BFG microsoft teams instructions

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**Microsoft Teams**

# 1.0 Downloading Teams

Please click on this link to download Microsoft Teams:

<https://teams.microsoft.com/downloads>

# 2.0 Microsoft Teams Quick Start

With Microsoft Teams on your PC, Mac, or mobile device, you can:

* Pull together a team.
* Use chat instead of email.
* Securely edit files at the same time.
* See likes, @mentions, and replies with just a single tap.
* Customize it by adding notes, web sites, and apps.

## **2.1 Sign in and get started**

1. Start Teams.
	* In Windows, click **Start** > **Microsoft Teams**.
	* On Mac, go to the **Applications** folder and click **Microsoft Teams**.
	* On mobile, tap the **Teams** icon.
2. Sign in with your Office 365 username and password. This is your Barnet Federated GP’s login (the login you use to login in to your computer/laptop).

**Pick a team and channel**

A *team* is a collection of people, conversations, files, and tools — all in one place. A *channel* is a discussion in a team, dedicated to a department, project, or topic.

The best way to get familiar with teams and channels is to pick a team and channel and start exploring!

1. Select **Teams** on the left side of the app and then pick a team.

If you're not on a team and want to create one.

1. Select a channel and explore the **Conversations**, **Files**, and other tabs.

**2.2 Chat and share files**

**Start a new conversation...**

**...with the whole team**

1. Click **Teams** , then pick a team and a channel.
2. In the box where you type your message, say what's on your mind and click **Send** .

**...with a person or group**

1. At the top of the app, click **New chat** .
2. In the **To** field, type the name of the person or people you want to chat with.
3. In the box where you type your message, say what's on your mind and click **Send** .

**Reply to a conversation**

Channel conversations are organized by date and then threaded. The replies in threads are organized under the initial post so it's easier to follow multiple conversations.

1. Find the conversation thread you want to reply to.
2. Click **Reply**, add your message, and click **Send** .

**Have fun with emoji, memes, and GIFs**

Express yourself and impress your coworkers!

* Click **Sticker** under the box where you type your message, then pick a meme or sticker from one of the categories.

The **Sticker** catalog contains a wide variety of customizable stickers and memes — you can even upload your own! Check out **Emoji** for smiley faces and **Giphy** for animated GIFs.

**2.3 Share a file**

Sometimes words aren't enough, and you need to post a file to a channel conversation.

**Tip:** Teams works particularly well with [Microsoft Office documents](https://support.office.com/en-us/article/great-ways-to-work-with-office-6fe70269-b9a4-4ef0-a96e-7a5858b3bd5a?wt.mc_id=otc_sixsteps).

1. In your channel conversation, click **Attach** under the box where you type your message.
2. Select from these options:
	* **Recent**
	* **Browse Teams and Channels**
	* **OneDrive**
	* **Upload from my computer**
3. Select a file > **Share a link**.

If you're uploading a file from your computer, select a file, click **Open**, and then **Send** .

You can always see all the files you post to a channel by going to the **Files** tab.

**2.4 Collaborating in Teams**

**@mention someone**

An @mention is like a tap on the shoulder — a way to get someone's attention in a channel conversation or a chat.

1. In the box where you type your message, type **@**, then type the first few letters of the person’s name. You can also @mention entire teams and channels.
2. Select the person. Repeat for as many people as you want to @mention.

Each person you @mention gets a notification in their **Activity** feed. Check for a red circle next to **Activity** right now to see if someone has @mentioned you!

**Stay on top of things**

Notifications let you know when someone @mentions you, likes something you’ve posted, or replies to a thread you started. The Activity feed helps you stay on top of all your notifications.

1. Click **Activity** .
2. **Feed** shows you a summary of everything that's happened in the channels you follow.
	* Click **Filter** to show only certain types of notifications such as @mentions or reactions.
	* Select **Feed** > **My Activity** to see a list of everything you've been up to lately in Teams.

**Search for messages, people, or files**

Searches cover your entire organization — all the teams and channels that you're part of.

1. Type a phrase in the command box at the top of the app and press Enter.
2. Select the **Messages**, **People**, or **Files** tab.
3. Select an item in the search results. Alternatively, you can select **More filters** to further refine your search results.

# 3.0 Welcome to Microsoft Teams

Microsoft Teams is a collaboration app that helps your team stay organized and have conversations—all in one place. Here's a quick look at the left hand side of Teams.

* **Teams** - Find channels to belong to or create your own. Inside channels you can hold on-the-spot meetings, have conversations, and share files.
* **Meetings** - See everything you’ve got lined up for the day or week. Or, schedule a meeting. This calendar syncs with your Outlook calendar.
* **Calls** - In some cases, if your organization has it set up, you can call anyone from Teams, even if they’re not using Teams.

