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Beginners Guide to Microsoft Teams

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Introduction to Microsoft Teams

Overview

Microsoft Teams is a collaboration platform that brings together people, conversations, content, and tools for easier and more efficient work. It is a part of the Microsoft 365 suite, providing seamless integration with other Microsoft services like SharePoint, OneDrive, and Outlook. Teams is designed to enhance productivity and facilitate communication within organizations, whether you're working in the office or remotely.

Why Use Microsoft Teams?

Centralized Communication: Teams consolidates all your communication into one platform. Whether it's chat, video conferencing, or file sharing, everything happens in one place, reducing the need for multiple communication tools.

Collaboration: With integrated Office 365 apps, you can co-author documents, share files, and collaborate in real-time with your team members.

Meetings and Calls: Schedule and host online meetings with HD video, VoIP, and dial-in audio conferencing options. Record meetings, share screens, and make calls directly from the app.

Integration with Apps: Enhance your workflow with integrations from hundreds of apps available in Teams. Whether you need project management tools, dashboards, or other third-party services, Teams has you covered.

Security and Compliance: Built on the Microsoft 365 security and compliance framework, Teams ensures your data is protected with enterprise-grade security.

Key Features of Microsoft Teams

Teams and Channels: Create different teams for various projects or departments. Within each team, create channels for specific topics, facilitating organized and focused discussions.

Chat and Messaging: Use chat for quick conversations and discussions. Send messages, share files, and use @mentions to get the attention of specific team members.

Meetings: Schedule and join meetings with just a click. Use video conferencing to connect face-to-face with colleagues, no matter where they are.

File Sharing: Store and share files within Teams. Access, edit, and collaborate on documents stored in SharePoint or OneDrive directly from the app.

Customization: Personalize your Teams experience with tabs, connectors, and bots. Add tools and services you use frequently to streamline your workflow.

Getting Started with Microsoft Teams

You most likely have access to Microsoft Teams through your organisational Microsoft account. As with almost all Microsoft applications you can use it in the browser, here is the link - <https://teams.microsoft.com/>, or for mobile and desktop you can download app here [Microsoft Teams download page](#).

Although mostly the same the desktop app does tend to have more functionality than the browser app. If you are logging in for the first time, then it is best practice to update your profile with a photo and with the correct details by clicking on your details in the top left corner of the application. This will be covered in more detail in later sections.

Microsoft Teams is a versatile platform designed to meet the needs of modern workplaces. Whether you're looking to improve communication, boost collaboration, or manage projects

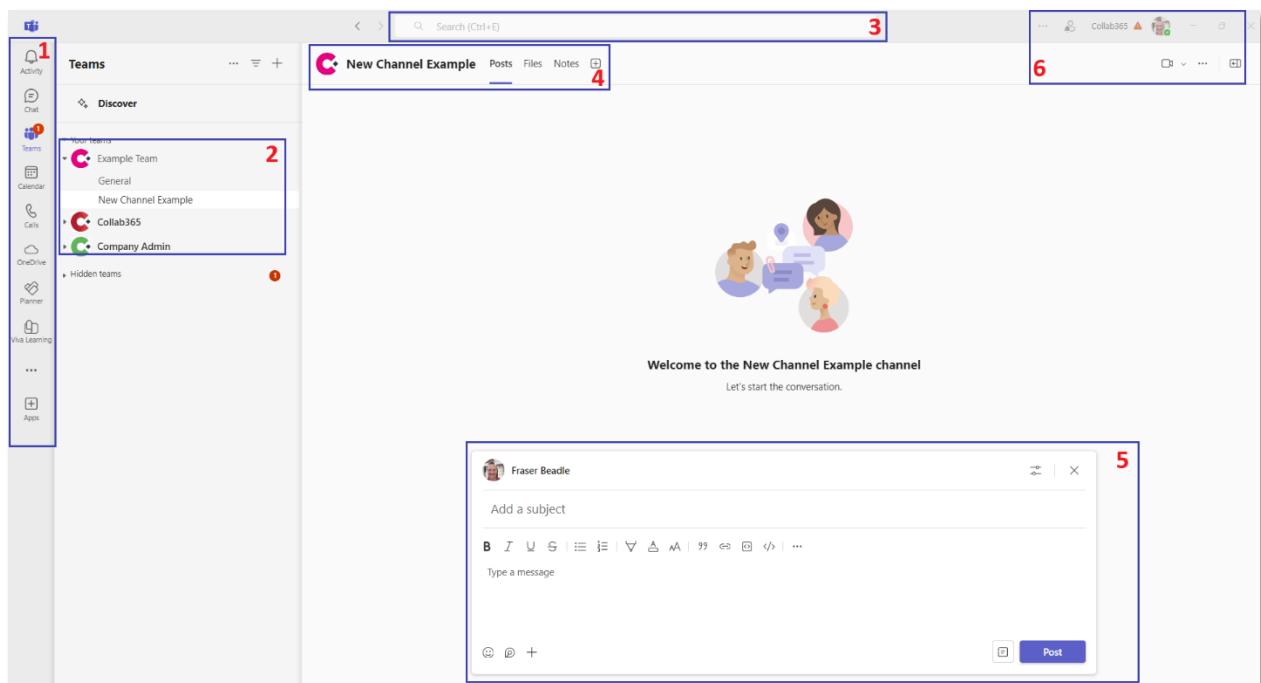
more effectively, Teams offers a comprehensive solution. This guide will walk you through everything you need to know to get started and make the most of Microsoft Teams.

Understanding the Teams Interface

Overview

Before diving into the functionalities of Microsoft Teams, it's essential to understand its interface. Familiarizing yourself with the layout and main components of Teams will help you navigate the platform more efficiently and make the most out of its features.

Main Components of the Teams Interface (*Labelled 1-6, see below for descriptions*):



1. App Bar - On the left hand side of the main Teams window consisting of:

- **Activity:** View notifications and recent activity within your teams and channels. This is your go-to place for staying updated with what's happening.

- **Chat:** Access your private and group chats. Start new conversations, continue existing ones, and view your chat history.
- **Teams:** See all the teams you are a part of and their respective channels. This is the central hub for team collaboration.
- **Calendar:** Syncs with your Outlook calendar, allowing you to schedule and join meetings directly from Teams.
- **Calls:** Make voice and video calls. Access your contacts, call history, and voicemail.
- **Other:** As you can see you can add other apps to the bar using the ellipse ‘...’ or the ‘Apps’ button.

2. Teams and Channels

- **Teams:** Represents a group of people working together, for example, a department or project team. Each team can have multiple channels.
- **Channels:** Dedicated sections within a team to organize conversations and content by specific topics or projects. Channels can be standard (accessible to all team members) or private (only accessible to selected members).

3. Command Bar

- Located at the top of the app, this bar allows you to search for specific items, execute commands, and navigate quickly using slash commands (e.g., /call, /chat).

4. Tabs

- At the top of each channel, tabs provide quick access to different tools and content such as Posts, Files, and other added apps like OneNote, Planner, or third-party services.

5. Message Compose Box

- Found at the bottom of the chat and channel windows, this is where you type and send messages. You can format text, attach files, and use emojis, GIFs, and stickers.

6. Settings and More Options

- Access additional settings and options by clicking on your profile picture in the top right corner. Customize your Teams experience, manage your account, and adjust notifications.

Navigation Tips

Switching Between Teams and Channels: Use the Teams tab on the App Bar to switch between different teams and channels effortlessly. Pin frequently used channels for quick access.

Search Functionality: Use the Command Bar to search for messages, files, and people. Type a keyword and hit enter to find what you need.

Keyboard Shortcuts: Utilize keyboard shortcuts to navigate more quickly. For example, press Ctrl + 1 to go to Activity, Ctrl + 2 to open Chat, and Ctrl + 3 to view Teams.

Understanding the layout and features of the Teams interface is crucial for efficient use of the platform. Spend some time exploring each component and customize your settings to fit your workflow. With a well-organized interface, you can focus on collaboration and productivity without any hassle.

In Later section we will go through how you can customise your Teams Interface and experience to work best for you.

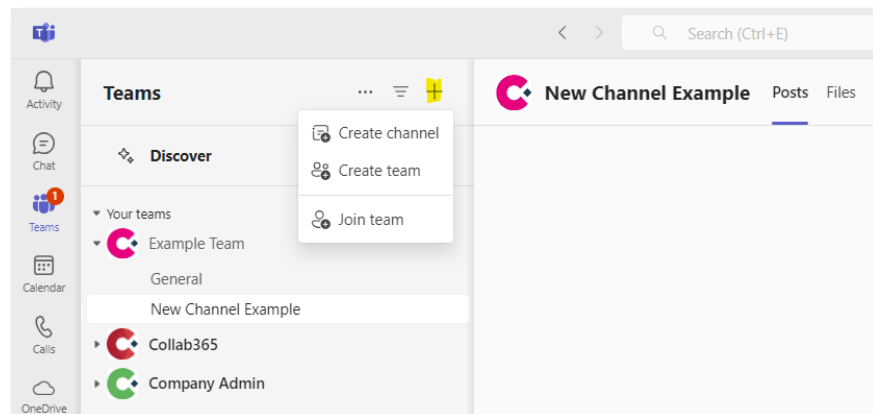
Creating and Managing Teams and Channels

Once you've set up Microsoft Teams, the next step is to create and manage your teams and channels. This section will guide you through the process of creating a team, adding members, and organizing channels for effective collaboration.

Creating your first Team

Creating a team is easy.

1. Once you are in the Teams App, click on **Join or create a team**



2. You do have the option to try and join a team, which will give the option of joining and teams that are set to be available to you or joining via a code that someone else will have given you to join their team. However, for this demonstration we will focus on just creating a team, Select

Create team

3. The team details page will now open for you to give the Team a name and description and select between **Private**, **Public** or **Org-wide**.

Create a team

You're creating a team from scratch. [More create team options](#)

Team name *

Give your team a name

Description

Let people know what this team is all about

Team type

Private

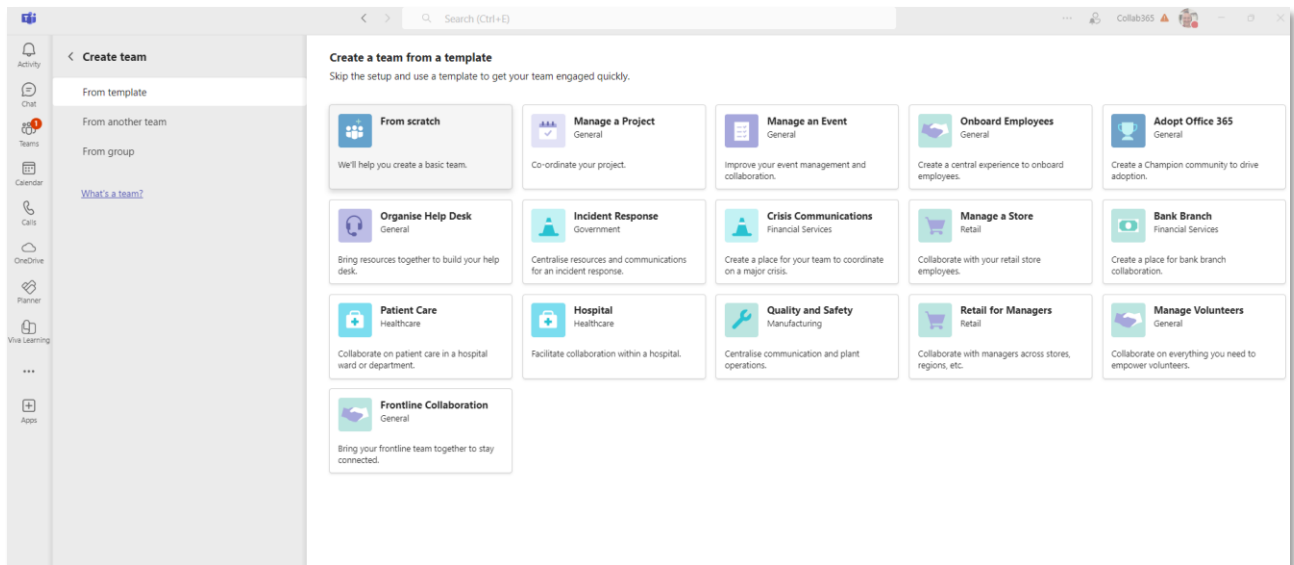
[What's a team?](#)

Cancel Create

These settings are important, and you should pick one which best suits your needs. We're going to pick **Private** which means you have to add people to your team. **Public** means that anyone from your organisation can join the team, and **Org-wide** means that everybody from your organisation automatically joins the team

4. Before progress from this screen you will also notice that there is a link at the top to – **More create team options**. If you were to progress without visiting these options then the Team would be created in the standard way with one General channel, and new Microsoft 365 Groups also created to support the new team.

