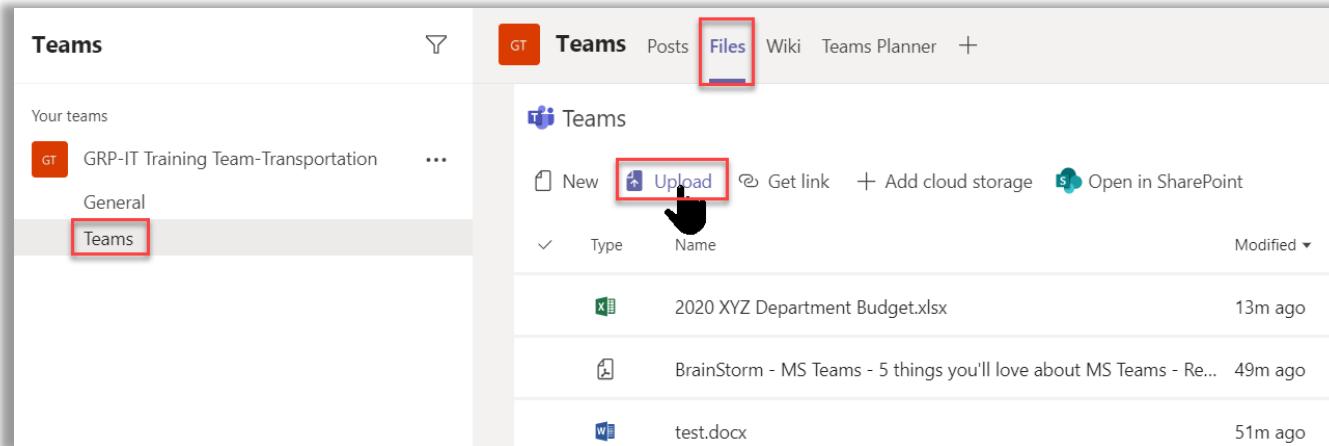
This screenshot shows the Microsoft Teams interface with the 'General' channel selected. The ribbon has 'Posts', 'Files', 'Wiki', and 'Teams Planner' tabs, with 'Files' being the active tab. Below the ribbon is a toolbar with 'New', 'Upload', 'Get link', 'Add cloud storage', and 'Open in SharePoint'. A red box highlights the 'New' button. A large red box surrounds the 'New' dropdown menu, which lists 'Folder', 'Word document', 'Excel spreadsheet', and 'PowerPoint presentation'. The main area shows a post from 'Johnson, Chante' about MS Teams features, with a timestamp of '29m ago'. Another post from 'Phillips-Rakestraw, ...' is partially visible with a timestamp of '30m ago'.

# Channel Files

## Upload a File

If you want to add a file that already exists somewhere else to a channel, **upload** the file to your channel.

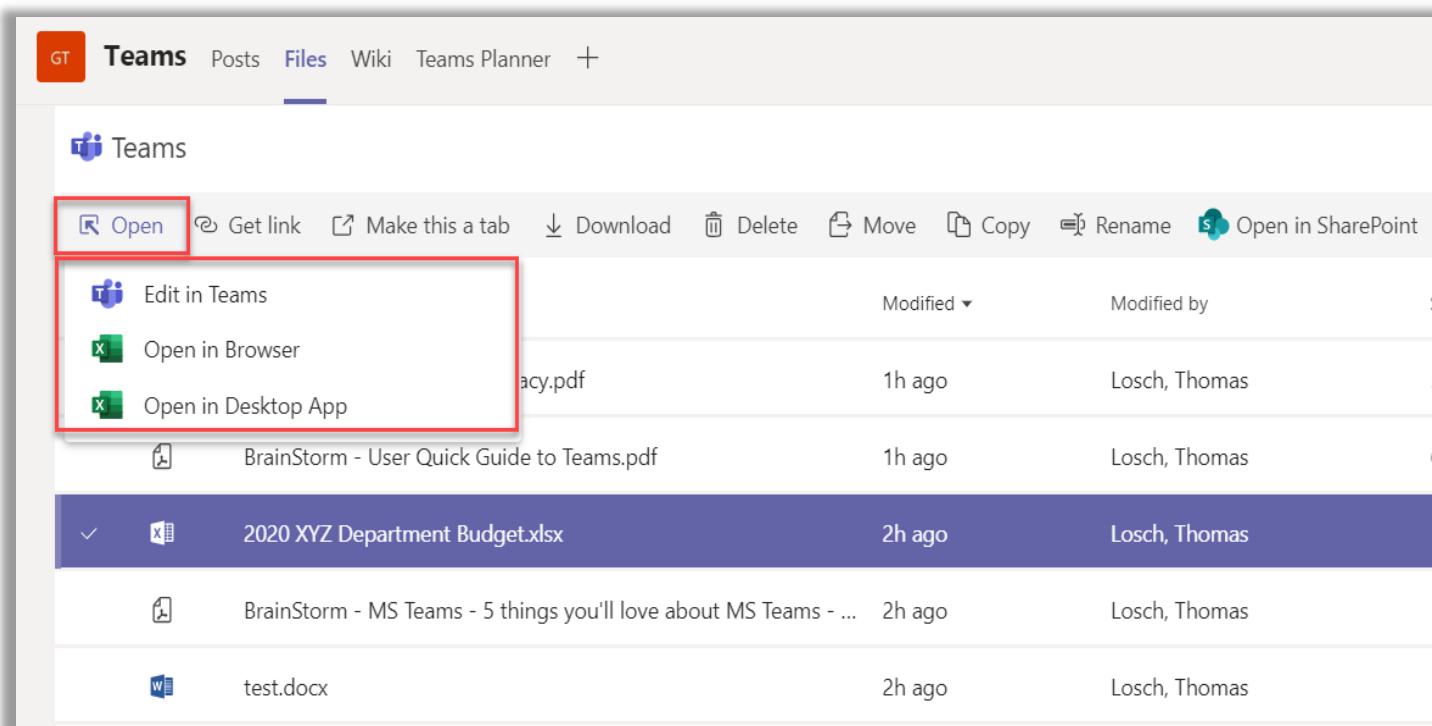
1. Click the **Files** tab in the channel where you want to upload the file.
2. Click **Upload**.
3. Browse to find the file that you want to upload. Select it and click **Open**.



# Channel Files\*

## Editing a File

You have the option of editing the document directly in Teams, in your internet browser, or directly in the desktop app. Select the file, then click **Open** to open it from your application of choice.



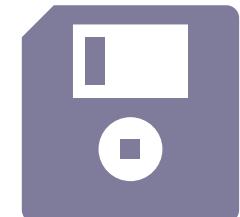
The screenshot shows the Microsoft Teams interface with the 'Files' tab selected. A file named 'Acency.pdf' is listed. A red box highlights the 'More options' menu (three dots) next to the file, and another red box highlights the 'Open' option in the dropdown menu, which is also highlighted with a blue background. Other options in the menu include 'Get link', 'Make this a tab', 'Download', 'Delete', 'Move', 'Copy', 'Rename', and 'Open in SharePoint'. Below the menu, three additional options are listed: 'Edit in Teams', 'Open in Browser', and 'Open in Desktop App'. The 'Edit in Teams' option is also highlighted with a red box.

File Name	Last Modified	Modified By
Acency.pdf	1h ago	Losch, Thomas
BrainStorm - User Quick Guide to Teams.pdf	1h ago	Losch, Thomas
2020 XYZ Department Budget.xlsx	2h ago	Losch, Thomas
BrainStorm - MS Teams - 5 things you'll love about MS Teams - ...	2h ago	Losch, Thomas
test.docx	2h ago	Losch, Thomas

# Channel Files

## Editing a File

- When editing a file in Teams, there's no need to save your changes. Changes are automatically saved. When you're finished editing, simply close the file.
- Multiple users can view and edit a file at the same time. See other users' edits in real time when working directly in Teams or in the web-based version of the Office apps.
- For the best experience and to access additional features and functions, open the file in the desktop version of the application.
  - When editing in the desktop application, remember to **save** your changes before closing the file to sync your edits to Teams.
  - If **AutoSave** is enabled in the desktop app, your changes will automatically be saved.

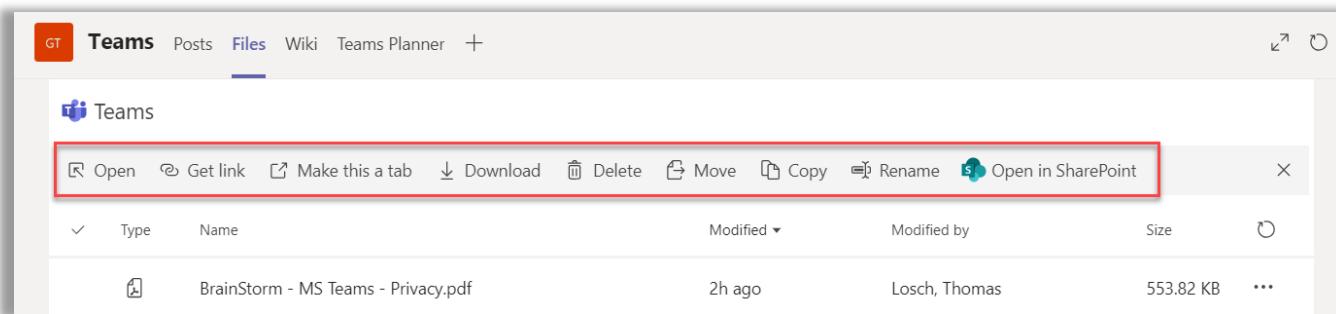


# Channel Files

## Top Menu Commands

The top menu of your channel's **Files** tab gives you various file activity options. Using these commands, you can easily **open**, **delete**, **move**, **copy**, or **rename** the selected file. You can **download** the file to save a copy to another location, like your desktop or personal OneDrive.

You can also make a file appear in a Teams channel as a tab at the top of your channel for easy access – just click the **Make this a tab** button to turn an important file into a tab in Teams so that you can quickly locate and edit the file without having to search for it in your folder.



*We'll talk about the **Open in SharePoint** option on the following slides.*

# Channel Files

## Opening Files in SharePoint

- Your team's channel's files are **accessible** in Teams, but are **stored** in SharePoint. (This is a backend process.)
- Each team has its own SharePoint site. The site is created automatically when a new team is created.
- Documents that you create and upload into Teams are automatically stored to your team's SharePoint site.
- In SharePoint, files are stored in separate folders for each channel.
- You may want to open your files in SharePoint in order to:
  - **Set alerts** on a file to see when changes are made
  - See **version history** for a file
  - **Check out a file** so that other users can't make edits
  - Access your **recycle bin** to recover deleted files
- Accessing your team's files in SharePoint also allows you to see all of your folders and files in one place, without clicking through to other channels.

# Channel Files

## Opening Files in SharePoint

To open your team's files in SharePoint,

1. Navigate to a channel library by clicking the **Files** tab in a channel.
2. Click **Open in SharePoint** in the top menu.
3. Your team's SharePoint site will open in an internet browser window. Teams SharePoint sites operate exactly like any other SharePoint site.

The screenshot shows a SharePoint site interface. At the top, there is a purple header bar with the 'SharePoint' logo on the left and several icons on the right. Below the header, the title 'GRP-IT Training Team-Transportation' is displayed, along with a 'Following' star icon and '3 members'. On the left side, a vertical navigation bar lists 'Home', 'Conversations', 'Documents' (which is highlighted in grey), 'Shared with us', 'Notebook', 'Pages', 'Site contents', and 'Recycle bin'. The main content area is titled 'Documents' and contains a table with two rows. The columns are labeled 'Name', 'Modified', and 'Modified By'. The first row shows a folder named 'General' modified on June 1 by Ott, William. The second row shows a folder named 'Teams' modified on June 18 by Phillips-Rakestraw, Mary.

Name	Modified	Modified By
General	June 1	Ott, William
Teams	June 18	Phillips-Rakestraw, Mary

# Channel Files\*

## Opening Files in SharePoint

- Note that in the main documents library for your SharePoint site, there is a folder for each channel in your team.
- You can work with your files in SharePoint just as you would in Teams – edit, rename, move, and more, right within SharePoint.
- To recover a deleted file, open the Recycle Bin from the left menu. Select the file you want to recover, then click **Restore** in the top menu. The file will be restored to its prior location.
- To check out a file to prevent other users from making unwanted edits, locate the file in its folder, select it, and click **Check out** in the top menu.
- To view a file's version history, select the file and click **Version history** in the top menu.
- To enable alerts on a file so that you're notified anytime the file is changed, select the file and click **Alert me** in the top menu.

# Teams File Retention

Teams **chat files** are accessible in Teams for 7 days.

After 7 days, they will be purged from Teams, but are still accessible in OneDrive in the **Microsoft Teams Chat Files** folder (or the **Shared** section of OneDrive, if you do not own the file).



Teams **meeting files** are accessible in Teams for 7 days. After 7 days, they will be purged from Teams, but are still accessible in OneDrive in the **Microsoft Teams Chat Files** folder (or the **Shared** section of OneDrive, if you do not own the file).



Teams **channel files** are accessible in Teams (and the team's SharePoint site) **indefinitely** and are currently not subject to the 7-day retention policy.



## Exercise

- ✓ In the General Channel, create a new MS Excel file and name it, “My Practice Excel File – your initials.” Enter some values in a few cells and then open it in desktop app. Add one more value, then exit Excel.
- ✓ Upload a Microsoft Office file from your computer’s Documents folder into the General channel, then use the Open in SharePoint button to open one of them.
- ✓ View some of the SharePoint options, like check out or version history.
- ✓ Delete the files from the General channel when finished.



# Viewing Your Personal Files in the App Bar

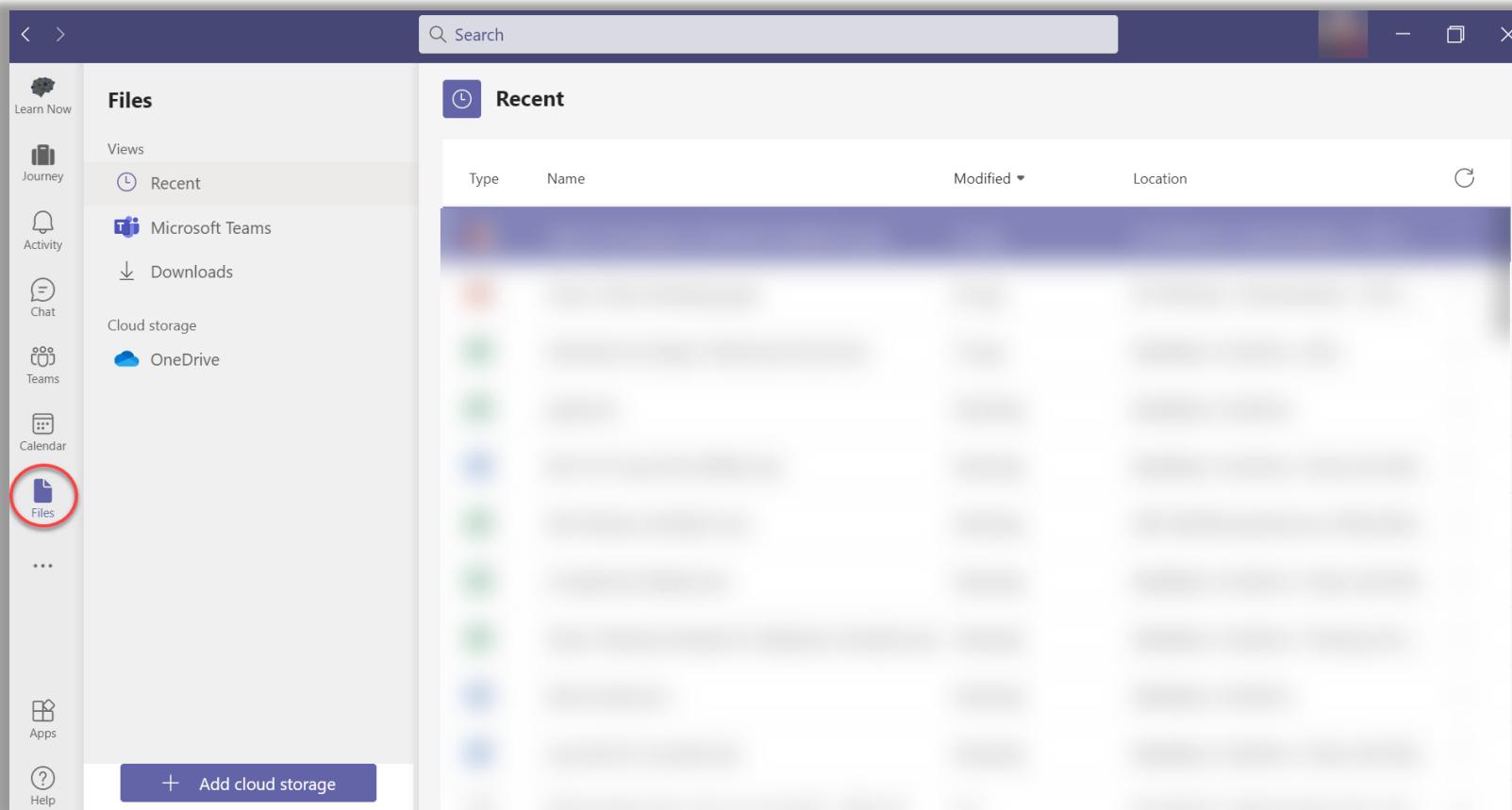
Click the **Files** button in the app bar. You will see four different view options to choose from.

- 1. Recent** – the default view, which shows you all of your recently-accessed cloud files.
- 2. Microsoft Teams** – shows you all of your team's files from across your channels
- 3. Downloads** – shows files that you've downloaded to your PC
- 4. OneDrive** – provides access to your personal OneDrive files without ever leaving Teams.

Use the column headers in each view to control how files are displayed – by date, alphabetically by name, and more.

# Viewing Your Personal Files in the App Bar

**Remember** – the files you view in your App bar are your own files. Other than the files in the Microsoft Teams view, no one else can access these files unless you've chosen to share the files with other users.



# Viewing Your Personal Files in the App Bar\*

You will be able to view and edit some file types directly in the **Files** view. You can view images and PDF documents, and you can edit Word documents, Excel spreadsheets, and PowerPoint presentations.

The screenshot shows the Microsoft Teams 'Recent' files view. A list of recent files is displayed, including:

Type	Name	Modified	Location	Actions
PP	Teams Presentation.pptx	40m ago	PD-PAPortal / Administration / ISTO / BIO / netdi...	...
PP	Teams Presentation.pptx	1h ago	C-tlosch's OneDrive / MS Teams	...
XLSX	2020 XYZ Department Budget.xlsx	Yesterday	GRP-ITTrainingTeam-Transportation / Teams	...
DOCX	test.docx	Yesterday	GRP-ITTrainingTeam-Transportation / Teams	...
DOCX	Teams QRC.docx	7/8/20	PD-PAPortal / Administration /	
DOCX	Teams User Manual.docx	7/8/20	PD-PAPortal / Administration /	
DOCX	Working with Files in Teams.docx	7/6/20	PD-PAPortal / Administration /	
DOCX	MS Teams - Sharing Files in Teams.docx	7/6/20	PD-PAPortal / Administration / ISTO / BIO / netdi...	...

