

GETTING STARTED WITH MICROSOFT TEAMS

A beginner's guide to using Microsoft Teams produced by the Digital Skills and Training team, Information Services.

Introduction to this guide

This guide has been designed to provide a basic overview of Microsoft Teams and its key features for those who are new to it or have limited experience using it. Even if you have been using Teams for a while, there may be useful tips and tricks you can learn from this guide.

LinkedIn Learning resources

Some sections within this guide contain links to related LinkedIn Learning videos. In addition to these videos, you can also view a [Microsoft Teams for New Users LinkedIn Learning Collection](#) containing a mixture of courses and videos on Teams. Find out more about LinkedIn Learning including how to create your free University account at www.ed.ac.uk/is/linkedinlearning.

University of Edinburgh Teams help and support

The University's main service help and support information for Microsoft Teams can be found on the Information Services' [Teams web pages](#).

Digital Skills and Training courses

In addition to this guide, the University's [Digital Skills and Training team](#) also deliver a Microsoft Teams training course titled 'Getting Started with Microsoft Teams'. This course is open to all Edinburgh University staff members and students and is bookable via the University's Event Booking Channel.

To book on the above course or view other offerings from the Digital Skills team, visit <http://edin.ac/2JHM2Pt>.

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1 Getting started with Microsoft Teams

1.1 What is Microsoft Teams?

Microsoft Teams is a communication and collaboration platform that combines chat, video meetings, file storage (and collaboration) and application integration. It's available to all staff and students through the University's Microsoft Office 365 subscription, and can be accessed via web, desktop and mobile apps.

1.2 How is Microsoft Teams used at The University of Edinburgh?

Like most Microsoft applications, Teams' use across the University varies depending on the team, department or person using the tool. Disciplines including Teaching, IT and Clerical have completed successful pilots of Teams and many continue to use it as a Collaboration tool.

Examples of how Microsoft Teams has been used successfully at Edinburgh University include:

- **Research Grant Applications:** Teams has been used by staff in the Centre for Clinical Brain Sciences as a platform for project managing research grant submissions. It provided a secure place to edit documentation collaboratively and better organise their communication about the project. *Further information:* [How to use Teams for Research Grant Applications](#).
- **Remote call-out for Teaching Space Technicians:** Teams has been used by staff in Teaching and Learning Spaces to better organise how Technicians receive and resolve issues, helping improve their call-out efficiency. *Further information:* [How Teams can be used for IT remote support](#).
- **Using Teams for Online Meetings:** Project Management staff have used Teams to have online meetings that allowed all staff to attend, even when working remotely. They also made use of integrated Teams features such as polling, planboards from Microsoft Planner, and file editing and sharing.
- **Planning shift patterns for frontline workers:** Teams has been used by staff in the University sports centre as an easier and more efficient way to plan and update shift patterns for their staff. Its use allowed staff to plan when they could take annual leave as well as be kept up-to-date on availability and cover. *Further information:* [Guidance on Shifts in Teams](#).

Further Edinburgh University Teams case studies can be found on the [Teams use cases](#) webpage.

2 Accessing Microsoft Teams

There are three main ways to launch the Microsoft Teams application. You can either access it through your web-browser, desktop or mobile apps (iOS and Android).

2.1 Accessing Teams via web-browser

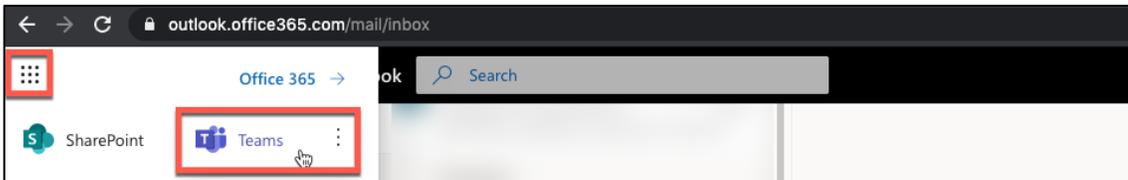
The easiest way to access Teams using your web-browser is via your University Office 365 account. Every member of staff and student has their own Office 365 account. You can either access your Office 365 account via MyEd or directly at www.office365.ed.ac.uk. Teams is not currently available for the Safari web browser. For the best experience we recommend using the Google Chrome browser.

To access Teams from the University's MyEd portal:

1. Go to www.myed.ed.ac.uk and click on the blue **Login to MyEd** button.
2. Enter your University username (UUN) and click **Continue**. Next, enter your password and click **Log in**.
3. From the 'Home' section of MyEd, click on the blue **Inbox** button within the 'Email' channel to open your Office 365 account in a new web-browser tab.



4. When your Office 365 account opens, click on the **App Launcher** button at the top left-hand side and choose **Teams** to open Microsoft Teams.

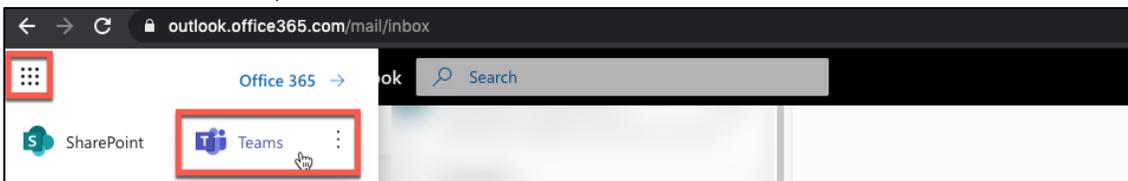


To access Teams via Office 365 directly:

1. Go to www.office365.ed.ac.uk and click on the orange **Sign In** button.
2. On the 'Sign in' page, enter your email address (uun@ed.ac.uk) and password then and click on the blue **Sign in** button.



3. When your Office 365 account opens, click on the **App Launcher** button at the top left-hand side and choose **Teams** to open Microsoft Teams.



2.2 Downloading the Teams desktop app

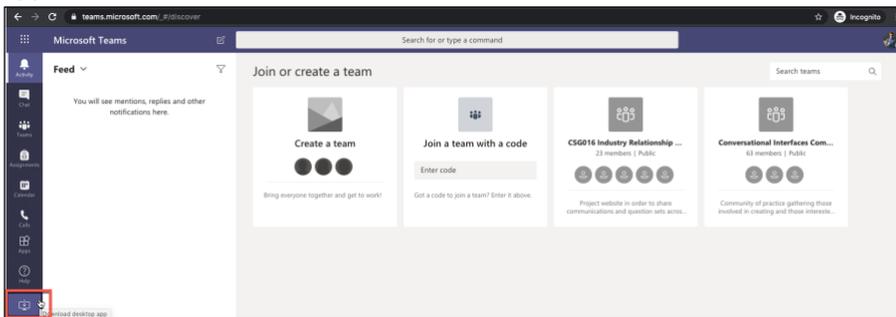
As well as the web-browser version, desktop apps for Windows, Mac and Linux devices can also be downloaded. The following steps outline the process for Windows and Mac users. Linux users can download the Linux Teams desktop app from the 'How to access Teams' section of this [Get Started](#) page.

