Microsoft Teams User Training Documentation

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Microsoft Teams is a messaging app for teams where all conversations, meetings, files, and notes can be accessed by everyone, all in one place.

How it benefits the South Central Regional Information Center:

- It makes communicating one-on-one and with groups a snap.
- It limits emails coming into your inbox.
- Collaboration happens in real time.
- It helps keep everyone in the conversation stay on topic.
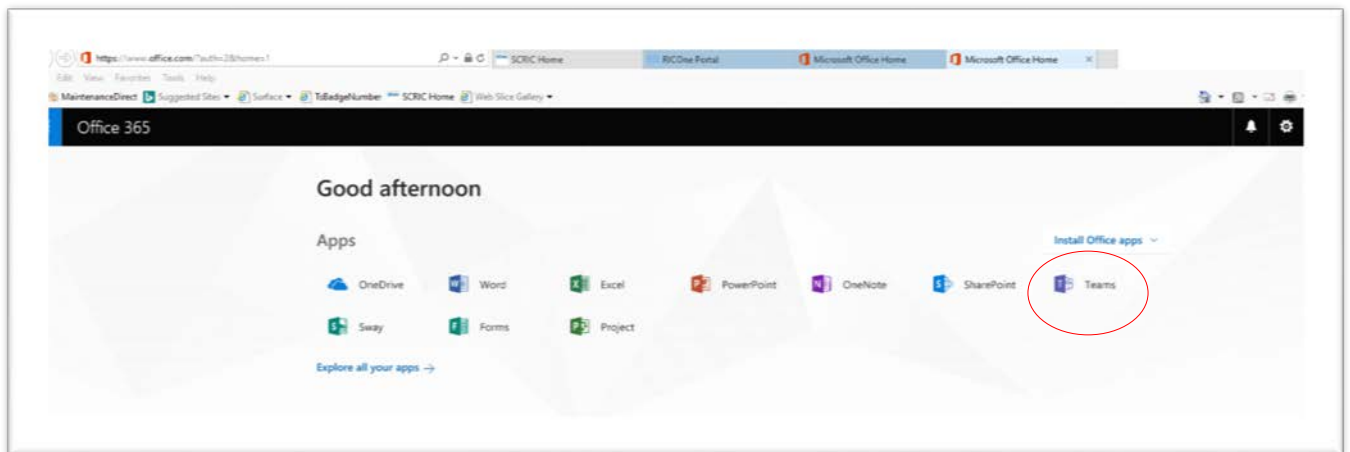- Everything your team cares about (all your files, docs, contact info, and more) is in one place

*Microsoft Teams is currently intended for communication within the South Central Regional Information Center. School districts do not currently use Teams. Districts will be utilizing Teams in the future. Stamford is currently piloting district use. In the future, we will be able to use it as a tool to collaborate with district staff.

1.) How to get Microsoft Teams

Downloading Microsoft Teams to your desktop is preferable. You can go to this site to download Teams: https://teams.microsoft.com/downloads.

You can also access it through Office 365 (http://myapps.btboces.org/). Sign in using your BT BOCES username and password, then click the Office 365 Icon. It will take you to this page:

Proceed to click on the Microsoft Team Icon.

Once you get into the app on Office 365, there is a pop up at the top of the webpage that says "Download the desktop app". Click the download button and it will save to your desktop.
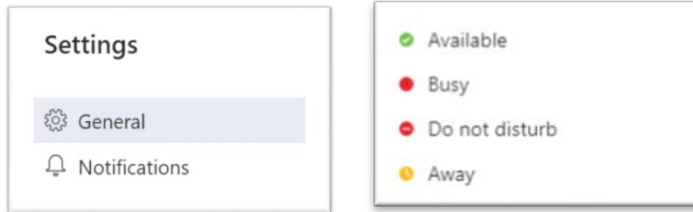
For the Mobile App, you can download it to your iOS, Android or Windows Phone. Just look in your mobile devices app store and search "Microsoft Teams". Separate documentation is provided for instructions on how to use the mobile app.

If you need help, you can put a ticket into ServiceNow and someone will assist you with downloading the application. The SCRIC TIS Team has the ability to deploy Microsoft Teams to a requested computer.

2.) Personalizing Teams

To personalize your settings, click your profile picture in the upper right hand corner. Select Settings. Here you have the ability to change your application settings, notifications, preferences, language, etc.