A red arrow points to the 'test.docx' row. A red box highlights the three-dot menu icon next to it, which is expanded to show a context menu with options: 'Edit in Teams', 'Open in Browser', 'Open in Desktop App', 'Download', and 'Get link'.

## Exercise

- ✓ Click on the Files button on the App bar in Teams.
- ✓ Observe the different views and see which view is the default.
- ✓ Click on the Microsoft Teams view, then click on the Downloads view, and finally click on the OneDrive view.
- ✓ Practice opening files in Teams, your browser, and the desktop Office application.



# Calls Overview

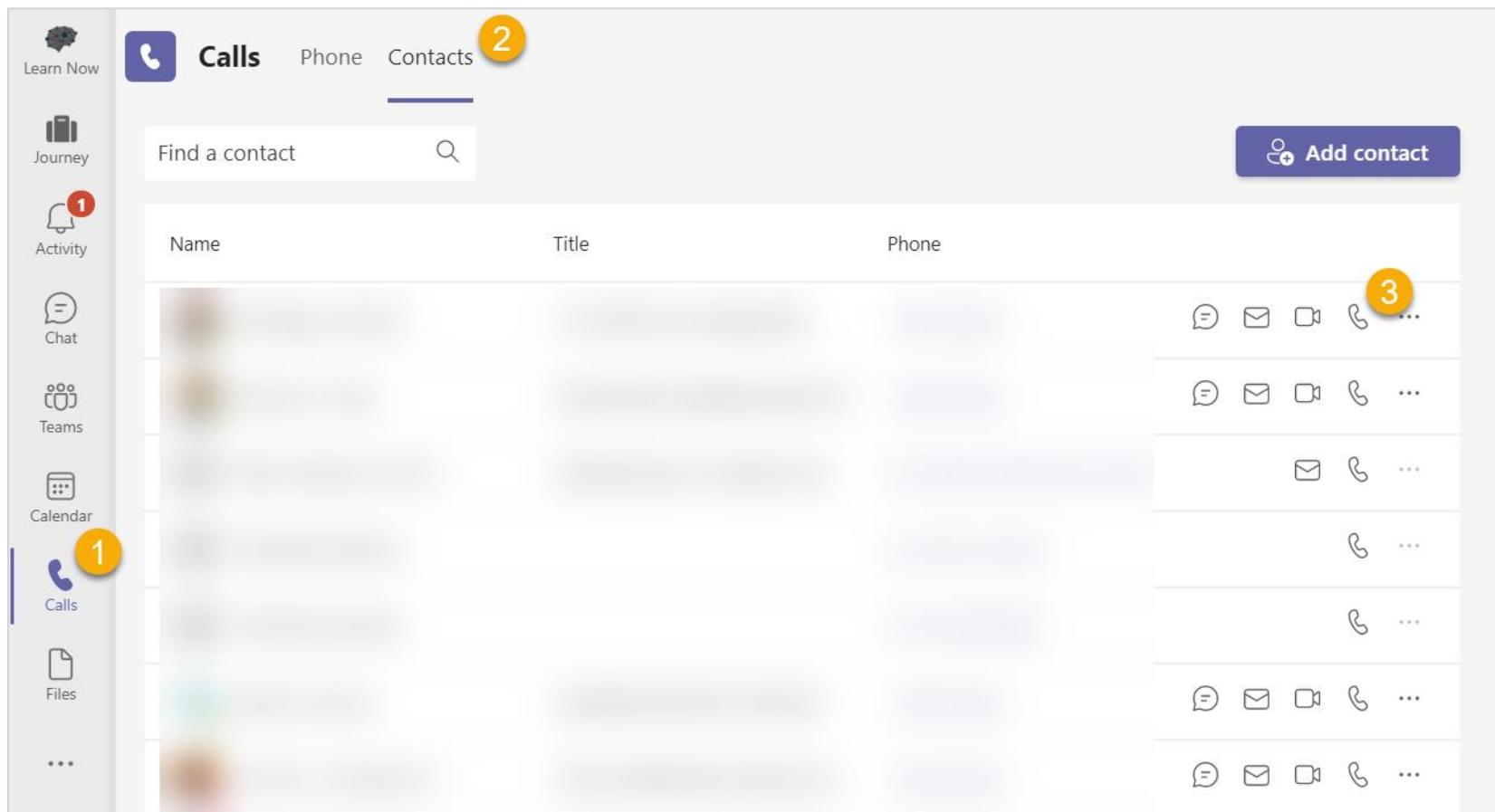
# Calls Overview

- You can use Teams to make **audio** and **video** calls. You can also access and manage your **voicemail** inbox, view your call **history**, and organize **contacts** in Teams.
- It's simple for team members to jump on a call from a text message thread. **Screen sharing** and call **recording** features are also easy to use.

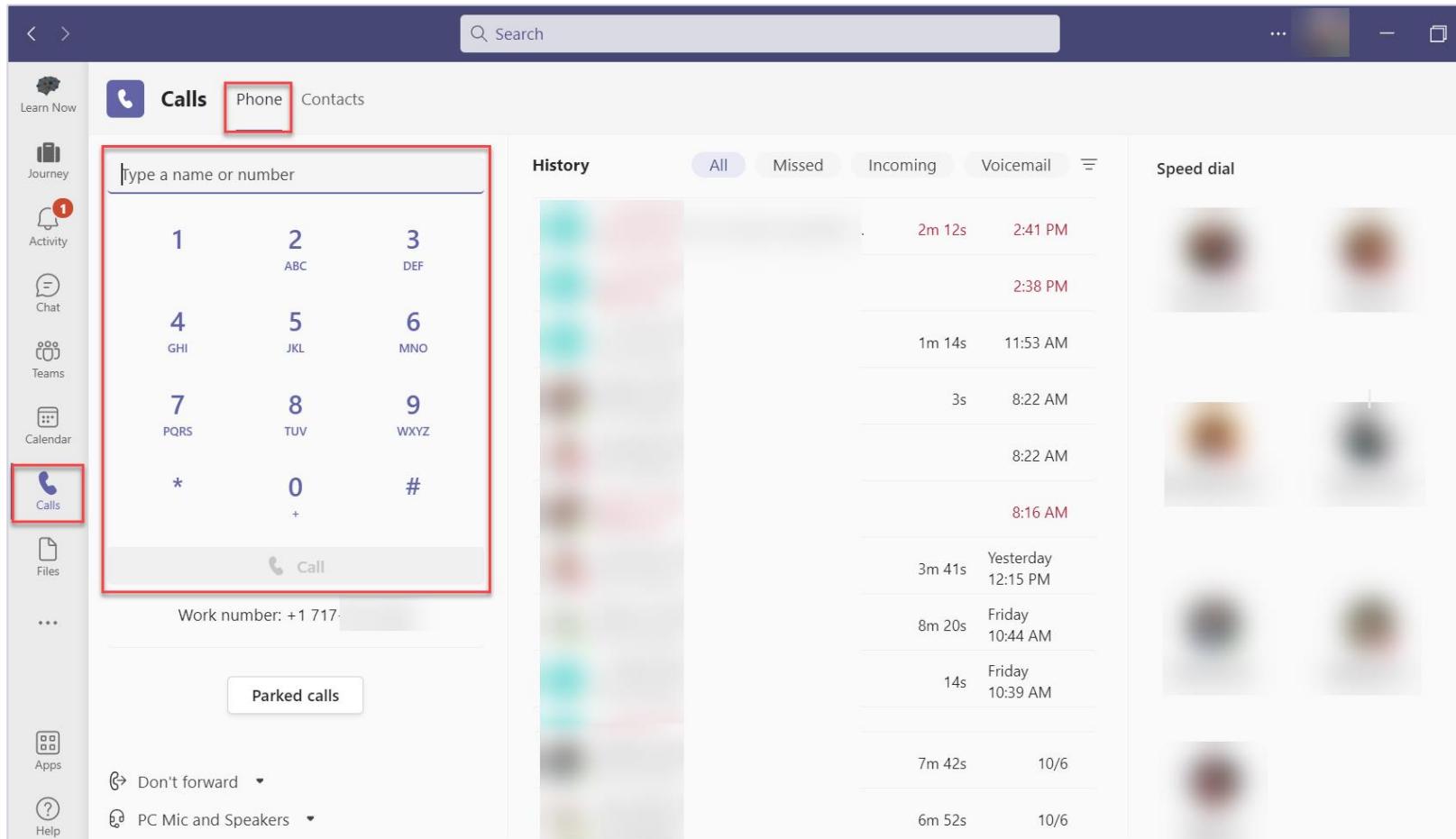


# Call a Contact

If you need to call a contact, click the **Calls** button on the App bar. Click the **Contacts** tab, then click the call button at the end of the entry. When you're finished with the call, simply click Hang Up.



# Call Someone Who Isn't a Contact

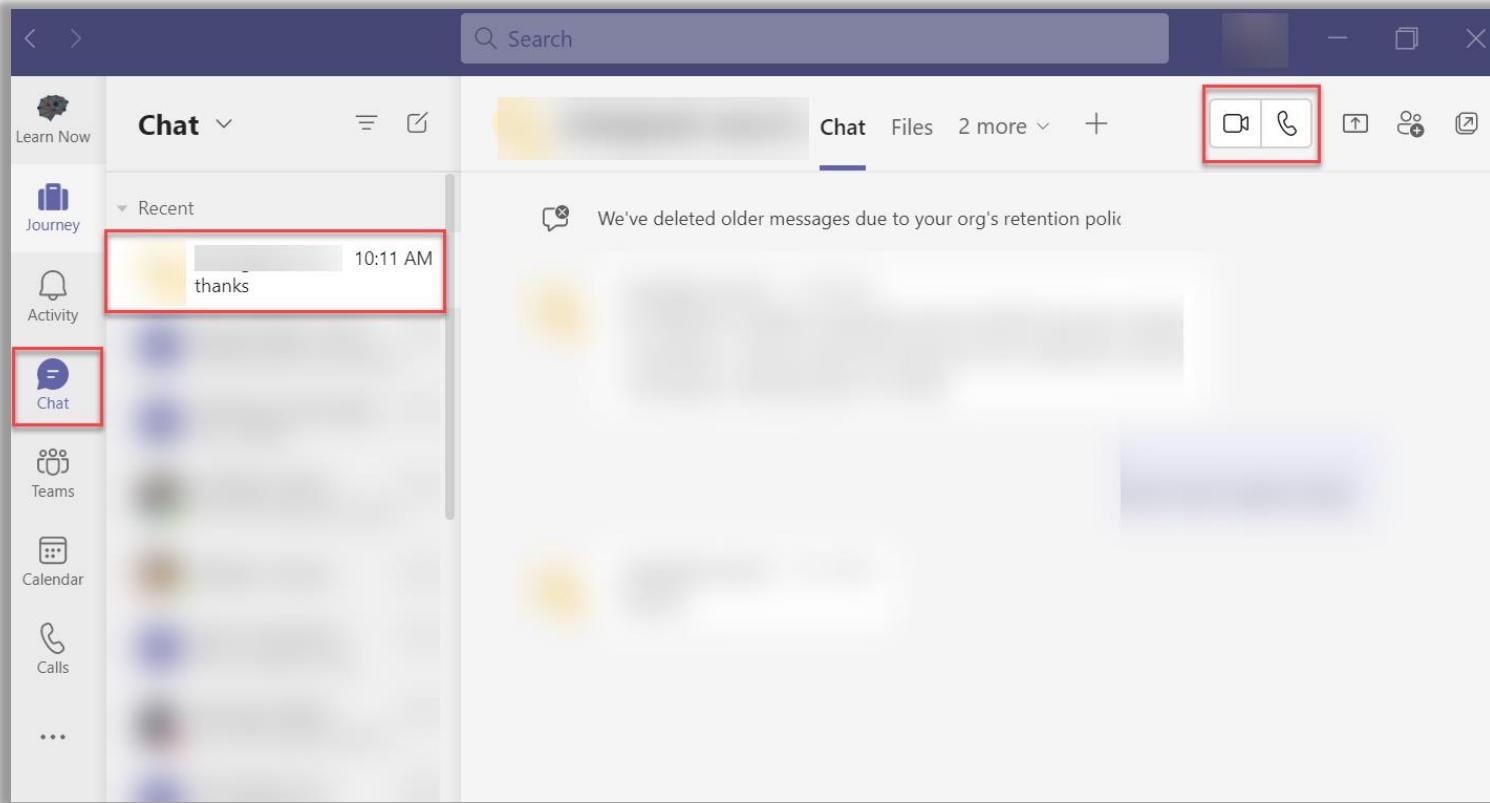


To use the dial pad, click the **Calls** button on the App Bar, then click the **Phone** tab. Enter the name or number of the person you want to call & click **Call**.

# Start a Call from a Chat

You can make one-on-one or group calls with anyone on your team directly from a chat (either a past chat or an ongoing one). Calls made from a chat are private and won't appear in any team conversation.

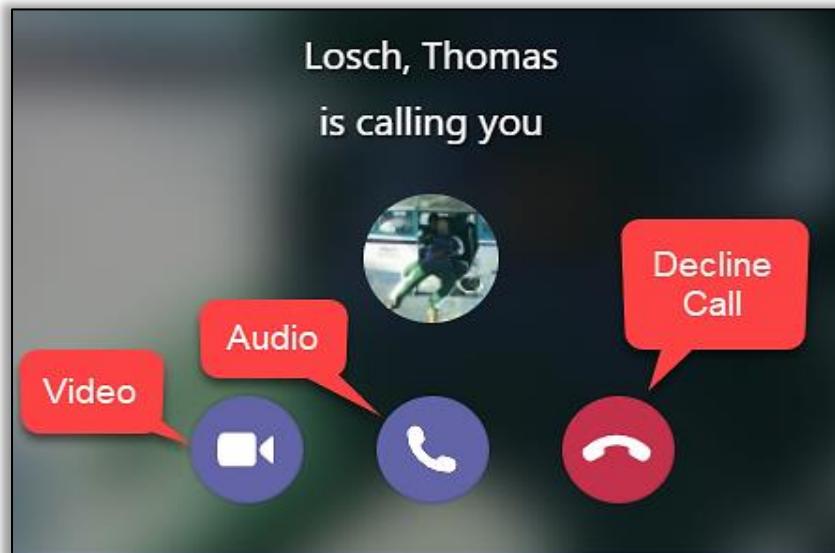
Click the **Chat** button on the App bar, then select the chat and click the **Call** button.



# Answer an Incoming Call

When someone calls you, a notification will appear on your screen. You can use the buttons that appear on the notification pop-up to answer it or decline it.

Click the **Accept with Video** or **Accept with Audio button**. The call starts, and the call screen takes over the Teams window.



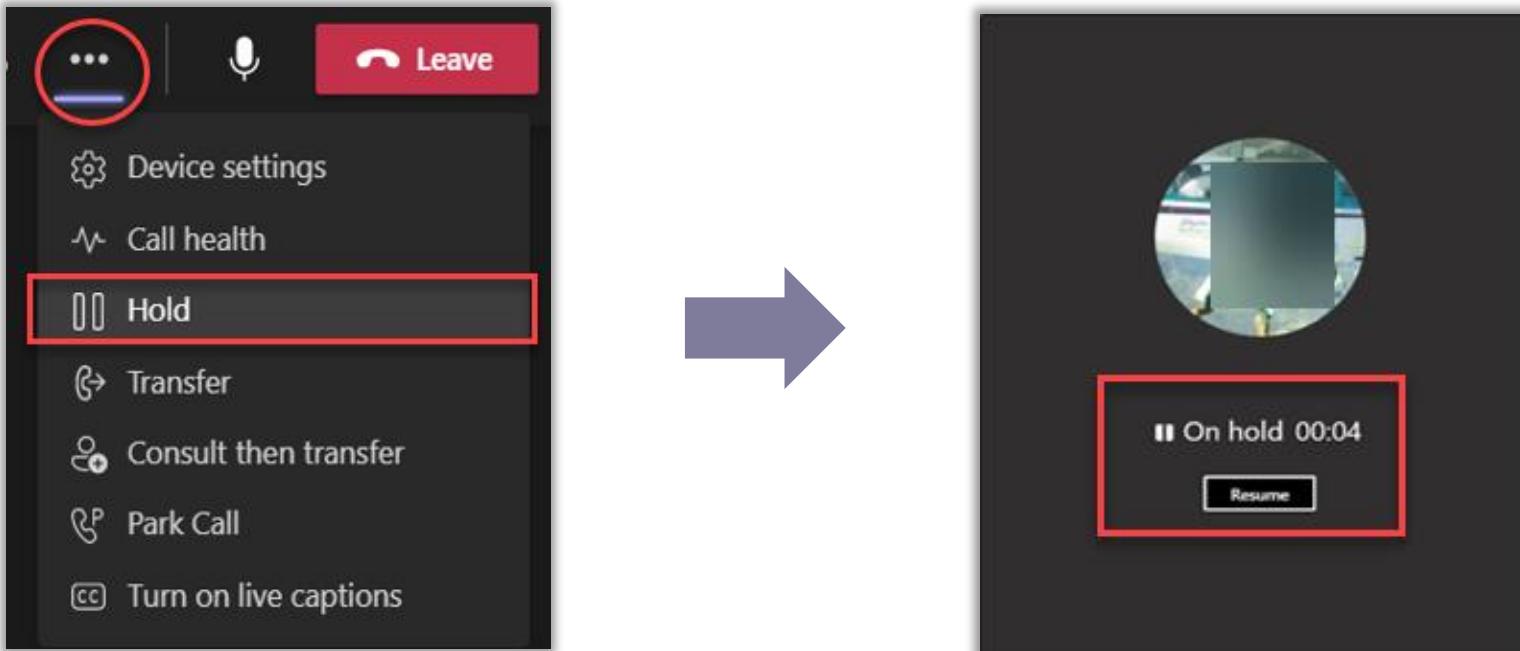
# Place a Call on Hold

While you're on a call, you can place it on hold to step away from it without ending the call entirely.

While on a call, click the **More Actions (...)** button and select **Hold**.

The call is placed on hold, and everyone else on the call is notified.

To return to the call, click **Resume**. The call resumes, and any video or screen sharing that was active before will be resumed as well.