As the name suggest one selecting the more options link takes you to more options for creating your Team:



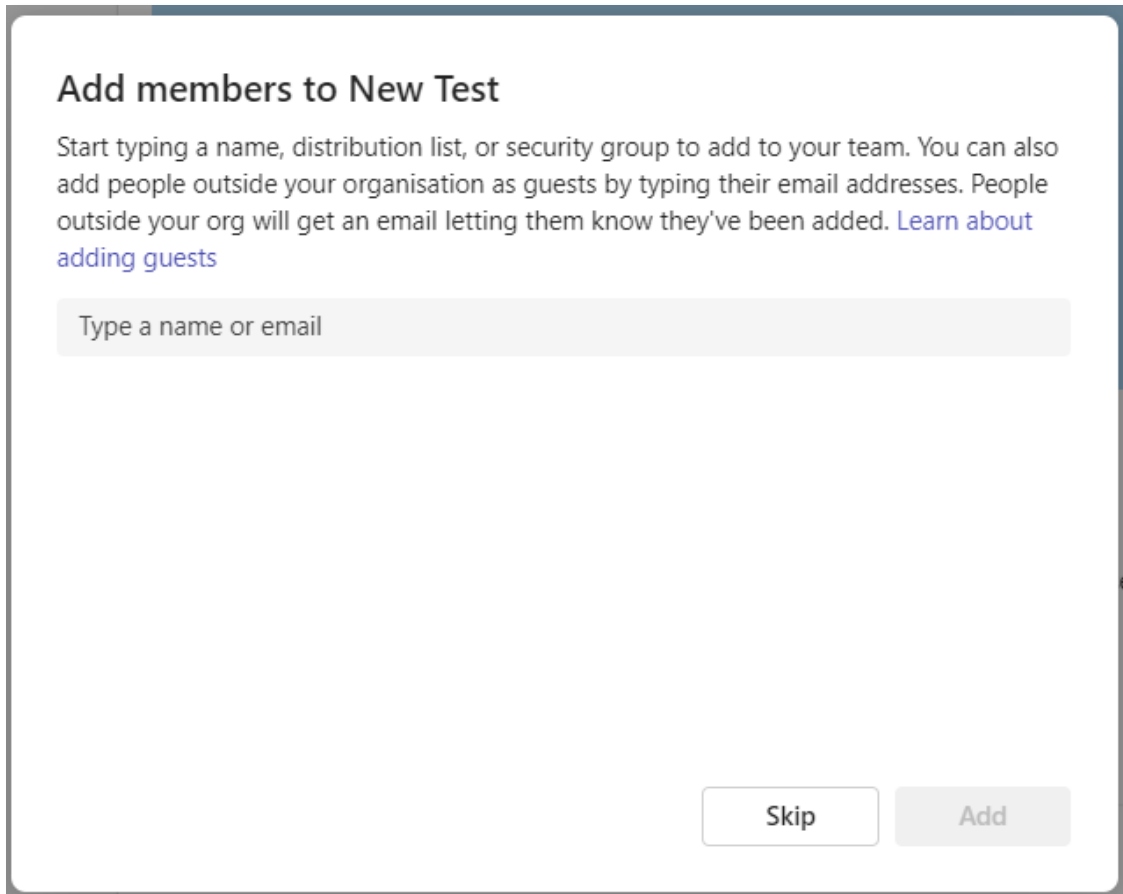
This gives you the option to create the Team in one of 3 additional methods:

From template - These are templates which are preconfigured with the suggested channels and apps for the specific use case described... e.g. For Onboarding employees.

From another team - This allows you to use the setup of one of your existing teams to create the is new team, a great way of maintaining organisational standards.

From group - This allows you to create this Team and add it to an existing M365 group rather than create a new group for the Team.

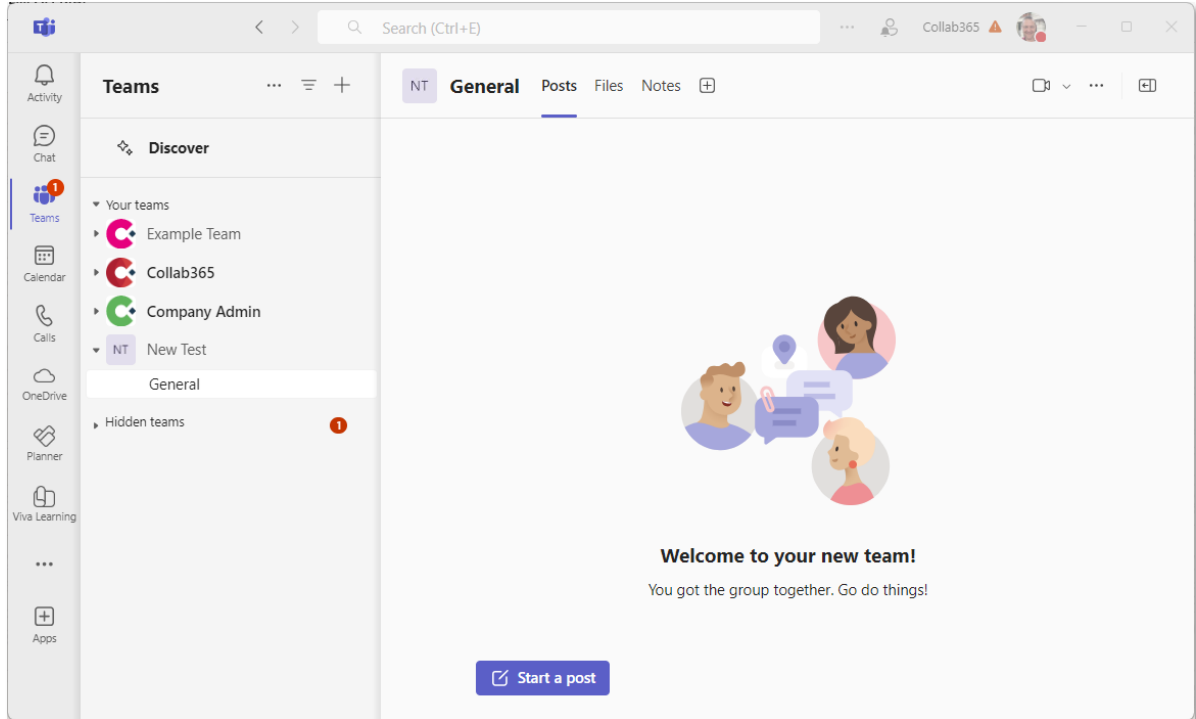
5. The first step after creating your team is to add members by typing a name, distribution list, or security group. Or you can skip it and add people later:



Add members to New Test

Start typing a name, distribution list, or security group to add to your team. You can also add people outside your organisation as guests by typing their email addresses. People outside your org will get an email letting them know they've been added. [Learn about adding guests](#)

6. And that's it – you've created your first team!



It's important to note that when you create a team, regardless of the template used, you are creating a:

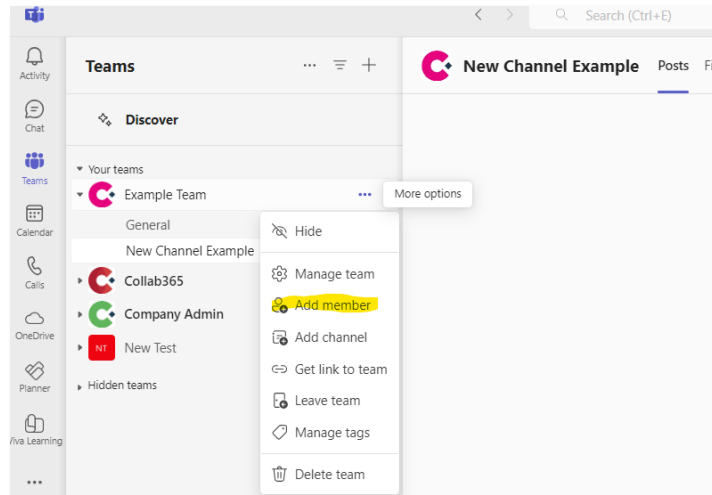
- A Microsoft 365 group
- A SharePoint site which contains a document library, which is where the File tab points to
- An Exchange Online shared mailbox and calendar
- A OneNote notebook

Also, all teams, no matter what template you use, have a channel called **General** and tabs called **Posts** and **Files**.

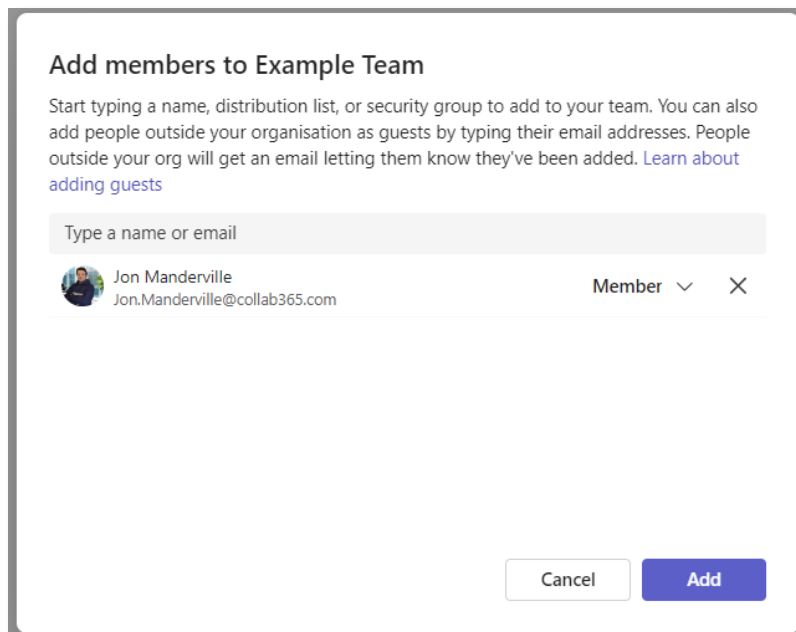
Adding people to your Team

There are two ways to add people to your team: when you first create your team, or once your team has been created. To add people to your team:

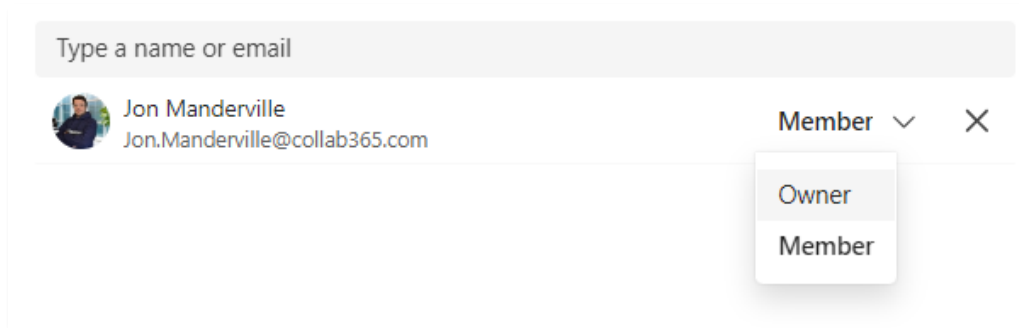
1. Click on ellipsis or three dots (...) by the name of your team and select **Add member**



2. Type in the name of the person and select **add**



3. You have the option to make the person an **Owner** or **Member**

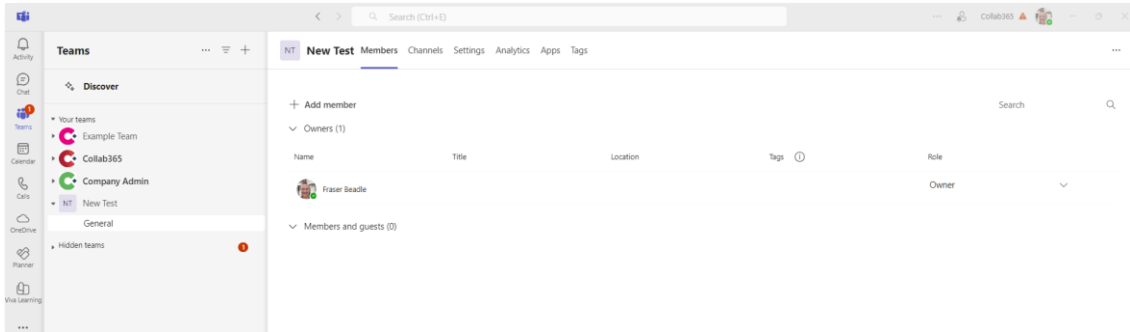


The following is a table which details the different roles people have in Teams.

ROLE	PERMISSIONS
Owners	Team owners manage certain settings for the team. They add and remove members, add guests, change team settings, and handle administrative tasks. There can be multiple owners in a team.
Members	Members are the people in the team. They talk with other team members in conversations. They can view and usually upload and change files. They also do the usual sorts of collaboration that the team owners have permitted.
Guests	Guests are people from outside of your organization that a team owner invites, such as partners or consultants to join the team. Guests have fewer capabilities than team members or team owners, but there's still a lot they can do.