# 4.0 Set up and customize your team

## **4.1 Get your team up and running**

**Create a team**

To get your team up and running in Microsoft Teams, create a team and add people.

1. Select **Teams** > **Join or create a team**.

This is where you create your own team, or discover existing ones.

1. Select **Create a new team**, and then select **Build a team from scratch** or select **Create from...** to build an all-new team or create from an existing group respectively.
2. Select **Private** if you'd like people to request permission to join, or select **Public** if anyone in your org can join.
3. Give the team a name and add a short description if you'd like.
4. Select **Create**.
5. Add members.

You can add people, groups, or even entire contact groups.

If you need to add people from outside your organization, use their email address to invite them as guests. Add a friendly display name for them too.

1. When you're done adding members, select **Add** and then **Close**.

**Note:** If you're a global administrator, consider [creating an org-wide team](https://aka.ms/orgwideteams) that automatically adds everyone in your organization.

**Customize and manage your team**

1. Select **More options...** next to the team name.
2. Select **Manage team** to find **Members**, **Channels**, **Settings**, and **Apps** for your team all in one place.
3. Select **Settings** > **Team picture** to add a team picture and give your team some personality.

## **4.2 Go-to guide for team owners**

As a team owner, you can add new members and guests, change members into owners, manage channels and settings, and archive a team that's no longer in use.

**Add members**

1. In the teams list, go to the team name and select **More options** > **Add members**.
2. Type in the name or email address of someone you want to add.

**Note:** If the person is outside of your organization, type in their email address. Select the pencil icon to add a display name everyone will recognize. The guest will receive an email inviting them to join the team.

1. Select **Add**.

**Remove members**

1. In the teams list, go to the team name and select **More options** > **Manage team**.
2. Under **Members**, select the **X** to the far right of the name of the person you'd like to remove.

**Add team owners**

1. In the teams list, go to the team name and select **More options** > **Manage team**.
2. In the **Members** tab, under **Role**, select the down arrow and change **Member** to **Owner**.

**Change team settings**

Go to the team name and select **More options** > **Manage team**. From there, you can access your team **Settings** tab, which lets you:

* Change the team picture.
* Set member permissions (like allowing them to create, update, or delete channels and tabs).
* Enable @team or @[team name] mentions in a channel.
* Set permissions for guests.
* Enable team members to send GIFs, emoji, and stickers.

**Manage and add Apps**

1. Go to the team name and select **More options** > **Manage team**.
2. In the **Apps** tab, you can manage the apps your team uses.
3. Select **Go to store** to find and install a new app.

**Archive a team**

1. Select the manage icon at the bottom of the teams list.
2. Select **More options** on the far right of the team name.
3. Select **Archive Team**.

## **4.3 Organising your teams list**

* To pin a channel, go to a channel name and select **More options** > **Pin**.
* To reorder your teams, select **Teams**, then click and drag the team name anywhere in your teams list.

# 5.0 Collaborating in teams

## **5.1 Working on a file together**

Working in Microsoft Teams lets you work on files together at the same time. Also, messages about the document stay with it and will show up in your team conversations.

1. In a team conversation or in the **Files** tab, select **More options** next to the file.
2. Choose if you want to edit the file in Teams, on your desktop, or online.
3. Edit the file. Colored flags show who else is working on it with you.
4. Select **Start conversation** to add a message about the file.
5. Type your message or @mention someone and select **Send**.

## **5.2 Send email to a channel**

If you need to communicate by email, send it to everyone in a channel.

**Get and copy a channel's email**

1. Select **More options** > **Get email address**.
2. Select **Copy**.
3. Paste the copied email address into a new email.
4. Select **Send**.

**Forward an email to a channel**

1. Open the email you'd like to forward.
2. Paste the copied email address into the To line of your email.
3. Select **Send**.

## **5.3 Create a plan with Planner**

Create a board with Planner to keep you and your team organized in Microsoft Teams.

1. In a channel, select **Add a tab**.
2. Select **Planner**.
3. Select **Create a new plan** or **Use an existing one**, and then select **Save**.
4. With a Planner board, you can:
	* Create buckets
	* Add and assign tasks
	* Update tasks
	* Chart progress

Additional video:

<https://support.office.com/en-us/article/create-a-plan-with-planner-d000976a-7490-4ddf-b9af-09ee764891e2>

# 6.0 Work with posts and messages

## **6.1 Create and format a post**

Create and format a post to start a conversation in a channel.

1. Type a message.
2. Select **Format**.
3. Format your post with the following options:
	* **Add a subject**
	* **Bold**
	* **Bulleted list**
	* **Insert link**
4. Select **Send**.

**6.2 Get attention with @mentions**

Send a co-worker or entire team a notification to get their attention when you use @mention.