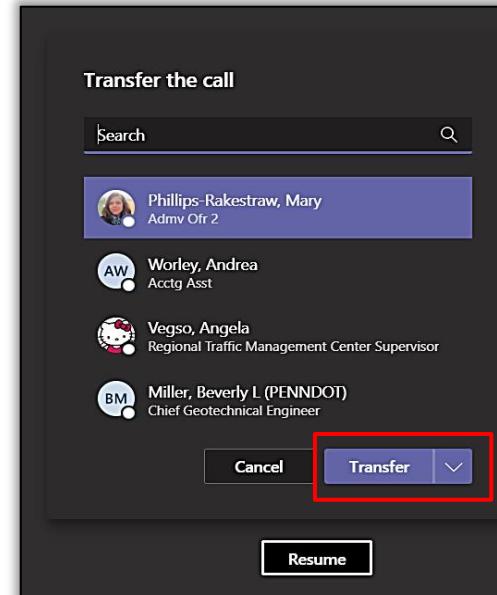
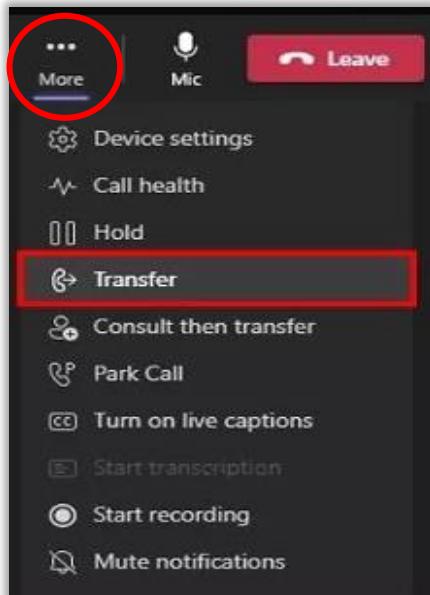
# Transfer a Call

## Blind Transfer

If you're on a one-on-one call, you can transfer your end of the call to someone else in your organization.

While on a one-on-one call, click the **More actions (...)** button, then **Transfer**. Start typing the name of the person you want to transfer the call to and select their name from the search results.

Click **Transfer**. The call is transferred.



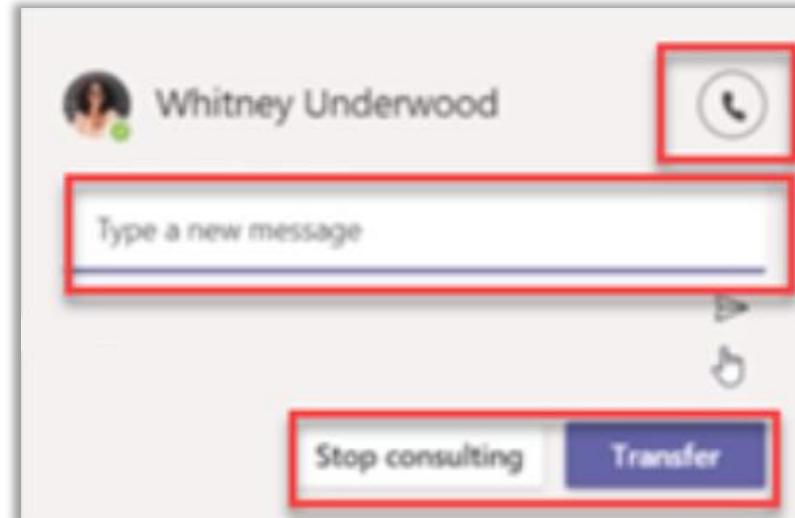
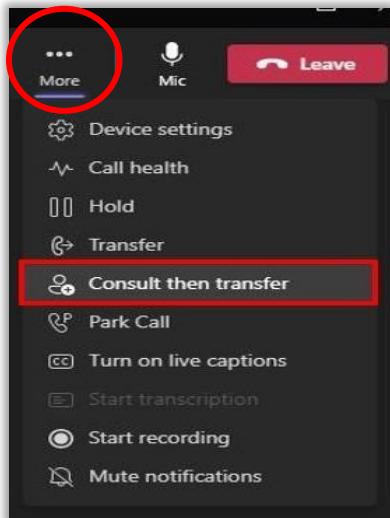
# Transfer a Call

## Warm Transfer

To consult with someone before transferring a call to them, click the **More actions (...)** button and select **Consult then transfer**. Start typing the name of the person you want to transfer the call to and select their name from the search results.

Type and send a message to them, or click the **Call** icon to dial them.

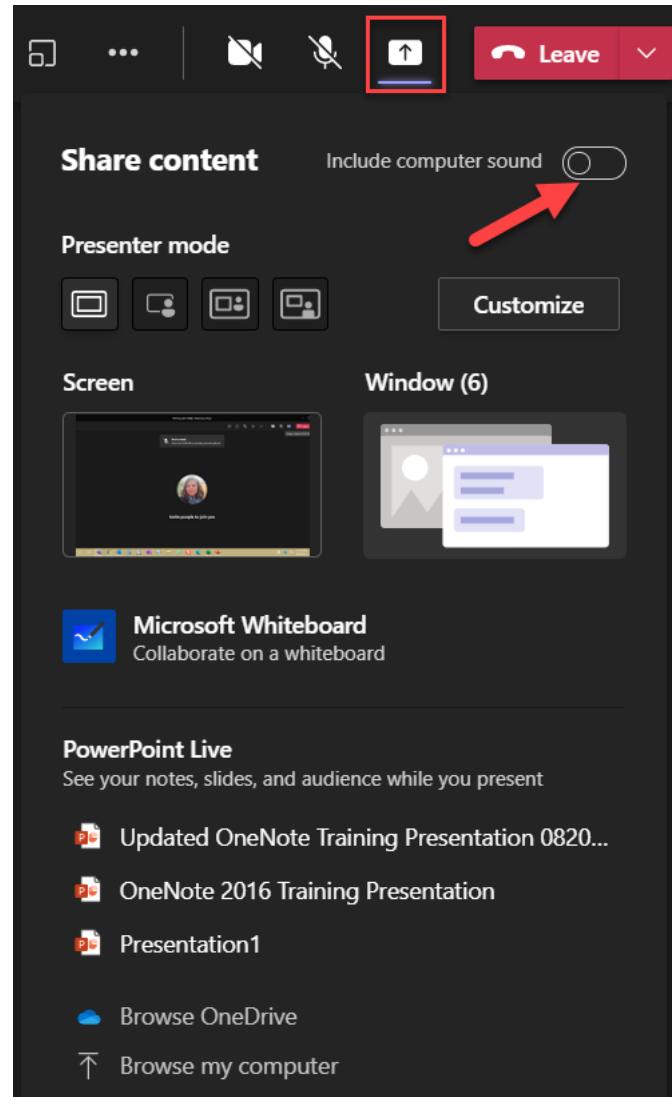
If they're able to take the call, click **Transfer**; otherwise, click **Stop consulting** to go back to the original call and continue your conversation.



# Share Your Screen

Sharing your screen is easy in Teams.

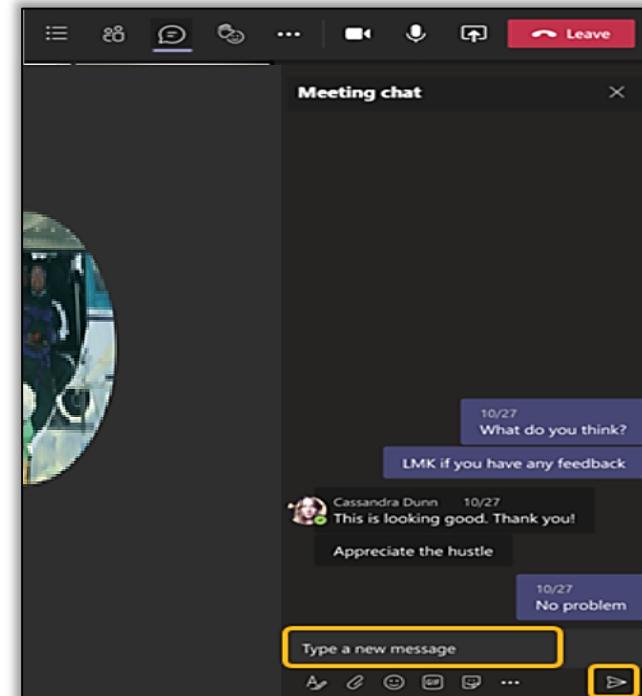
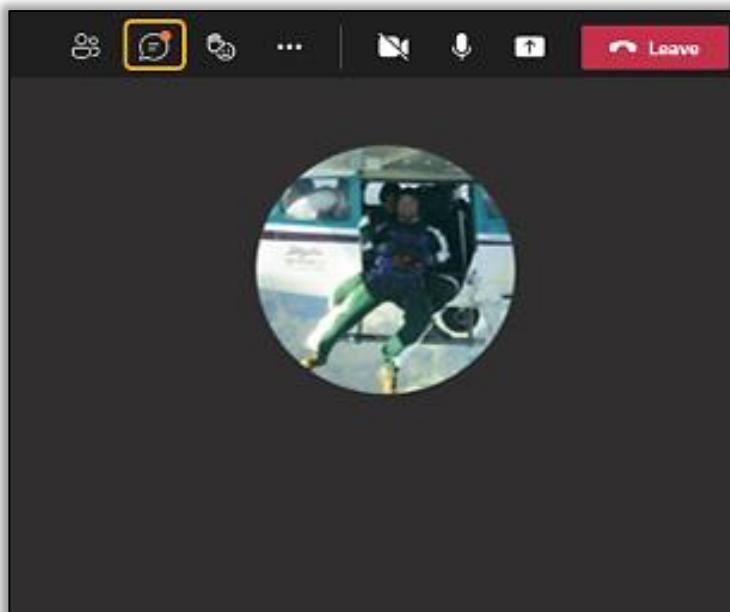
1. Click the **Share** button
  
2. Choose whether to share your entire desktop, a window (recommended), a whiteboard, or a PowerPoint presentation
  
3. To enable system audio so that participants can hear sound and audio from your PC's speakers, toggle the switch next to **Include computer sound**.
  
4. To stop sharing, click the **Share** button again (which will display an X over it): 



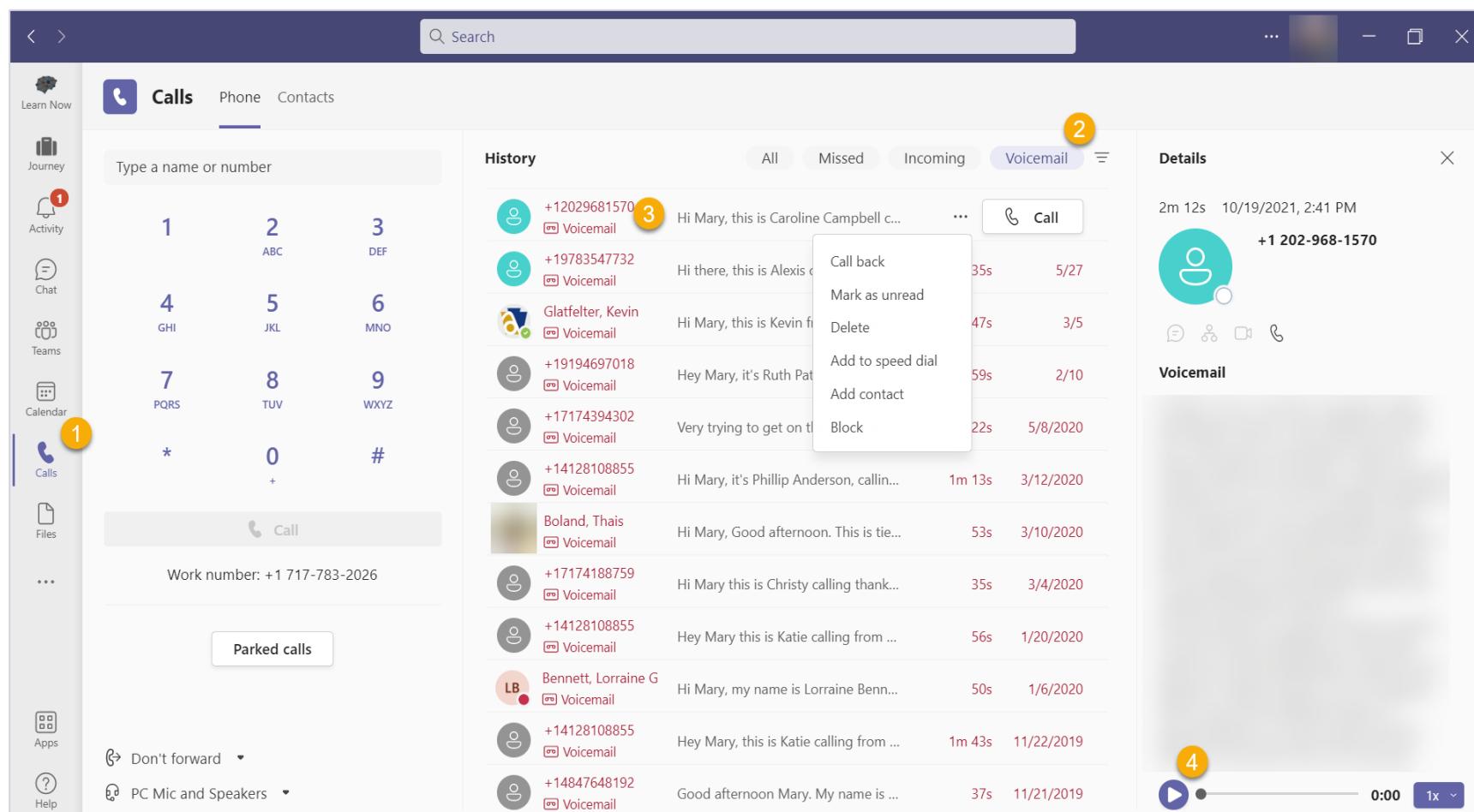
# Chat While in a Call

The ability to chat during a call can be convenient, especially if you're having audio problems or there are multiple people on one call.

1. While on a call, click the **Chat** button.
2. The chat pane will open on the right.
3. When finished, click the black X (next to the Chat label) to close chat.



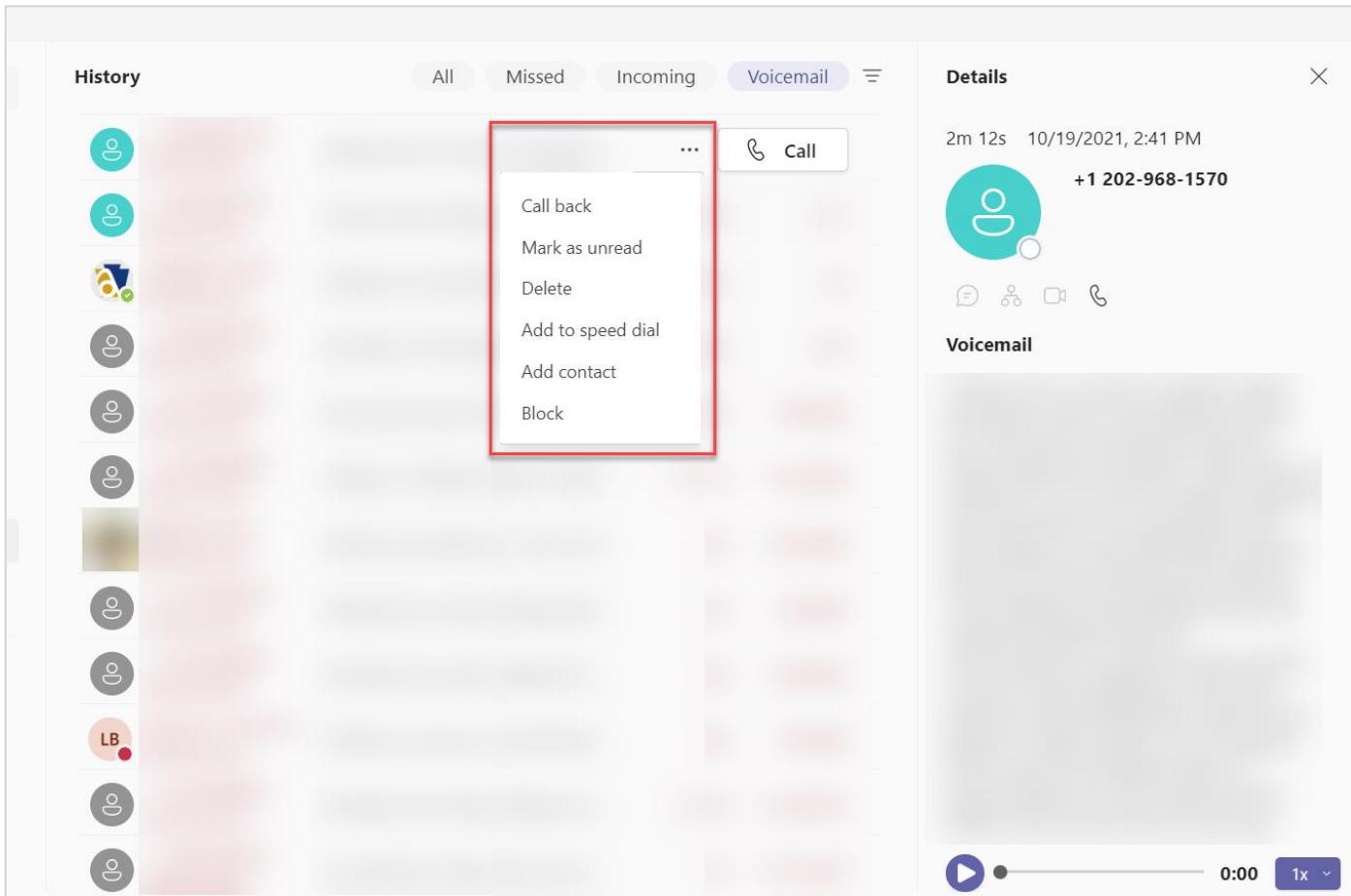
# Check Your Voicemail



1. Click the **Calls** button on the App Bar.
2. Click the **Voicemail** tab in the **History** section.
3. Left click on an entry to open it.
4. Click the **Play** button in the lower right corner or read the transcription

# Delete a Voicemail

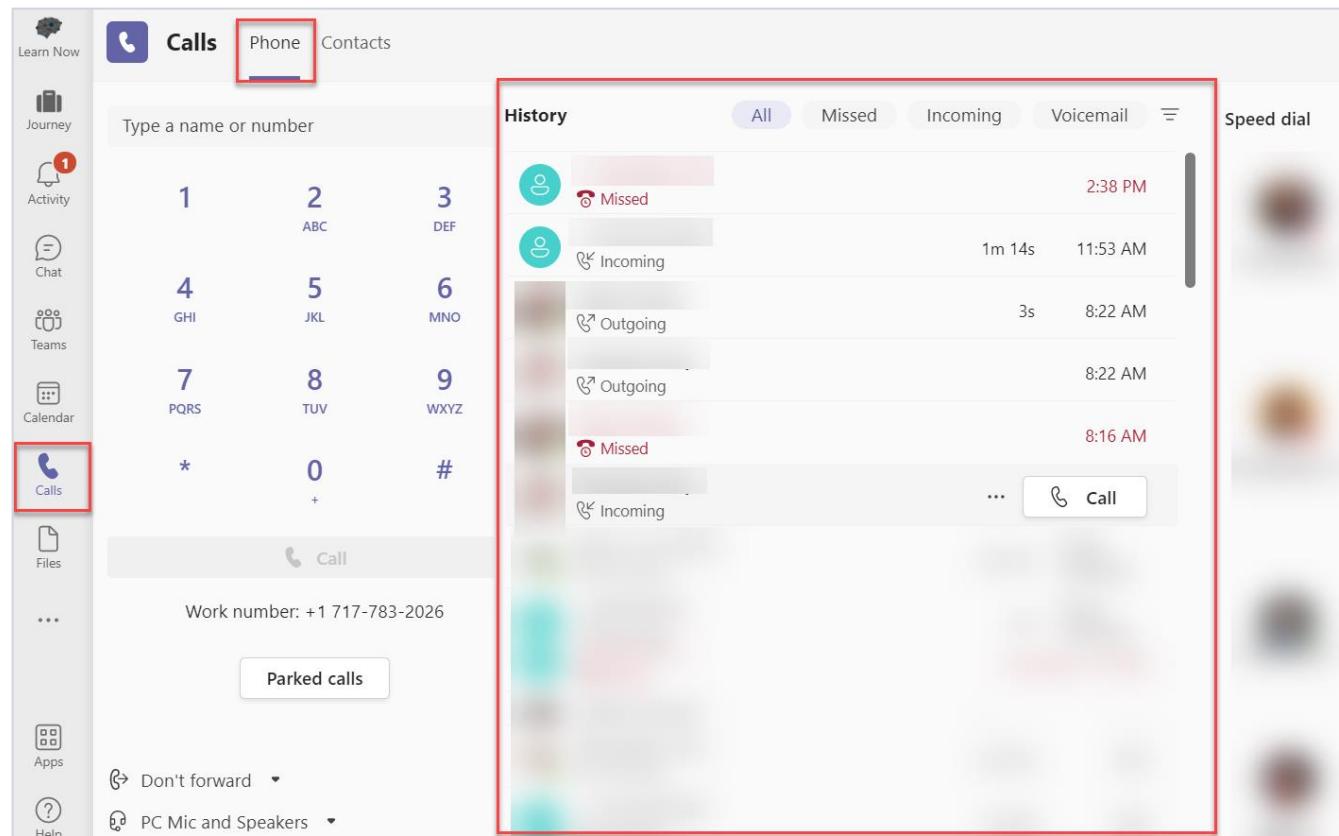
While viewing your voicemail, click a message's **More actions** (...) button, then click **Delete**.