Although this section outlines the desktop app download process, the remainder of this guide will focus on how to use the web-browser version of Microsoft Teams.

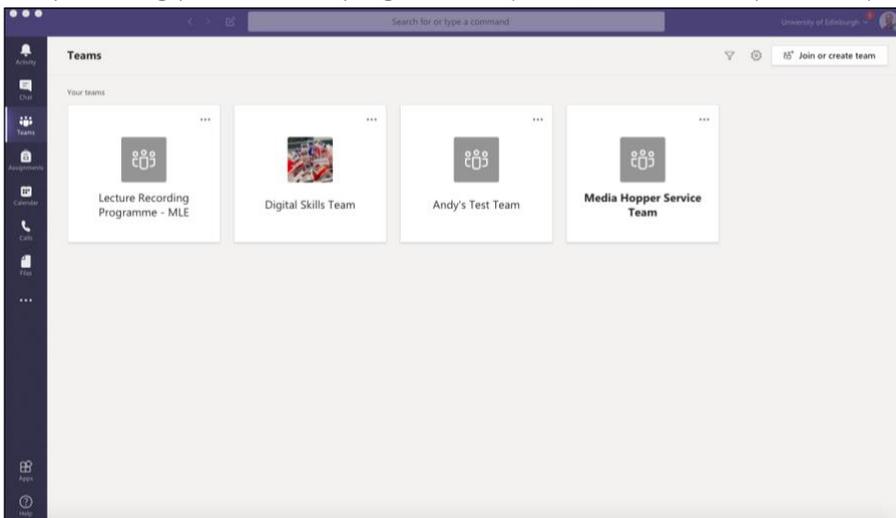
To download the app from your web-browser:

If you are not using a managed University computer, you should be able to download the Teams app directly from your web-browser using the steps below. Users of University supported devices may require administrative permissions on the device to install the app. If this prevents you from downloading you should consider downloading and installing directly from the [Self-Service](#) (Mac) or [Software Center](#) (Windows) tools. This method will allow installation without requiring administrative privileges.

1. Log into your Office 365 account and open Teams using the steps on the previous page.
2. From within Teams, click on the **Download Desktop App** button at the bottom left of the application.

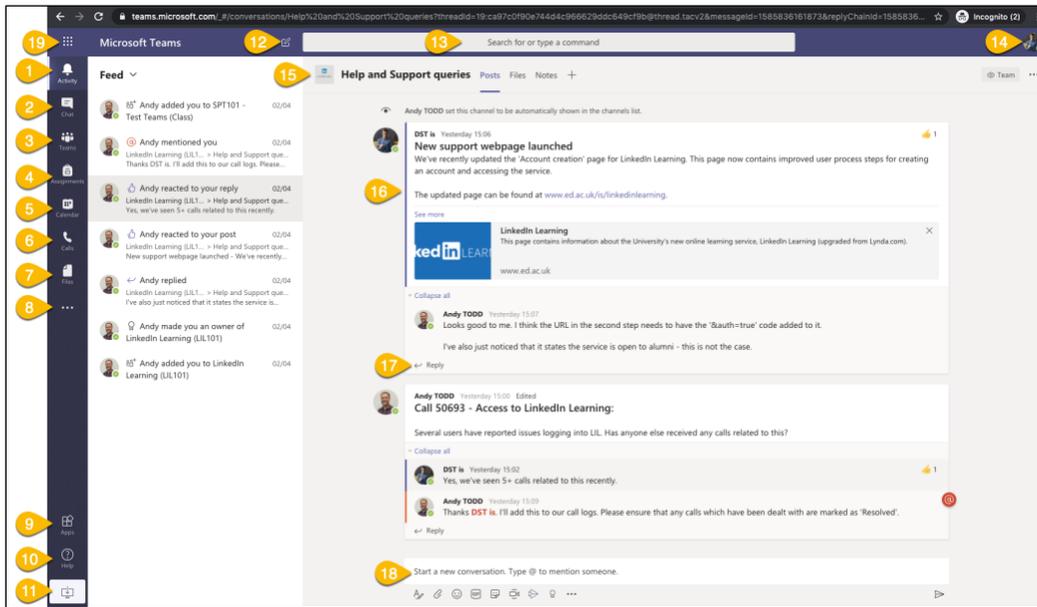


3. Once the installation file has been downloaded, open it and install the application in the same way as you normally would on your device
4. Upon opening the Teams desktop app, you may be asked to log into your Office 365 account. Do so by entering your University login details (UUN@ed.ac.uk and password).



3 The Teams interface

The image below shows Teams using a specific channel within a team they are a member of. The main window in the middle will vary in appearance depending on which menu option within the left-hand side menu is in use. The menu at the top and down the left-hand side will always remain the same and visible.



1. **Activity:** View the latest activity related to you including mentions, replies, reactions, teams you've been added to and general notifications.
2. **Chat:** Direct conversations with individuals or groups outside of your teams. Chat allows instant messaging, audio/video calling and file sharing.
3. **Teams:** Shows any teams that you belong to.
4. **Assignments:** Shows any tasks or pieces of work assigned to students or team members who are members of a 'Class' team.
5. **Calendar:** Displays the Office 365 calendar for the account you are logged into Teams with.
6. **Calls:** View and add contacts, call a contact and view call history.
7. **Files:** Find all of the files you work with from Teams (SharePoint) and OneDrive. Files can also be added from other storage locations.
8. **More added apps:** Allows you to add and pin additional apps to the left-hand menu.
9. **Apps:** Browse and add additional apps to Teams.
10. **Microsoft Help:** Access Microsoft help, support and training materials without leaving Teams.
11. **Desktop app download:** Download the Teams desktop app for your device.
12. **New Chat:** Creates a new chat message in Chat.
13. **Search:** Quickly Search chat messages, user directory and files by keyword.
14. **User:** Change your user status, set a status message, view saved content and view user settings.
15. **Channel:** Dedicated sections within a team to keep conversations organised by topic.
16. **Post:** New comments/threads posted to a channel by team members.
17. **Post reply:** Option to reply to existing post.
18. **New Conversation (Post):** Start a new conversation thread within a channel.
19. **App Launcher:** Used to access other Office 365 applications.