Source : <https://support.microsoft.com/en-us/office/team-owner-member-and-guest-capabilities-in-microsoft-teams-d03fdf5b-1a6e-48e4-8e07-b13e1350ec7b>

4. Once you have added a person, you can get an overview of your team by selecting - **Manage Team** from the ellipsis (...) by the name of your team

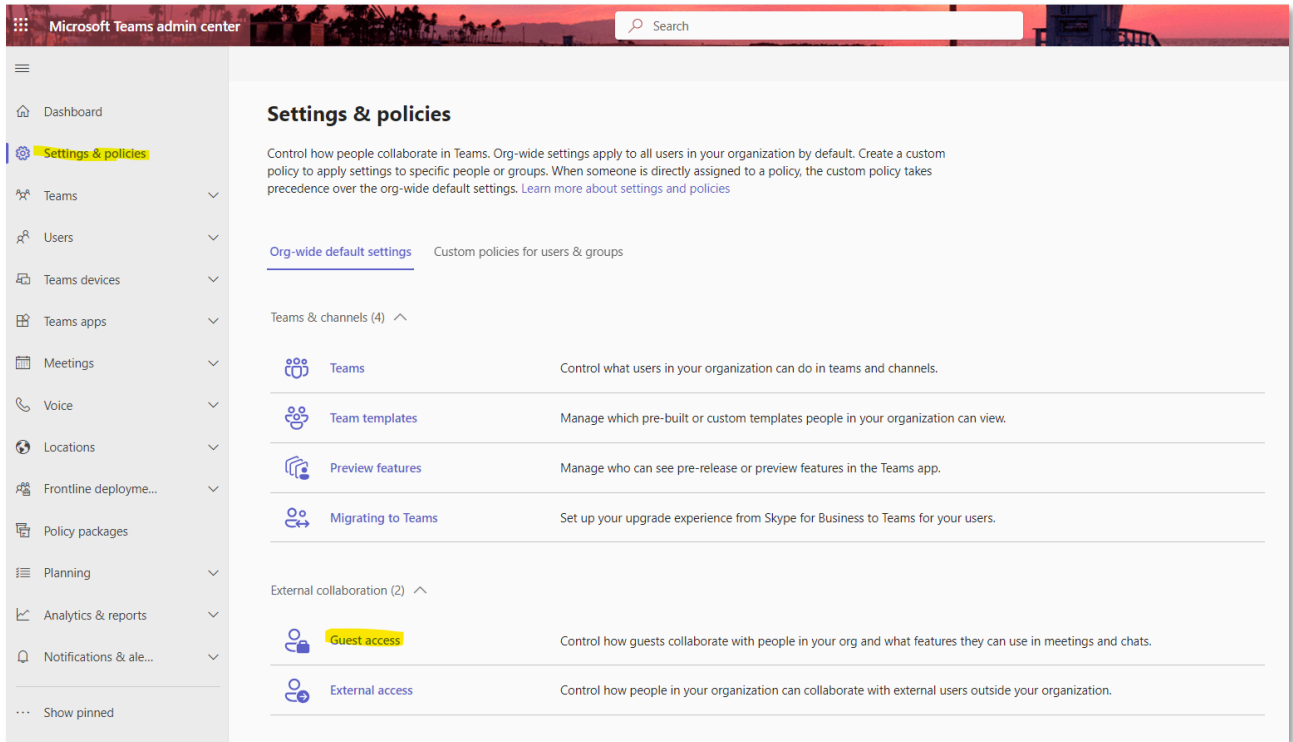


When you add a person, they will automatically get an email which gives them access to the team

Adding Guests to your team

If you want to add a person who is not from your organisation to your team, you can. This person will be called a **Guest**. Now, before you can add a guest you (or your Office 365 administrator) must turn on guest access in the Teams admin center - <https://admin.teams.microsoft.com/>.

The layout of the admin panels do change from time to time, you are looking for Teams Guest Access. Currently to get there you would select **Settings & Policies** and then **Guest Access**. In there you can have it On or off.



Once the admin side has been taken care of, adding guests is easy. Just perform the same steps as when adding a teammate from your organisation and type in their email address in the search box.

Guests will receive a notification in their email that they have been added to a team. For a comparison of what a guest can do compared to a regular teammate, see this full list from Microsoft <https://docs.microsoft.com/en-us/microsoftteams/guest-experience>

Channels

Every team has at least one channel called **General**. A channel is a place where you can chat, share files and add tabs, among other activities. At best, a channel should help you organise your team. For example, if you have a team dedicated to a project, different channels can reflect different aspects of the project. Adding channels is easy:

1. Select the ellipsis (...) by your team's name, and choose **Add channel**
2. Give your channel a **Name**, an optional **Description**, and (in this example) set the Channel Type to:

Standard – Accessible to everyone on the team

Shared – People in your Teams or outside your organisation can have access.

Private – Specific People on the Team have access (More details below)

Create a channel

Channel name *

Letters, numbers, and spaces are allowed

Description

Help others find the right channel by providing a description

Choose a channel type * ⓘ

Select

- Standard
Everyone on the team has access.
- Shared
People or teams in your org or outside your org can have access.
- Private
Specific people on the team have access.

Cancel Create

3. Once added, your channel will sit below the **General** channel in your team.

Points to note:

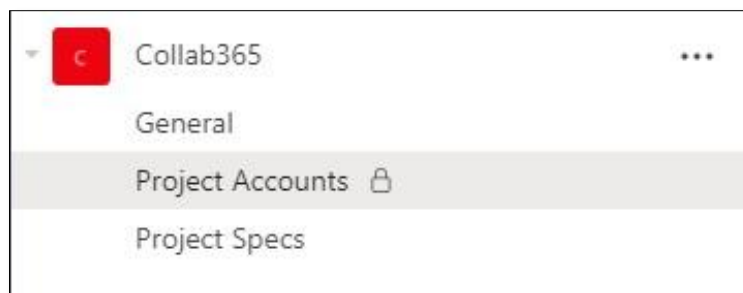
- Each channel will always have a **Posts** and **Files** tab
- When selecting **Standard privacy**, it means that all your teammates will see the channel
- Posts in this channel will be only posted to this channel

Private Channels

Let's say that you need to share files and have chats with some of your teammates but not all of them. This is best done via **Private** channels.

To create a Private channel, perform the same steps as when creating a standard channel, but select **Private – Accessible only to a specific group of people within the team** and select **Next**

When prompted to **Add members to the...channel** and choose people from your existing team. When your channel appears, it has a lock symbol on it, denoting that it's private



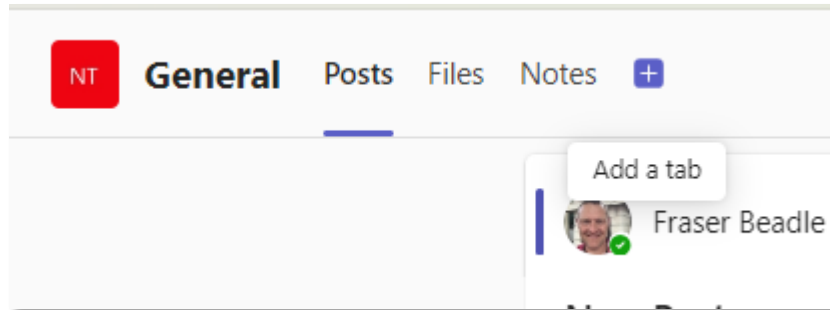
Tabs

Tabs add functionality to your team by giving you a shortcut to a file such as Excel or Word, or allowing you to work with an app. All teams have at least two tabs – **Posts** and **Files** – which cannot be deleted.

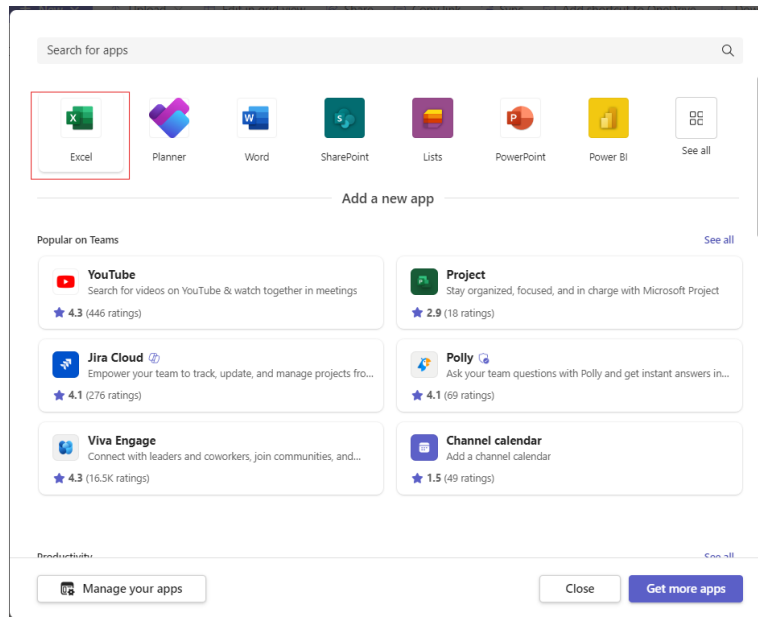
You can add more tabs if you like, and the tabs that you add, can be deleted.

In this example, we're adding a tab in order to detail the Weekly Sales.xlsx file which is in the **Files** or document library.

1. Click on **+ Add a tab**

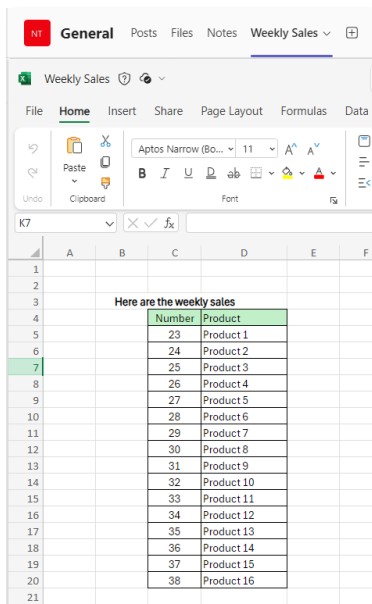


2. The **Add a tab** window opens detailing many non-Microsoft Microsoft programs and apps which can be used as tabs to help your productivity.

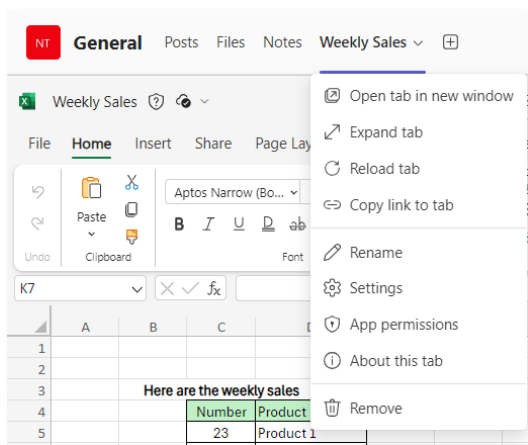


3. In this case we are interested in adding and Excel document as a tab, so we select Excel from the top, the next window allows you to navigate through your file locations including the files in the team that you are in to select which file you want to add as a tab.
4. Once you have chosen the file you want to use, you can choose if you would like to notify other members of the team or not, and the click save for the Tab to be added.

5. A tab appears called Weekly Sales and allows you to input data without opening up the file in Excel. However, for the full functionality of Excel, select **Open in Desktop App**



6. By selecting the dropdown arrow by the tab's name, you have a number of actions you can carry out including **Rename**, **Remove** and **Copy link to tab** for sharing .



Team and Channel Management Best Practices

Use Clear Naming Conventions - Ensure teams and channels have descriptive and consistent names to make it easy for members to identify and join the right discussions.

Regularly Review and Clean Up - Periodically review teams and channels to archive or delete those that are no longer active to keep your workspace organized and clutter-free.

Organize Channels by Topic or Project - Structure channels within a team by specific topics, projects, or departments to keep conversations focused and relevant.

Set Channel Descriptions - Add clear descriptions to channels to provide context on their purpose and help members understand where to post or find specific information.

Pin Important Channels - Pin frequently used channels to the top of your Teams list for quick access, ensuring that you stay updated on critical discussions.

Use Channel Moderation - Enable moderation in specific channels where it's important to control who can start new posts, ensuring that discussions remain relevant and on-topic.

Leverage Tabs for Key Resources - Add tabs for important documents, apps, or websites within channels to make key resources easily accessible to all team members.

Encourage Use of @Mentions - Promote the use of @mentions to draw the attention of specific members or the whole team, ensuring important messages are seen by the right people.

Foster Open Communication - Encourage team members to ask questions and share updates in channels rather than private chats, which promotes transparency and collaboration.

Set Expectations for Channel Use - Clearly communicate the purpose and expectations for each channel to avoid off-topic posts and ensure the channel serves its intended function.

Practices for Team and Channel Management

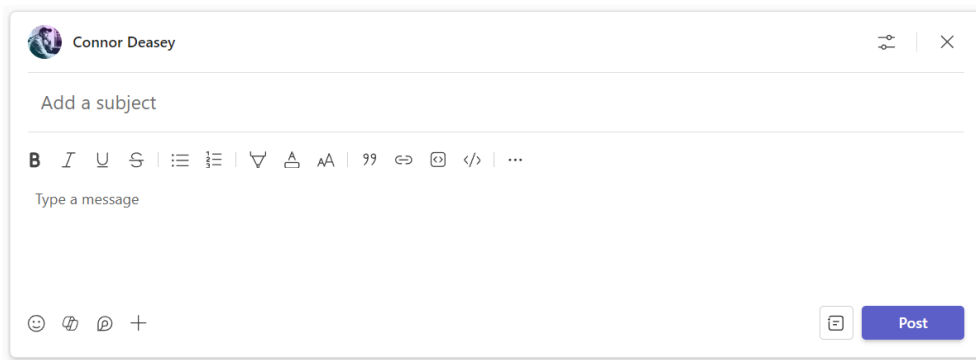
Communicating in Teams

Posts

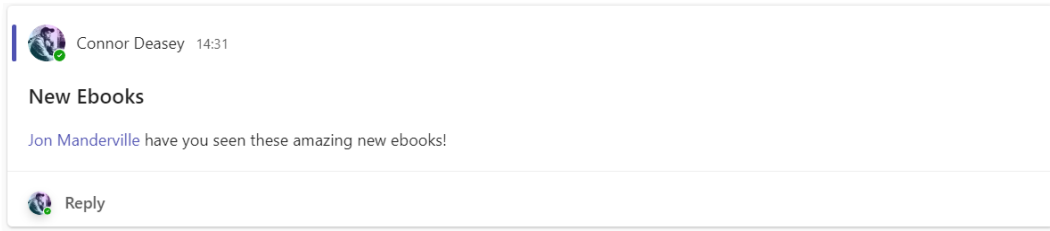
Posts are where you communicate with all the people on your team. This is a great place to discuss items which are normally sent through email.

