Microsoft Teams Training

Start a new conversation...
...with the whole team
1. Select **Teams** ⛂, then pick a team and a channel.
2. Select **New conversation**.
3. In the box where you type your message, say what's on your mind and select **Send** ▷.

...with a person or group
1. Select **Chat** > **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 select **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. Select **Reply**, add your message, and select **Send** ▷.

@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.
2. You can also @mention entire teams and channels. For example, @GWC Classified Senate – this will notify everyone a part of that team.
3. Select the person. Repeat for as many people as you want to @mention (you can @ multiple people at once).

Each person you @mention gets a notification in their **Activity** feed. There will also be a little red @ symbol in the corner of the Teams icon.
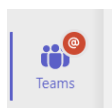
Sharing Files
Sometimes words aren't enough, and you need to post a file to a channel conversation.
Tip: Microsoft Word docs work best in Teams.

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

If you're uploading a file from your computer, select a file, select **Open**, and then select **Send** ▷.
You can always see all the files posted to a channel by going to the Files tab (left side).

Collaborating within your Team

Teams are made up of two types of channels — **standard** (available and visible to everyone) and **private** (focused, private conversations with a specific audience). Each channel is built around a topic like "Team Events," a department name, or just for fun. Channels are where you hold meetings, have conversations, and work on files together.

The tabs at the top of each channel link to your favorite files, apps, and services.

Add a Tab:
- Select the plus sign next to the tabs.
- For example, add Planner to create a project board for tracking team tasks.

Pin and unpin a channel:
If you have a lot of channels, pin the most important ones to make them easy to find.
- To pin a channel, choose one to pin and then select **More channels** > **Pin**.
- To unpin a channel, choose one to unpin and then select **More channels** > **Unpin**, and to see what else you can do.

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 to expand and learn more about it.

Teams Settings

Add or Remove Members

In the teams list, go to the team name and select **More options** ⋯ > **Manage team**.

You can manage these member settings:
- To remove someone, select **X** to remove them.
- To change someone's role, select the dropdown arrow and choose a role such as **Owner** or **Member**.
- To add someone, select **Add member**. Add a member from within or outside your org:
  - To add someone in your org, type in the name of who you want. Then, select **Add**.
  - To add a guest, type in their email address. Select the pencil icon to add a display name for them. Then, select **Add.**

Manage Channels

Go to the team name and select **More options** ⋯ > **Manage team**.

In the **Channels** tab, you can:
- Select **Add channel** to add new channels.
- Make channels visible for team members.

Change Settings

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

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

Share information to multiple Teams/Channels

You can post a conversation or announcement to multiple channels at once.

1. In the channel, select **New conversation** > **Format** ✏️ .
2. At the upper-right area of the box that opens, select the dropdown to choose between **New conversation** or **Announcement**.
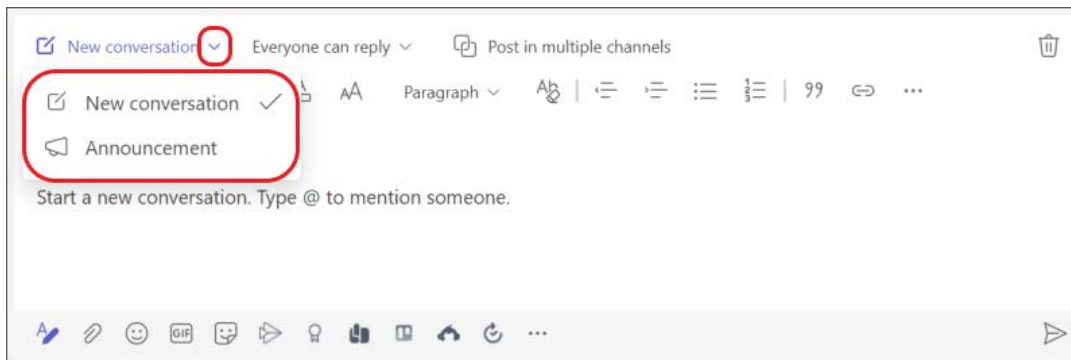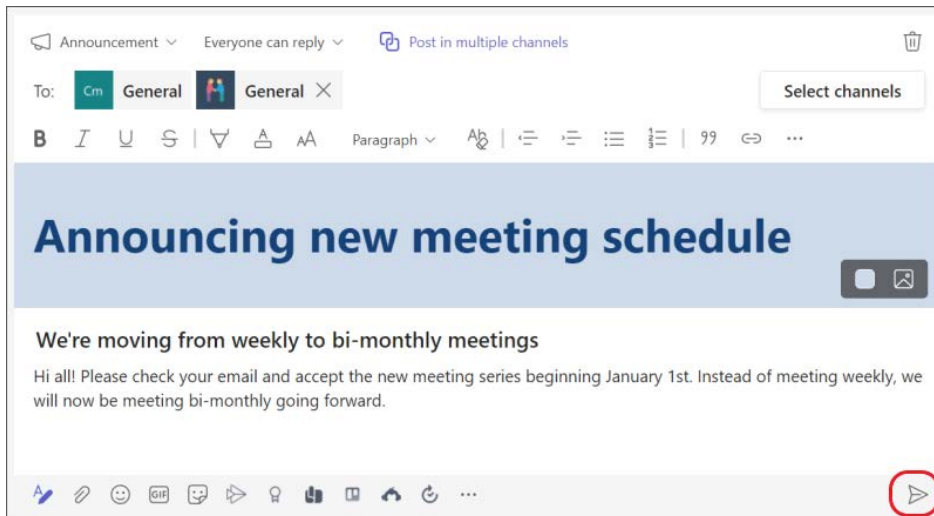