# View Your Call History

Teams keeps track of all the calls that you make and receive. You can see who you called, who called you, and when those calls took place.

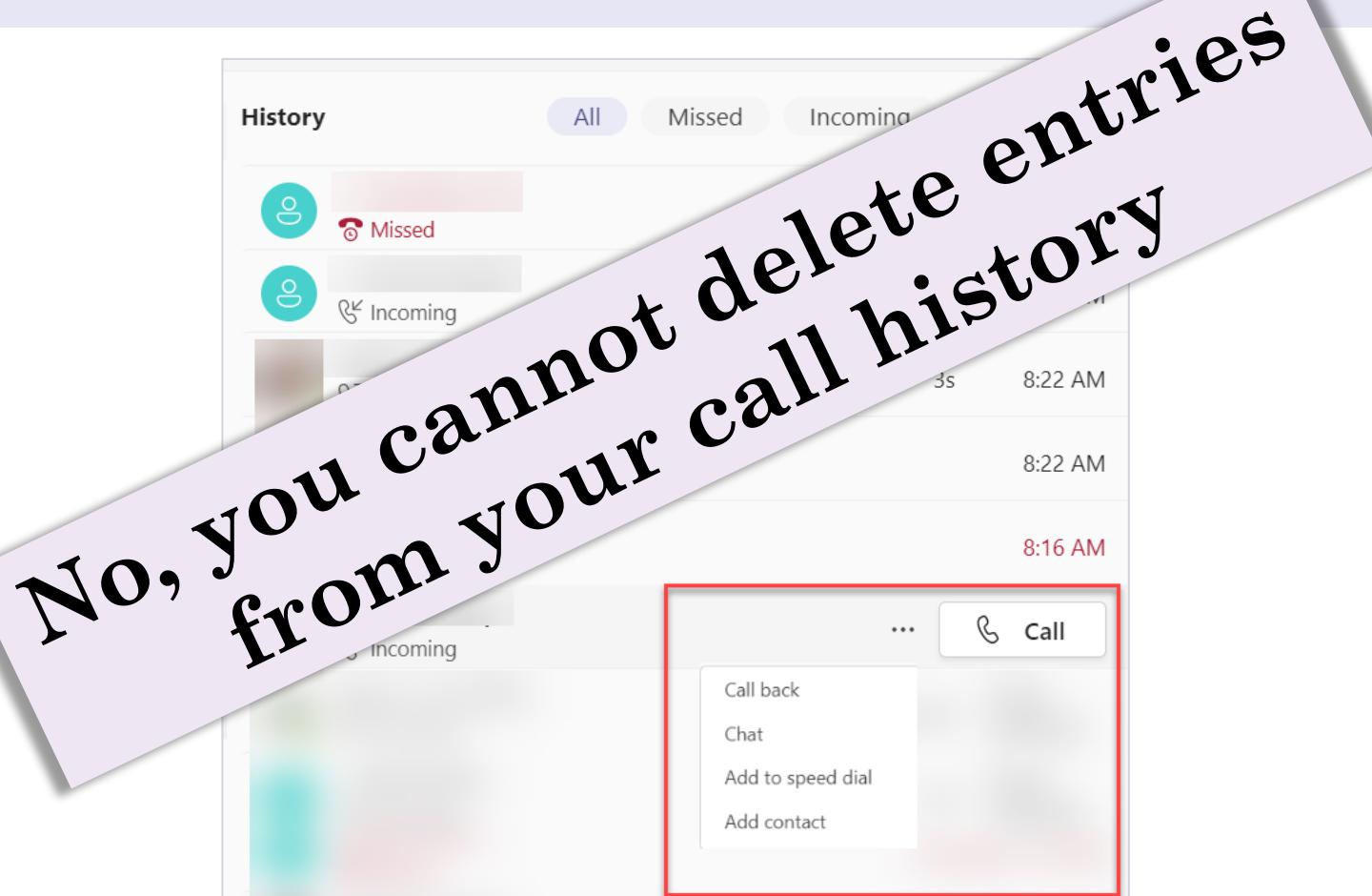
Click the **Calls** button on the App bar, then the **Phone** tab. **History** is displayed in the center of the window.



# Return a Call

It's easy to call someone back right from the call history.

Hover your mouse over the entry to see the **Call** button, or click the **More Actions (...)** button and click **Call back**.



## Exercise

- ✓ Switch to the Calls area in Teams.
- ✓ View your call history.
- ✓ View your voicemails. Click the More Actions (...) button next to a voicemail message and view the options available to you.
- ✓ View your contacts and speed dial contacts.



# Meetings Overview

# Teams Meetings

Microsoft Teams allows you to host and join virtual meetings from anywhere, using your laptop, phone, or tablet.

Join Teams meetings using the Teams desktop application or your web browser, or dial in on your phone for meeting audio on the go.

Users (internal and external) who don't use Teams can still join Teams meetings easily using the Teams web app in their browser, or by dialing into the meeting on their phone.

Host up to 1,000 people in a Teams meeting, or more with Teams Live Events.

Take advantage of meeting tools like screenshare, in-meeting chat, meeting notes, video, and more.

# Join a Teams Meeting

Via the Teams App

When it's time for you to join a Teams meeting, you have options! Easily join via...

- **Your Outlook calendar:** Open your Outlook calendar, locate the meeting, open it, and click the **Click here to join the meeting** link.
- **Microsoft Teams:** Open your Teams calendar, locate and click on the meeting, then click **Join**.
- **The Outlook meeting reminder:** When you receive a reminder popup from Outlook a few minutes in advance of your meeting, just click the **Join Online** button on the popup to easily join the meeting.



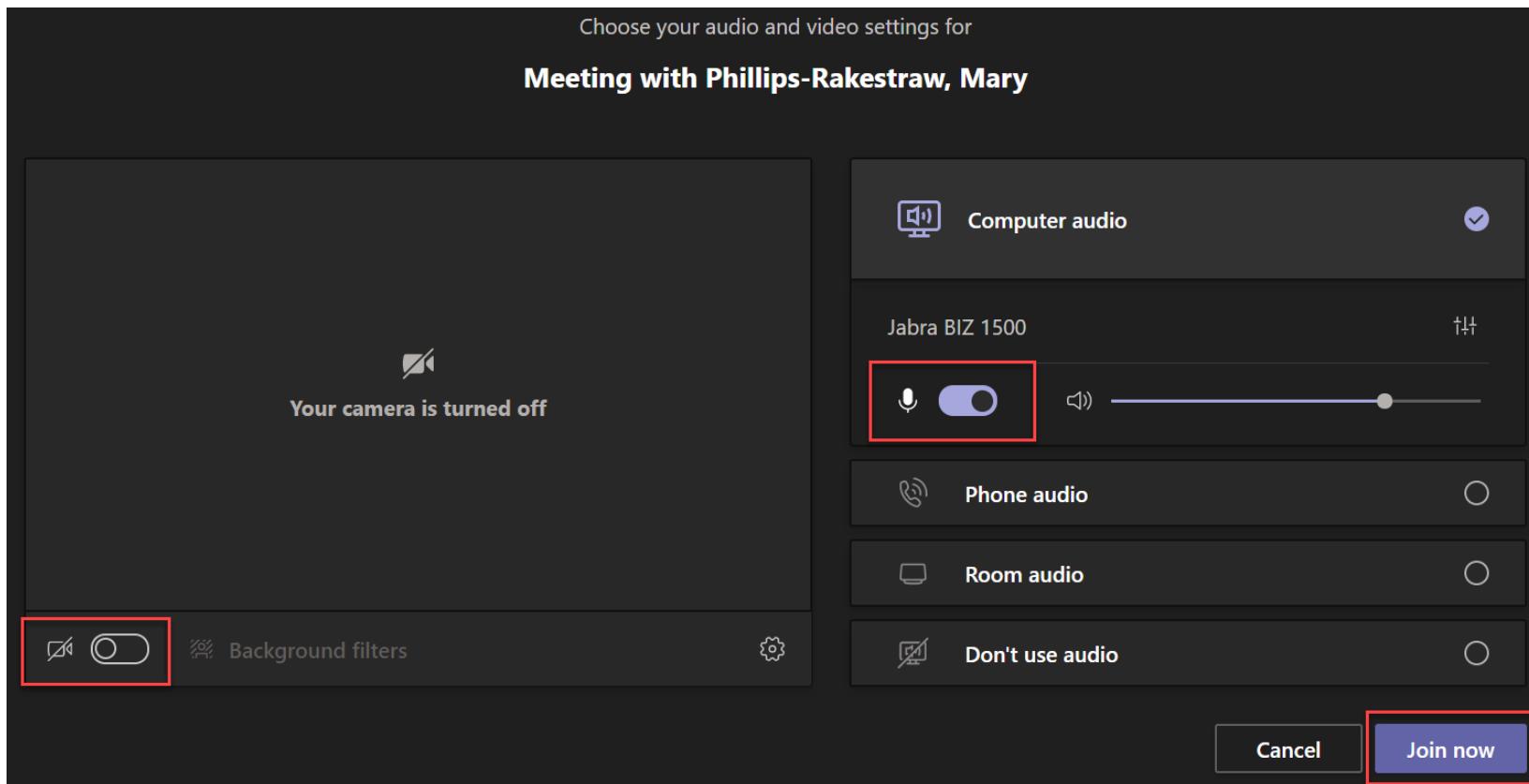
**Tip:** If you join the meeting via a PC, tablet, or smartphone app, you can still join audio via telephone if needed (or, just use your PC's default mic and speakers).

# Join a Teams Meeting

Via the Teams App

Configure your audio and video settings. Note the toggle buttons for your microphone and camera (as a best practice, it's wise to join with your mic muted). When you're ready, click **Join now**.

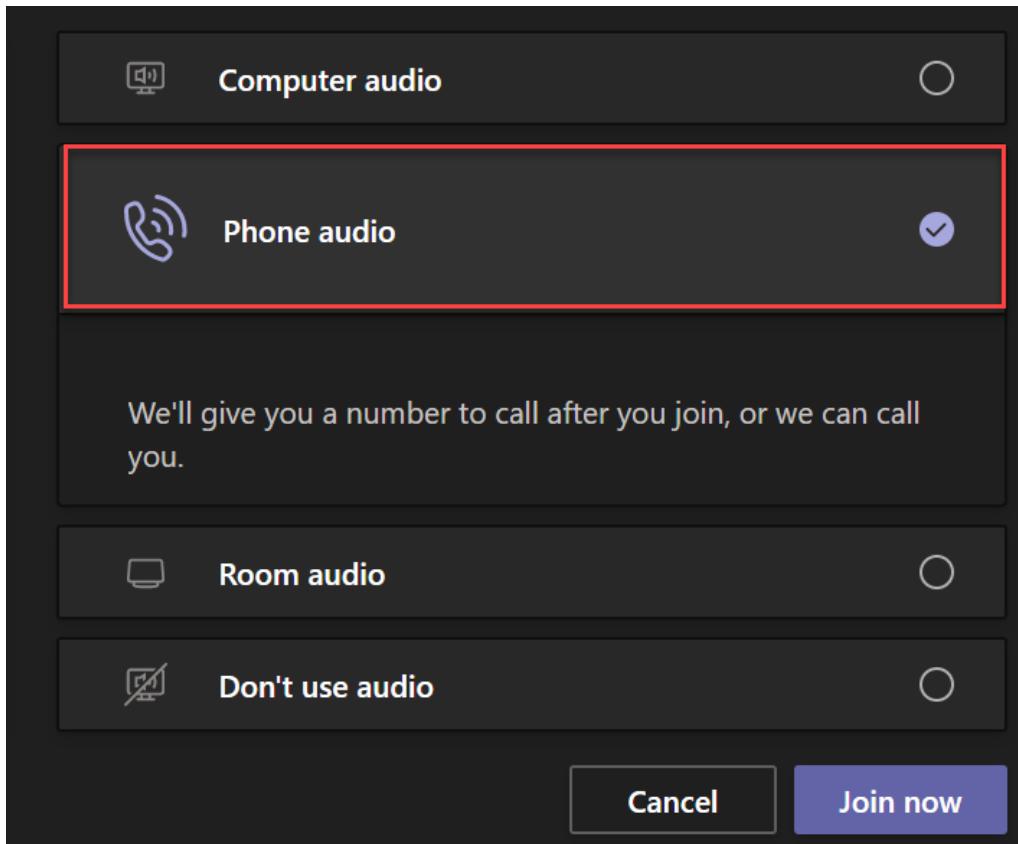
**Note:** If you're in a conference room & don't need to join the meeting audio, make sure to click **Don't use audio** to avoid an echo.



# Join a Teams Meeting

Via the Teams App

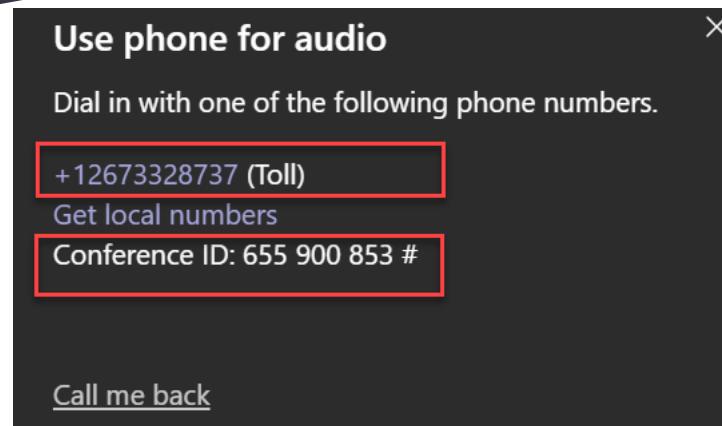
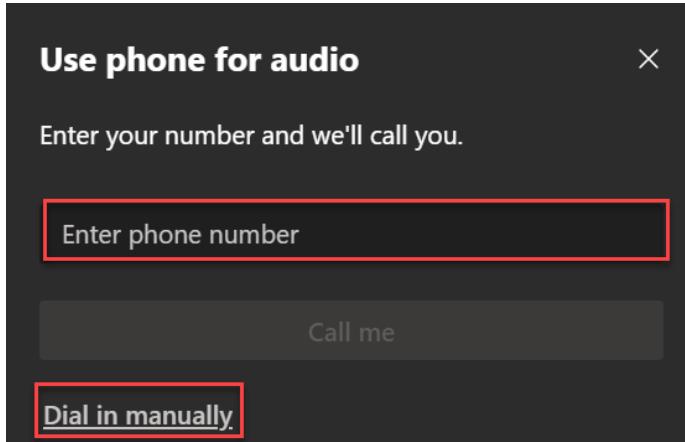
You may need to join the meeting via the Teams app to view content, but join the audio via a phone (due to a poor audio connection on your device, or because you're joining via a conference phone in a meeting room with multiple attendees).



1. Join the Teams meeting.
2. Click **Phone audio** on the meeting screen that appears, then click **Join now**.
3. On the next screen, enter the number where you'd like Teams to call you, or click **Dial manually**.

# Join a Teams Meeting

Via the Teams App



You'll then be connected to the Teams meeting via the app (for content sharing and video) **and** via the phone number that you used to dial in (or had Teams call you at).

This permits you or multiple people to view the content, while also participating via phone – handy for when there's more than one person in the room or when the audio on your device is less than ideal.

# Join a Teams Meeting

## Via Phone

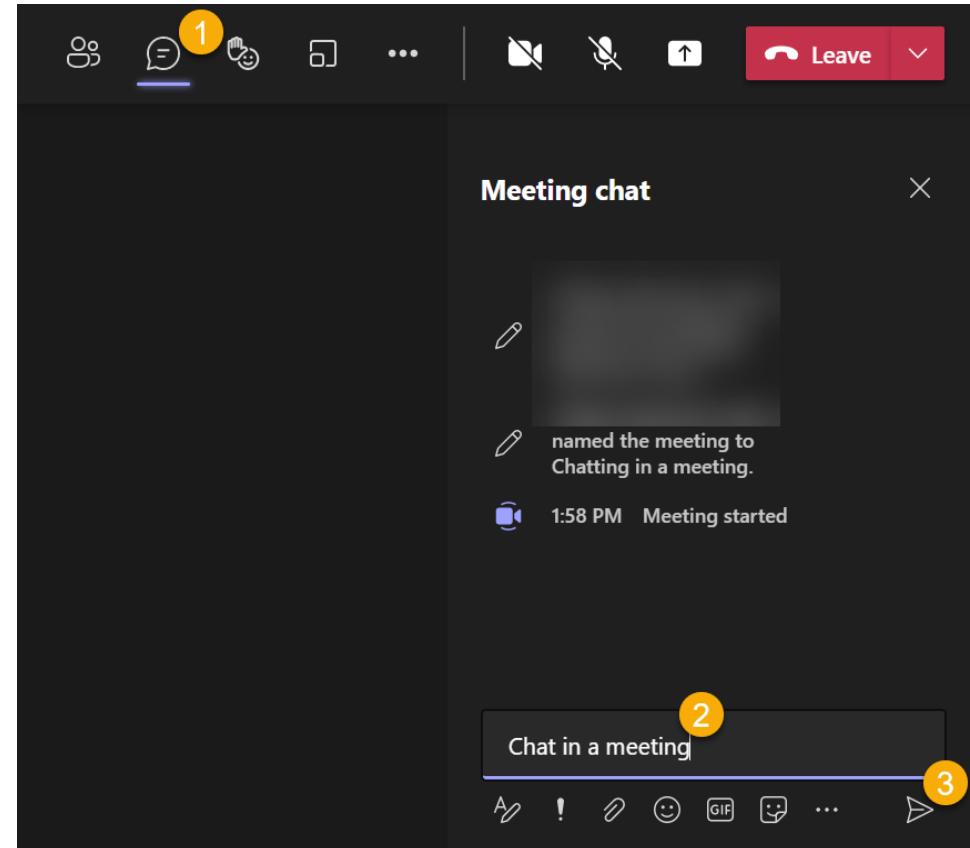
When you've got a meeting scheduled but you're not able to join via the app (whether because of a poor internet connection, if you're on the road, or simply away from an internet-connected device), you can still join a Teams meeting by dialing in on any phone.