**Get one person's attention**

1. Type a message in a reply or start a new conversation.
2. Type @ and the person's name.
3. Select the person's name you want to mention.
4. Finish your message and select **Send**.

**Get an entire team or channel's attention**

1. Type a message in a reply or start a new conversation.
2. Type @**team** or @**channel**.
3. Select the team or channel you want to mention.
4. Finish your message and select **Send**.

**6.3 Save a post or message**

* To save a message or post, select **Save message** just to the right of the text.
* To see a list of your saved messages, select your profile picture at the top of the app, then choose **Saved**.

Or type **/saved** in the command box at the top of the screen.

# 7.0 Upload and find files

## **7.1 Upload and share files**

Anywhere in Teams, look for the paperclip icon to **Attach** a file. Alternately:

* Go to the **Files** tab.
* Select **Upload**.
* Select single or multiple files from device computer or OneDrive for Business account.
* Select **Open**.

**7.2 Find and filter files**

Filter files to find recent documents, ones that have been created or edited in your channels, or downloaded to your computer.

1. Select **Files** and choose a filter:
	* **Recent**: Recent files you've viewed or edited.
	* **Microsoft Teams**: Files created or edited across your channels.
	* **Downloads**: Files you've downloaded from Teams. Select Open Downloads Folder to find them.
2. OneDrive is connected by default. If you'd like, choose another cloud storage provider to use in Teams.

# 8.0 Start chats and calls

## **8.1 Start and pin chat**

Start 1:1 or group chats to collaborate with a smaller group or to talk privately, and pin chats for quick access.

In **Chats**, you can have 1:1 or group chats with people.

1. Select **New chat** .
2. Type the name of the person or people you want to contact.
3. Select the down arrow to add a name to your chat group.

**Make video and audio calls from a chat**

* Select **Video call** or **Audio call** to call someone directly from a chat.

**Pin a chat**

1. To pin a chat, select **More options** > **Pin**. The chat appears in the **Pinned** list.

**Note:** You can pin up to 15 chats.

**8.2 Make calls**

Start 1:1 or group calls with anyone in your organization — no matter where you are in Microsoft Teams.

**Start calls**

* Select **Audio call** or **Video call** to start a call from a chat.
* In the command box, type "/call" and choose the person you'd like to reach.
* Hover over someone's profile photo anywhere in Teams, and select **Audio call** from their contact card.

**Dial an outside number**

**Note:** If your organization has an Enterprise Voice or Business Voice license, you can call anyone from Teams even if they're not using it.

1. Select **Calls**.
2. Select **Dial a number to call any number**— even if they're not using Teams.

**View history and listen to voicemails**

* Select **History** to view missed calls.
* Select **Voicemail** to listen to a voicemail, and then select **More actions** > **Call back** to return someone's call.

**8.3 Hide chats, delete messages**

* While you can't delete an entire chat, you can hide a chat from your chat list if it's not relevant to you anymore. Select the chat you want to hide, then **More options** > **Hide**.
* If you need to backtrack and delete something you just sent, go to the message and select **More options** > **Delete**.

## **8.4 Set up a delegate to take your calls**

Add a delegate to answer or make calls on your behalf in Microsoft Teams.

1. Select your profile photo.
2. Select **Settings** > **General**, and then select **Manage delegates**.
3. Select **Your delegates** and type the person's name.
4. Choose which permissions to give the, and then select **Add**.

Your delegate gets notified about their new status.

1. Under **Settings**, select **Forward my Calls** > **My delegates** to manage your permissions and make sure your calls go to all your delegates.

**9.0 Manage Meetings**

## **9.1 Join a Microsoft Teams meeting**

**Join a Teams meeting from the app**

1. In a Teams meeting invite, select **Join**.
2. You have two choices:
	* **Join Microsoft Teams Meeting**: Enter a meeting from your Teams meeting invite.
	* **Dial-in number and conference ID**: Use these if you need to call into the meeting.
3. Choose the audio and video settings you want.
4. Select **Join now**.

**Join a Teams meeting on the web**

Don't have the Teams app? You can still join a Teams meeting.

1. In your email invite, select **Join Microsoft Teams Meeting**.

You can also use a dial-in number and conference ID from the email to call in.

1. You have two choices:
	* **Download the Windows app**: Download the Teams app.
	* **Join on the web instead**: Join a Teams meeting on the web.
2. If you select to join via web, type in your name and select **Join now**.

If you have a Teams account, select **sign in** to view the meeting chat and more.

1. Choose the audio and video settings you want.
2. Depending on meeting settings, you'll go to a lobby where attendees can admit you.

## **9.2 Create instant meetings with Meet now**

**Start a meeting**

1. To start a meeting, do one of the following:
	* Select in a new conversation.
	* Select in an existing conversation to keep all that conversation’s context.
2. In your video preview, enter a name for the meeting, and select **Meet now**.
3. Select the names of the team members you want to invite to the meeting. You can also type a phone number, a good way to add people outside your organization that aren't using Teams.