You have four options to choose from when setting your status for Teams – Available, Busy, Do Not Disturb, & Away.
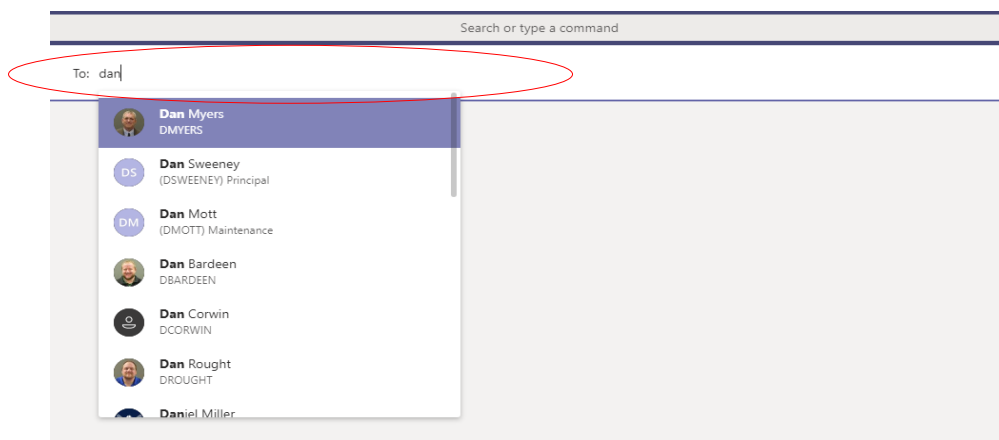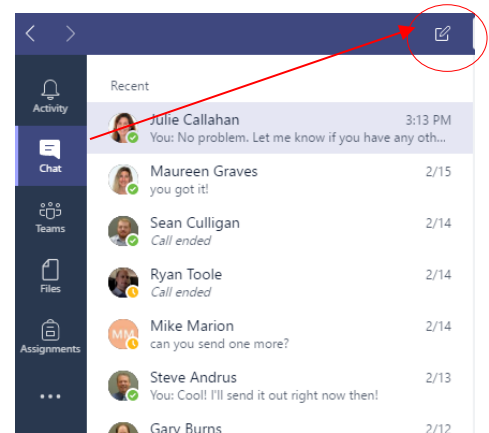

3.) Chat – Private Conversations

In this portion, you can engage in private conversations with any one or more individuals within your organization.

To start a new chat, you will need to click the icon in the upper right hand corner. Begin typing a name in the recipient line. Then, select the people you would like to chat with.

To search for a recipient to chat with, you will go to the following area and type in the user's name. Microsoft Teams will search for that individual and bring up a list of possible recipients. Select one and it will autofill their name. You have the ability to favorite, mute or hide the conversations with a person or group.
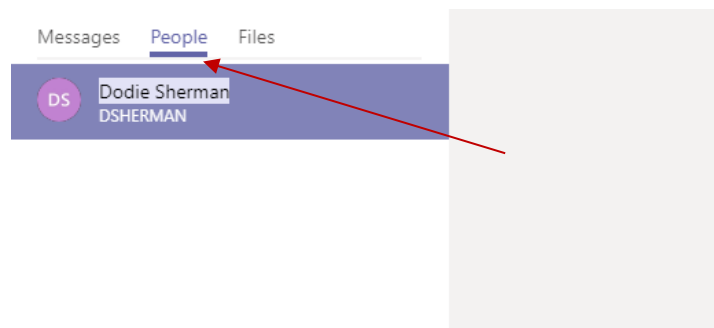
Microsoft Teams allows you to have the ability to have written conversations with your work peers. There are additional ways that you can communicate with them through chat. Microsoft teams Chat has the capability to send emojis, GIFs, stickers, longer composed messages and files. You can also make phone/video calls from Chat.

All conversations are ARCHIVED in the system. Please make sure you are using proper work etiquette and language when using Teams. By default, you can delete your own messages in your private conversations and teams. This can help clean up your chat window with overcrowding messages. They will disappear from the recipients chat window. You have the option to undo the act of deleting your messages as well. However, if you delete chat messages, they are still archived in the system.