4 Joining, creating, managing and leaving teams

A 'team' is a set area where a group of users can work collaboratively, share ideas and information, conduct meetings and make use of tools all within one safe and secure space. Conversations, files and notes created and shared within team channels are only visible to members and owners of the team they were shared within.

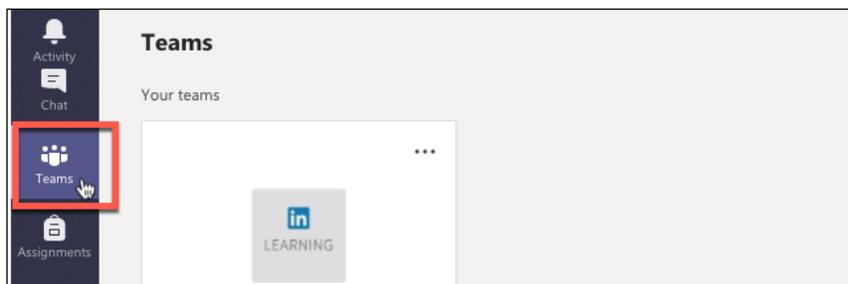
4.1 Joining an existing team

There are many different ways to join an existing team. You can be added to a team by the owner, search for a team from the database, follow a request link or join a team with a special access code.

4.1.1 Automatic enrolment

One of the most common ways to be added to a team is by the team's owner. Any teams you have been added to or are already a member/owner of will be visible in the Teams menu on the left-hand side.

There's no requirement for you to request access or await approval to access the team.



4.1.2 Search for a team

If you've not been added to a team automatically then you may still be able to search for it from within the Teams panel. Only teams which are set to Public or Private but discoverable can be found.

To search for a team:

1. Click on **Teams** from the left-hand menu to open the **Teams** area.
2. Click on the **Join or create team** button at the top right of the **Teams** area. If you already have a team open then you'll need to click on **< All teams** to go back to the main area before you'll be able to see the button.



3. Enter your search term in the **Search box** (1) and press the **Return** key. Any teams matching your search term will now appear. You can join a team by clicking on the **Join team** button (2). Press the **< Back** button to return to the main **Teams** area.



4.1.3 Join using a link

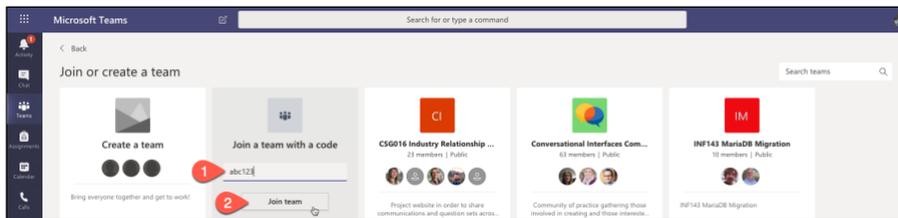
Instead of being added to a team, you may be issued with a link to join an existing team. If the team's privacy level is 'Public', when you follow the link you'll be able to join and view the team immediately. If the team is 'Private', you can join it but must wait until the team owner(s) accepts your request.

4.1.4 Join using a code

The final way of joining a team is to do so by entering a special code issued by the team owner. The benefit of this method is that because the code can only be issued by the team owner, you don't need to await approval to access the team.

To join an existing team using a code:

1. Copy the access code you were sent by the team owner.
2. From the **Teams** area click on the **Join or create team** button.
3. Within the **Join a team with a code** box, paste the code into the code entry box (1) and click the **Join team** button (2).



4. Click on the **< Back** button to check that the team appears in the list.

VIDEO: View the 'Join an existing team' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/join-an-existing-team?autoplay=true&u=50251009&auth=true>

4.2 Creating a new team

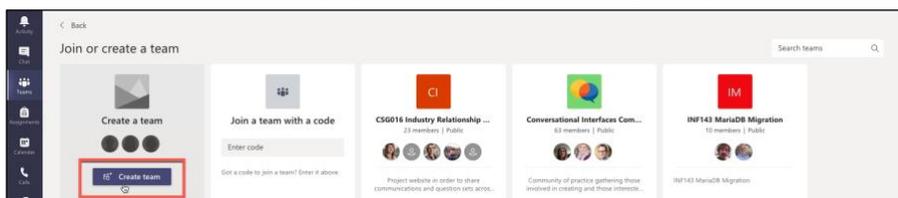
Any user of Microsoft Teams can create their own team and add members to it. You can create as many teams as you like and there are no restrictions on the number of team members you can add. When creating a new team you automatically become its owner.

To create a new team:

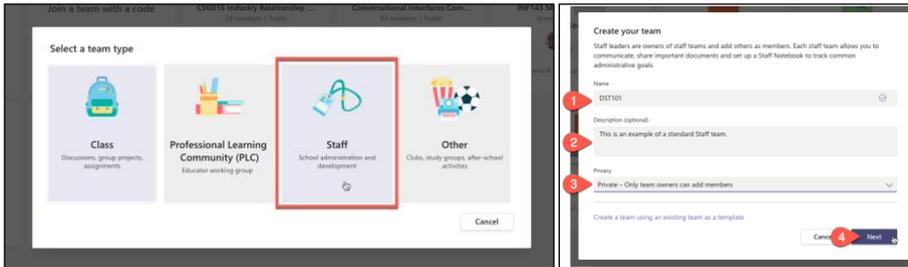
1. Click on **Teams** from the left menu to open the **Teams** area. Make sure you're viewing all of the teams you're a member of and not one individual team.
2. Click on **Join or create team** button at the top-right of the screen.



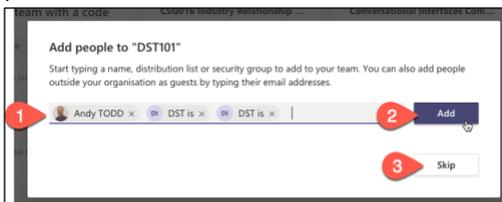
3. Click on the **Create team** button within the **Create a team** box.