3. Select **Post in multiple channels** > **Select channels**.
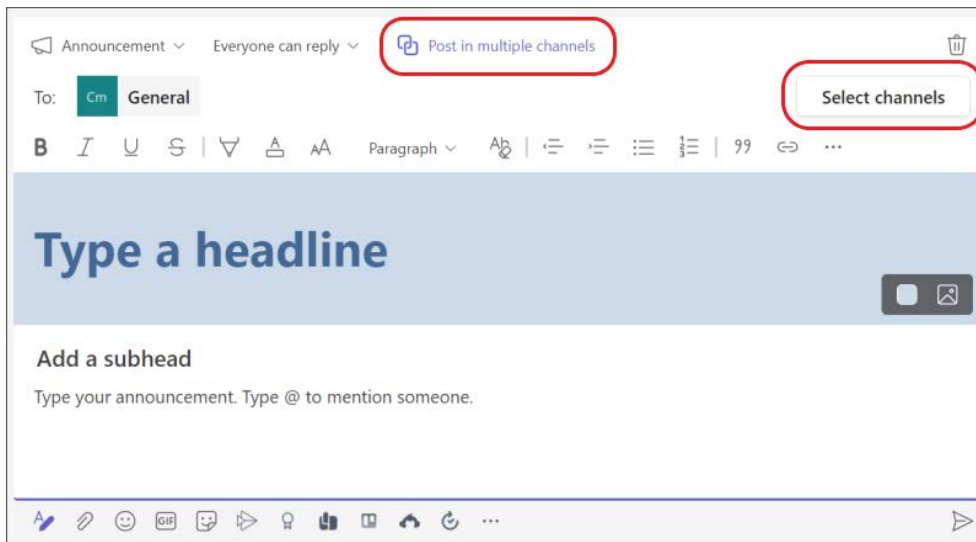
4. Choose the channels you want to cross-post to, or use search to find a channel. You can post wherever you're a member. Select **Update** to save.
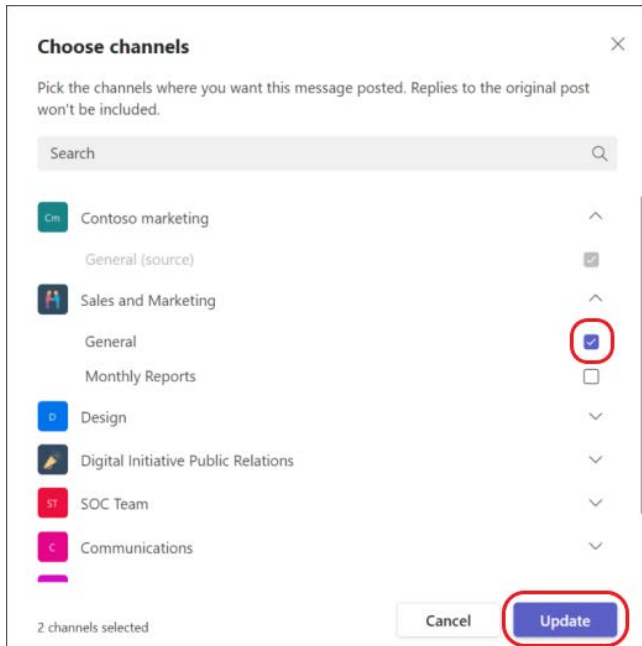
5. The **To** field updates and shows the channels your message will be posted in. Type your message and select **Send**. This posts your message to the selected channels.