When you search for someone to start a new private conversation with, you will start typing the desired recipients name in the 'Search' box at the top of the screen. If you have never started a chat with a specific person and you hit the enter button. It will take you to this view:

It will automatically take you to the 'Messages' tab. You will want to select the 'People" tab to find and select your recipient.
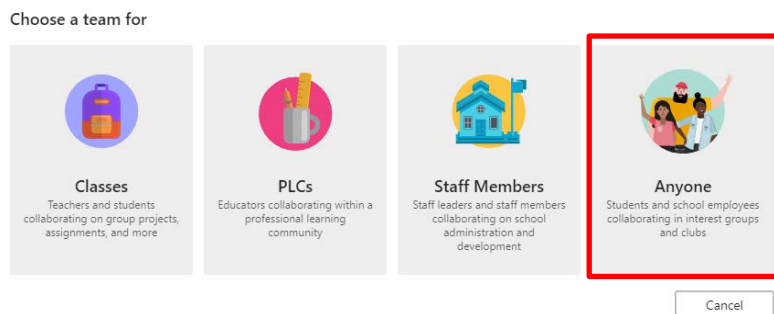
4.) Teams and Channels

Creating a Team:
To start collaborating, you need to create a team or group. To create a team, you will need select the 'Teams' icon on the far left of the screen. There will be a button labeled "Join or create a team".

Once you click that button, 4 choices will appear for you to select a specific team for. For the RIC, we recommend you choose 'Anyone".

After, you will pick a team name and give a description of what its purpose is. **You will need to make sure that your team is set to PRIVATE.** If you choose

public, any user is capable of joining/viewing the team that you have created. This could potentially cause security and privacy concerns, so please make sure to select the private option.

As of March 23, 2018, Microsoft Teams made it possible for Private Teams to be discoverable via search and the Suggested Teams gallery. If a user requests to join a private team, the team owner will receive a notification and can approve or deny the request directly in Teams.

Once you have selected your team to be private, you can start adding members. Any member has 'student rights'. They are able to chat, view and edit items in the group. The owner has rights over the whole team.
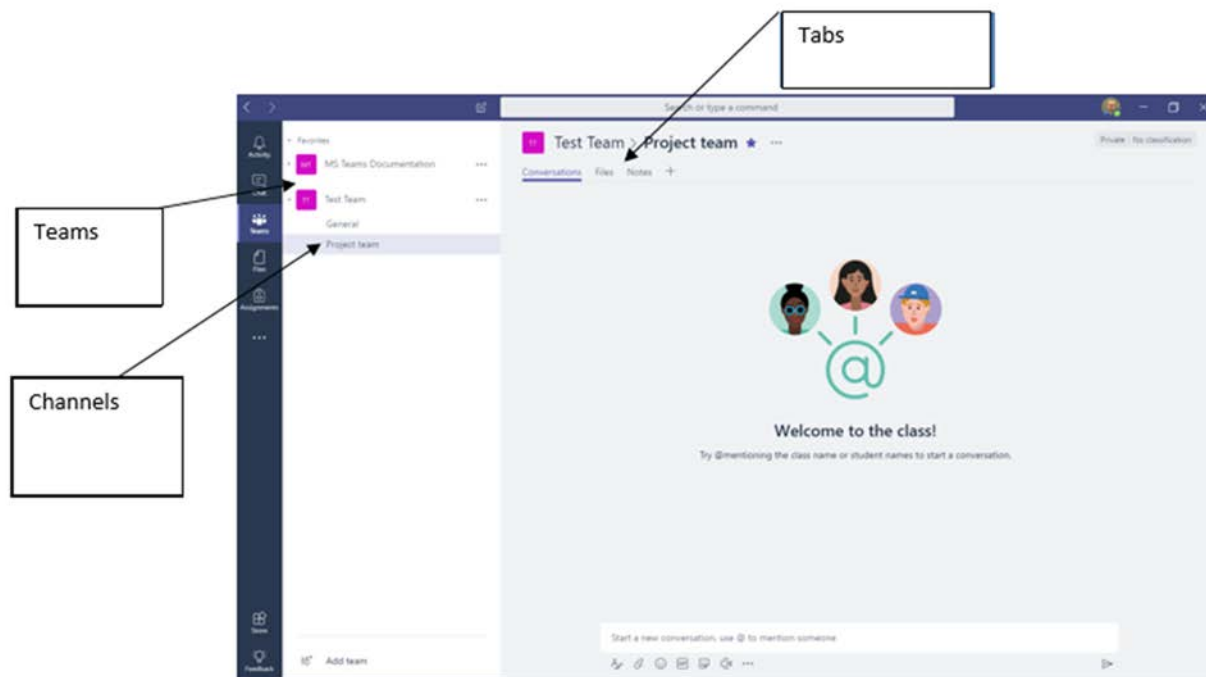
Channels:
Each team has a subsection that contains a channel. Multiple channels can be created in order to show multiple workgroups or teams.