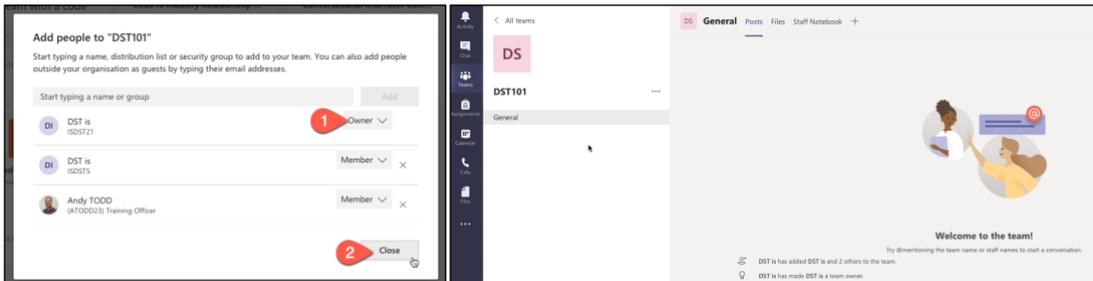
- Click on the type of team you'd like to create and when the **Create your team** options appear, give it a **Name** (1), **Description** (2) and choose the **Privacy level** for your team. When ready, click **Next** (4). If you are unsure which team type to use, choose 'Other'.



- Once your team has been created, you'll be asked to add people to it. Search for users by name (1) and use the **Add** button (2) to add them to your team. You can also use the **Skip** button (3) if you'd rather add users at a later date.



- Assign permission levels for each user (1) and click **Close** (2) to complete the process. You'll now be taken to your newly created team within the **Teams** area.



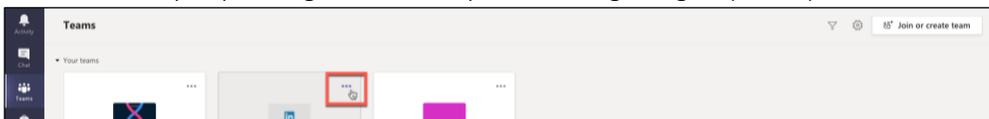
VIDEO: View the 'Create teams and add members' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/create-teams-and-add-members?u=50251009&auth=true>

4.3 Inviting users to a private team

If you have created a private team then users will not be able to join unless you add or invite them. As the team owner, it's likely you'll add users as members, however, you can also invite them so that they can choose whether or not to join your team. This can be done via a direct link to your team or a code.

To invite users to your private team via direct link:

- Click on the **Teams** button to display your teams.
- Click on the **More options** button next to the team you wish to invite users to. The location of this button will vary depending on whether you are using the grid (below) or list view.

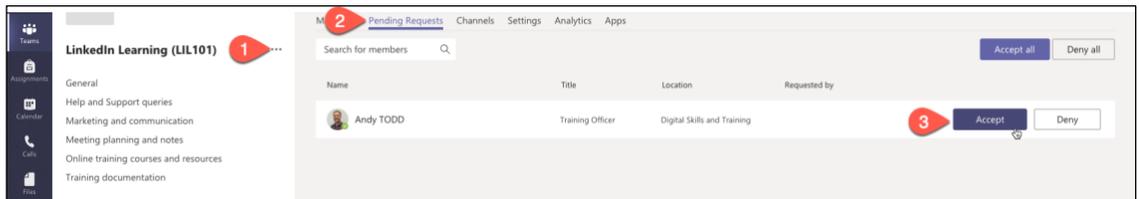


- From the list, choose **Get link to team** and when the link appears, click **Copy**. You can now share the link with your users.



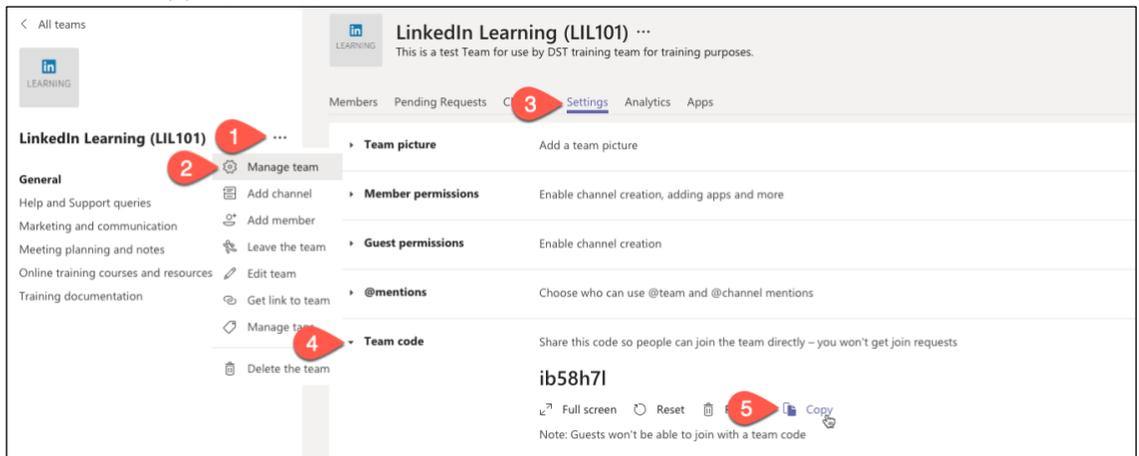
Any team member can access and share this link but only team owner(s) can approve requests to join. The owner(s) will receive a notification and email when a user requests to join their team.

- Pending requests can be viewed, accepted or denied by team owners via **More options > Manage team > Pending Requests**.



To invite users to your private team via code:

- Open the **More options** (1) for the team you want to generate a code for and choose **Manage team** (2).
- Open the **Settings** menu (3) and click **Team code** (4) to expand the group and display the joining code. Click **Copy** (5) to copy the code.



You can now share this code with any users you wish to invite to your team. They will not need to request approval to access the team and will be able to view content immediately after joining with the code.

VIDEO: View the 'Invite people to a private team' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/invite-people-to-a-private-team?u=50251009&auth=true>

4.4 Managing users and team settings

Team owners have access to certain controls that standard team members do not. As a team owner you can add and remove users from your team, manage existing users' permissions, manage pending requests and modify the general team settings. Each team can have multiple team owners.

'Members' are people within the team. In most cases, members can interact with other members, view, upload and change files but cannot perform administrative tasks like managing users.

To access the above controls as an owner, choose **More options (1) > Manage team (2)** for your team.