In fact, one of the benefits of using Teams is to reduce the number of emails that are sent. A conversation is one self-contained discussion. You can have many conversations at once.

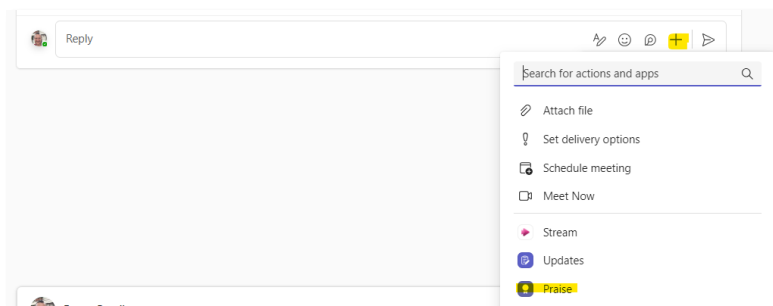
- **Start A Post** – At the bottom of your screen, the **Start a post** entry is used to start a new chat and not to reply to the conversation above. Use the **Reply** option to reply to an existing conversation
- **Subject** – When creating a conversation, it is good to add a subject. By clicking the 'A' icon you get more edit options. Adding the title helps to keep focus and context to that conversation



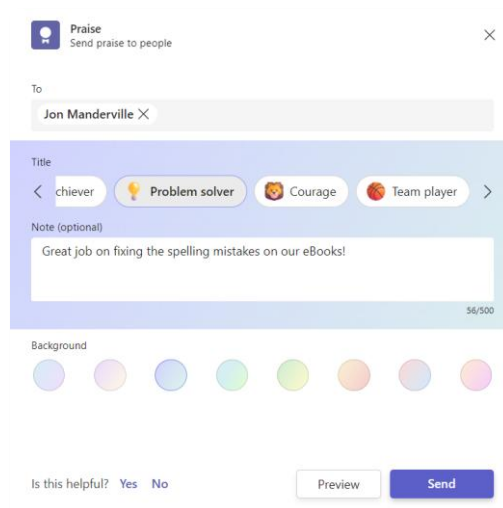
- **@mention** – When starting a conversation or asking a specific question, it's good to use the **@mention** functionality to either get the whole channel's attention (by using the name of the channel) or a team member's name. The relevant people then get alerted in the Teams app to this new reply or conversation. The below screenshot shows a subject and Jon Manderville has been alerted to it



- **GIFs** – In both chat and conversation you can brighten up everyone's day and use GIFs
- **Praise** – One of the great options available when selecting the '+' on a chat or post conversation box, is **Praise**.



Allowing you to give praise to team member or members for good work.



Chats

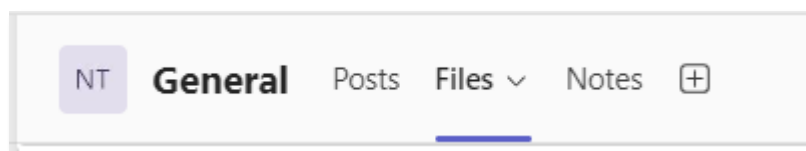
A chat is different to a conversation as it's usually between you and one other person (sometimes multiple people via a group chat). You access your chats in the App bar and can turn the chat into a call or a video call by selecting the relevant icons on the top right-hand side of the screen.

Managing Files in Teams

Microsoft Teams integrates robust file management features that allow seamless collaboration and document sharing within teams and channels. Understanding how to manage files effectively in Teams will help you streamline your work processes, ensure easy access to important documents, and collaborate efficiently with your colleagues.

File Storage and Access

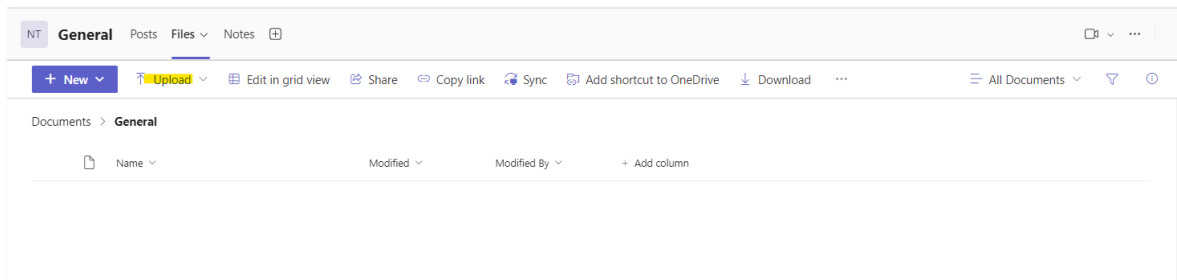
When you share files in a Microsoft Teams channel, they are stored in the **Files** tab of that channel. These files are automatically saved to the associated SharePoint site of the team, ensuring they are securely stored and easily accessible by all team members.



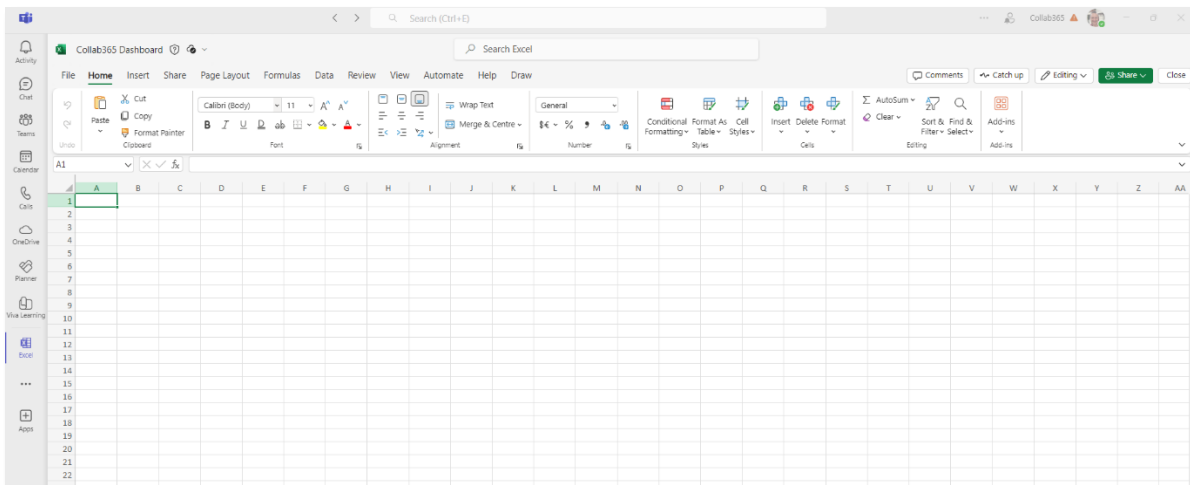
For private chats, files shared are stored in your OneDrive for Business account and are only accessible to the participants of that chat.

Key Features of File Management in Teams

Uploading Files: You can upload files directly to a Teams channel by dragging and dropping them into the Files tab or by selecting "Upload" in the tab. This makes the file accessible to everyone in the team.

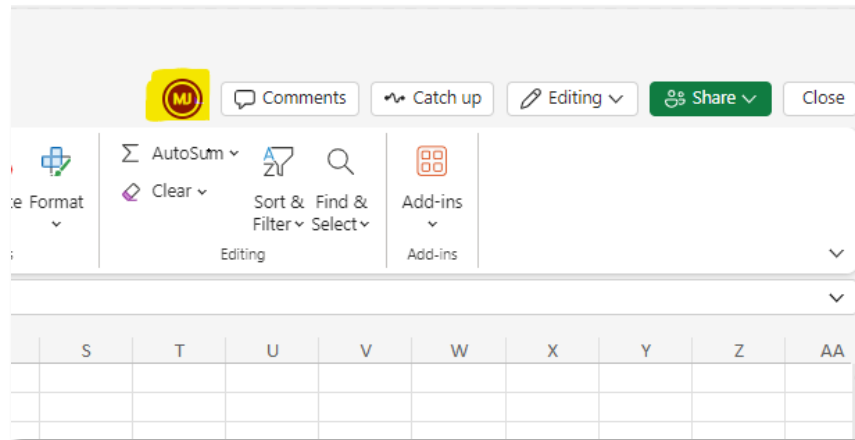


File Editing: From Teams you are able to open files directly within Teams, in a web browser, or in the desktop app (e.g. Excel, Word etc). Any changes made are saved automatically. Below is an Excel document opened within Teams, as you can see most of the standard functionality is available just like in the desktop app.



Collaborative Editing: Teams allows multiple users to co-author Word, Excel, or PowerPoint documents in real time. You can see when others are in the same document with the initials

shown in the top right corner, in this case Mark Jones (MJ) is the other person, but it could be multiple people at the same time.



Initials will also show next to the cell or object being edited by the users you are co-editing with.

File Sharing: You can easily share files with colleagues by posting them in a chat or channel. Links to these files are shared rather than the files themselves, ensuring that everyone always accesses the latest version.

Version History: Teams, integrated with SharePoint and OneDrive, allows you to view the version history of a document. You can revert to an earlier version if needed, ensuring that no work is ever lost.

File Permissions: Depending on your role in the team, you may have different permissions for files. Owners can manage permissions, ensuring that sensitive files are only accessible to certain team members.

Syncing Files: You can sync the files from a Teams channel to your local device using OneDrive. This enables you to access and work on files even when offline, with changes syncing back to Teams when you reconnect.

Best Practices for File Management in Teams

- **Organize Files by Folders:** Create folders within the Files tab to keep documents organized by project, department, or type. This makes it easier for team members to find what they need quickly.
- **Use Consistent Naming Conventions:** Establish a consistent naming convention for files and folders to avoid confusion and make searching for documents more intuitive.
- **Regularly Review and Archive:** Periodically review files and archive those that are no longer needed to keep the workspace clean and efficient.
- **Leverage File Sharing Links:** Instead of attaching files to emails or messages, use sharing links within Teams to ensure that everyone has access to the most current version.

Meetings and Video Conferencing

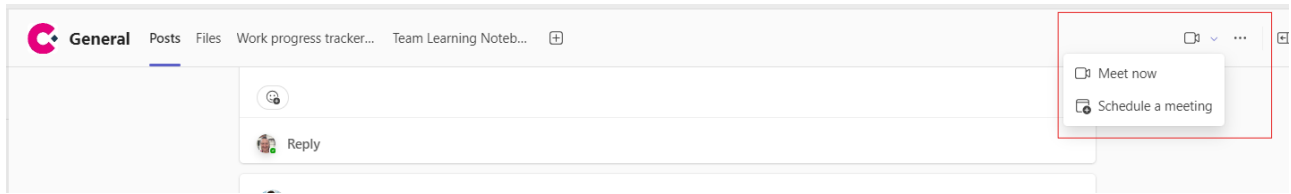
Teams is a great tool for communication. You can message individuals, groups, and use the amazing video conferencing tools, too.

Organising meetings

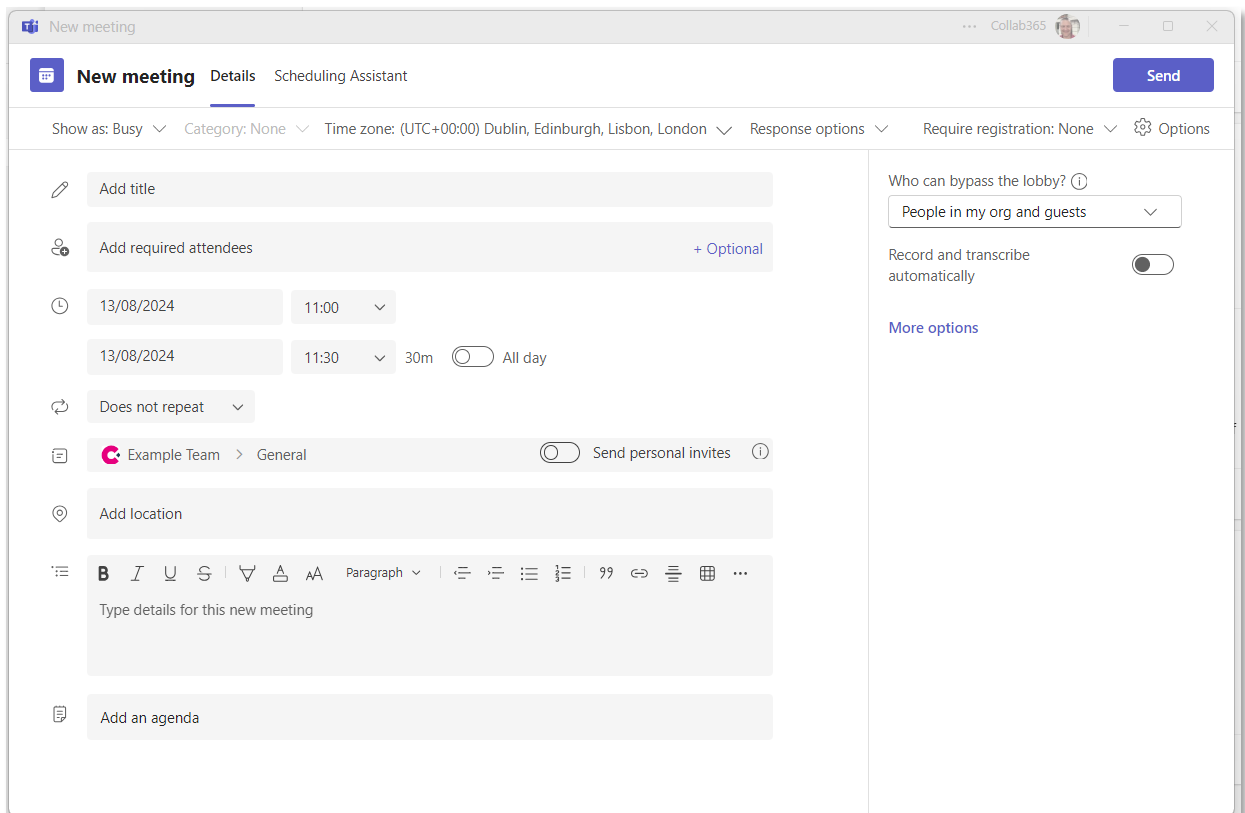
When organising a meeting, you must decide if it is with members of an existing team, or a person, or group of individuals. The reason for this is, if you organise from within an actual team then it will be linked to a Channel. Whereas, if you organise a meeting from the Calendar, it will not be linked.

