TEAMS

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Teams

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Introduction and Overview

Welcome to TeachUcomp Inc.'s Mastering Teams Made Easy™ course. This class is designed to give the user of Microsoft Teams a thorough training in using the Teams application.

Microsoft Teams is an Office 365 collaboration and communication app that allows team members to chat, meet, call, and share information to achieve common goals. A team is made up of a group of people, often from the same organization. Teams are comprised of channels, which are the conversations between teammates. Channels can be created for different projects, departments, and topics. Channels are where meetings take place, files are shared, and team conversations occur.

In addition to channel conversations, Teams also allows users to send and receive private chat messages either one-on-one or between a specific set of members. Video and audio calls can be made freely between team members. With a calling plan in place, calls can also be made outside of the organization, even if the other party isn't using Teams. The Calendar app, which syncs with your Microsoft Outlook calendar, helps to organize activities in Teams and schedule and join meetings. Files that are shared in a channel conversation can be edited simultaneously by team members, making Teams a truly collaborative environment.

This is a comprehensive course for students interested in learning how to effectively use Microsoft Teams. The course begins by exploring the Teams interface and the various parts of the application. After that you will learn how to set up teams and channels and create, edit, read, and reply to posts and messages. You will also learn how to place and receive video and audio calls, conduct meetings, share and collaborate on documents, and host live events. We will conclude by examining the apps and tools available to fully realize the power and potential of Microsoft Teams.

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1.1- The Teams Environment:

The picture shown below is of the Teams application interface. In the following lessons within this chapter, you will examine the elements of the Teams environment. New users should first familiarize themselves with the tools and elements within the program's environment to best utilize its resources.

The app bar is the primary navigation tool in Teams and runs along the left side of the Teams desktop client and at the bottom of the Teams mobile clients on iOS and Android devices. The buttons in the app bar link to different areas of Teams or additional apps. By default, the Microsoft Teams buttons displayed in the app bar are Activity, Chat, Teams, Calendar, Calls, and Files. We will look at customizing the app bar in a future lesson. To navigate to an area of Teams, simply click one of the buttons in the app bar.

As you click buttons in the app bar, the panes and windows to the right will change depending on the area of Teams you have entered. For example, when you click the "Teams" button, the pane to the right of the app bar changes to the "Teams" pane, in which you can select, edit, and manage your teams. This is also where you will see your team's channels, where conversations between teammates happen. Similarly, if you click the "Chat" button, the "Chat" pane will display to the right where you can select from your chat history. When you select an item in this pane such as a chat, its contents appear to the right in the larger content pane. If you select a specific channel within "Teams," you'll see all the channel conversations to the right instead.

At the top of the content window is a series of tabs which provide members access to content and services within the dedicated environment of a channel or chat. For example, this allows a team to easily collaborate on a single document shared in a channel or chat by easily accessing it on the "Files" tab.