4.4.1 Adding and removing users from your team

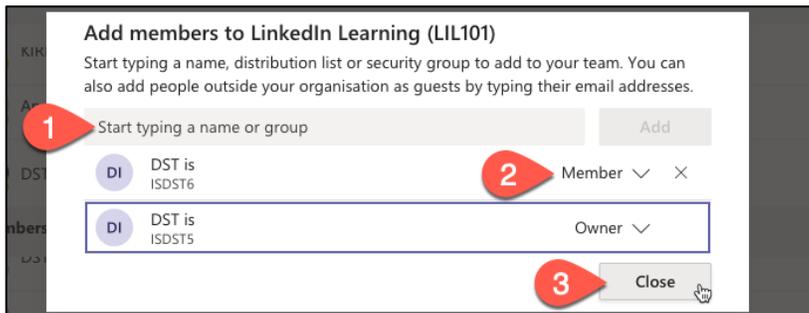
Instead of inviting users to your team, as an owner you can add them to it directly. Likewise, a team owner can also remove a user from a team.

To add a user to your team:

1. Open the **Members** tab (1) and click on the **Add Member** button (2).



2. When the **Add members to [your team name]** box appears, search for and select your user (1), and click **Add**. Choose whether to make the user a Member or Owner (2) and click **Close** (3).



To remove a user from your team:

Existing users can be removed from a team by simply clicking on the 'X' next to the user's name within the **Members** tab. *Just be careful, though, as you are not asked to confirm before removing the user.*

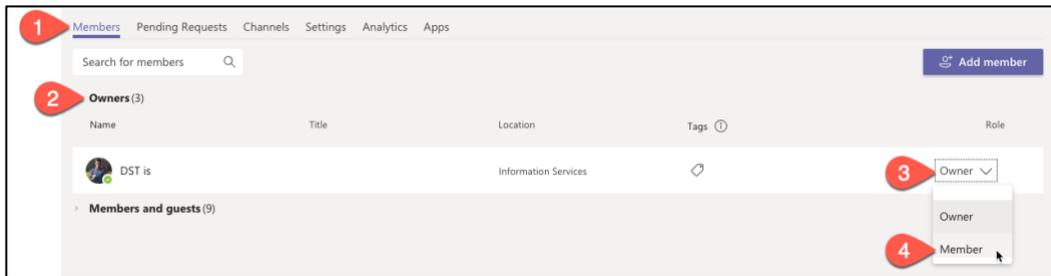


4.4.2 Promoting or demoting an existing team member

As previously mentioned, when a user is added to a team they are assigned either an owner or member role. A user's role can be modified anytime by a team's owner.

To change a user's role within a team:

1. Open the **Manage team** options for your team and click on the **Members** tab (1).
2. If necessary, expand the user group (2) to show all of its users, click on the down-pointing arrow (3) next to the role type for the user you wish to promote/demote and choose another role (4).

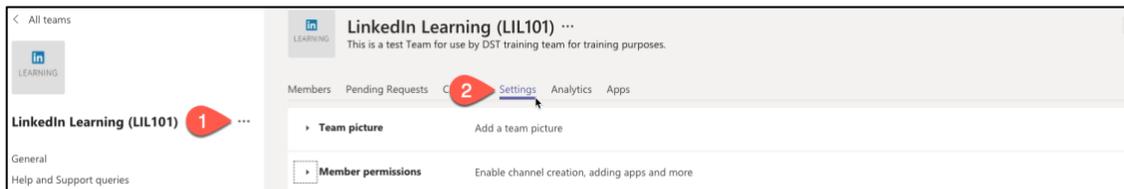


The user will now be moved into the relevant group.

You must always leave at least one user as an owner for a team. If you try to demote the last owner an error message will be displayed and the action will not be completed.

4.4.3 General team settings

Team owners can also make changes to the general settings for the team including member/guest permissions (what members can and can't do) and options to generate joining code for the team. These settings can be accessed by the team owner(s) from **Manage team** (1) > **Settings** (2).



VIDEO: View the 'Manage teams and members' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/manage-teams-and-members?u=50251009&auth=true>

4.5 Hiding, leaving or deleting a team

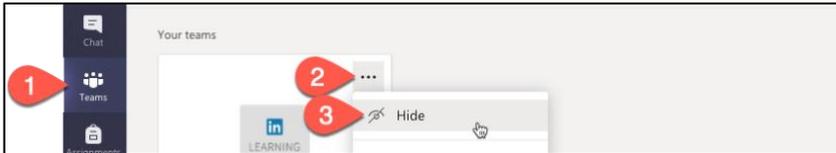
A team member has the ability to hide or leave any team that they are part of but only team owners can delete a team.

4.5.1 Hiding a team

Over a longer period of time you may begin to find that the Teams area becomes a bit congested with all of the teams you are a member of. To help make it more manageable, you can hide any teams which you wish to remain part of but don't need to see within the Teams area.

To hide a team:

1. Click on **Teams** (1) from the left-hand side menu then **More options** (2) > **Hide** (3).



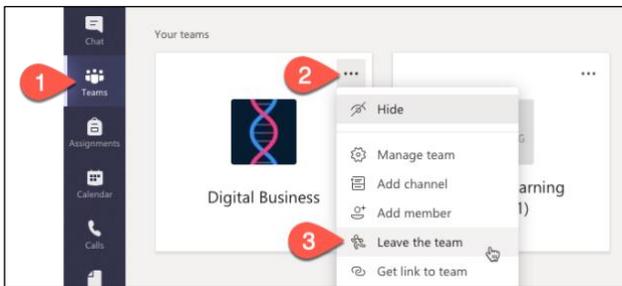
The hidden team will now be moved to the **Hidden teams** group within the **Teams** area.

4.5.2 Leaving a team

If you no longer need or want to be part of a team then there is an option to leave it.

To leave a team:

1. Click on **Teams** (1) from the left-hand side menu then **More options** (2) > **Leave the team** (3).



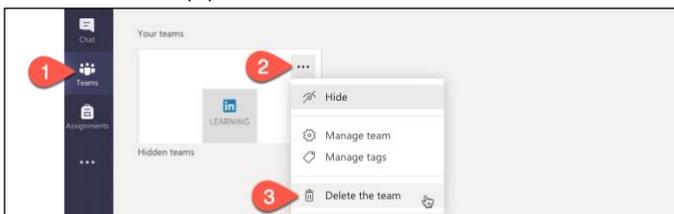
2. When the **Leave team** dialog box appears, click on the **Leave the team** button. The team will be completely removed from the **Teams** area and you will no longer have access to it. You can re-join at a later date provided the team still exists.