Edit your cross-post:

You can edit your original message in a cross-post anytime by selecting **More actions** ⋯ in the post, and then choosing **Edit** ✏.

From here, you can also add channels to post in, or you can remove channels from the list. Select **Post in multiple channels** > **Select channels** to find a channel to add. To remove a channel, just delete it from the **To** field.
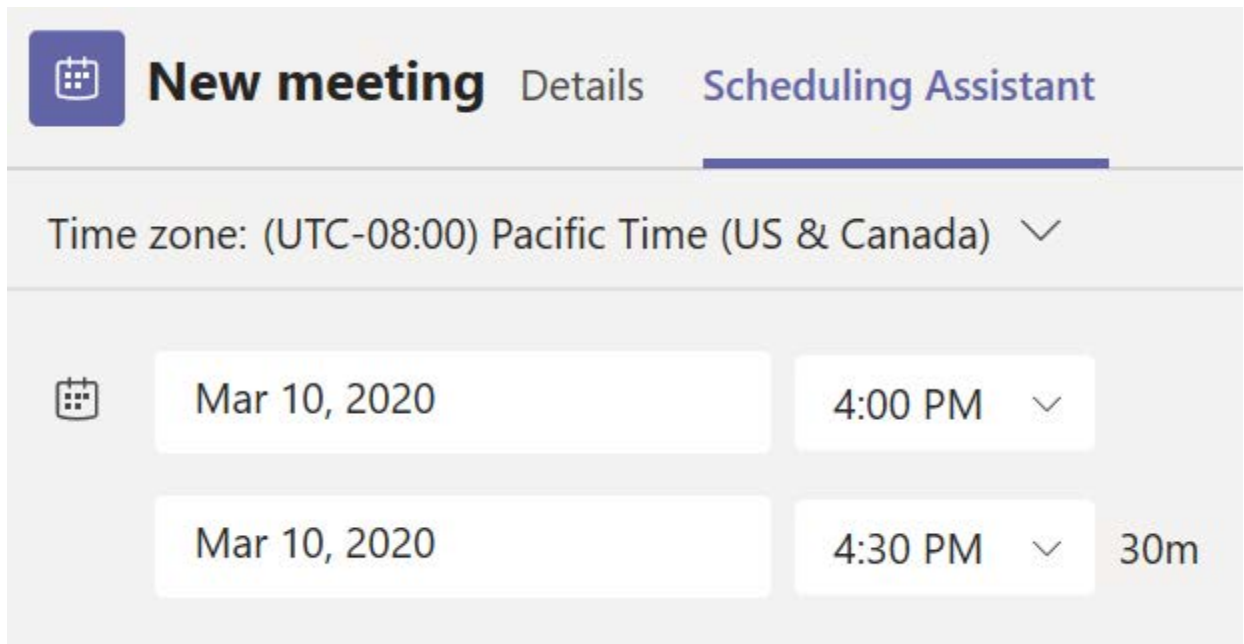
Finally, for any post you create, you can make it a cross-post by selecting **More actions** ⋯, then choosing **Edit** ✏ > **Post in multiple channels** > **Select channels**, and then selecting the channels you want to add.

Schedule a meeting

There are several ways to schedule a meeting in Teams:

- Select **Schedule a meeting** ⊞ in a chat (below the box where you type a new message) to book a meeting with the people in the chat.
- Go to **Calendar** ⊞ on the left side of the app and select **New meeting** in the top right corner.
- Select a range of time in the calendar. A scheduling form will pop open.

The scheduling form is where you'll give your meeting a title, invite people, and add meeting details. Use the **Scheduling Assistant** to find a time that works for everyone.

Once you're done filling out the details, select **Save**. This will close the scheduling form and send an invite to everyone's Outlook inbox.

Assign a category to your meeting

Color code your calendar with categories. Just like in Outlook, you can assign one or more categories to each meeting in your calendar. There are a couple ways to assign categories:

1. Right-click an event in your calendar and select **Categorize**, then pick a color.
2. When scheduling a meeting, select **Category** at the top of the scheduling form.