The Command Box runs along the top of the application and is used to search, take quick actions, and launch apps. We will examine using the Command Box in more detail later in the course.
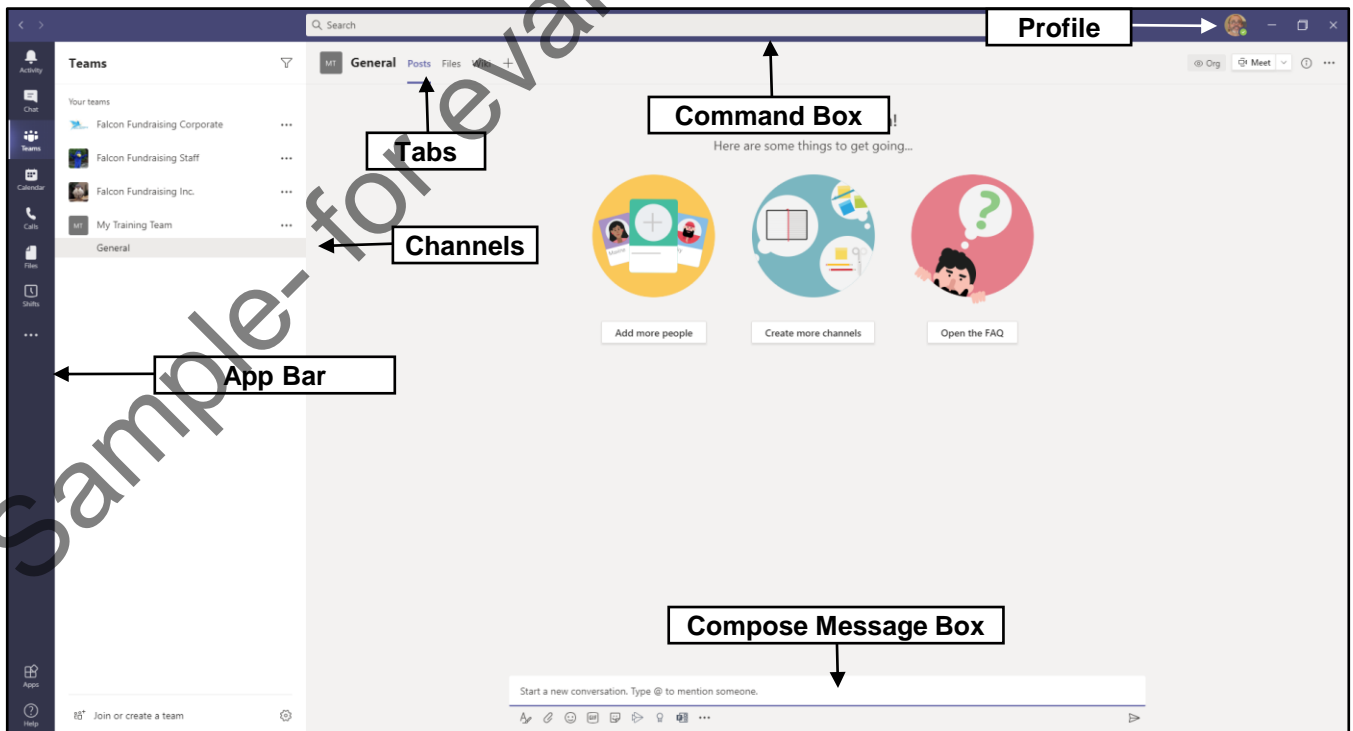
1.1- The Teams Environment- (cont'd.):

To the right of the Command Box is the Profile icon. The Profile icon is where you customize your profile and Teams settings, set status messages, and change your availability settings.

In the upper-right corner of the "Teams" area of the app, you can click the "More options" ellipsis to access various channel settings. We will take a closer look at these settings in upcoming lessons.

The Compose Message box appears along the bottom of the Teams app in channel conversations after you click the "New conversation" button, and in chats. This is where you create posts and messages. The toolbar below the Compose Message box provides tools to format your messages. At the right-end of the toolbar is the "Send" button, which you click when done composing your post or message.

Now that you have an overview of the names and locations of the major onscreen elements, let's examine the use and purpose of these various tools within the Teams application in the upcoming lessons.

1.2- Viewing and Managing the Activity Feed:

The Activity feed is a record of everything you and your teammates do in Microsoft Teams. It consolidates all the activity from your different chats, calls, channels, and teams into one place. As activity goes on in your channels, a red numbered icon will appear over the app to alert you to activity not yet seen.

To view the Activity feed, click the "Activity" button in the app bar. Activities that have not yet been seen are marked in bold. The activity feed displays to whom the activity is linked, what type of activity it was (@mentions, likes, replies, etc.), and when and where it happened (chat, channel, etc.).

You can filter the results by clicking the drop-down at the top of the pane to select from either "Feed" (to see all activity) or "My Activity" to see only yours. To further filter the activities, click the "Filter" icon at the top of the activity feed and type text by which to filter. For example, you can type someone's name and any activity matching that criteria will be automatically displayed in the Activity Feed. You can also click the "More options" ellipsis in the "Type to filter" field and then choose an activity from the menu. For example, you could select "@Mentions" to see all activity where someone mentioned you specifically.