4.5.3 Deleting a team

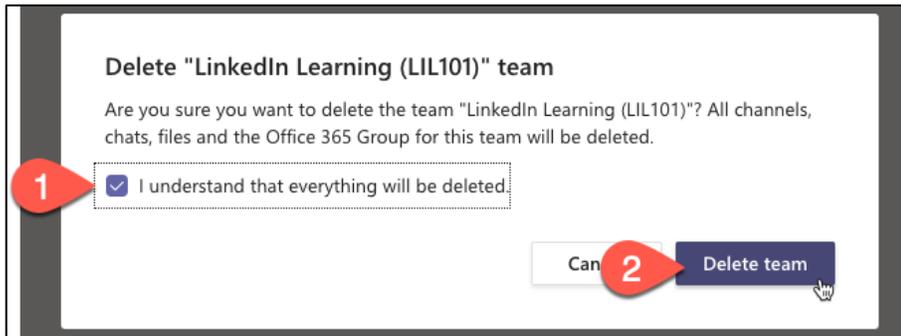
A team can be deleted by *any* of its owners. Always be sure you want to delete the team and all of its content before doing so, though.

To delete a team:

1. Click on **Teams** (1) from the left-hand side menu then **More options** (2) > **Delete the team** (3).



2. When the **Delete team** dialog box appears, confirm that you understand everything will be deleted (1) and click on the **Delete team** (2) button.



The team will now be removed from the **Teams** area for all members. The team owner can [restore a deleted team](#) within 30 days of it being deleted. After 30 days, the team will be permanently deleted.

VIDEO: View the 'Leave, hide, or delete a team' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/leave-hide-or-delete-a-team?u=50251009&auth=true>

5 Working with channels

Channels within a team are dedicated sections to keep conversations organised. For example, if you are using a team for a project then a new channel could be created for each of the project's workstreams. Channels will appear underneath the team name in the Teams area. By default, every newly created team starts out with a 'General' channel.

5.1 Creating, managing and deleting channels

5.1.1 Creating a channel

Microsoft Teams allows you to create a total of 100 channels over the life of a team. A new channel can be created by any user enrolled in the team, either as a member or an owner.

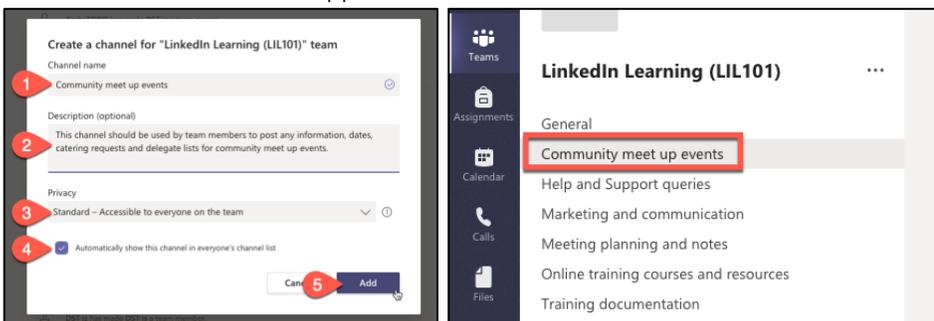
To create a new channel within a team:

1. From the **Teams** area (1), open the team you wish to create the new channel within.
2. Click on **more options** (2) and choose **Add channel** (3).



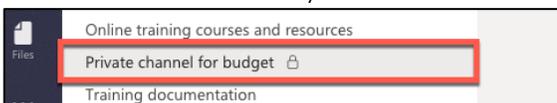
3. When the **Create a channel** dialog box appears, enter a **Channel name** (1), **Description** (2) and select the **Privacy** level (3) for the channel. The privacy option allows you to make your new channel either accessible to everyone (Standard) or only specific people within the team (Private). You may also wish to tick the checkbox so that everyone within the team can see the channel. When you're ready to create the channel, click **Add** (5).

The new channel will now appear within the team's channel list.



Private channels:

If you create a private channel then you will automatically become its owner, even if you are only a member within the team. Only users who are part of the team the private channel is being created within can be added to the private channel. A private channel will appear with a padlock icon next to it and will only be visible to its creator or those added to it.

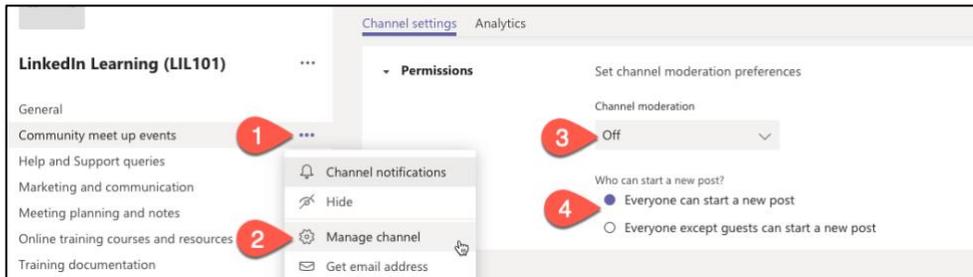


5.1.2 Managing an existing channel

Existing channels can only be managed by team owners; however, they can be deleted by both team owners and members. Private channels work slightly differently as they are owned by the user who created them or any user added to the channel as an owner, so can only be managed and deleted by those users.

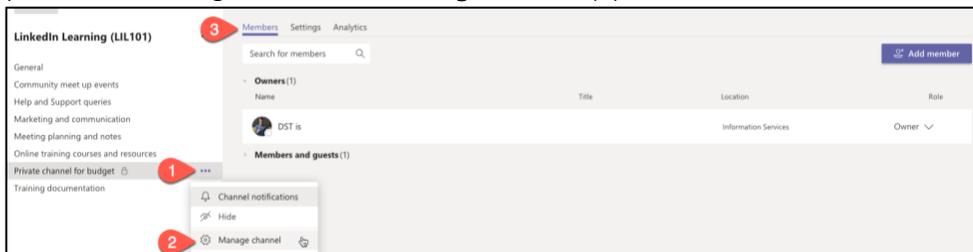
To manage a standard existing channel:

1. As a team owner, click on the **More options** option (1) for the channel you wish to manage and choose **Manage channel** (2).
2. Use the options under **Channel settings** to moderate posts/comments within the channel (3) and choose which users can add new posts (4).



To manage a private channel:

1. As a user who created the private channel, click on the **More options** option (1) for the channel you wish to manage and choose **Manage channel** (2).



2. Click through the various tabs (3) below the channel title to manage channel members, edit general channel settings and view channel analytics.

5.1.3 Deleting a channel

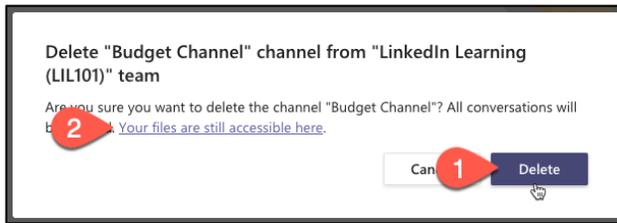
By default, any user with a team can delete a standard channel. Private channels can only be deleted by the owner(s) of a channel. Members of private channels have an option to leave a private channel.