Each channel has its own tabs. These tabs are where you can find the conversation and join in, the files shared with the group and a note tab. Please note that all of these tabs are saved and viewable by the entire group.

At the end of the tabs, three automatic tabs you can also add your own, which currently include Planner, Excel spreadsheets, Word documents, Power BI dashboards and many more.

Channels can be deleted. Microsoft recently implemented the ability for owners of a team to restore deleted channels for up to 21 days. Team owners can do this when they go to manage their team.

Within those channels, you will have multiple conversations within that team. You can use the '@' followed by the person's name to tag someone into the conversation. Within a team, anyone who is a member can see that '@' mention. You cannot '@' mention someone who is not a member of a team that is private. It is there to help get member's attention.
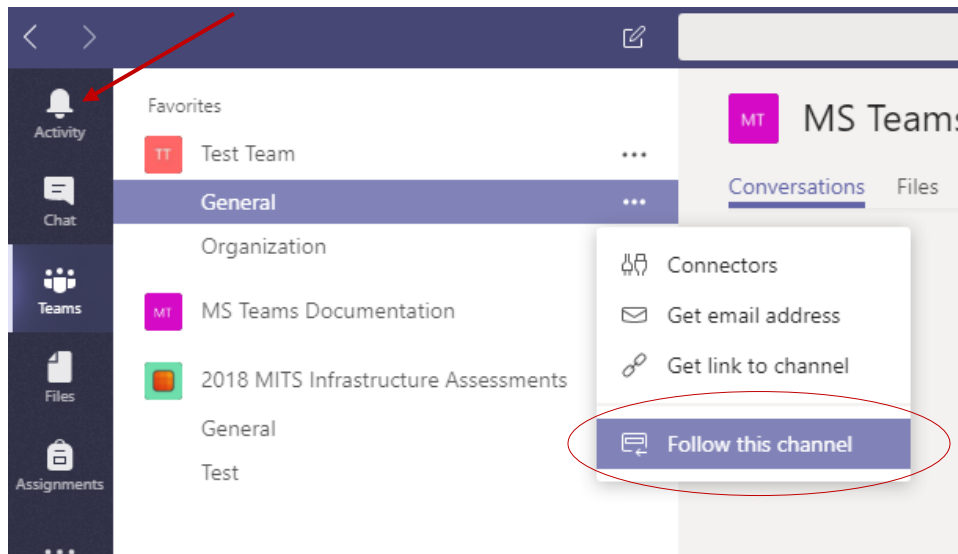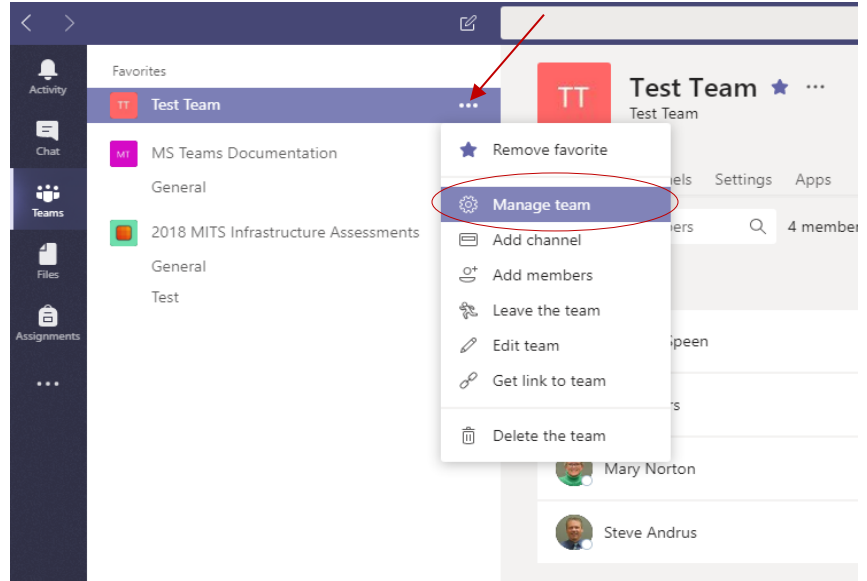
Managing Your Team:
To manage your team, you will need to go to the team name on the left column and click on the tri-dots. Then, select the choice that says "Manage Team" from the dropdown menu.