To close the filter, click the "Close filter" button. To view an activity in the place where it happened, click the activity to view the details, which are then highlighted in the pane to the right. To flag a read message for future reference, hover over it, click the "More options" ellipsis to the right of the activity, and select "Mark as unread."

1.3- Customizing Settings:

You can easily customize your profile picture in Microsoft Teams. To add or change your profile picture, click the Profile icon in the upper-right corner of the application. Click the "Change picture" link that appears just below your name. To upload or replace an existing picture, click the "Upload picture" link in the "Change your profile picture" dialog box. Navigate to the file, select it, and click the "Open" button in the "Open" dialog box. Click the "Save" button. To remove a picture, click the "Remove picture" link and click "Save" instead. When you are done, click the "Close" button.

You can also adjust general settings and permissions, set privacy controls, adjust notification preferences, manage audio and camera devices, and configure voicemail using the "Settings" command. To access settings, click your Profile icon or picture and select "Settings" from the menu. You can click one of the categories on the left ("General," "Privacy," "Notifications," etc.) to display the setting's controls to the right. Use the various checkboxes, sliders, drop-down menus, and text fields to adjust your desired settings.

The settings on the "General" tab allow you to select a theme to adjust the look of Teams, adjust

1.3- Customizing Settings- (cont'd.):

how the application behaves, and select language options. "Privacy" lets you control who can contact you and what notifications they receive from your communications. "Notifications" is where you select which notifications you want for the various activities in Teams and where you want them to be displayed. "Permissions" grant access to your device from the apps within Teams.

To troubleshoot audio/video problems, select the "Devices" setting at the left of the "Settings" dialog box. Ensure that the proper audio and camera devices are selected from the drop-down menus. To make a test call to verify the settings are working correctly, click the "Make a test call" button to call the "Teams Echo" assistant and follow the voice prompts. The "Calls" tab provides settings that determine how Teams handles your incoming calls, what your ringtone sounds like, and how your voicemail is configured. We will discuss setting up your voicemail in more detail in a later lesson.

When you are finished customizing your settings, click the "Close" button in the "Settings" dialog box, which automatically saves any changes you have made.

1.4- Setting Your Status and Creating Status Messages:

You can set your status in Microsoft Teams to display your availability to other team members and let them know whether you're available to chat, busy in a meeting, or just temporarily away. A dot appears on your profile picture that indicates your current status. Teams automatically sets your status in certain situations, such as when you are idle, in a meeting, or on a call. You can also manually set your availability status. To change your status, click your profile picture, hover over your current status, and make a selection from the menu that appears.

"Available" tells others that your schedule is free, and you are available for calls, meetings, and chats. When your computer is locked or enters idle or sleep mode, Teams will automatically change your status from "Available" to "Busy." The "Busy" status indicates that you are online but occupied with another task. However, you will still receive notifications. "Do not disturb" tells others not to contact you and prevents notifications in Teams from being displayed. When "Do not disturb" is set, those members to whom you have granted priority access will still be able to reach you. To manage priority access, click your profile picture, select "Settings" from the menu, and then click the "Privacy" tab to the left. Click the "Manage priority access" button and enter names into the text box and select them to add them to your priority list. To remove a name, click the "X" to the right of a name. When done, click "Back to settings" in the upper-left corner of the window and then the "Close" button in the "Settings" window. The "Be right back" status indicates you will be gone for only a short period of time. "Appear away" is for times when you want to work on something and don't anticipate responding to any messages right away. "Offline" is not a status that you set. It appears to others when you are not logged into Teams.

Once you no longer need a status that you have manually set, you can reset it so that Teams will resume automatically setting it. To reset your status, click your profile picture, hover over your current status, and select "Reset Status" from the menu that appears.

A status message conveys more personal or detailed information to team members about your current status. The message you set will be displayed on your contact card when someone clicks on your profile picture within the Teams application. To compose a new status message, click your profile picture and select "Set status message" from the menu. Type the text that you'd like to display. The message can be up to 280 characters long. To display the message above the Compose Message box when someone sends you a message or @mentions you, click the "Show when people message me" checkbox. Choose when to clear the status message from the drop-down menu, then click the "Done" button.