To delete a channel:

1. Click on the **More options** option (1) for the channel you wish to manage and choose **Delete this channel** (2).



- When the **Delete channel from team** dialog box appears, click **Delete** (1) to delete the channel and all of its conversations. Although you are deleting the channel you can still access any files created or shared within it via SharePoint using the link (2) in the dialog box.



VIDEO: View the 'Create, manage and delete channels' video on LinkedIn Learning: <https://www.linkedin.com/learning/microsoft-teams-essential-training-5/create-manage-and-delete-channels-2?u=50251009&auth=true>

5.2 Channel conversations

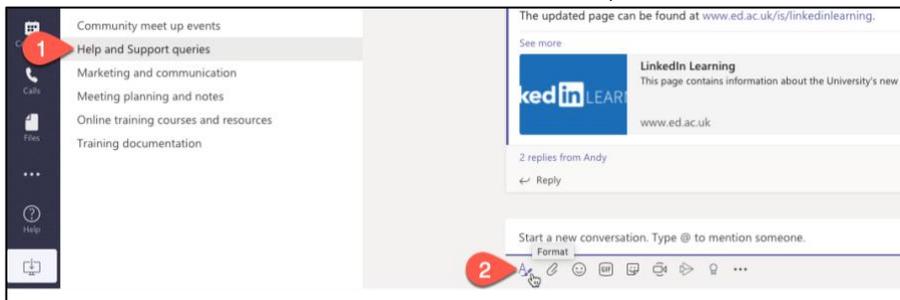
One of the main things that you'll likely do in Microsoft Teams is engage with other team members. Conversations within a channel are essentially threads which team members can reply to.

5.2.1 Starting a new conversation

Any member of a team can start a conversation within a team's channel.

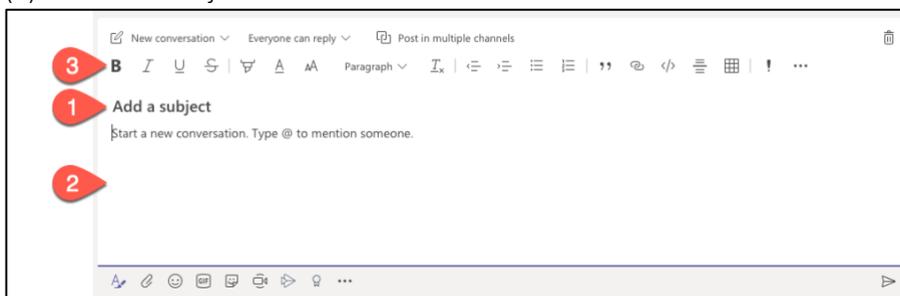
To start a conversation within a channel:

- From the **Teams** area, click on the channel (1) you wish to start a conversation within.
- At the bottom of the channel, click on the **Format** option below the **Start a new conversation** box.

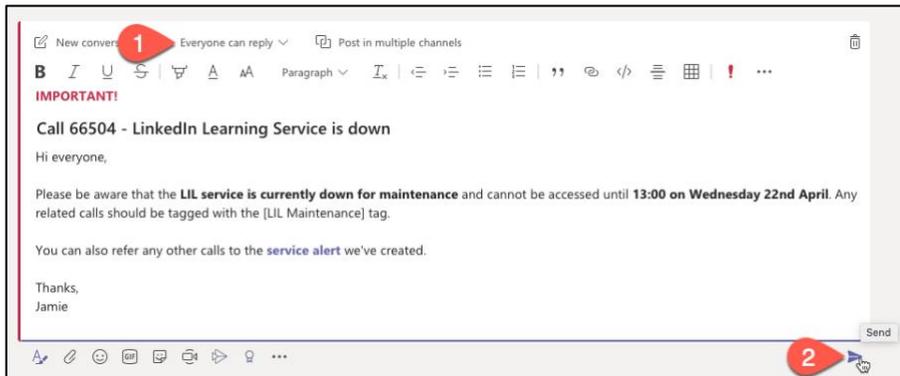


Opening the formatting options allows you to enter a subject for your conversation as well as access formatting tools. Adding a subject makes it easier for users to identify threads.

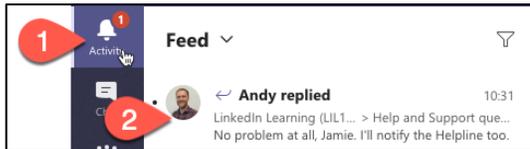
- Enter your conversation's subject in the **Add a subject** box (1) and type your message in the box below it (2). You can select your message text and apply formatting using the formatting options (3) above the subject box.



- Once you've constructed your message, decide who you want to be able to reply. The default for a new conversation is everyone but you can change this using the **Reply** options (1). When you're ready to post the conversation, click **Send** (2).



The conversation will now appear in the channel for users to see and reply to. One benefit of creating a new conversation thread like this is that when users reply you'll receive a notification within the **Activity** area (1) where you can also view the reply (2).

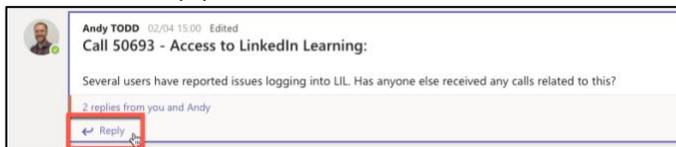


5.2.2 Replying to a conversation

The main reason for creating a new conversation within a channel is to keep conversational topics together in one thread. Instead of replying to a conversation with a new conversation, use the reply option within the existing conversation.

To reply to an existing conversation:

- Click on the **Reply** button at the bottom of the conversation you wish to reply to.



- When typing your reply (1), formatting options can be found below the message box (2). You can also mention a team member in your reply by typing '@' (3) and selecting them from the pop-up list (4). To send your message, click on the **Send** button (5).



The user you mentioned will receive a notification about your comment within their Activity area.