Here you have the ability, as an owner of a team, to edit Team settings, channels and member status/privileges.

If you would like to receive notifications for a specific Team's messages, you will need to do the following:
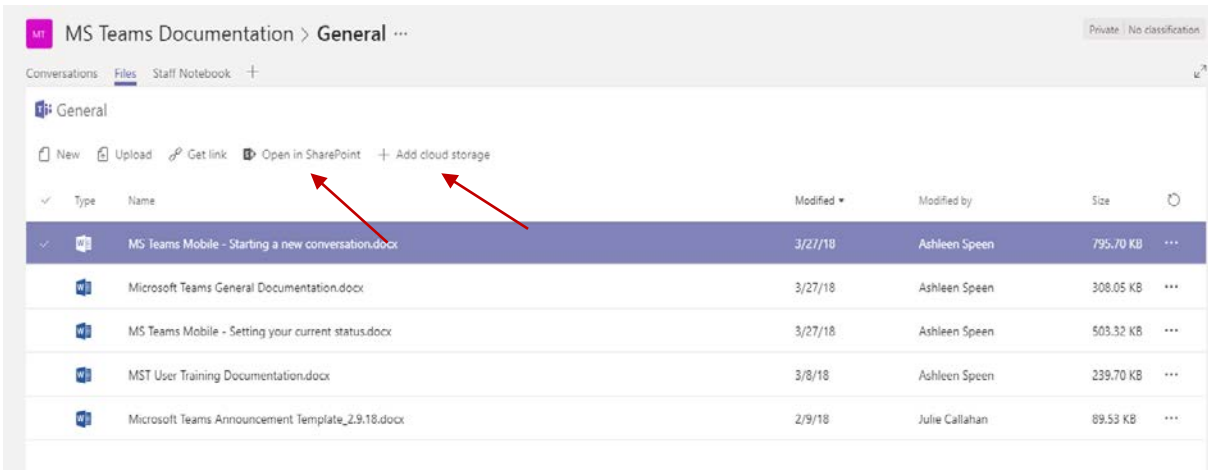
Go to the Team name and hit the dropdown arrow. Click the tri-dot on the channel name that you would like to receive notifications from. Click "Follow this channel" on the drop down menu. After that, you will receive notifications for that Team's channel. The will all appear in the activity section (where the red arrow is pointing in the image below.

5.) File Sharing and Editing

The 'Files' section is an overall place where files from any conversation in Microsoft Teams are kept. Within a team, if you go to the file tab, you can upload or edit files that your team is working on.

If you begin working on a file within a team, you can also start a Group chat alongside the file, to allow team discussions while all working on the files. The conversation will appear in your Conversation thread.
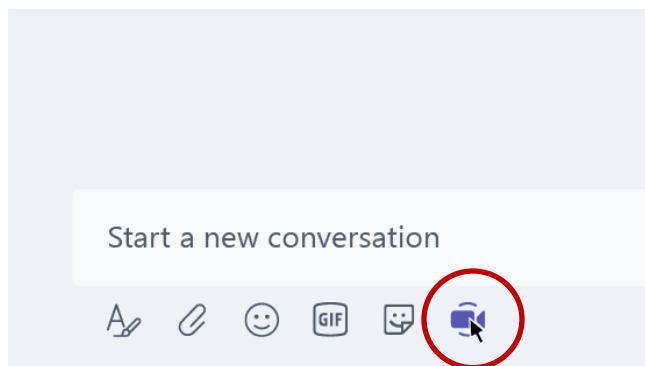
When a team is created, a SharePoint site is automatically created for it. Files put in that team are automatically uploaded to a SharePoint site. It does not matter if you upload a file to SharePoint or Microsoft Teams, it will all show up in the same place. You also have the ability to add cloud storage so your files can appear in your OneDrive if you would like.
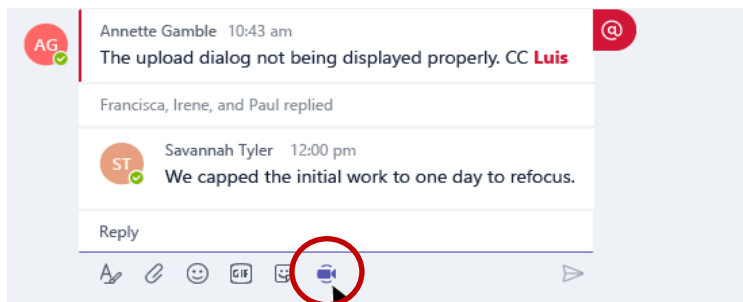
6.) Meetings