ACTIONS-
GETTING ACQUAINTED WITH TEAMS

THE TEAMS ENVIRONMENT:

1. The **app bar** is the primary navigation tool in Teams and runs along the left side of the Teams desktop client and at the bottom of the Teams mobile clients on iOS and Android devices.
2. By default, the Microsoft Teams buttons displayed in the app bar are Activity, Chat, Teams, Calendar, Calls, and Files
3. **To navigate to an area of Teams**, click one of the buttons in the app bar.
4. As you click buttons in the app bar, the panes and windows to the right will change, depending on the area of Teams you have entered.
5. When you click a button in the app bar, except the "Calendar" button, the pane to the right of the app bar changes to show items for that category.
6. When you select an item in this pane, its contents appear to the right in the larger content pane.
7. At the top of the content window for "Teams" and "Chat" is a series of tabs which provide access to content and services in the channel or chat.
8. The **Command Box** runs along the top of the application and is used to search, take quick actions, and launch apps.
9. To the right of the Command Box is the **Profile icon,** where you customize your profile and Teams settings, set status messages, and change your availability settings.
10. In the "Teams" content window, you can click the "More options" ellipsis in the upper-right corner to access channel settings.
11. The **Compose Message box**, where you create posts and messages, appears along the bottom of the Teams app in channel conversations after you click the "New conversation" button and it appears all the time in chats.
12. The toolbar below the Compose Message box provides tools to format your messages.
13. At the right-end of the toolbar is the "Send" button, which you click when done composing your post or message.

VIEWING AND MANAGING THE ACTIVITY FEED:

1. The Activity feed is a record of everything you and your teammates do in Microsoft Teams. It consolidates all the activity from your different chats, channels, and teams into one place.
2. **To view the Activity feed**, click the "Activity" button in the app bar.
3. **To filter the results**, click the drop-down at the top of the pane to select from either "Feed" (to see all activity) or "My Activity" to see only yours.
4. **To further filter the activities**, click the "Filter" icon at the top of the activity feed and either type text by which to filter or click the "More options" ellipsis and choose an activity from the menu.
5. **To close the filter**, click the "Close filter" button.
6. **To view an activity in the place where it happened**, click the activity.
7. **To flag a read message for future reference**, hover over it, click the "More options" ellipsis to the right of the activity, and select "Mark as unread."

ACTIONS-
GETTING ACQUAINTED WITH TEAMS

CUSTOMIZING SETTINGS:

1. **To add or change a profile picture**, click your Profile icon in the upper-right corner of the application.
2. Then click the "Change picture" link that appears just below your name.
3. **To upload or replace an existing picture**, click the "Upload picture" link in the "Change your profile picture" dialog box.
4. Then navigate to the file, select it, and click the "Open" button in the "Open" dialog box.
5. Then click the "Save" button.
6. **To remove a picture**, click the "Remove picture" link and click "Save" instead.
7. When done, click the "Close" button.
8. **To access settings**, click your Profile icon or picture and select "Settings" from the menu.
9. **To display a setting's controls to the right**, click its category name at the left side of the window.
10. The "General" settings let you select a theme, adjust how Teams behaves, and select language options.
11. The "Privacy" settings let you control who can contact you and what notifications they receive from your communications.
12. The "Notifications" settings let you select which notifications you want for the various activities in Teams and where you want them to be displayed.
13. The "Permissions" settings grant access to your device from the apps within Teams.
14. **To troubleshoot audio/video problems**, select the "Devices" setting at the left of the "Settings" dialog box.
15. Then ensure the proper audio and camera devices are selected from the drop-down menus.
16. **To make a test call to verify the settings are working correctly**, click the "Make a test call" button to call the "Teams Echo" assistant and follow the voice prompts.
17. The "Calls" tab provides settings that determine how Teams handles your incoming calls, what your ringtone sounds like, and how your voicemail is configured.
18. **To change settings**, use the various checkboxes, sliders, drop-down menus, and text fields to adjust your desired settings.
19. When finished customizing settings, click the "Close" button in the "Settings" dialog box.
20. Changes are saved automatically.