Schedule a Meeting with your Team

To organise a meeting with your teammates, click on the Camera icon on the right-hand side of your team.



You have two choices: **Meet now** or **Schedule a meeting**. Select **Schedule a meeting** and enter the following details: Name, attendees (you must have at least one attendee), and a date. As we have scheduled this meeting through our team, it is automatically linked to our **General** channel.



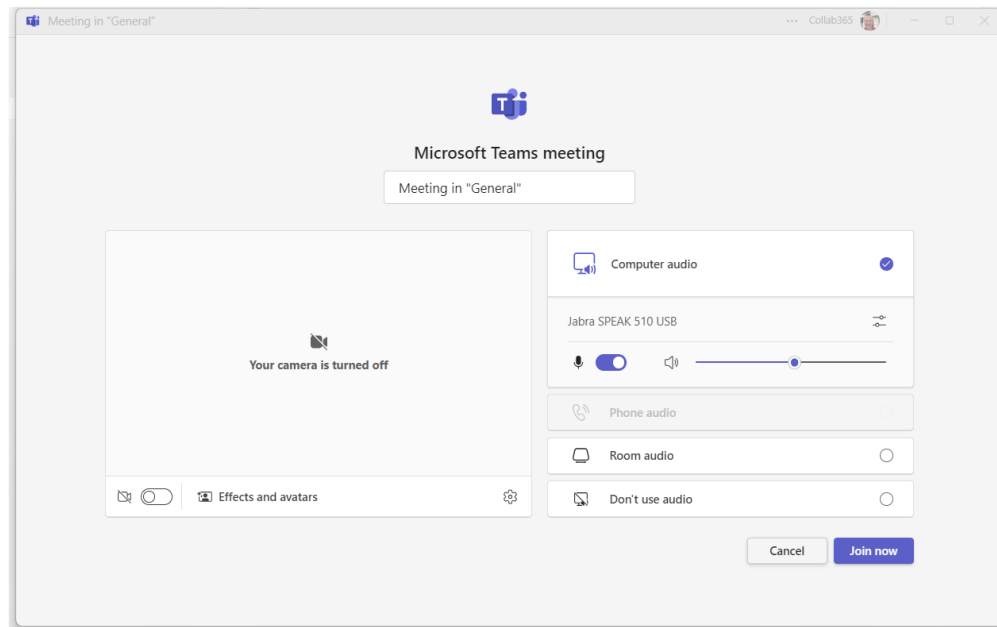
Add a location (office, meeting room etc.) if required, and a message to the attendees. When you select Send the attendees will get an email in Outlook. Even though you have created this meeting in Teams, it will also appear in your Outlook calendar.

Meet now

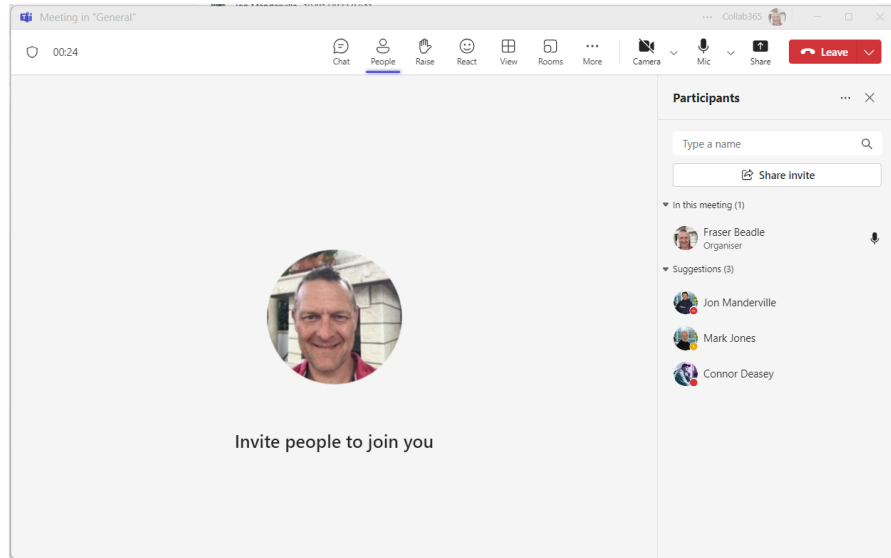
Meet now allows you to start a meeting immediately and you can ask people to join your meeting on the fly. It doesn't matter where you launch your **Meet now** meeting as it's will not be connected to a team.

Click on **Meet now**

Before you start your meeting, you can adjust the settings for the meeting including camera, audio and effects and avatar settings.

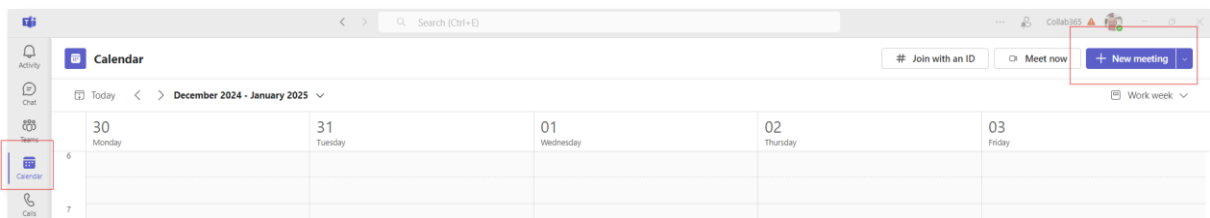


Once your meeting has started, you can invite more people by entering their names in the Participants pane.



Schedule a Calendar Meeting

In a similar way that you would do in outlook, you can organise a Teams meeting with other people usually a mix of Teams and even a mix of organisations , by clicking on the Calendar icon in the App bar, and on the right hand-side of the screen select New meeting.






Carry out the same steps as above, however, you will notice that no channel has been selected.

Meeting options

Regardless of whether you have scheduled a meeting, launched Meet now, or have been sent a link to a meeting, if you are using the Teams app, you'll have a lot of meeting options.

When you are in a meeting, by selecting from the icons at the top, you have the options.

OPTIONS	FUNCTION
<p>Show participants</p>	<p>See who is in the meeting or add more people.</p>
<p>Show conversation</p>	<p>Chat with everybody in the meeting by bringing up the conversation pane</p>
<p>Raise your hand</p> 	<p>Raise a virtual hand to let people know you want to contribute without interrupting the conversation.</p>
<p>Breakout rooms</p>	<p>Create a breakout room – we’ll discuss this in depth in a later section.</p>

<p>More options</p> <p>(...)</p>	<p>Device settings allows you to select your audio and video options for the meeting</p> <p>Meeting options governs who can bypass the lobby, who can present and unmute options for attendees. There's more about the lobby in the next section</p> <p>Meeting note are notes that you can take and then share with attendees. They'll end up as a wiki page on as a tab on your team</p> <p>Gallery gives you options on how the people on your meeting are presented</p> <p>Full screen will enlarge your gallery to the full size of your monitor</p> <p>Apply background effects allows you to change the appearance of your background</p> <p>Start Recording records the meeting and saves the file in a separate app called Stream</p> <p>Dial Pad allows you to call a phone number (this needs to be set up by your Office 365 administrator)</p> <p>Turn off incoming video turns off video for people joining the meeting, which is great if you have a poor connection</p>
<p>Camera </p>	<p>To turn on your video on or off, select Camera </p>

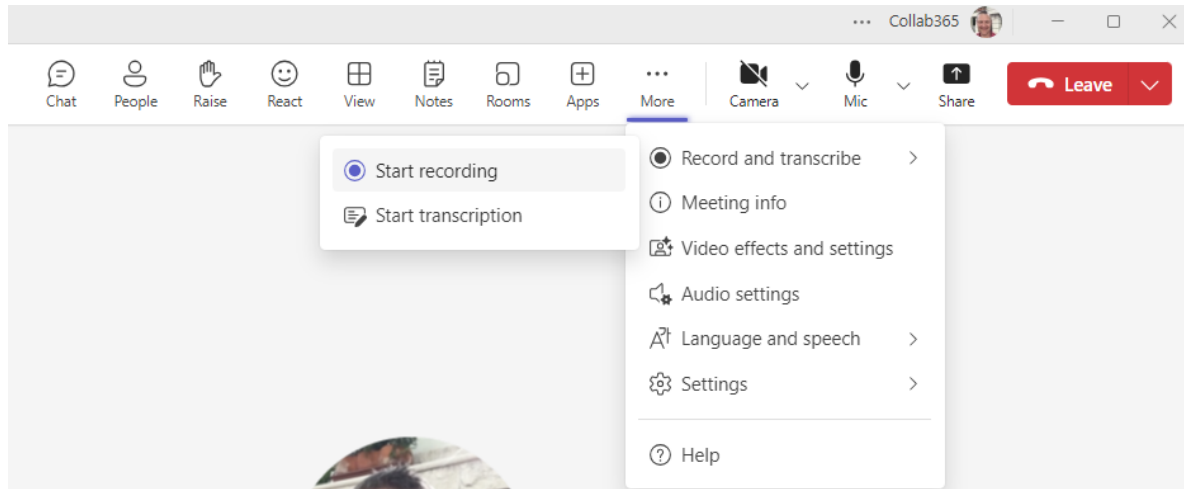
Audio	Turn on your audio, or mute yourself
Share content	When you share content, you either share your entire screen, a specific window such as a file, or a program, such as PowerPoint or Excel. You will know that you are sharing your screen because it will be framed in red
Leave	You can either leave the meeting, or end it for all participants

Recording meetings

You can record your Microsoft Teams meetings. The recording captures Audio, Video, and any screen sharing activities. The meeting is recorded in the cloud and saved to Stream, meaning you can manage, download, and share along with all your organisation's other video content.

At the most basic level, this allows you to have a record of what was discussed, so you can go back to it at a later stage or share with team members that could not attend.

Once in the meeting just click the (...) and click '**Start Recording**':



After you start the recording, a notification will appear at the top of the meeting, informing all participants that the meeting is being recorded. Once you are finished, go back to the same (...) menu and select **Stop recording**.

The recording will be automatically saved to **OneDrive** (for private meetings) or **SharePoint** (for channel meetings). You'll also see a link to the recording in the meeting chat, and an email notification with the link will be sent to the organizer and anyone specified. Participants can access the recording through the meeting chat or the email link.

Here are a couple of links to help explain further and give other prerequisites and considerations:

- [End User Documentation: Record meeting in Teams](#)
- [Manage Teams recording policies for meetings and events](#)
- [Teams meeting recording storage and permissions in OneDrive and SharePoint](#)

Calls in Teams

Calls is another central part of Teams. Once everybody is online or connected to the internet, you can start a call with one or more of your colleagues.

However, there is a vital distinction between calling people in your organisation over the internet and calling actual landlines/mobiles.