A team meeting is held online in a channel, so you can go from a conversation to a meeting with the click of a button.

Team meetings include audio, video, and desktop sharing, and anyone from the team can join. And because they're online, you always have a meeting space and never need a room or projector.

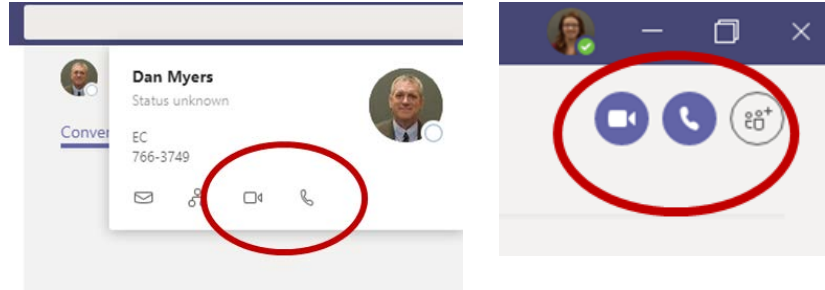To start a team meeting, click the 'Meet Now' button beneath the compose box in a new conversation:

You can also keep the context of the current conversation by clicking 'Meet now' beneath the compose box in an existing conversation:
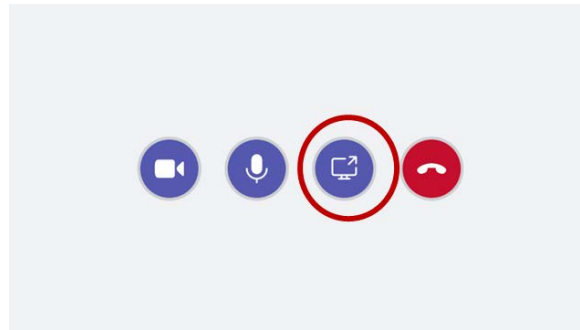
7.) Video/Audio Calling

To call anyone in your organization from a one-on-one or group chat, click Audio call or video call at the top right corner of your screen. To start a call from someone's contact card, hover over their profile picture, then click Audio call.

Screen Sharing:

Desktop sharing lets you present your screen or the app you're using during a meeting. To share your screen in a meeting, click the Share desktop button in your meeting controls.

8.) Additional Tips and Information

Using T-Bot:

T-Bot can help you learn how to use Teams. On your mobile device, tap Chat and select T-Bot. Type a question, a keyword, or a phrase into the chat. You can also head to one of the Tabs in T-Bot's chat window labeled Help, FAQs or Videos to answer your questions or for more information.
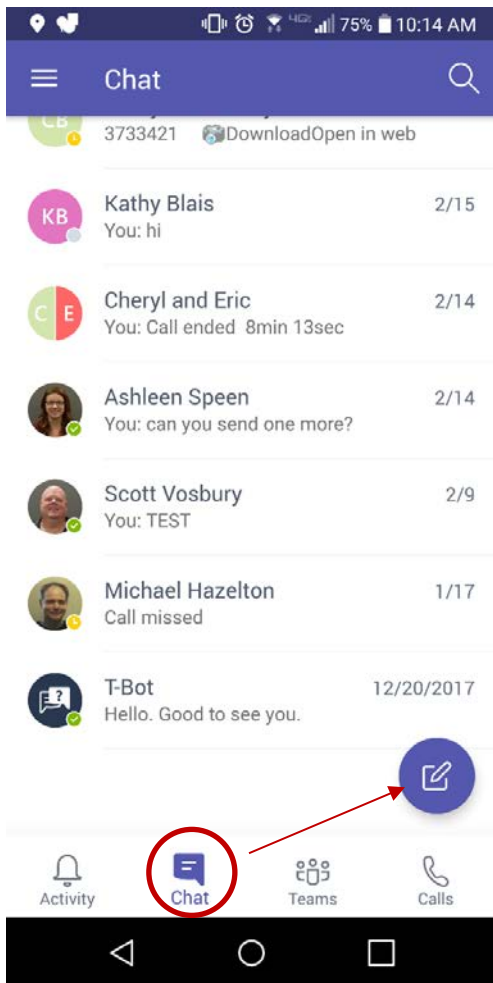
9.) Using the Mobile App