**Join a meeting**

1. Look for the meeting notification icon in a conversation to find a meeting.
2. Select **Jump In** to participate in the meeting.

**Share**

* Select the share screen icon to show your screen to the other people in the meeting.
* Select more options icon to record the meeting. You'll be emailed when the video is ready so you can view, edit, and share with others.

## **9.3 Manage meetings**

**View meetings**

* Select **Calendar** to view your appointments and meetings for the day or work week.

These appointments stay synchronized with your Outlook calendar.

* Select a meeting invite to see what the meeting's about, who's attending, and to respond to the meeting.

**Schedule a meeting**

1. Select **New meeting**.
2. Type in a meeting title and enter a location.

An online meeting is created by default.

1. Choose a start and end time, and add details if needed.
2. Enter names in the **Invite people** box to add them to the meeting.

**Note:** To invite someone outside your organization, type in their email address and they'll get an invite to join as a guest — even if they don't have Microsoft Teams.

1. See everyone's availability in the **Attendees** list and, if needed, choose a suggested time or select **Scheduling assistant** to see more available times in a calendar view.
2. Under **Select a channel to meet in**, select the drop-down arrow to manage your meeting's privacy settings:
	* Select **None** to keep your meeting private.
	* Select a channel to open the meeting to team members.

If your meeting gets posted in a channel, it'll appear under the **Posts**tab. Team members can set agendas, share files, or add comments.

## **9.4 Sharing your screen during a meeting**

In Microsoft Teams, you can show your desktop, a specific app, presentation, or any file while in a meeting.

1. Select **Share** .
2. Select what you want to share:
	* **Desktop** lets you show everything on your screen.
	* **Window** lets you show a specific app.
	* **PowerPoint** lets you show a presentation.
	* **Browse** lets you find the file you want to show.
3. After you select what you want to show, a red border surrounds what you're sharing.
4. Select **Stop sharing** to stop showing your screen.

## **9.5 Presenting PowerPoint slides**

If you're a presenter

1. Select **Share**.
2. Choose a presentation under the **PowerPoint** category.

If you're a meeting participant

1. Select **Navigate forward** to move forward in a presentation without interrupting the presenter.

**Note:** The presenter must share the file from the PowerPoint category in order for participants to skip around during a presentation.

1. Select **To presenter** to sync your view back to the presenter's when you want.

## **9.6 Move around during a Microsoft Teams meeting**

In Microsoft Teams, you can keep working even while you're in a meeting.

1. While in a meeting, select outside the meeting. For example, reply to a message or check the latest activity.

The meeting window becomes a smaller window at the top of the app.

**Note:** You always have access to the meeting controls, like muting or unmuting your microphone.

1. Select the smaller meeting window to make it full screen again.

# 10.0 Explore apps and tools

## **10.1 Use apps**

Apps let you do more in Microsoft Teams. They can show up in several places, depending on what they do and how they’ve been built.

**Apps in tabs**

Apps can be used in channels or chats.

1. Select the plus sign next to the tabs.
2. Select the type of app you want or **Search**.

**Apps in messages**

Select **More options**   under the message box, choose an app, and select **Add**.

**Apps as Connectors**

Are there certain notifications that are useful to the whole channel? Go to the channel you want, select **More options**   > **Connectors**, and choose an app. Then you’ll be prompted to configure notifications.

**All Apps**

Looking for all apps? Select **Apps**  on the left-hand side, and browse for the app available to your organization. Some require subscriptions or signing-in.

## **10.2 Turn a file in to a tab**

If everyone in your channel needs quick access to a file, turn it into a tab so it's easy to get to.

* Select **More Options** > **Make this a tab**.

## **10.3 Use the command box**

Wherever you go in Microsoft Teams, the command box is always there at the top of the screen to help you search, take quick actions, or launch apps.

**Use the command box to search**

1. Type what you're looking for in the command box, like a message, person, channel, or file.
2. Select one of the suggestions from the list.

Or press Enter to see more results.

**Use slash commands to perform tasks**

1. In the command box, type a **/** to see a list of commands and descriptions.
2. Choose a command from the list or type it.

For example, to call someone, type **/call**, press Tab, and select or type the name of the person you want to call.

Check out [Available commands](https://support.microsoft.com/en-us/office/use-commands-in-teams-88f61508-284d-417f-a53d-9e082164050b#bkmk_available_commands) to see a list of commands or just type **/** to see the menu in the command box.

**Use the @ command**

* Type @[someone's name], press Tab, and then type a message to message someone without moving away from what you're working on.
* Type @[app name] to launch an app directly from the command box.