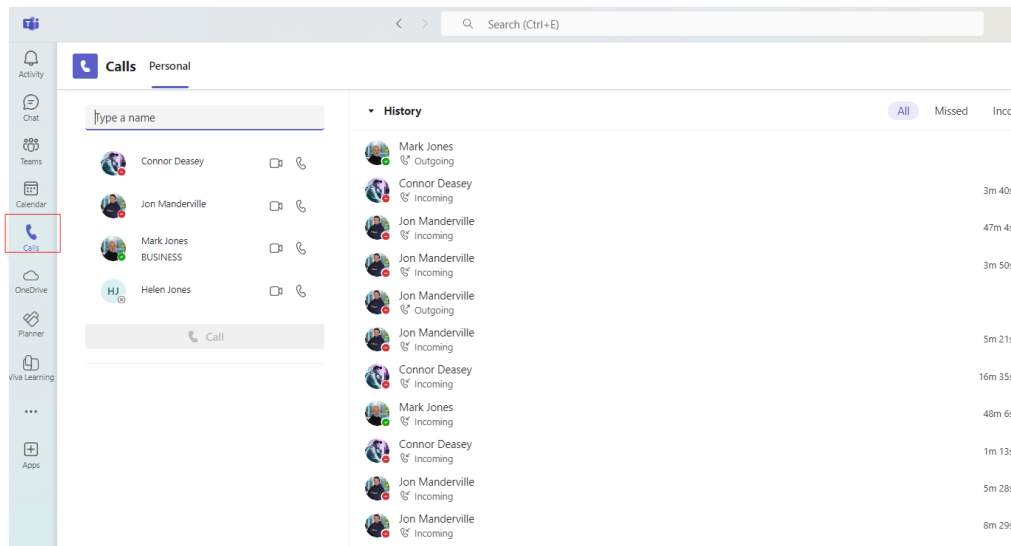
This section only covers calls made over the internet and not landlines/mobiles. For more information about **Calling Plans**, see Microsoft's guide -

<https://docs.microsoft.com/enus/microsoftteams/configuring-teams-calling-quickstartguide>

Calling people in Teams

Call a colleague by selecting **Calls**.

To make a call to someone in your organisation, enter their name in the **Make a call** field

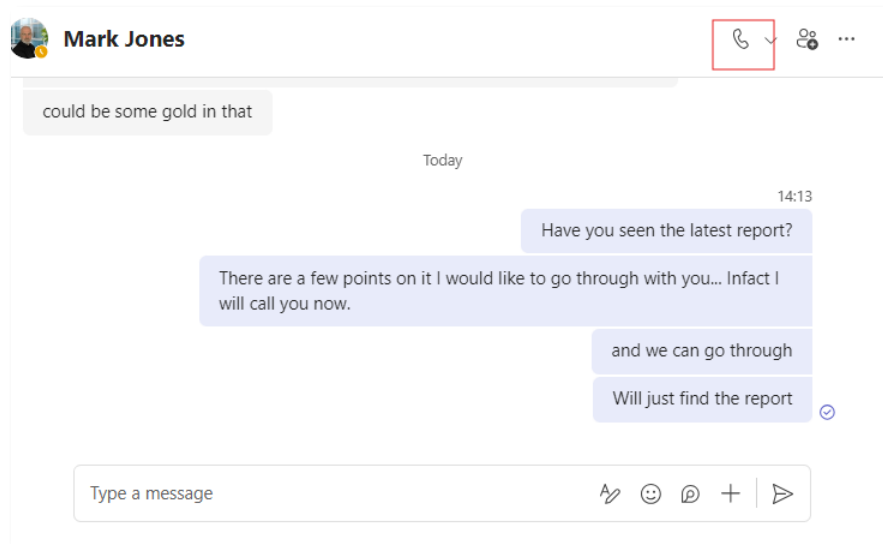


Your call can be either a voice call or a video call

Once on the call, the familiar meeting environment will appear, and if it's a video call, your image on the bottom right of the screen

Call someone you are chatting with

If you are in a chat, or if you go to a previous chat, select either video or the voice symbol at the top right-hand side of the screen



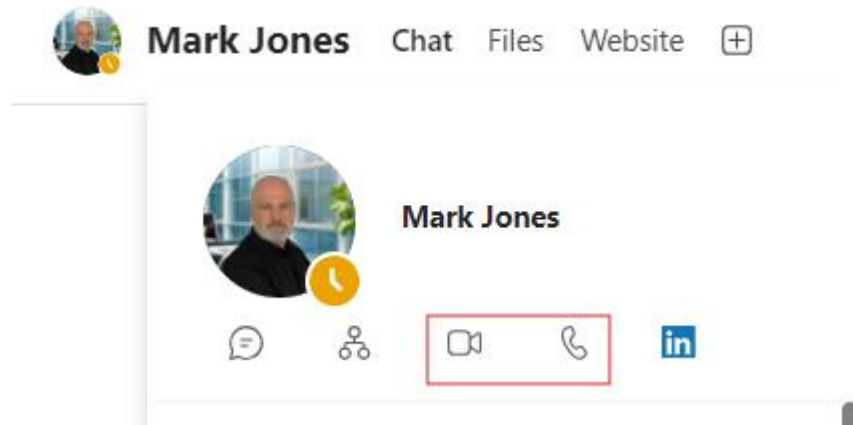
Call with the Command box

Type **/call** into the command box and enter the person's name



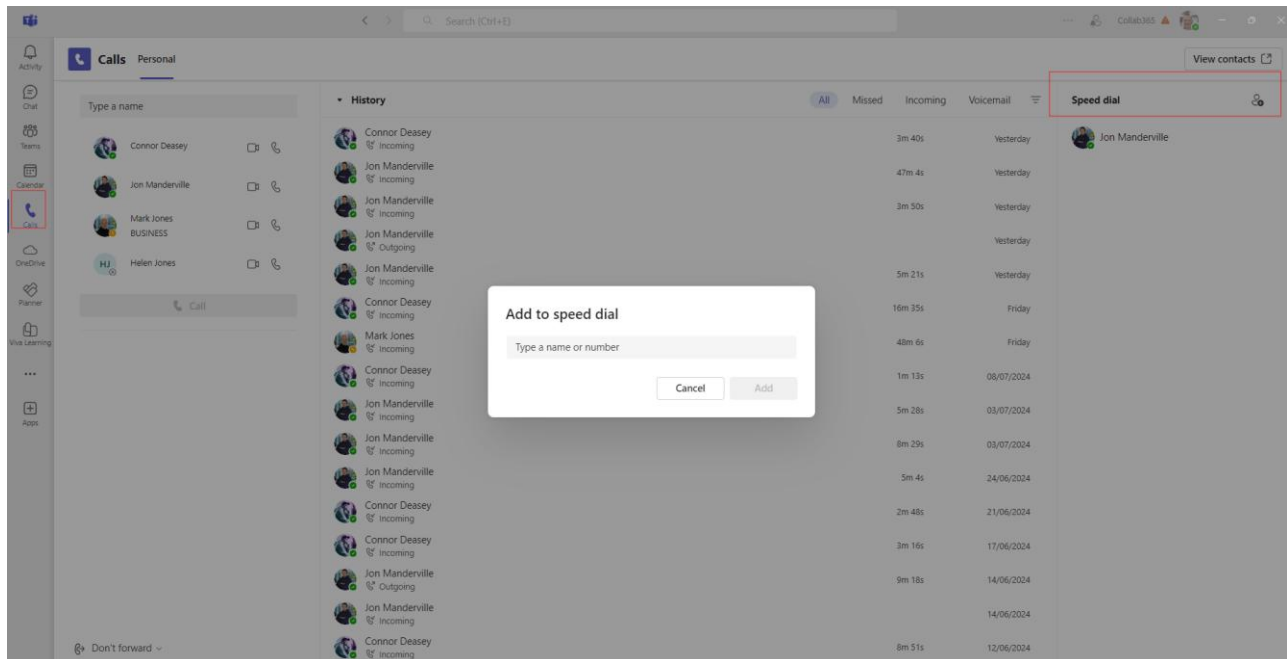
Via a Profile picture

In Teams you will often see people's profile pictures. If you hover over one of them, you can start a video or voice call:



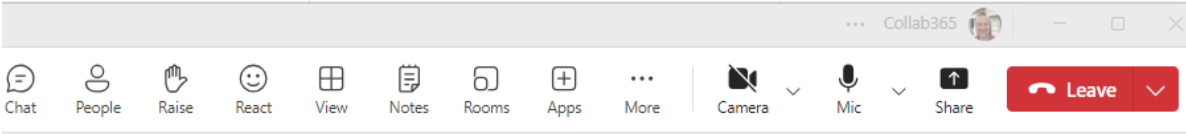
Add contact to Speed dial

Go to **Calls** and Speed dial and **Add speed dial**. Enter the person's name or number and **add**



Calls Options

During a call, you have many options accessed from the menu at the top of the call window. The options that each person sees will depend partly on their organizational level settings, here are some of the options that may be available



OPTIONS	FUNCTION
Device settings	This is where you can select the audio settings, such as what speaker, microphone and camera to use.
Hold	By selecting Hold , you put the call on hold for everybody in the call.
Transfer	Type in the name of the person you want to transfer, select them, and then Transfer .
Consult then transfer	If you like, you can consult with a person before transferring them, and once you have finished consulting them, select Transfer

<p>Turn on live captions</p>	<p>Live captions take note of what is being said in the call. However, as it's transcribed by the AI feature in Teams, it may not be perfect</p>
<p>Start transcription</p>	<p>When you start a transcription, a text-based record of the meeting's conversation will be created and saved to the meeting chat or Microsoft Stream. Participants are notified when transcription starts.</p>
<p>Mute/Unmute</p>	<p>Allows you to mute or unmute your microphone during the call.</p>
<p>Start/Stop Video</p>	<p>Let's you turn your camera on or off.</p>
<p>Blur background/Change background</p>	<p>You can blur your background or replace it with a custom image, or one provided by Teams.</p>
<p>Share content</p>	<p>Allows you to share your screen, a window, or specific files with participants.</p>

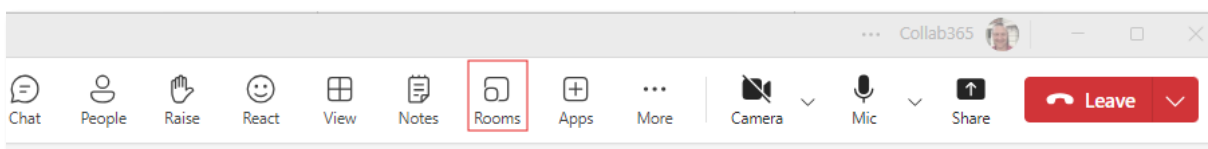
End call	This option ends the call for you (or for everyone if you are the organizer).
Raise hand	Let's you signal that you want to speak without interrupting.
Chat	Opens the chat panel where you can send text messages to participants during the call.

Advanced Meeting Features and Tips

Breakout rooms

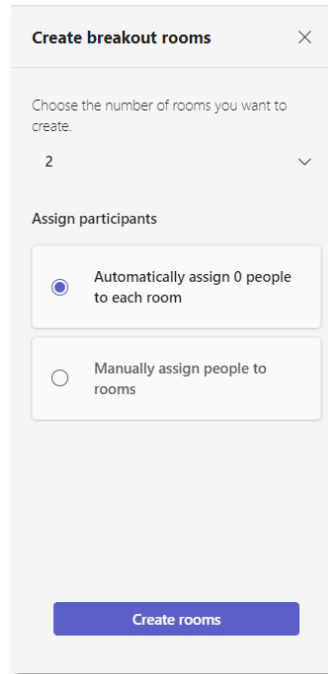
Breakout rooms allow you to create rooms where you can have a separate meeting within a meeting. This is ideal for people who are attending a meeting to have a private chat, with the option to returning to the original meeting.

Only meeting organisers using the desktop version of Teams can create breakout rooms. The highlighted icon below is for Breakout rooms.



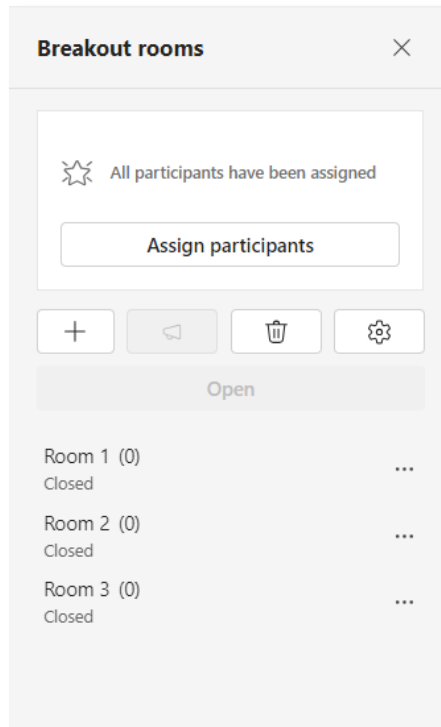
1. Select **Breakout rooms** and chose how many rooms you need – the maximum is 50.

Then either assign participants **Automatically** or **Manually** and select **Create Rooms**



The screenshot shows a dialog box titled "Create breakout rooms" with a close button (X) in the top right corner. Below the title, there is a text prompt: "Choose the number of rooms you want to create." Below this prompt is a dropdown menu showing the number "2" with a downward arrow. Underneath the dropdown is the section "Assign participants" which contains two radio button options: "Automatically assign 0 people to each room" (which is selected) and "Manually assign people to rooms". At the bottom of the dialog box is a blue button labeled "Create rooms".