The mobile app updates in real time, but you can pull down to force a refresh of your messages. This could be very helpful for the Techs in the field so they are able to communicate easier with other Teams at the South Central Regional Information Center. The layout of the mobile app is the same whether you have iOS, Android or Windows mobile device.

Microsoft Teams Mobile – Starting a new conversation (Single and Group):
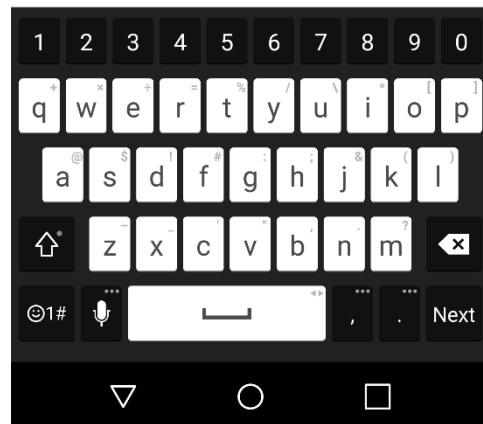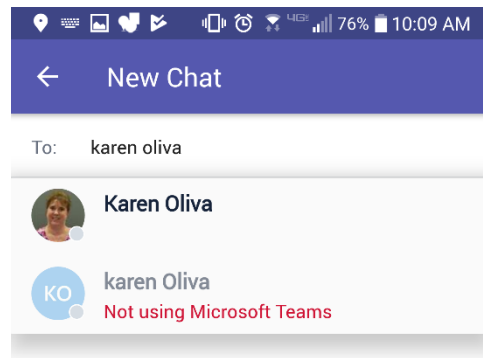
Step 1:
On the bottom of your screen click on the Chat icon followed by the New Conversation button
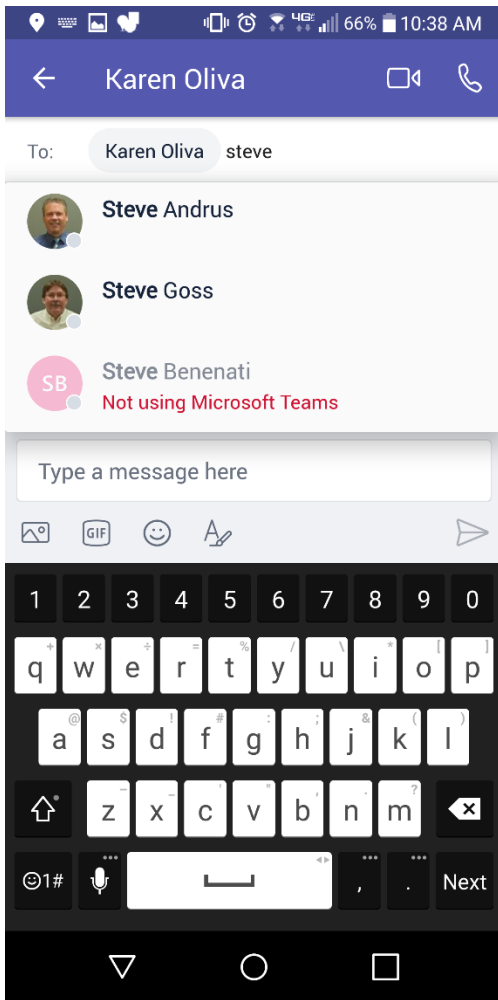
Step 2:
Tap the screen where it says 'To: Add members'. This will bring up the keyboard where you can search for the people you wish to start a conversation with. Tap on their name when it populates in the list.