SETTING YOUR STATUS AND CREATING STATUS MESSAGES:

1. An availability status dot appears on your profile picture, which indicates your current status
2. Teams automatically sets your status sometimes, like when you are idle, in a meeting, or on a call.
3. **To manually change your availability status**, click your profile picture, hover over your current status, and make a selection from the menu that appears.
4. The "Available" status tells others your schedule is free, and you are available for calls, meetings, and chats.
5. The "Busy" status indicates that you are online but occupied with another task. However, you will still receive notifications.
6. "Do not disturb" tells others to not contact you and prevents notifications in Teams from being displayed. When "Do not disturb" is set, members to whom you have granted priority access can still reach you.
7. **To manage priority access**, click your profile picture, select "Settings" from the menu, and then click the "Privacy" tab to the left.
   (cont'd.)

SETTING YOUR STATUS AND CREATING STATUS MESSAGES- (CONT'D.):

8. Then click the "Manage priority access" button and enter names into the text box and select them to add them to your priority list.
9. **To remove a name**, click the "X" to the right of a name.
10. **When done adding priority access members**, click "Back to settings" in the upper-left corner of the window and then the "Close" button in the "Settings" window.
11. The "Be right back" status indicates you will be gone for only a short period of time.
12. "Appear away" is for times when you want to work on something and don't anticipate responding to any messages right away.
13. "Offline" is not a status that you set. It appears to others when you are not logged into Teams.
14. **To reset your status once you no longer need a status you have manually set**, click your profile picture, hover over your current status, and select "Reset Status" from the menu that appears.
15. A status message conveys more personal or detailed information to team members about your current status. The message you set appears on your contact card when someone clicks on your profile picture in Teams.
16. **To compose a new status message**, click your profile picture and select "Set status message" from the menu.
17. Then type the text that you'd like to display.
18. **To display the message above the Compose Message box when someone sends you a message or @mentions you**, click the "Show when people message me" checkbox.
19. Choose when to clear the status message from the drop-down menu, then click the "Done" button.

EXERCISES:
GETTING ACQUAINTED WITH TEAMS

Purpose:

1.   To begin exploring the Teams environment.

Exercises:

1.   Open your Teams application.
2.   Find the app bar at the left side of the Teams window.
3.   Click the "Activity" button in the app bar.
4.   Click the "Teams" button in the app bar.
5.   Click to select a team and channel you have joined in the pane that opens to the right.
6.   In the content window that appears to the far right, find the tabs for the team channel at the top of the content window.
7.   Click the "Files" tab in the team's channel.
8.   Find the Command Box at the top of the Teams window.
9.   Find the Profile icon in the upper-right corner of the Teams window.
10.   Find the "More options" ellipsis in the upper-right corner of the team channel.
11.   Click the "New conversation" button at the bottom of the rightmost content pane for the team's channel to see the Compose Message box appear.
12.   Find the "Send" button at the right end of the toolbar that appears below the Compose Message box.
13.   If you want to set your Teams profile picture, click the Profile icon in the upper-right corner of the Teams window.
14.   Click the "Change picture" link that appears below your name.
15.   Click the "Upload picture" link in the "Change your profile picture" dialog box.
16.   Navigate to a picture you want to set as your new Teams profile picture, click it to select it, and then click the "Open" button in the "Open" dialog box that appears.
17.   Click the "Save" button.
18.   Click the "Close" button.
19.   To review your Teams notification settings, click your Profile icon and select "Settings" from the menu.
20.   Click the "Notifications" category to the left to then review the notification settings to the right.
21.   Click the "Close" button in the "Settings" dialog box.
22.   If you want to manually change your availability status to "Busy" to show you are learning Teams, click your Profile icon.
23.   Hover over your current availability status in the menu and then select "Busy" from the side menu that appears.
24.   If you want to set a status message that says you are learning Teams, click your Profile icon.
25.   Select the "Set status message" command in the menu.
26.   Type "I'm in Teams training." in the message box that appears.
27.   Check the "Show when people message me" checkbox.
28.   Select "Today" from the "Clear status message after" drop-down.
29.   Click the "Done" button.