2. To assign people manually to a breakout room, select **Manually** and check peoples' names and then assign a room. At this stage you can add more rooms and assign people accordingly



3. Once you have assigned somebody to a room, you must **open** the room by clicking on the (...) beside the room and selecting **open** - the room status will change from **Closed** to **Open**
4. The attendees will be notified on screen that: The breakout room session has started. You will be automatically moved in 10 seconds
5. As a meeting organiser you can join any of the breakout room by selecting the **More options** (...) next to the room and **Join room**. When the meeting organiser joins a breakout room, the original meeting is put on hold
6. To send an announcement to everybody in all the breakout rooms, select the (...) and choose **Make an announcement**
7. When finished with the breakout rooms, you can either close one or all of them at once. To close one, select **More options** and pick the room that you would like to close. Alternatively, select **Close rooms** to close them all
8. Attendees who want to return to the main meeting can select **Return**

9. Please note - when the attendees have finished with their breakout rooms and want to join the original meeting – and if you as the meeting organiser have also joined a breakout room – you must select **Resume** to start the original meeting and then the attendees will automatically join it

Breakout room tips

- **Only a meeting organizer can move freely between multiple breakout rooms:** The meeting organizer has the ability to join and switch between breakout rooms at any time. Co-organizers may also have this ability, depending on the organization's settings.
- **You must be using the desktop version of Teams – not the web app – to organize breakout rooms; however, attendees can use the web app/mobile app to take part in breakout rooms:** Only organizers on the desktop version can create and manage breakout rooms. Participants can join breakout rooms from the web app, desktop, or mobile apps.
- **Attendees can present in breakout rooms by default:** Attendees have the ability to share content and present in breakout rooms unless the organizer changes the settings.
- **You can rename your breakout room by selecting the (...) by the room's name:** The organizer can rename breakout rooms by clicking the ellipsis (...) next to the room's name.
- **In each breakout room, you can record, chat, and share content just like in a regular Teams meeting:** While you can chat and share content, only the organizer can start a recording in a breakout room. Each breakout room's recording will be separate from the main meeting's recording.
- **Breakout rooms become part of the original meeting and remain in place for further use, if required:** Breakout rooms are tied to the original meeting and will remain available as long as the meeting is active. You can reuse them in future sessions of the same meeting.

- **A room must have attendees assigned for it to open:** A breakout room cannot be opened unless at least one participant is assigned to it.
- **You can start breakout rooms individually or all at once:** The organizer has the flexibility to open rooms individually or simultaneously, depending on the needs of the meeting.
- **If a guest selects Re-join while in a breakout room,** they will leave that room and the original meeting; in order to re-join the original meeting, they must click on the link which they were initially sent: When a guest selects "Re-join," they typically return to the main meeting, not leave both the breakout room and the main meeting entirely. However, if they do get disconnected, they will need to use the original meeting link to re-join.
- **Reassigning participants:** Organizers can reassign participants to different breakout rooms even after the rooms have been created and opened.
- **Closing breakout rooms:** When the organizer closes the breakout rooms, all participants return to the main meeting automatically.
- **Timers for breakout rooms:** The organizer can set a timer for breakout rooms. When the timer runs out, the rooms will automatically close, and participants will be returned to the main meeting.
- **Broadcast message to all rooms:** Organizers can send a broadcast message to all breakout rooms, useful for giving instructions or updates to all participants simultaneously.

The lobby

If you have organised a meeting (and are the official ‘meeting organiser’), you decide who gets to join the meeting directly or if people have to wait in the lobby. If someone is waiting in the lobby, you will get a notification in by the participants’ icon and can let them join the meeting by selecting the green tick.

Who can bypass the lobby?	What happens	Recommended when...
Only you	As the meeting organizer, only you can get into your meeting directly. Everyone else will wait in the lobby.	You want everyone else to wait in the lobby until you're ready to admit them.
People in my organization	Only people in your org (including those who have different email domains than yours) can get into your meetings directly.	You want all external guests (anyone outside your org) to wait in the lobby so you can approve them one by one.
People in my organization and trusted organizations	Only people in your Teams org and external guests from trusted organizations can get into your meetings directly.	You want some external guests to wait in the lobby so you can approve them one by one.
Everyone	Anyone who has access to the meeting link gets into the meeting directly, including people who call in.	You don't want anyone to wait in the lobby. You want everyone to be able to join your meetings without specific approval.

Table source: <https://support.microsoft.com/en-us/office/change-participantsettings-for-a-teams-meeting-53261366-dbd5-45f9-aae9-a70e6354f88e>

Other Meeting or Event Types

There are a number of other meetings or event types that you can use Microsoft Teams for that might be worth you exploring:

Live Event

- **Purpose:** Designed for large online audiences, such as town halls, company-wide presentations, or public broadcasts.
- **Audience Size:** Up to 10,000 attendees.
- **Complexity:** More complex than regular meetings, requiring a presenter and a producer to manage the event.
- **Features:** High-quality video streaming, moderated Q&A, attendee analytics, and the ability to record events for later viewing.

More Information: For detailed steps on scheduling and managing Live Events, visit [Microsoft Support - Schedule a Teams Live Event](#).

Webinars

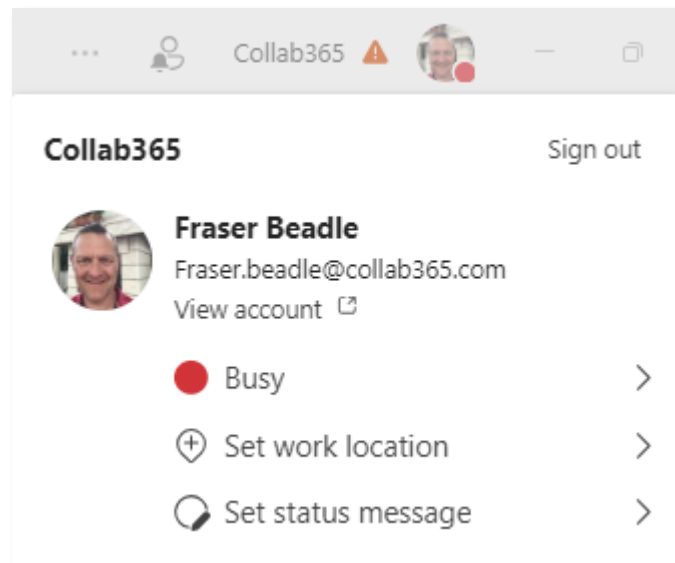
- **Purpose:** Ideal for interactive presentations, training sessions, and workshops where attendee participation is key.
- **Audience Size:** Up to 1,000 attendees.
- **Complexity:** Easier to set up than Live Events, but with more engagement features than standard meetings.
- **Features:** Registration page, attendee reports, breakout rooms, interactive Q&A, polls, and surveys.

Customizing Your Teams Experience

Microsoft Teams offers a variety of customization options to tailor your experience to your specific needs and preferences. By customizing your settings, notifications, and appearance, you can streamline your workflow and enhance your overall productivity.

Customizing Your Profile and Status

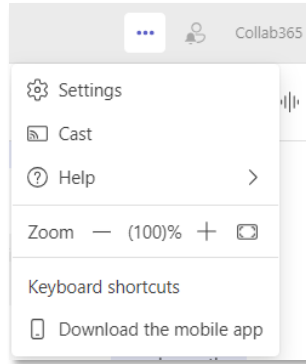
In the top right corner of your Teams window, you will see your profile image or the placeholder for it if you have not set one. Clicking on this will open the menu that will allow you to set or change your profile picture by clicking on the circle image.



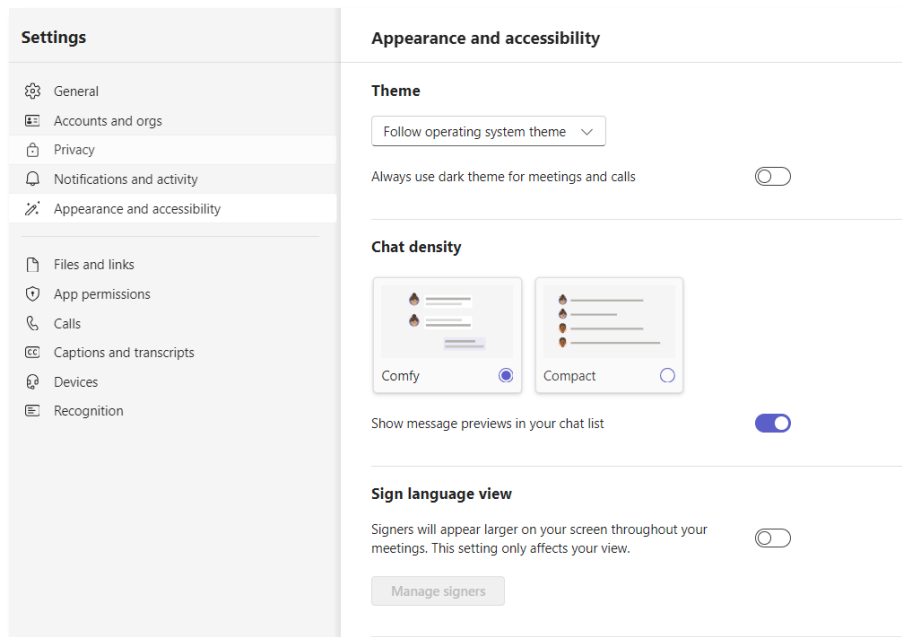
This is also where you can set your status, work location, and status message, to help keep your Team informed of where you are and when you are available.

Personalizing Themes and Appearance

There are a number of ways you can change the look and feel of your Teams experience to work best for you. You access these settings by going into **Settings**



Select **Appearance and accessibility** > **Theme** you can then choose between Default, Dark, High Contrast, and classic.



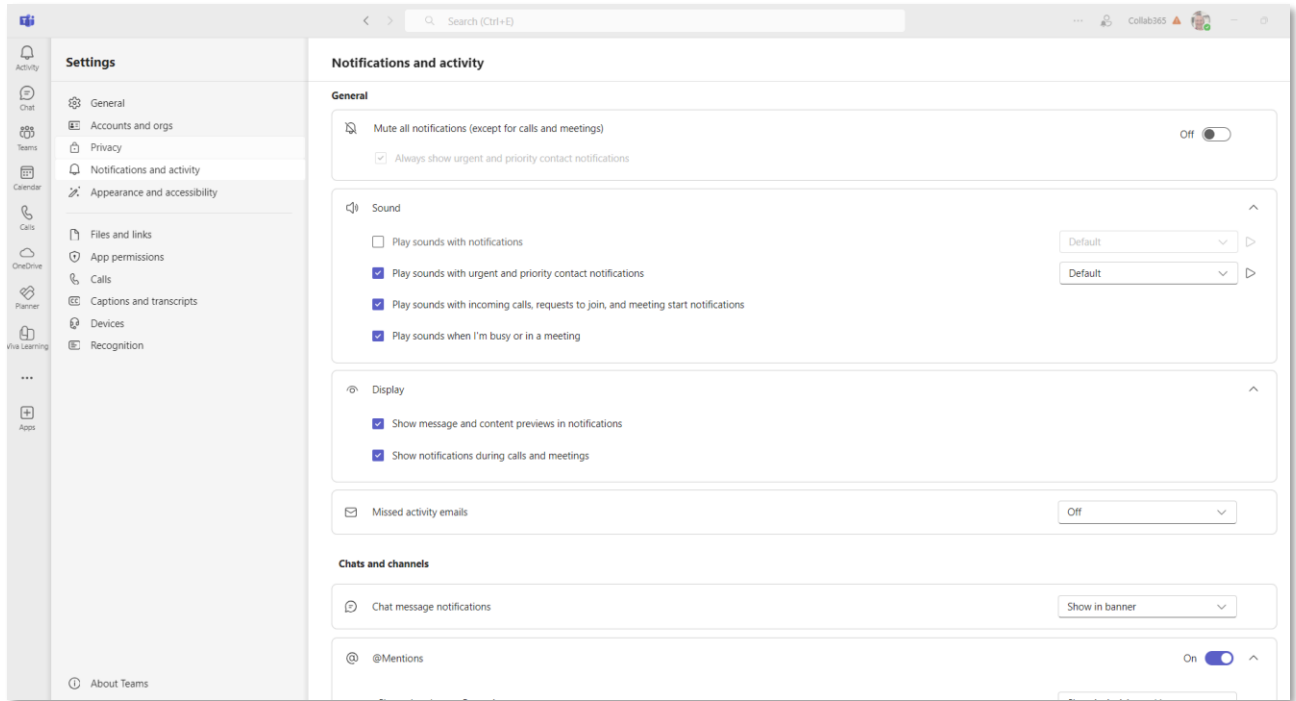
There are many other settings you can tweak in order to get your Teams set just right for you, so these settings are worth exploring further.

Managing Notifications

From the same settings window you can customise your notifications settings to ensure you never miss important activity or sometimes even more important, that you are not hindered by

too many notifications of things you are less interested in.

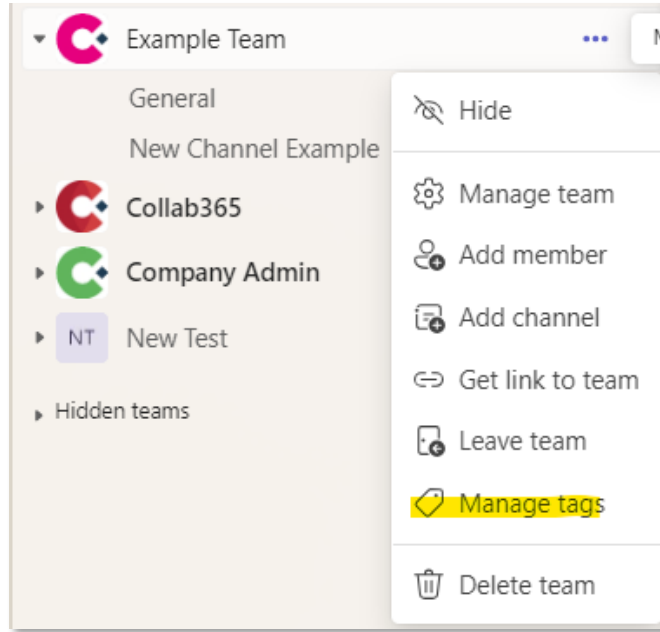
Go to **Settings > Notifications and activity** to update all the different notification settings.