Note that this will **only** allow you to participate in the meeting via audio, and you won't be able to see any content being shared on the screen.

- Locate the Teams meeting on your Outlook or Microsoft Teams calendar.
- Scroll down to the bottom of the message and find the dial-in number (under the **Click here to join the meeting** link).
- Dial the number on your phone, then enter the conference ID (listed in the calendar appointment) when prompted.

# Use In-Meeting Chat

- Having trouble with audio and unable to communicate with the group?
- Need to share a link or attachment?
- Have a question but don't want to interrupt the person who's speaking?

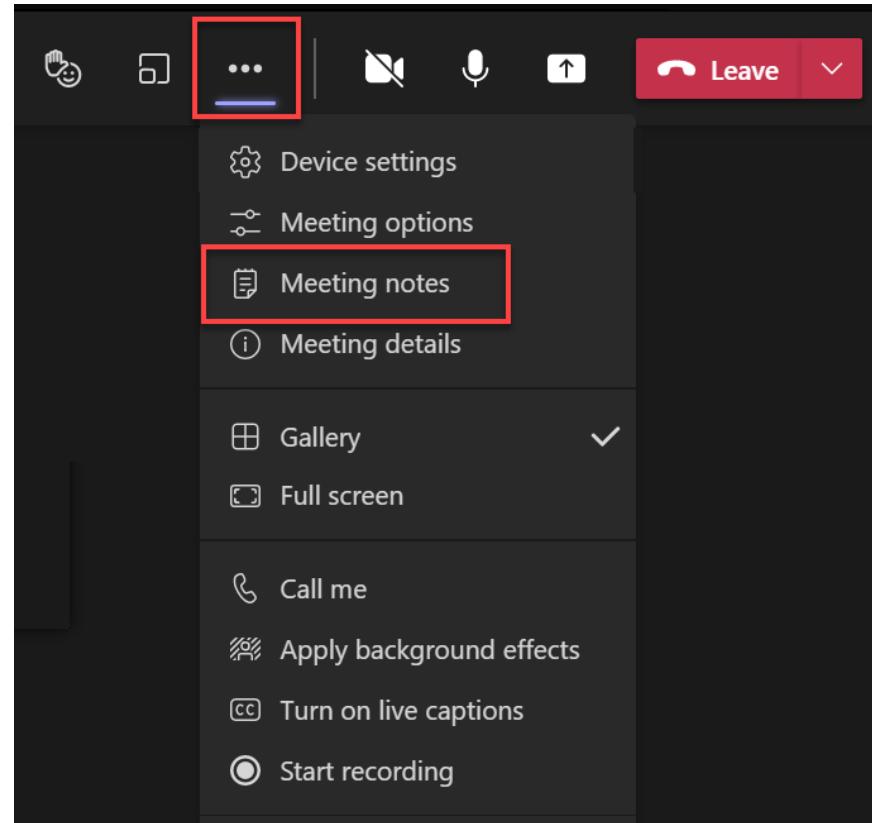


*...Try using  
Teams' Meeting  
chat feature!*

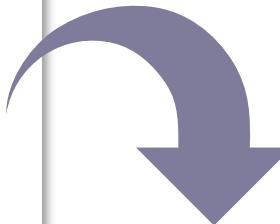
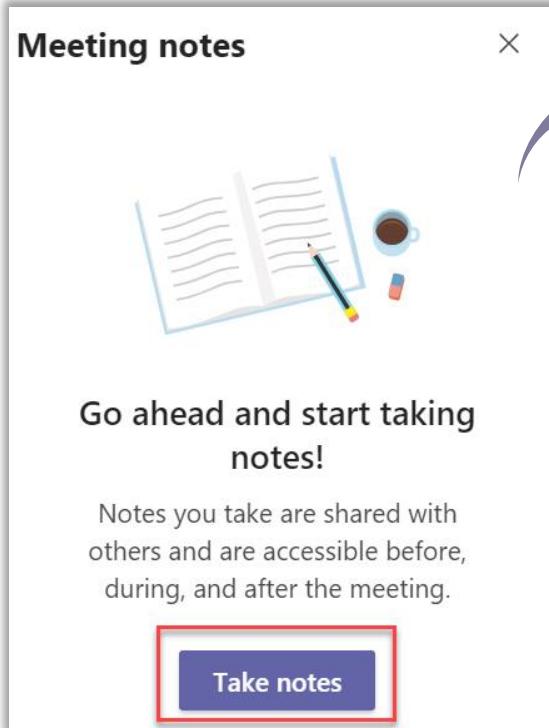
1. Click the **Show Conversation** button.
2. Type your message in the chat bar.
3. Click **send** when you're ready to share with the group!

# Take Meeting Notes

- The **Notes** feature in Teams allows attendees to take notes right within the meeting. Notes will be stored in the channel (for channel meetings), or in the chat (for meetings outside of the channel).
- To begin note-taking, click the **More options** button, then **Show meeting notes**. If someone has already begun taking notes, you'll see their notes in the pane at the right of your screen. If you're the first person to start taking notes, you'll need to click **Take notes** in the meeting notes pane.



# Take Meeting Notes

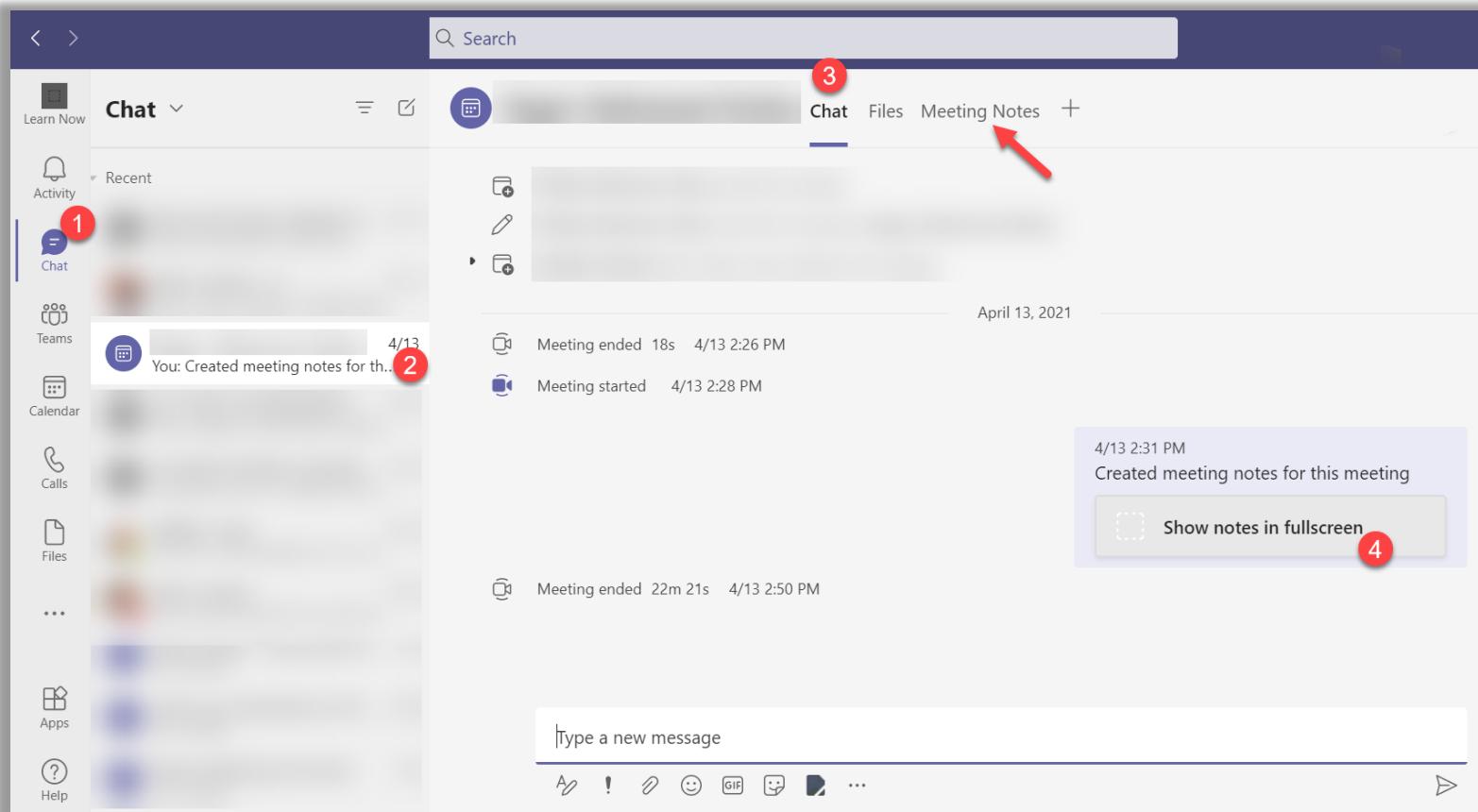


A screenshot of the Microsoft Teams meeting chat interface. The top navigation bar shows the title 'Chatting in a meeting', a 'Chat Files' tab, a 'Meeting Notes' tab (which is currently selected), a '+' button, a user profile picture, and a 'Join' button. The main area displays the heading 'Chatting in a meeting' and the sub-heading 'Last edited: Just now'. Below this is a section labeled 'Notes' with a horizontal line underneath.

**Note:** Anyone in the meeting can take notes, and view and edit other participants' notes, too. If you need to take private notes, try using another app outside of Teams like OneNote or Word.

# Take Meeting Notes

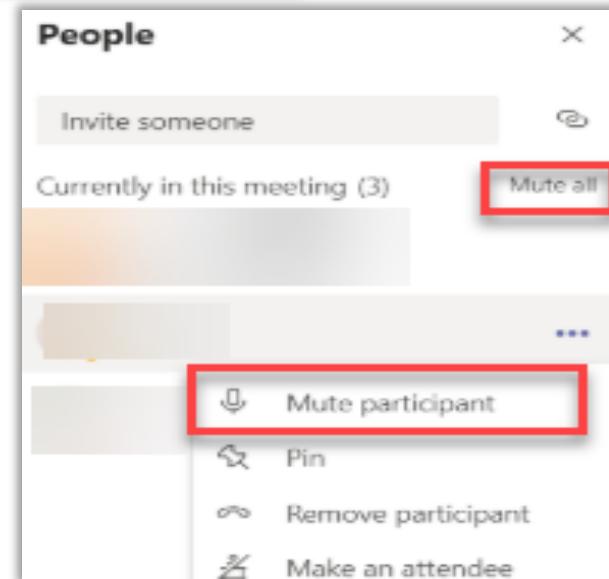
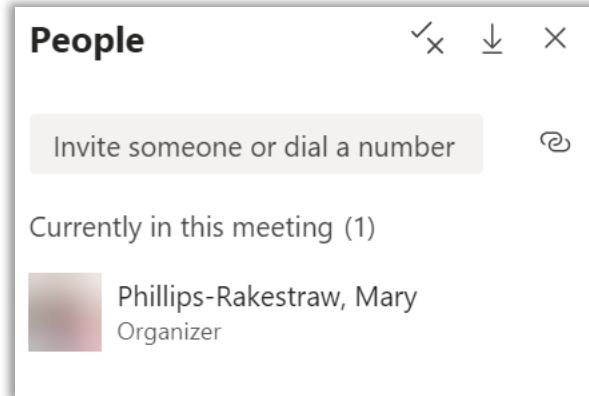
To review your notes after the meeting, click the **Chat** icon in the app bar, then select the meeting from the list pane and on the **Chat** tab, find the notes and click **Show notes in fullscreen**. Or, just click the **Meeting Notes** tab!



# View Meeting Participants

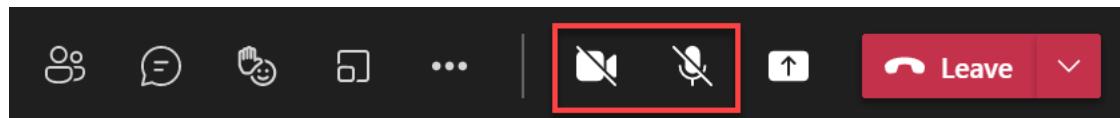
If you need to know who's in a meeting or check participants' mic status, it's easy to view a list of the meeting's participants.

Just click the **Show participants** button to open the participants pane. A pane will open on the right side of your screen, where you can view participants, invite additional users, download a participants list (if you are the meeting organizer), mute participants' microphones, and more.



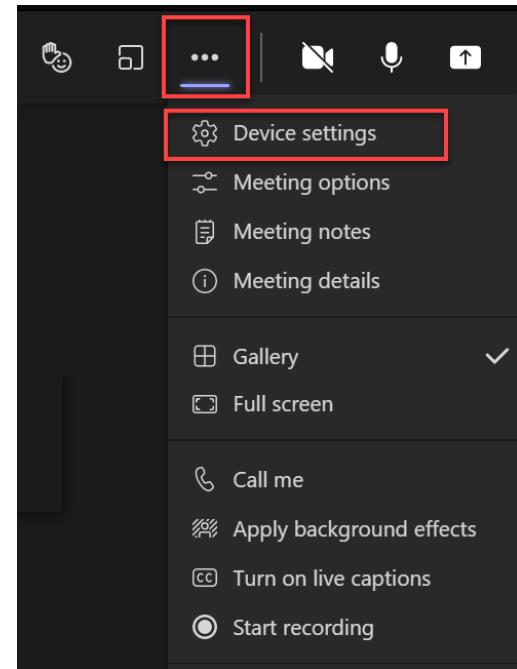
# Manage Audio and Video Settings

While in a Teams meeting, you can easily enable or disable your video, or mute and unmute your microphone using the respective buttons in the meeting:



To change your device settings or switch to another device, click the **More options (...)** button, then click **Show device settings**.

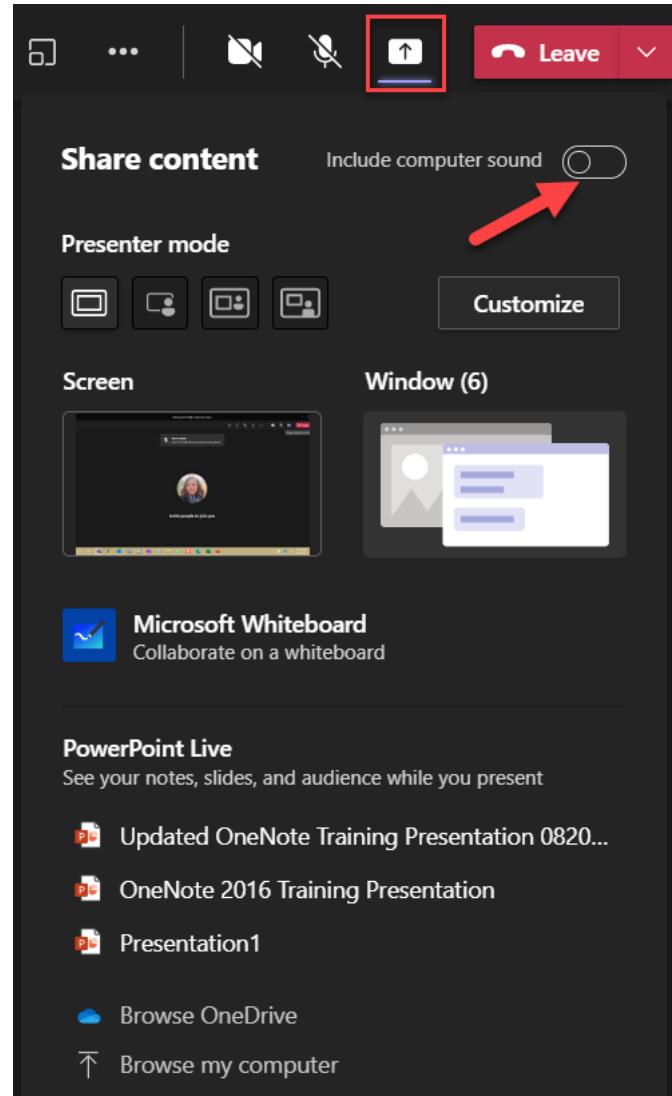
Under **More options**, you can also **show background effects** if your camera is on, **turn on live captions**, **start recording** (with everyone's permission), and more.



# Share Your Screen

Sharing your screen is easy in Teams.

1. Click the **Share** button
  
2. Choose whether to share your entire desktop, a window (recommended), a whiteboard, or a PowerPoint presentation
  
3. To enable system audio so that participants can hear sound and audio from your PC's speakers, toggle the switch next to **Include computer sound**.
  
4. To stop sharing, click the **Share** button again (which will display an X over it): 



# Schedule a Teams Meeting

Schedule a meeting right from your calendar in Microsoft Teams, or set up a meeting from your Outlook calendar.

## **Set up a meeting from **Outlook** if you want to...**

- Invite external participants who do not have a CWOPA email
- Make your meeting private so other users can't see the meeting details on your calendar
- Include an attachment with your meeting invitation

## **Set up a meeting from **Teams** if you want to...**

- Include the meeting in a Teams channel
- Avoid having to open or switch to another window/application
- Schedule a Teams Live Event

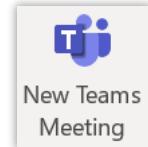
# Schedule a Teams Meeting

	Outlook	Teams
Include dial-in information	✓	✓
Schedule a recurring meeting	✓	✓
Invite external participants	✓	
Schedule a Teams Live Event or Webinar		✓
Use the Scheduling Assistant	✓	✓
Schedule a meeting in a channel		✓
Set a meeting as “private”	✓	
Include an attachment with your invite	✓	
Browse the CWOPA address book (GAL) to find participants	✓	

# Schedule a Teams Meeting

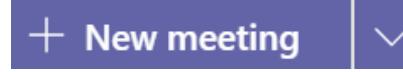
(In Outlook)

- Open Microsoft Outlook from your computer's Start Menu. 
- Go to your Outlook calendar. 
- On the Home tab of the ribbon, click the **New Teams Meeting** button.
  - **NOTE:** If you don't see the **New Teams Meeting** option, submit an IT Service Desk ticket.
- Fill out the title, recipients, date and time, and any optional fields (like recurrence, location, body of meeting invite, and privacy status).
- To make sure everyone is available during the scheduled time, click the **Scheduling Assistant** tab.
- When everything is customized to your liking, click **Send**.