Notes:
- At this time, category names and colors can only be edited from Outlook.
- For recurring meetings, categories can only be applied to the series, not an individual occurrence.
- Currently, categories can't be applied to channel meetings.
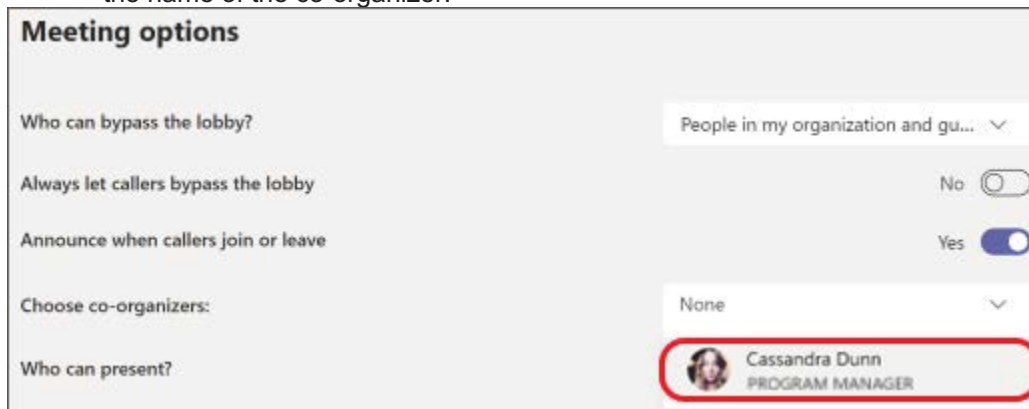
Invite others (outside your org)

Teams lets you invite people outside your organization, including those who don't have a Teams license. You'll need their full email address to invite them.

1. Go to where it says **Add required attendees**. If anyone is an optional attendee, select **Optional** instead.
2. Type the person's full email address (ex: Joe@example.com).
3. Select **Invite**. They'll receive an email with a link to the meeting.

Add co-organizer

After you've invited people to your meeting, you can add up to 10 co-organizers to help manage your meeting. Before adding co-organizers, make sure the people you want to add are already added as required attendees and then follow the steps below:

1. Select your meeting and then select **Edit**.
2. Select More options *** > **Meeting options**.
3. On the meeting options page, next to **Choose co-organizers**, select the down arrow and choose the name of the co-organizer.
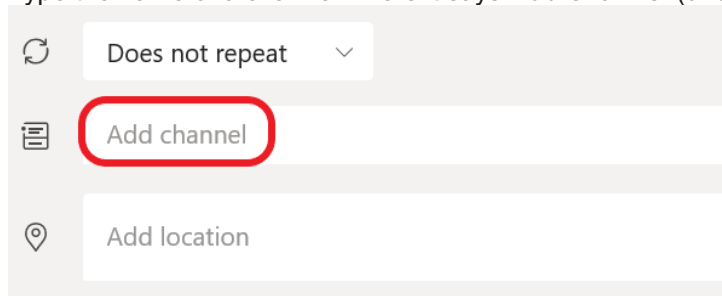

4. Select **Save** at the bottom of your screen.

Make it a channel meeting

1. Select **New meeting**.
2. Type the name of a channel where it says **Add channel** (under the time and date fields).

Channels can't be edited or added once the invite is sent. You'll need to send a new invite with the updated channel.

Note: When you have a meeting in a channel, everyone in the team will be able to see it and join it in that channel. This feature isn't available in private channels.

Once you've added the people you want, select **Scheduling Assistant** to find the best time.

If it's a recurring meeting, open the dropdown menu next to **Does not repeat** (just below the date). Choose how often you want it to occur from the default options, or select **Custom** to create your own cadence.

Schedule meetings in a channel calendar

If you're unfamiliar with how to add a calendar to a channel, the steps are outlined for you at See all your meetings in Teams. Once that's done, you have a few ways to add events to the shared calendar.

- Select **Add new event** at the top of the calendar.
- Click and drag your cursor on the calendar to select a block of time.
- Or, select the arrow next to **Meet now** at the top of the app to open the menu and select **Schedule meeting**.

Each of these actions will open the scheduling form with the channel name filled in, feel free to add an Outlook group or individuals by manually entering their names. Guests and partners from outside your org won't have access to the channel calendar and will also require being added to the meeting invite.