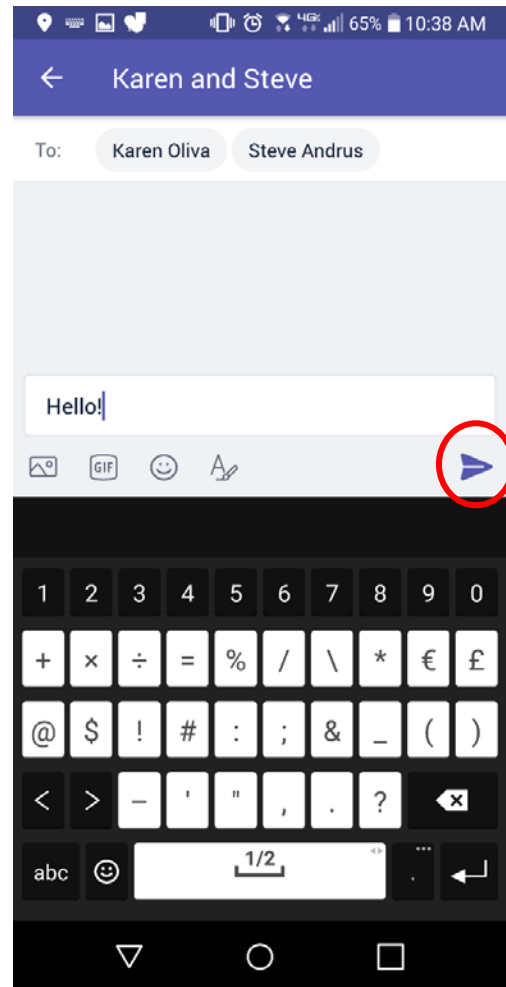You can also add multiple people to a conversation, see optional Step 3.

Step 3 (Optional): Adding more recipients to create a group conversation
After you've selected your first contact, you'll see a light gray oval appear around their name. Tap to the right of their name to bring up the cursor, begin typing, and select the next person's name. You can do this for as many people as you'd like to add to the conversation.
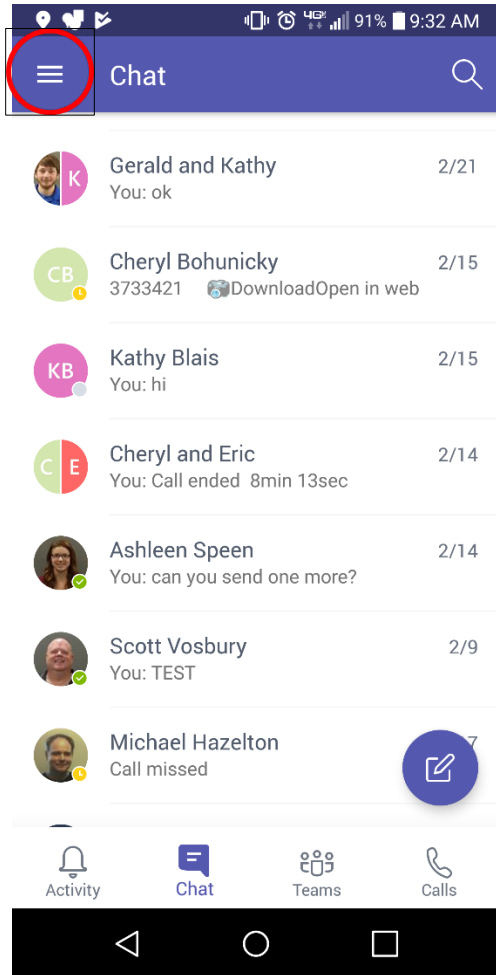
Step 4:
Type your first message and click on the paper airplane icon to send. After sending, you will see this conversation appear at the top of your chat list. Your most recent messages will always appear at the top.

Microsoft Teams Mobile – Setting your current status:
You can change your online status to one of the following: Available, Busy, Do not disturb, or Away.

Step 1: Tap the triple-bar icon on the top left of your screen. This will bring up your current online status and the settings menu

Step 2: Tap on your current status to expand the list. Choose the status you wish to set. You'll see it change at the top of the list. When finished swipe the menu left to get back to the main screen.