# Schedule a Teams Meeting

(In Teams)

- Open Microsoft Teams from your computer's Start Menu. 
- Go to your Teams calendar. 
- Click the **New Meeting** button. 
  - **NOTE:** If you want to schedule a Teams Live Event or Webinar, click the dropdown and select **Live event** or **Webinar**.
- Fill out the title, recipients, date and time, and any optional fields (like recurrence, location, and body of meeting invite).
- To make sure everyone is available during the scheduled time, click the **Scheduling Assistant** tab.
- When everything is customized to your liking, click **Save**.

## Exercise

- ✓ Switch to the Calendar area in Teams.
- ✓ Schedule a meeting in Teams.
- ✓ Cancel (or reschedule) the meeting you just organized.

**Note:** There are several other meeting-related features that aren't as commonly used, and that are not covered in this training. Find handouts and manuals for the following topics on the IT Training Portal:

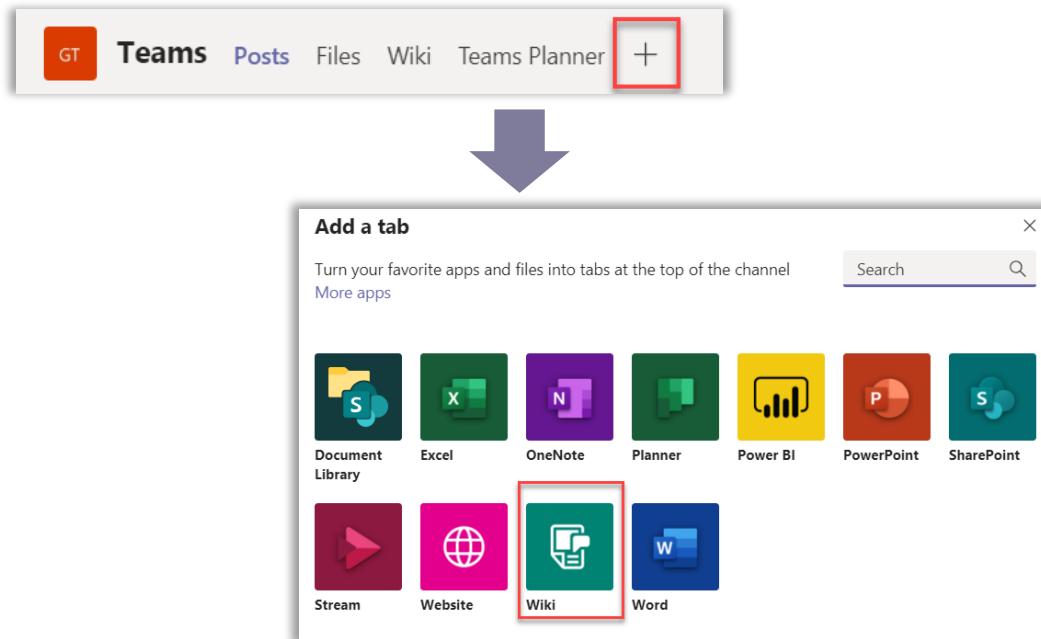
- **Meeting Breakout Rooms**
- **Teams Live Events**
- **Whiteboard**
- **Polls in Meetings**



# Wikis Overview

# Wiki

- A Teams wiki is a smart-text editor that doubles as a communication machine where you draft, edit, and chat all in one place. Think of your Teams Wiki as a more basic version of a **OneNote notebook** (without all of OneNote's functionality).
- To add a new **Wiki** tab, select **Add a tab (+)** next to the other tab names in the channel. Select **Wiki** from the tab gallery. Name the tab and start writing.



# Wiki\*

Your team's **Wiki** is made up of **pages** and every page is made of different **sections**.

You can have a separate wiki for each team channel, and multiple wikis per channel.

A **Wiki** comes with all the usual text formatting options.

To begin, title your page, then start authoring sections. A wiki is a great place to organize miscellaneous bits of information – notes, information – anything that helps your team stay organized and productive!

To add a new section, hover over the left side of the page and select **Add a new section here**.

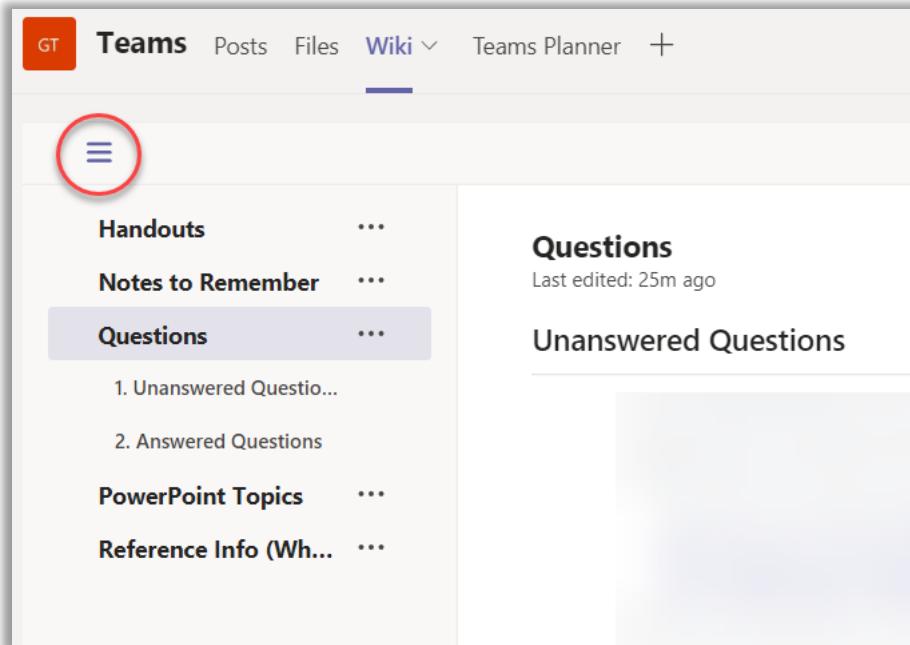
The **New Page** button is at the bottom of the Wiki.

- |                       |                 |             |                  |
|-----------------------|-----------------|-------------|------------------|
| 1. Wiki tab           | 4. Expand       | 7. Page     | 10. Page options |
| 2. Navigation menu    | 5. Refresh      | 8. Section  | 11. Conversation |
| 3. Formatting options | 6. Wiki options | 9. New page | 12. New section  |

# Wiki

Navigate your wiki via the menu in the left corner.

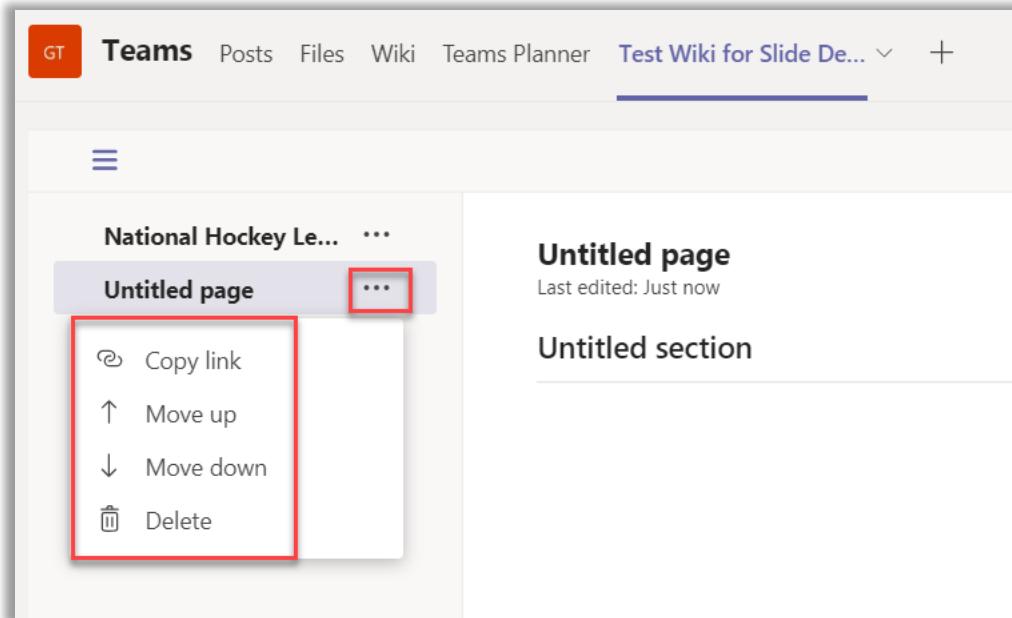
**Tip:** To minimize the menu so you have more writing space, click the menu icon a second time.



# Wiki

Every Wiki page has these activities associated with it:

- Copy Link
- Move Up
- Move Down
- Delete



# Chat from your Wiki tab

- **@mention someone in a section** – To talk with a teammate about a page, @mention them in a section. This comes in handy when you want feedback or you’re waiting on someone else to contribute a section to your page. When you @mention someone, they’ll receive a notification in their Activity feed. Selecting the notification takes them directly to the section that needs their attention.
- **Start a chat in a section** – If commenting directly on the page isn’t your style, you can always start a conversation in the tab itself by selecting **Show section conversation** to the right of a section. From there, you can post questions, leave comments, or @mention your teammates. You’ll have all the same formatting and attachment options that you do in your regular compose box.
- If someone else has already left comments in the tab conversation, you’ll be able to view them in the channel. You’ll also know that someone has left comments in your Wiki tab because **Show section conversation** appears at the top of your page.

# Chat from your Wiki tab

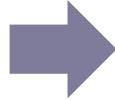
National Hockey League  
Last edited: 32m ago

Philadelphia Flyers  
They get a **first-round bye** when the season resumes this month.

Toronto Maple Leafs  
Will play in a best-of-five series.

A small red box highlights the "Conversation" tab at the top right of the window.

A message box at the bottom contains the text: "Johnson, Chante - do you think the Flyers will win the Stanley Cup this year?" This message is also highlighted with a red box.



Conversation X

2:42 PM  
Johnson, Chante - do you think the Flyers will win the Stanley Cup this year?

 Philadelphia Flye...

A message input field at the bottom is labeled "Reply". This field is also highlighted with a red box.

At the bottom of the input field, there are several icons: a speech bubble, a smiley face, a GIF icon, a video camera icon, an ellipsis, and a send arrow icon.

# Exercise

- ✓ Go to the General channel.
- ✓ Add a Wiki tab and rename it “Your initials – Test.”
- ✓ Rename the page with a name of your choice.
- ✓ Add some content (of your choice) to the first section.
- ✓ Add a second and third section, and this time, apply some formatting options to your text.
- ✓ Start a conversation about one of the wikis with one or more of your teammates.



# Apps in Teams

# Apps in Teams

In Microsoft Teams, apps are small programs, similar to extensions on your web browser.

They are specifically designed to increase collaboration and make you more productive, whether you work from home or the office.

Usually, these apps are connectors to integrate other services into Microsoft Teams. For instance, the OneNote app allows you to create, edit, and view notebooks in Teams.

Another popular app is Microsoft Planner. It is a handy app with a card-based interface that's used for personal and teamwork planning.

# Apps in Teams

- Although the primary process for adding apps is the same, the final setup process may be slightly different depending on the app. For example, in some apps, you may be able to select the option to install it to a specific team or chat. Or you may also be required to sign in and configure specific options when adding third-party services.
- Your network administrator may or may not allow you to add apps to the experience. If you don't see any apps, then it's likely that you don't have permission. If you see only a few apps, then your organization is filtering apps allowing you to see only certain ones.

# Apps in Teams

Apps can be **personal** or **shared**, depending on where you place them in Teams.

**Personal apps** appear on the left side of your screen, in the **Apps bar**.

When used as a personal app, Planner gives you a personal view of your own Planner tasks, regardless of what team or channel they were assigned in.

Another app that you may use privately is OneNote. Use OneNote's Teams integration to organize and access all of your information in one place.

**Shared (public) apps** appear in **channel tabs**, and can be used by all of your team members.

Public apps allow you to collaborate with others on content and tasks. When apps are placed in a channel tab, everyone can use and interact with the app.

Some examples of commonly-used public apps are Planner and OneNote.

# Installing a Personal App

In Microsoft Teams, you can install an app in the App bar for private use.

1. Click on **Apps** (in the App bar). 
2. Select from a category to browse for an app (or use the search box). It defaults to the **All** category.
3. Select the app.
4. Click the **Add** button.
5. Continue with the on-screen directions (if applicable).

# Installing a Personal App

The screenshot shows the Microsoft Teams application interface, specifically the 'Apps' section. On the left, there's a vertical sidebar with icons for 'Learn Now', 'Activity', 'Chat', 'Teams', 'Calendar', 'Calls', 'Files', and three dots. The 'Apps' icon is highlighted with a red box. Below the sidebar, there's a search bar and a 'See all' button.

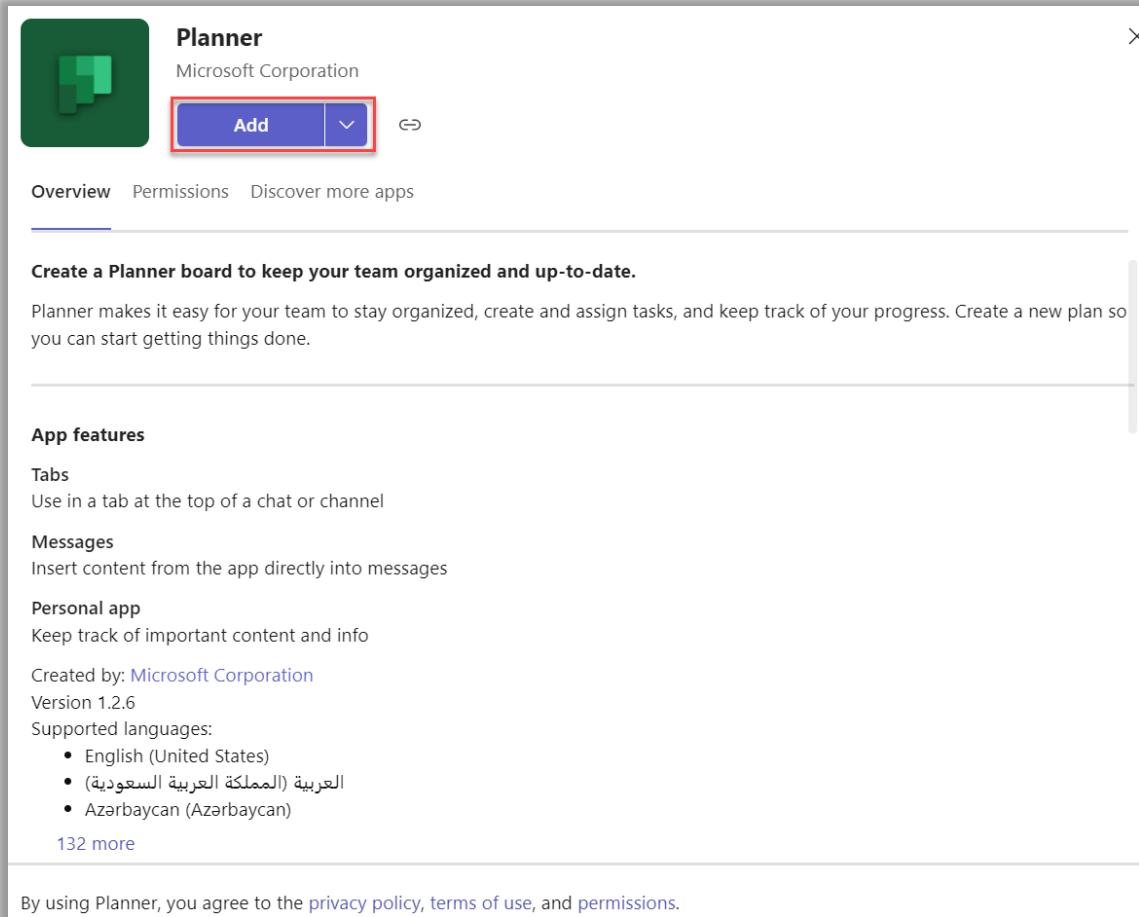
The main area is titled 'Apps' and contains several sections:

- Built for your org**: Created and approved by your organization's technology team. It lists 'Learn Now' (Vitalyst, LLC.) and 'SmartTAP' (AudioCodes).
- Popular in your org**: Added and used the most in your organization. It lists 'Adobe Acrobat' (Adobe), 'Forms' (Microsoft Corporation), 'Learn Now' (Vitalyst, LLC.), 'ArcGIS Maps' (Esri), 'Viva Insights' (Microsoft Corporation), and 'Planner' (Microsoft Corporation).
- Manage tasks**: It lists 'Power Automate' (Microsoft Corp.) and 'Viva Insights' (Microsoft Corporation).
- Productivity**: It lists 'Project' (Microsoft Corporation) and 'Milestones' (Microsoft Corporation).

At the bottom of the sidebar, there are links for 'Manage your apps' and 'See more'.

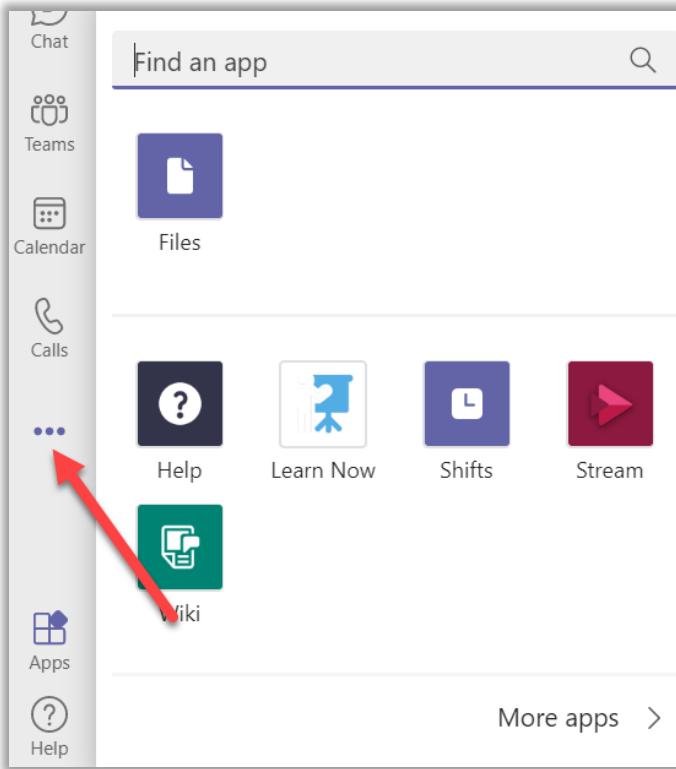
# Installing a Personal App

Click the **Add** button. (The dropdown will show additional options that are available for that app, like add to team or add to a chat.)