Using Tags to Group Members of a Team

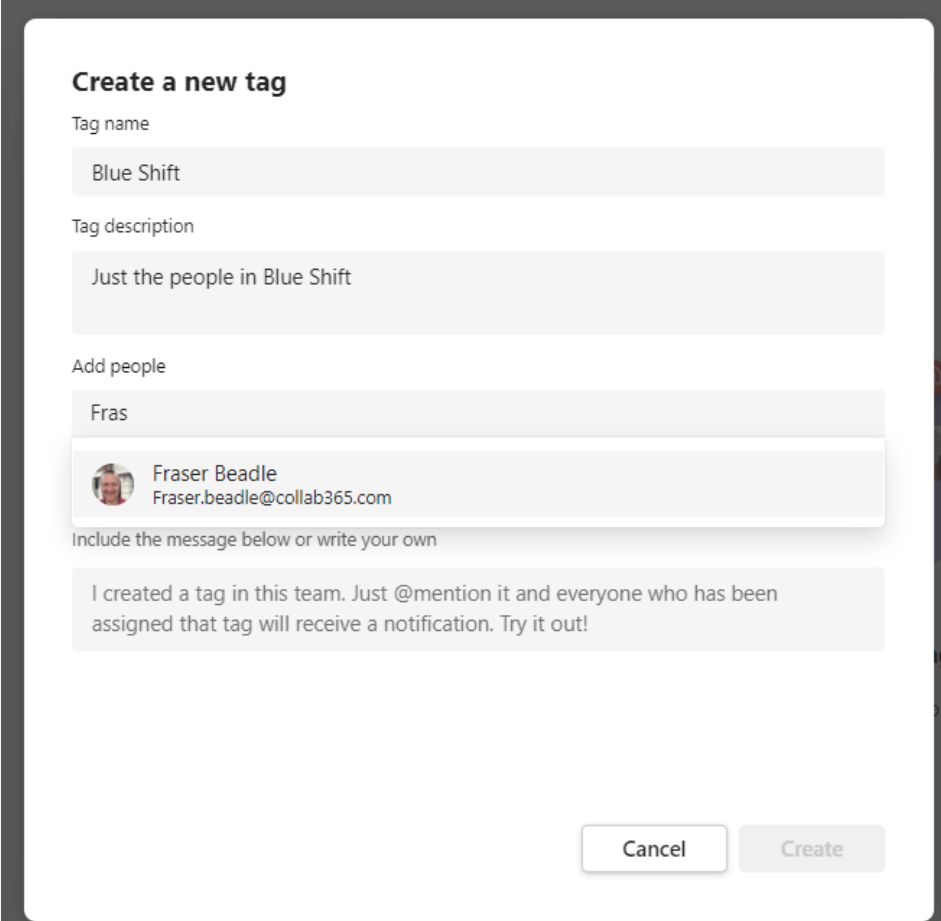
This is a fantastic way of grouping your team members so that you can send messages in the Team with @mentions that only alert a subset of people in the team.

It can be particularly useful for larger Teams. There are a couple of ways to allocate the tags, you can do it on a user by user basis, or you can bulk add users to tags using the Manage tags option.



To do this, navigate to your Team, click the '...' menu and select '**Manage Tags**'. From here, you can see all your Tags and which team members have them as well as Create new tags and allocate to Teams members.

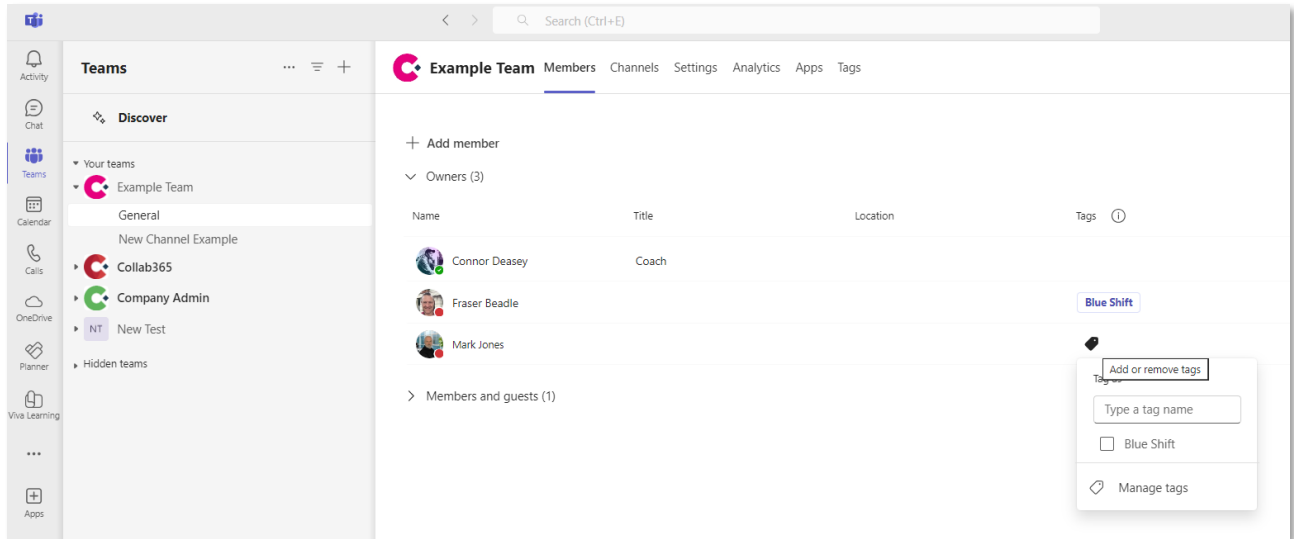
If you choose to create a new tag, team members can be allocated to that tag as you create it:



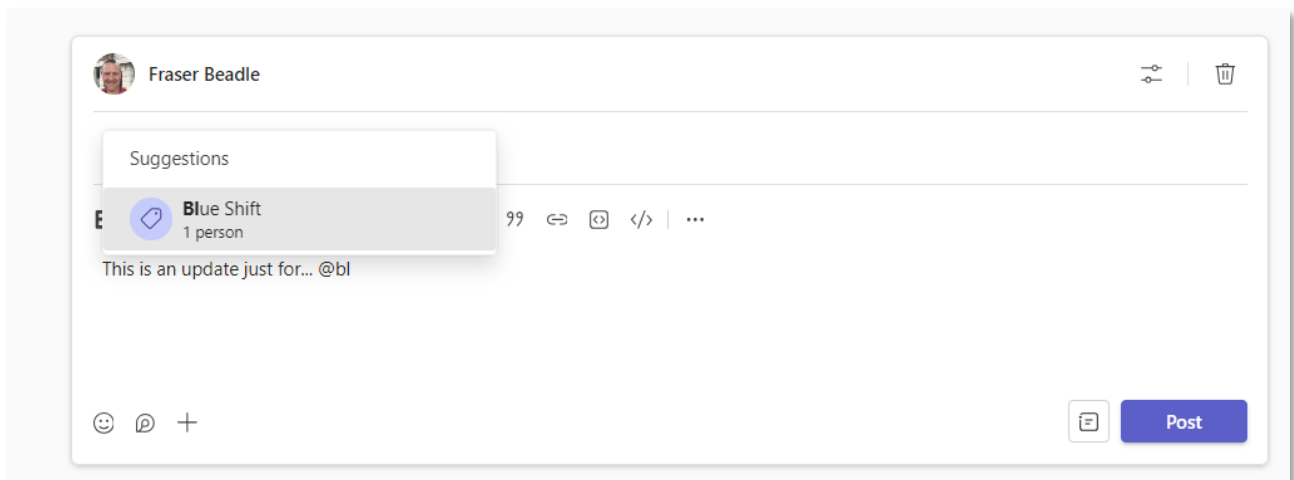
The screenshot shows a 'Create a new tag' dialog box with the following fields and content:

- Tag name:** Blue Shift
- Tag description:** Just the people in Blue Shift
- Add people:** A search bar containing 'Fras' with a dropdown menu showing a member: Fraser Beadle (Fraser.beadle@collab365.com).
- Message:** I created a tag in this team. Just @mention it and everyone who has been assigned that tag will receive a notification. Try it out!
- Buttons:** Cancel and Create.

If you edit members within a team, you can allocate them from the members list simply by clicking in the tags field of the members list and selecting the tag you would like to allocate to the member.



Once a tag exists and members are allocated to the tag, it means you can @mention that subset of members in a conversation to only notify those members:



So, in this example we are @mentioning all of the members with the tag Blue Shift, and when we post this conversation, they will all get a notification, and the other members of the team will not.

Customizing your Microsoft Teams experience allows you to create a workspace that is tailored to your specific needs and preferences. By taking advantage of these customization options, you

can improve your efficiency, reduce distractions, and enhance your overall productivity. Spend some time exploring these settings and adjustments to get the best experience that works for you.

Additional Features

The Command Box

The search bar at the top of Microsoft Teams offers a selection of command options that allow you to quickly change your status, start conversations, and perform other actions. To use these commands, simply type '/' in the command box and choose from the options provided. Here are the available commands:

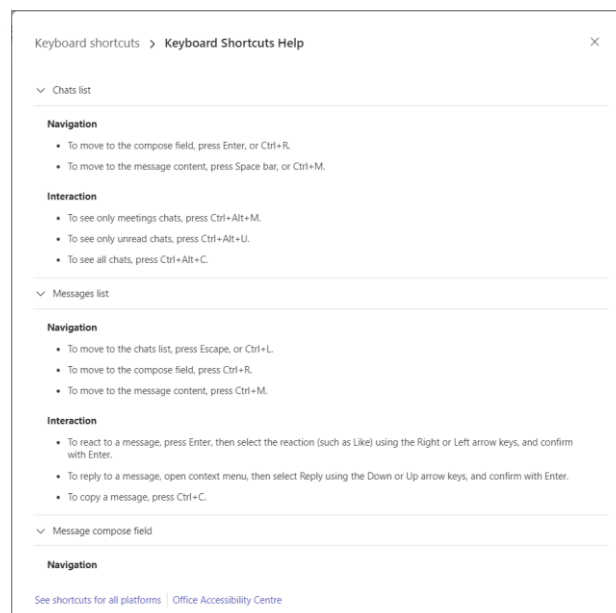
- **/available** – Set your status to "Available," indicating that you're ready to collaborate.
- **/chat** – Start a quick message to a person. Simply type the command followed by the person's name to initiate a chat.
- **/call** – Initiate a call with someone by typing the command followed by their name.
- **/away** – Set your status to "Away," signaling that you're not at your computer.
- **/busy** – Set your status to "Busy," letting others know you're occupied and prefer not to be disturbed.
- **/dnd** – Set your status to "Do Not Disturb," which will silence notifications and let others know you're focusing on something important.
- **/brb** – Set your status to "Be Right Back," indicating a temporary absence.

- **/offline** – Set your status to "Appear Offline," which hides your online presence from others.
- **/praise** – Show gratitude to your peers by sending a "Praise" message. This is a great way to recognize someone's contributions or efforts.

Shortcut Keys

To further streamline your experience in Microsoft Teams, here are some useful keyboard shortcuts:

- **Navigate the Left Navigation Panel:** Use **Ctrl + 1, 2, 3**, etc., to quickly jump between different sections (e.g., **Ctrl + 1** = Activity feed, **Ctrl + 2** = Chat, **Ctrl + 3** = Teams).
- **Reorder Your Teams:** Use **Ctrl + Shift + Up or Down Arrow** to move the selected team up or down in your list of teams.
- **Access All Shortcuts:** Press **Ctrl + . (Full Stop)** to bring up a list of all available keyboard shortcuts in Teams, providing a quick reference to all the shortcuts you can use.



Closing Thoughts: Mastering Microsoft Teams

Congratulations on completing this guide to Microsoft Teams! By now, you should have a solid foundation in navigating, using, and optimizing Teams for your daily tasks. From setting up meetings and managing channels to utilizing advanced features like Breakout Rooms and commands, you are well on your way to becoming a Teams pro.

But remember, this is just the beginning. Microsoft Teams is a robust platform that continues to evolve, with new features and updates rolling out regularly. To truly harness the full power of Teams, and Microsoft 365 as a whole, continuous learning is key.

Continue Your Learning with Collab365 Academy

At [Collab365 Academy](#), we specialize in helping you deepen your knowledge of Microsoft 365, including Teams, Power Platform, and much more. Whether you are looking to explore advanced Teams features, streamline your workflows, or become a certified Microsoft 365 expert, Collab365 Academy offers a range of courses, challenges, and workshops tailored to you and your teams needs.

Why Choose Collab365 Academy?

- **Expert-Led Courses:** Learn from seasoned professionals who bring real-world experience and insights.
- **Hands-On Learning:** Participate in interactive workshops, challenges, and full success paths, which go beyond theory.
- **Community Support:** Join a thriving community of learners and experts who are eager to help you succeed.

If you're ready to take your Microsoft 365 skills to the next level, visit [Collab365 Academy](#) today and explore our offerings. Your journey to becoming a Microsoft 365 expert starts here!