The screenshot shows the Microsoft Teams app store page for the "Planner" app by Microsoft Corporation. The "Add" button is highlighted with a red box. Below the app icon and name, there are tabs for "Overview", "Permissions", and "Discover more apps". A descriptive text block says: "Create a Planner board to keep your team organized and up-to-date. Planner makes it easy for your team to stay organized, create and assign tasks, and keep track of your progress. Create a new plan so you can start getting things done." Under the "App features" section, there are four items: "Tabs" (described as "Use in a tab at the top of a chat or channel"), "Messages" (described as "Insert content from the app directly into messages"), "Personal app" (described as "Keep track of important content and info"), and "Created by: Microsoft Corporation Version 1.2.6". The "Supported languages" section lists English (United States), العربية (المملكة العربية السعودية), and Azərbaycan (Azerbaijan). At the bottom, there is a link to "132 more" features and a note: "By using Planner, you agree to the [privacy policy](#), [terms of use](#), and [permissions](#)".

# Installing a Personal App



The app is added to **More added apps** (… ) area  
on the Teams app bar.

# Add a Public App\*

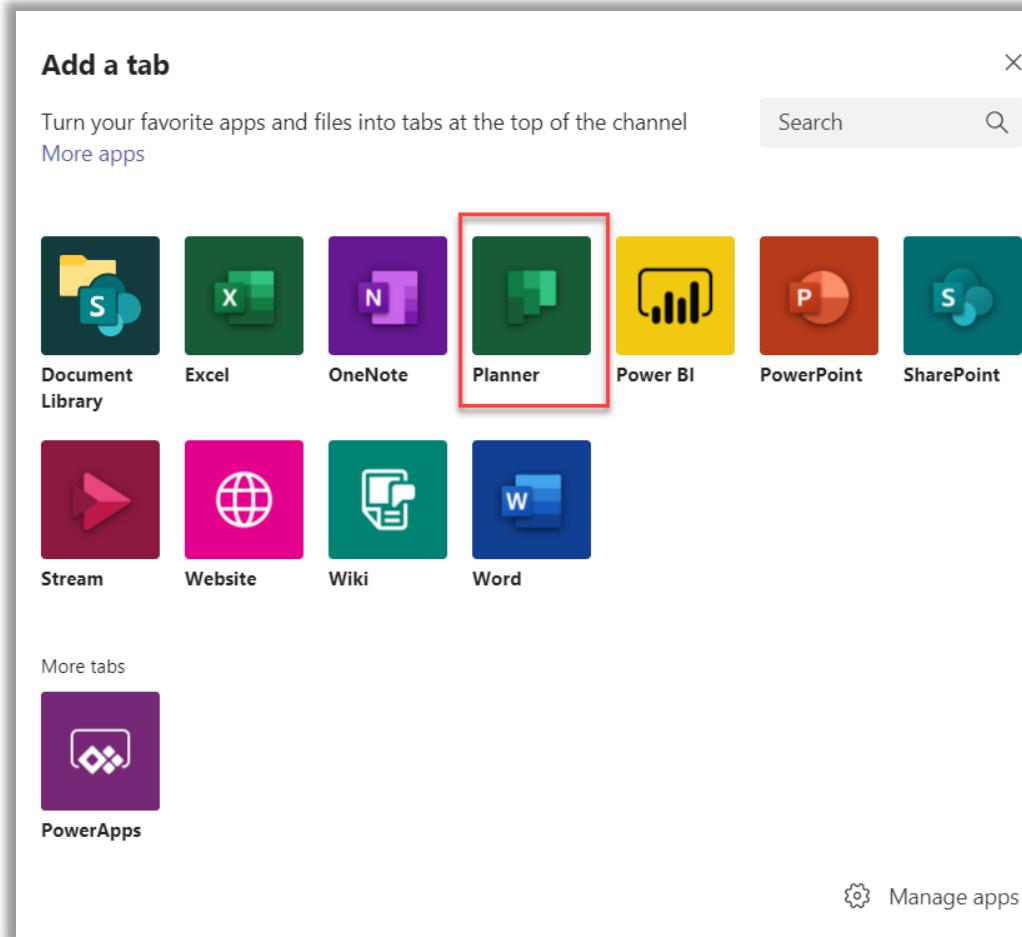
You can add an app to a team channel to add a prominent link to important content, like a specific web page, document, or wiki page.

Just click the **Add a tab** (+) button at the top of the window to locate and add shared apps to your channel.



# Add a Public App

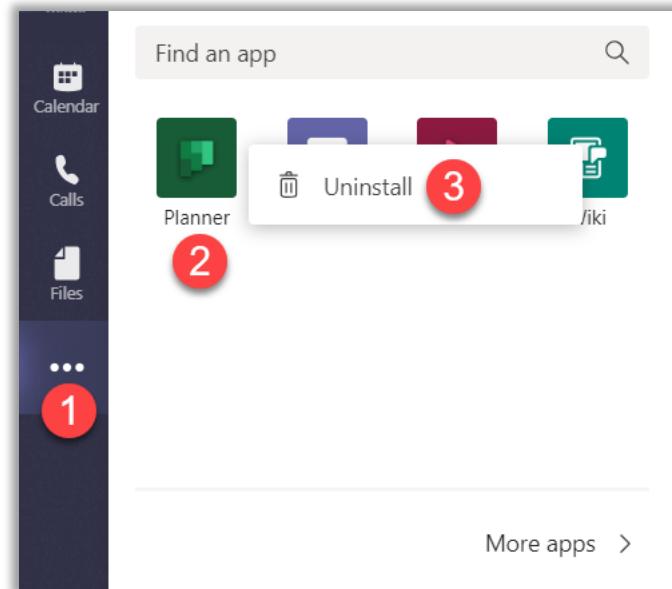
Browse for the app you want to add, then click its tile to add it to your channel's tabs. Follow the on-screen instructions to complete setup.



# Remove a Personal App

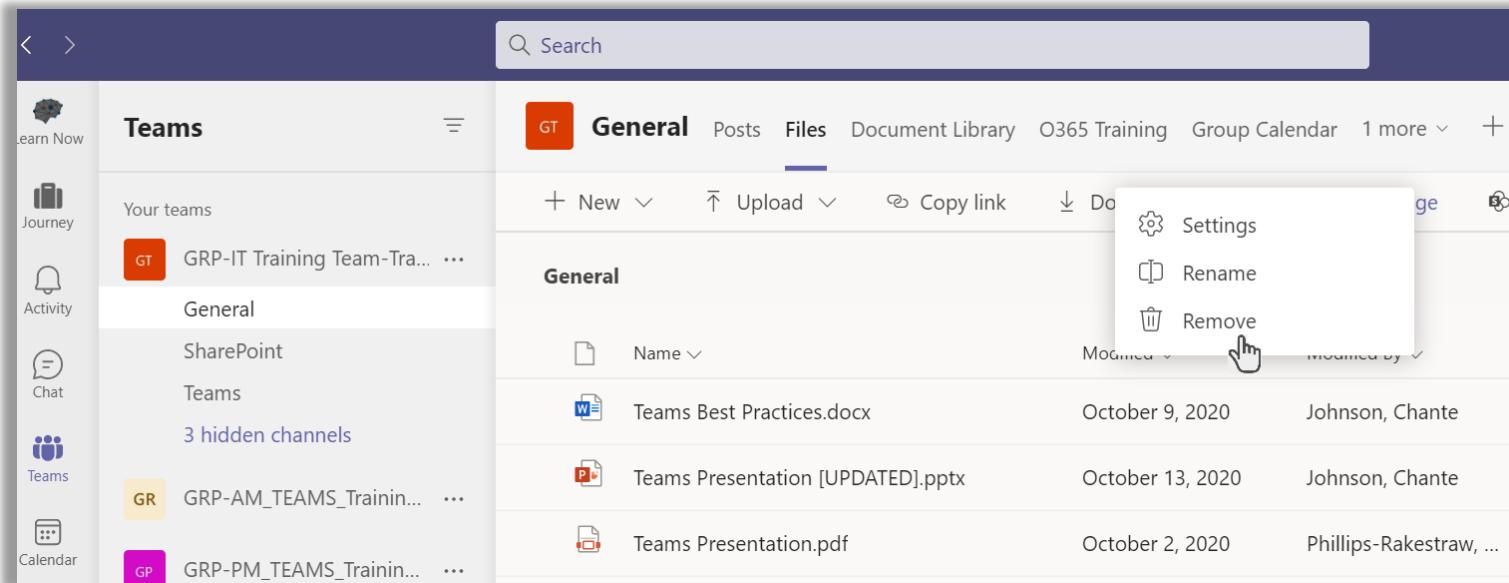
If you no longer need one of your personal apps, you can easily remove it from your App bar.

1. Click the **More added apps** (...) button on the App bar.
2. Right click on the name of the app that you want to remove.
3. Click **Uninstall**.
4. The app is removed from your App bar.



# Remove a Shared App

1. Go to the team and channel where you want to remove the app.
2. Right click on the channel tab that you want to remove.
3. Click **Remove**.



# Remove a Shared App

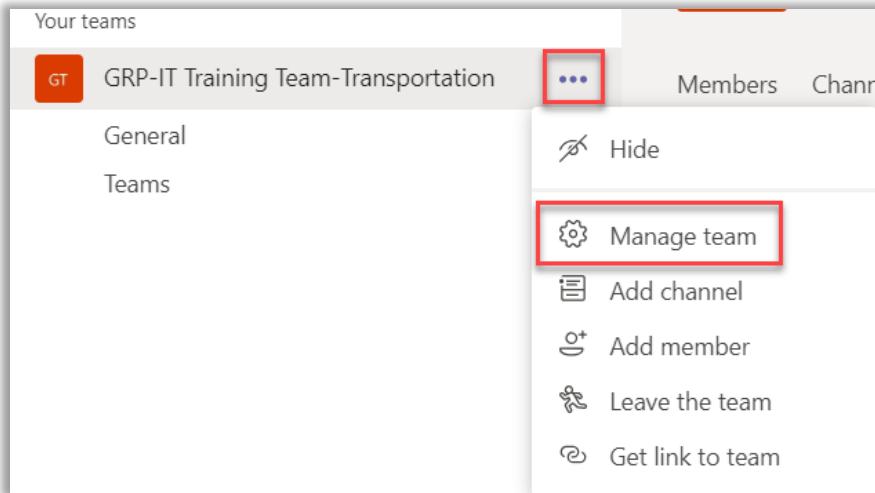
If you're a team owner who's able to add apps to a team, you can also remove unnecessary apps from a team, too. **Removing an app this way makes it so that no team members are able to add or use the app in the team.**

1. Click the **Teams** button on the App bar.
2. Click a team's **More options (…)** button.
3. Select **Manage Team**.
4. Click the **Apps** tab.

A list of the apps installed to this team is displayed. Each app has an uninstall button to its right, in the shape of a trash can.

5. Click an app's **Uninstall button**.  
You'll be asked to confirm that you do want to uninstall the selected app.

# Remove a Shared App



A screenshot of the Microsoft Teams "Apps" page. The "Apps" tab is selected, indicated by a red box. Below the tabs, a message reads: "Apps let you complete tasks, receive updates, and communicate at the same time. To get started @mention a bot or add a tab in a team channel." On the right, there is a "More apps" button. The main area shows a list of installed apps:

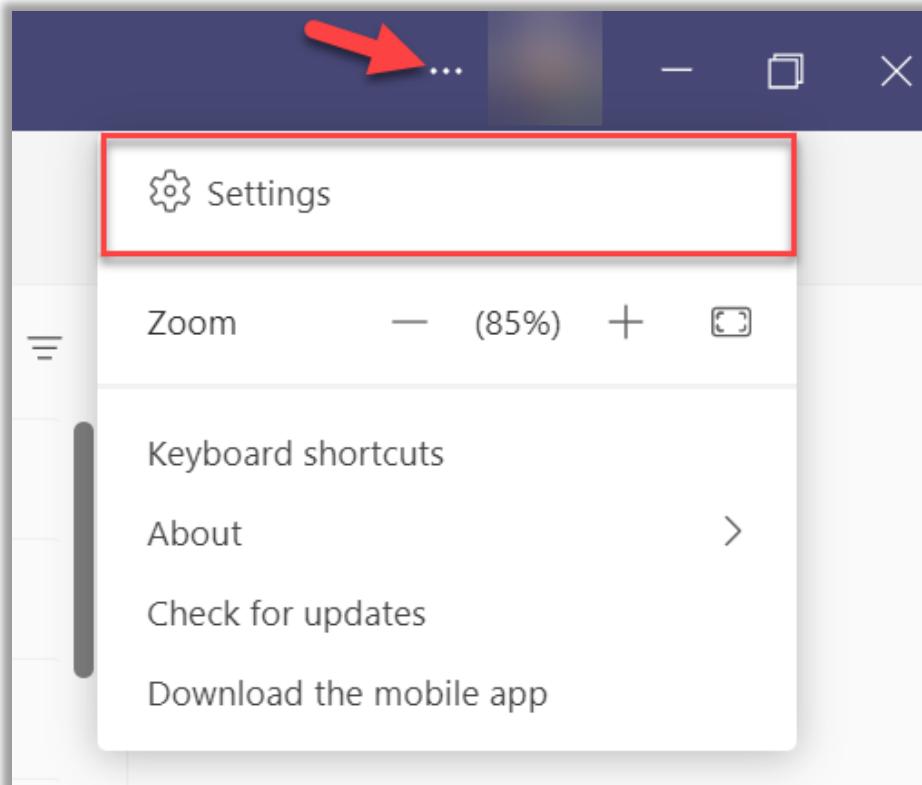
Name	Description	Action
OneNote	Use OneNote notebooks to collaborate on digital content and share it with your team.	Uninstall (highlighted with a red box)
Planner	Planner makes it easy for your team to stay organized, assign tasks, and keep track of your progress. Create a new plan so you can st...	Uninstall (highlighted with a red box)
SharePoint	Add a SharePoint page or list. Lists can be edited. Pages are read only in Teams.	Uninstall (highlighted with a red box)

# Tools and Settings

# Settings

Teams has several settings that let you customize how it works, ranging from privacy settings to the way the app looks.

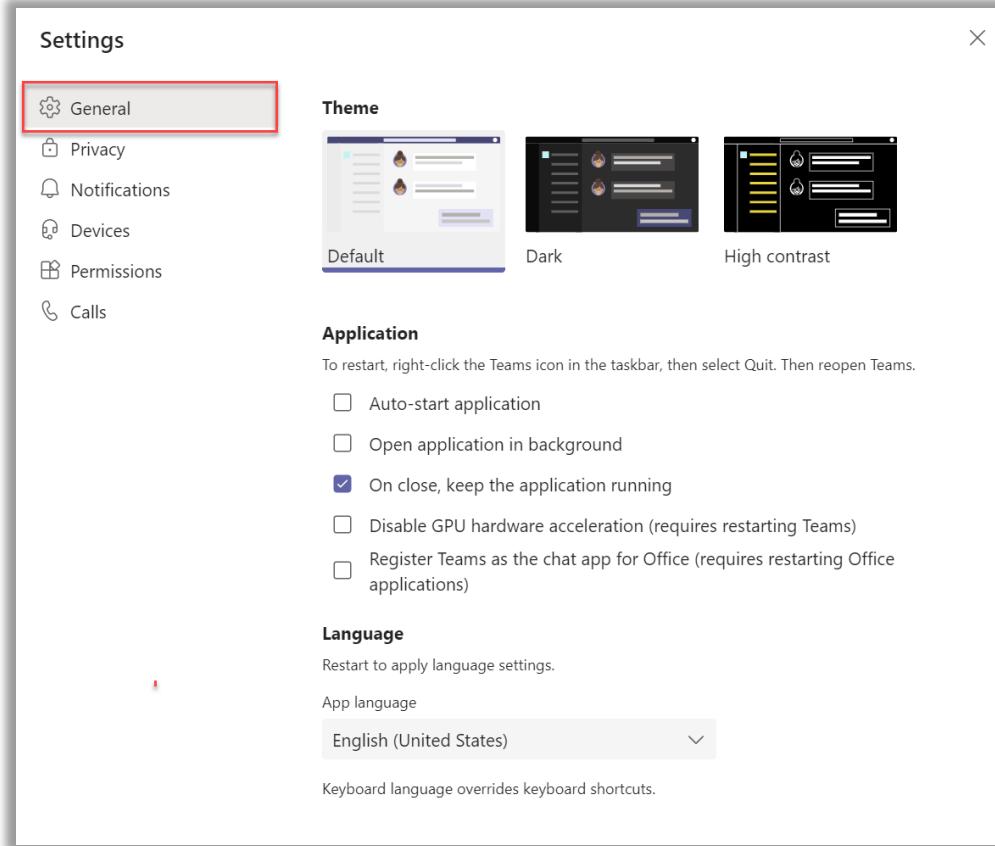
To change settings, simply click the **More actions** button (...) next to your profile picture and select **Settings**. The Settings window opens.



# General Settings

**General** settings hold the themes, application, language and display settings.

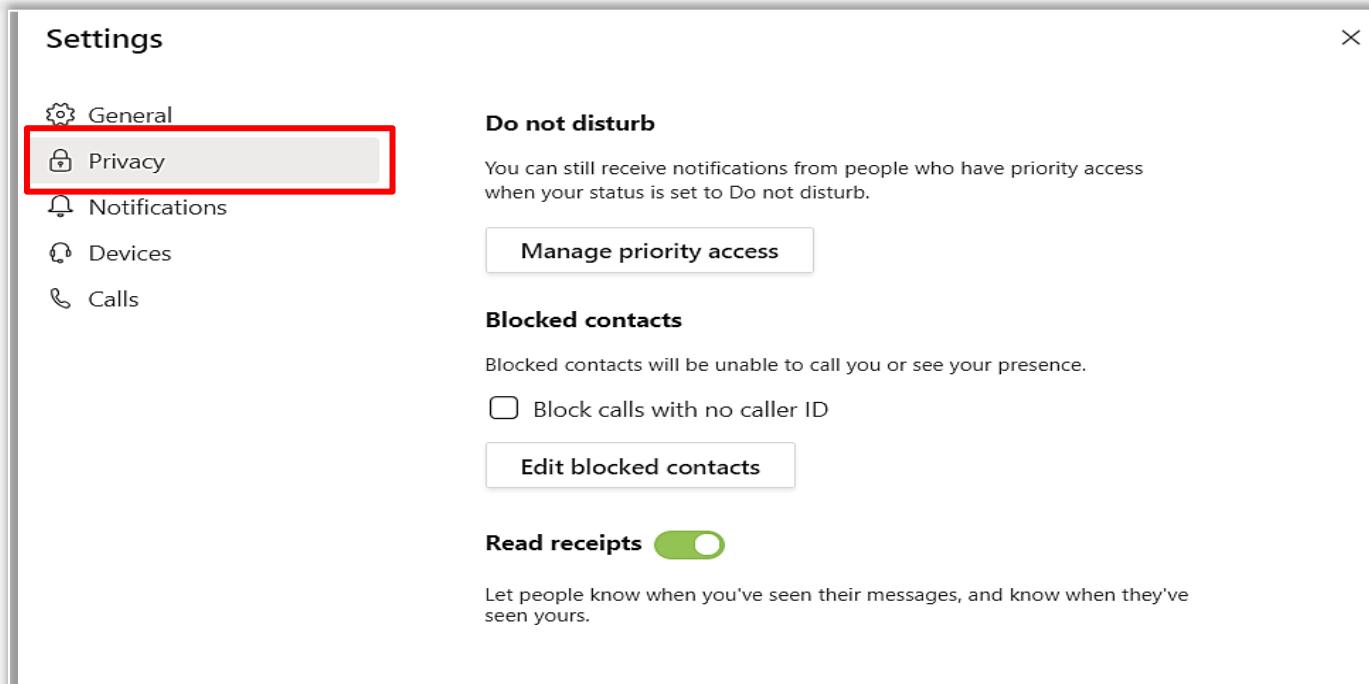
Just click your user icon and select **Settings**. By default it will be on the General tab. Change general settings as needed.



# Privacy Settings

**Privacy** settings allows users to change their do not disturb options, block contacts/edit block contacts, and edit read receipts.

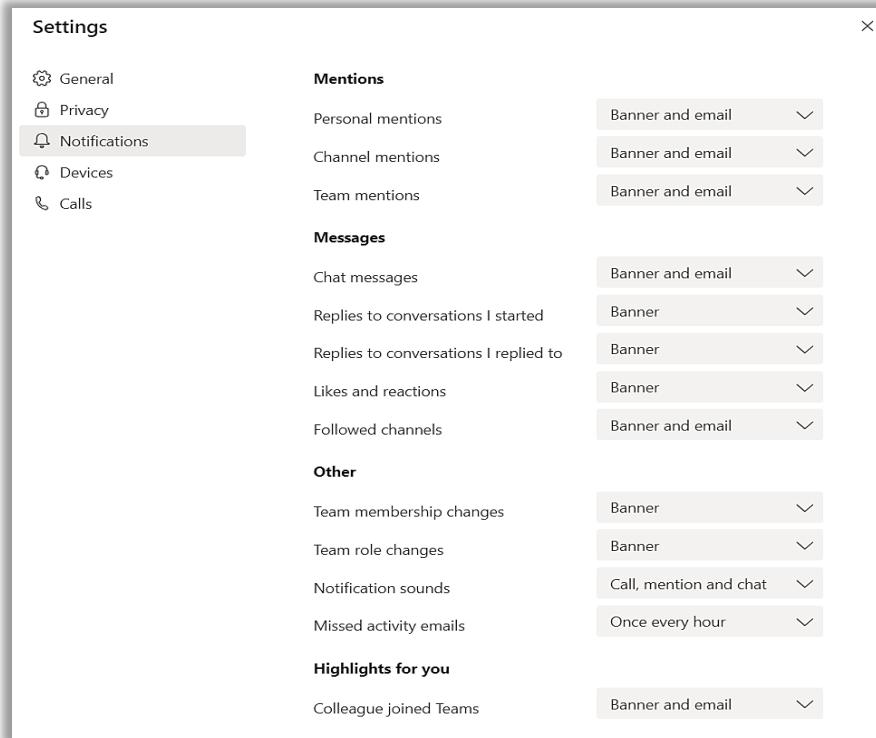
Simply click your user icon, select **Settings**, and select the **Privacy** tab to change privacy settings as needed.



# Notifications Settings

The **Notifications** settings allow user to change notifications for mentions, messages, emails, and more.

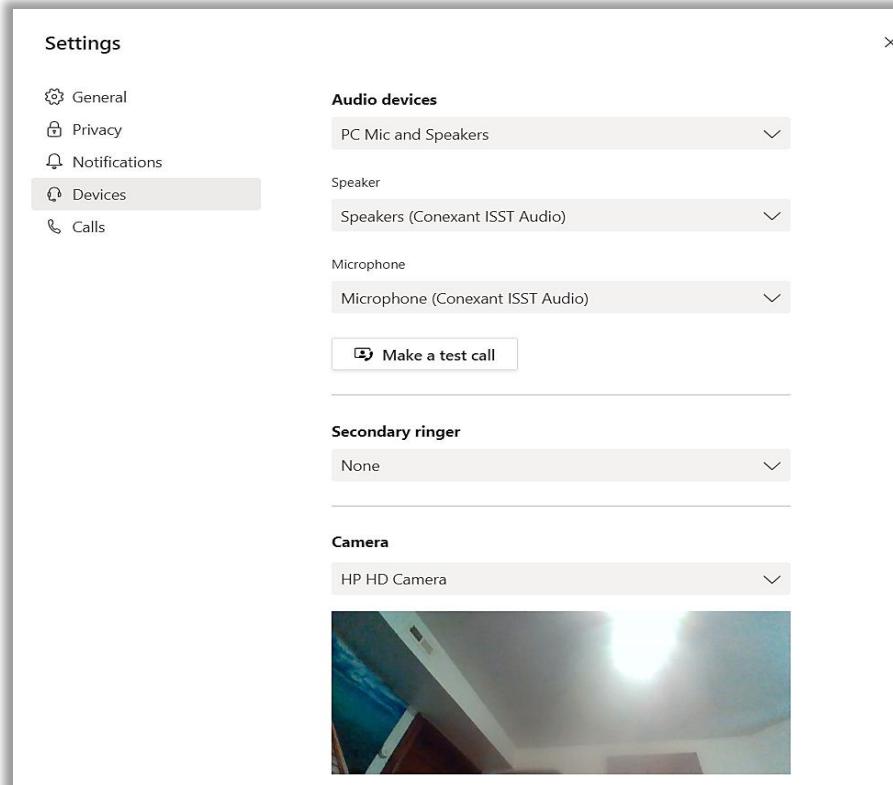
Just click your user icon, select **Settings**, click the **Notification** tab, and change notification settings as needed.



# Device Settings

**Device** settings allow users to change audio devices, secondary ringer, and camera options.

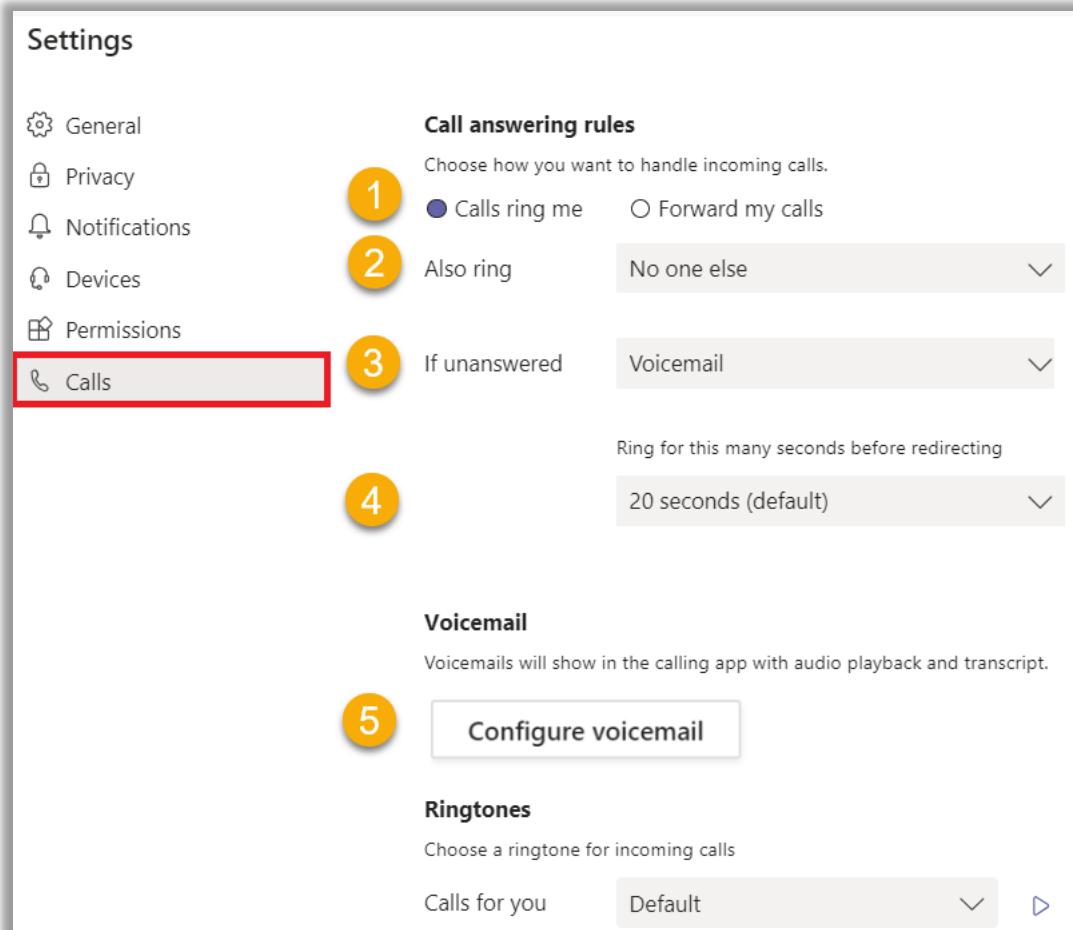
Just click your user icon, select **Settings**, click the **Devices** tab, and change devices settings as needed.



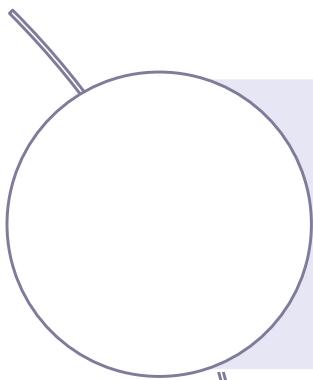
# Change Calls Settings

After opening your Settings (as described on the prior slide), click **Calls** from the left menu to access and customize your call settings.

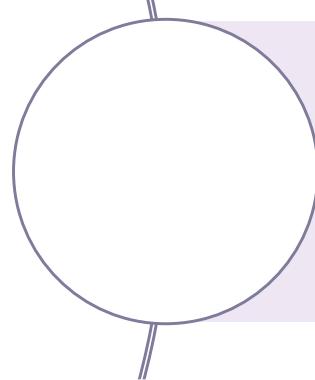
1. Call forwarding
2. Simultaneous ring
3. Unanswered call handling
4. Ring time
5. Voicemail settings



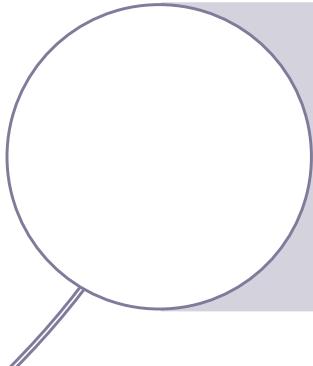
# Change Calls Settings



**Call forwarding:** Forwards all incoming calls to another number or Teams user. Used when you'll be away from your phone & still need your calls to be answered.



**Also ring:** Equivalent to Skype's "simultaneous ring." Rings numbers on two devices at once so there's less chance of you missing a call (e.g., your personal cell phone & Teams on your PC)

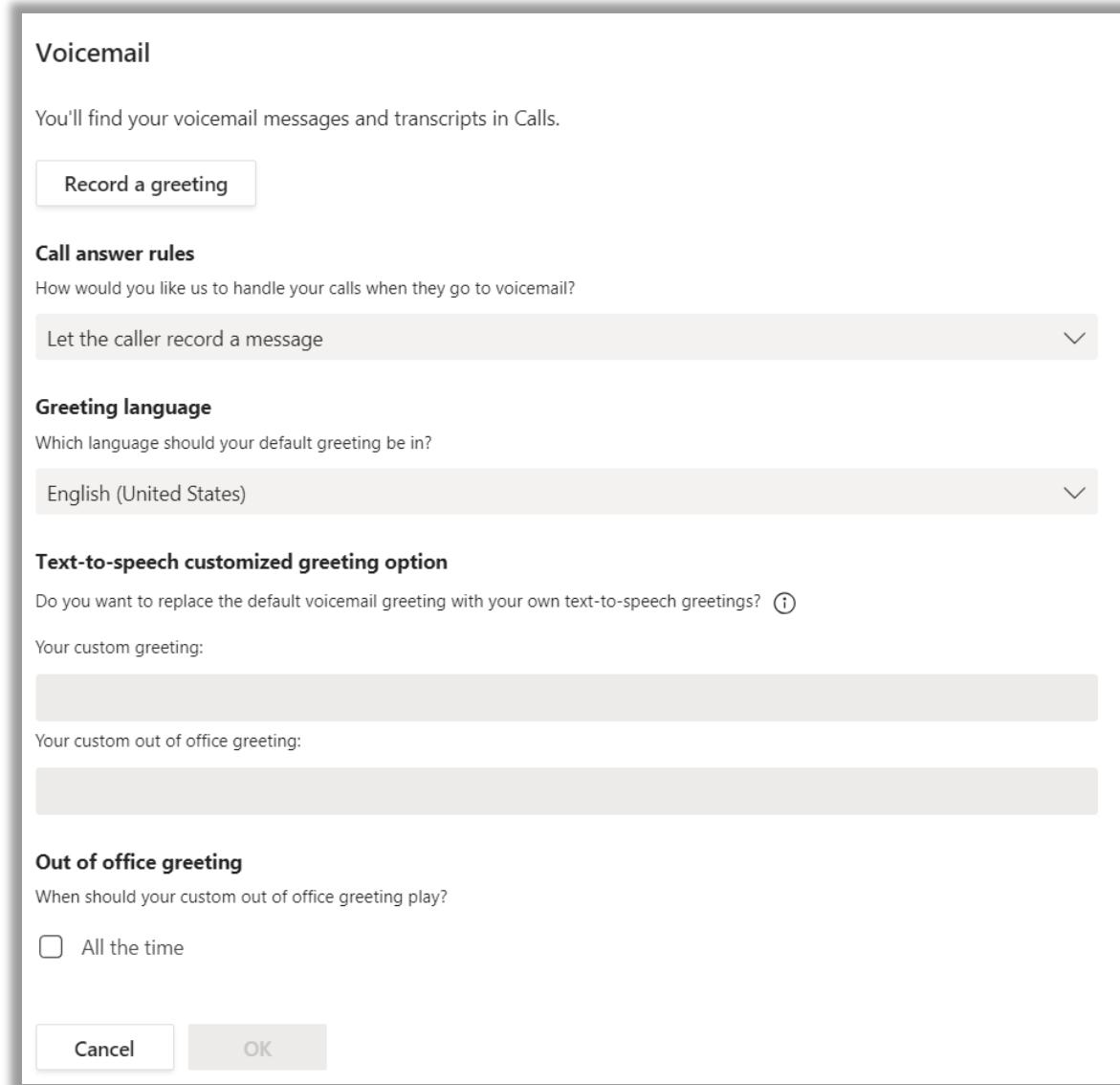


**If unanswered:** Forwards your call to another number or user *only if* you do not answer the incoming call. This is a great option for main numbers or lines that must be answered; this helps avoid calls going to a voicemail.

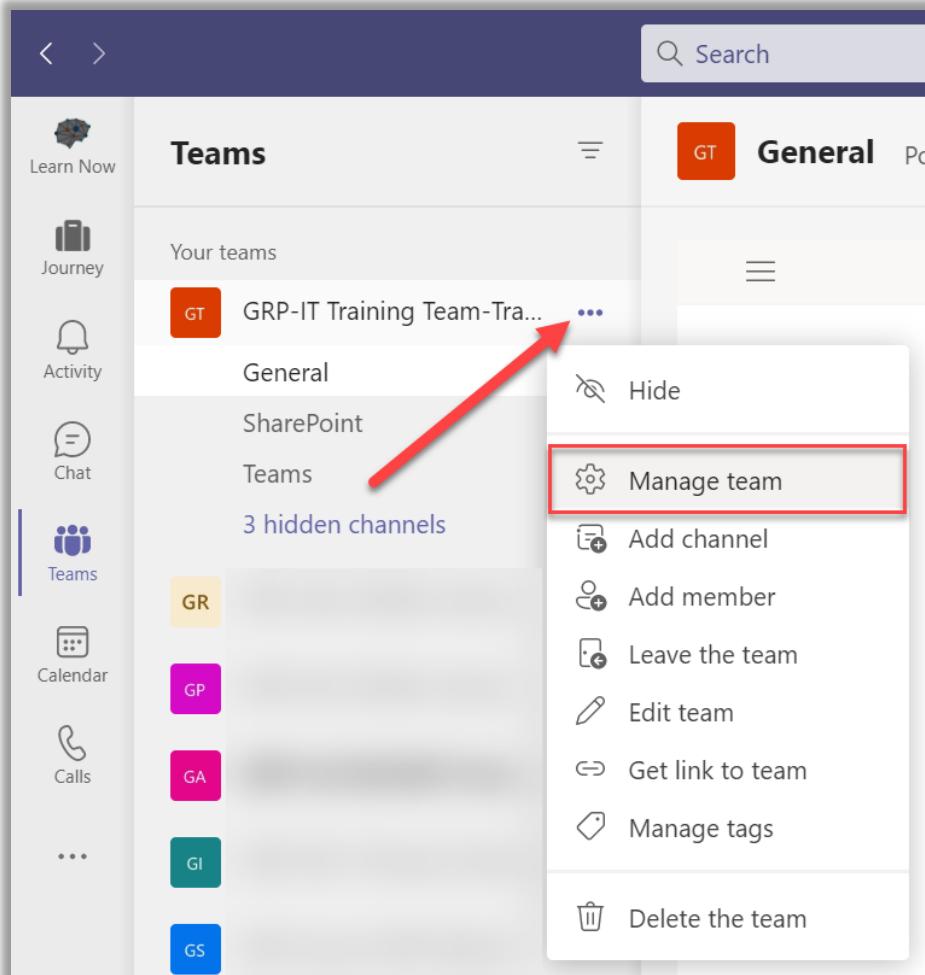
# Configure Voicemail Settings

To configure voicemail settings,

1. Click your user icon.
2. Select **Settings**.
3. Click **Calls**.
4. Click **Configure Voicemail**.
5. Make changes.
6. Click **OK** to save.



# Managing a Team



Team owners can manage their team, including changing membership roles, limiting activity, and setting member permissions.

To do so, click the **More options** button (...) next to the team name, then click **Manage Team**.

# Managing a Team



GRP-IT Training Team-Transportation ...  
GRP-IT Training Team-Transportation

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

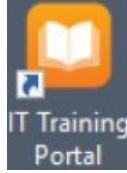
» **Tags** Choose who can manage tags

## Exercise

- ✓ Navigate to the Teams settings via your profile picture.
- ✓ Review General, Privacy, Notifications, Devices, and Calls settings in Teams.
- ✓ In the Calls settings, change the ringtone for incoming calls to one of your choice.



# Resources

- IT Service Desk: **717-783-8330**
- IT Training Portal: The logo for the IT Training Portal features a stylized orange book icon with white lines representing text, positioned above a smaller blue square icon with a white 'P' or checkmark. Below the icons, the text "IT Training Portal" is written in a small, sans-serif font.
- IT Training Unit: **RA-PDITTraining@pa.gov**
- IT Tech Help: **https://ITCentral.pa.gov**
- Microsoft Office: **www.office.com**
- Quick Help Brainstorm Videos:  
**https://app.quickhelp.com/pa/skillPaths/134711**

# Questions?