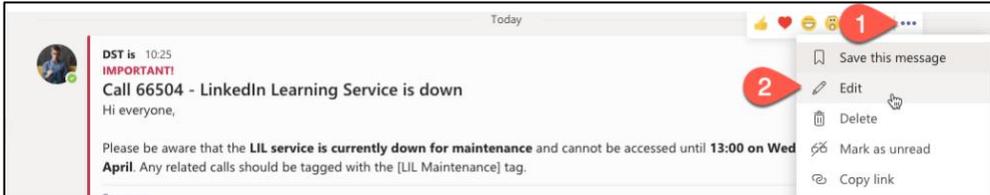
VIDEO: View the 'Post and read messages' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/post-and-read-messages?u=50251009&auth=true>

5.3 Editing and deleting conversations and replies

Conversations and messages can be edited or deleted but only by the user who posted them. When deleting a conversation or message you will be given the option to undo and reinstate it after deletion.

To edit a conversation or message:

1. Hover over the conversation or message you have posted and click on **More options**. From the options list choose **Edit**.

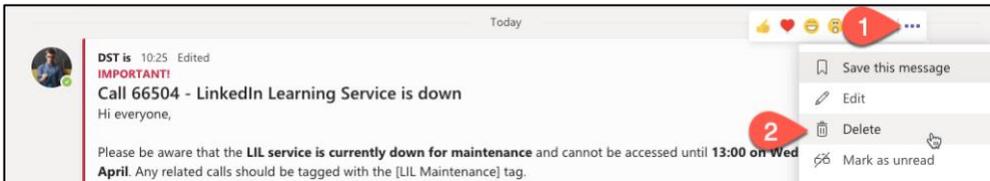


2. Make your changes to the text and click on the **Done** button (tick) to approve or the **Cancel** button (cross) to decline.



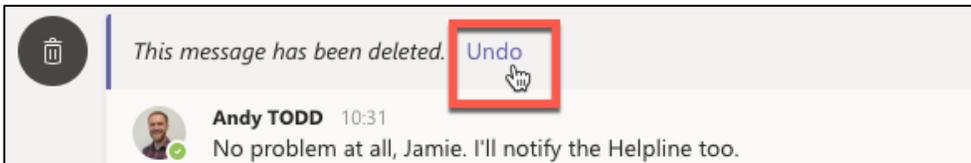
To delete a conversation or message:

1. Hover over the conversation or message you have posted and click on **More options**. From the options list choose **Delete**.



Once the message has been deleted all users will see the "This message has been deleted" text where the message used to be. Replies for a deleted conversation will still be visible to all users.

2. To reinstate the deleted conversation or reply, click **Undo**. The message will now reappear within the channel or thread for all users.



VIDEO: View the 'Edit and delete messages' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/edit-and-delete-messages?u=50251009&auth=true>

5.4 Reactions and bookmarking messages

5.4.1 Reactions to messages

Occasionally, a message posted by a user may not require a fully typed reply but you'd still like to quickly acknowledge it. For these situations, emoji reactions can be useful.

To react to a message with an emoji:

1. Locate the message you wish to react to and hover over it.
2. When the six emojis appear, click on one to apply it to the message. The first three are the most commonly used.



3. To change your reaction, select another emoji. To remove your reaction, click the emoji in use.



5.4.2 Bookmarking messages

As Teams is mainly used for conversation and collaboration, there can be times when users are engaged in lengthy conversations within a channel. If you've not got time to read, react or action messages immediately then you can bookmark them to return to later.

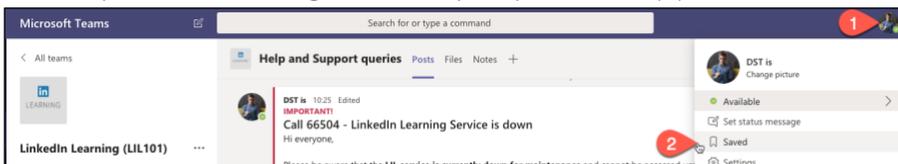
To save a message for later:

1. Locate the message you wish to save and hover over it.
2. Click on the **More options** button and choose **Save this message**.



Once saved, a notification will appear at the top right of the screen (below your profile icon).

3. To view your saved messages, click on your profile icon (1) and choose **Saved** (2).



4. The **Saved** area will now appear and will show any messages you've saved (1). You can unsave messages by clicking on the **Unsave this message** button (2).



VIDEO: View the 'React to messages and bookmark messages' video on LinkedIn Learning: <https://www.linkedin.com/learning/microsoft-teams-essential-training-5/react-to-messages-and-bookmark-messages?u=50251009&auth=true>

6 Private chats and meetings

One of the most powerful features of MS Teams is its use for private instant messaging and audio/video meetings. As with most Microsoft applications, there are many different ways to initiate these. In this section of the guide we'll focus on the easiest and most common methods.

6.1 Private chats

Teams' Chat feature allows private one-to-one or group conversations to take place between users within the University user database, not just members of a team. Conversations conducted within Chat are only visible to those within the private chat group, which can be up to 100 users. Teams chats are ideal for quick conversations or messages which are either private or don't necessarily need to be posted to the wider group in a channel.

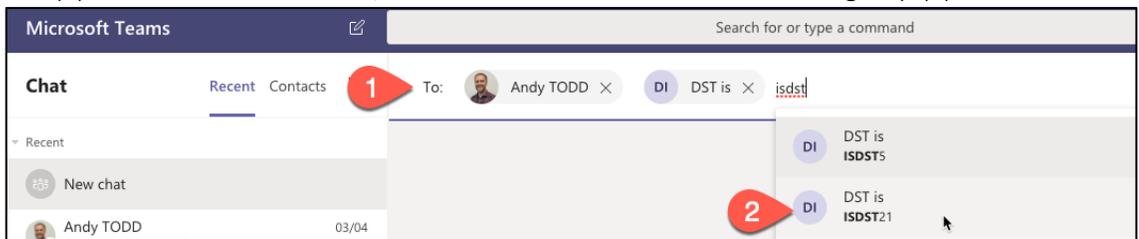
6.1.1 Creating a chat

To start a new chat:

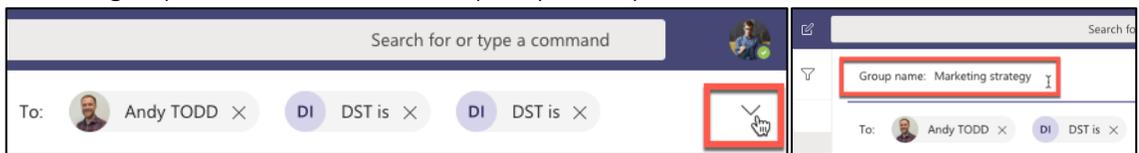
1. Click on the **New Chat** button to the left of the search box on the top bar.



2. When the **Chat** area opens, enter the name of the user or group you wish to chat to into the **To:** box (1). When the user is found, click on their name to add them to the group (2).



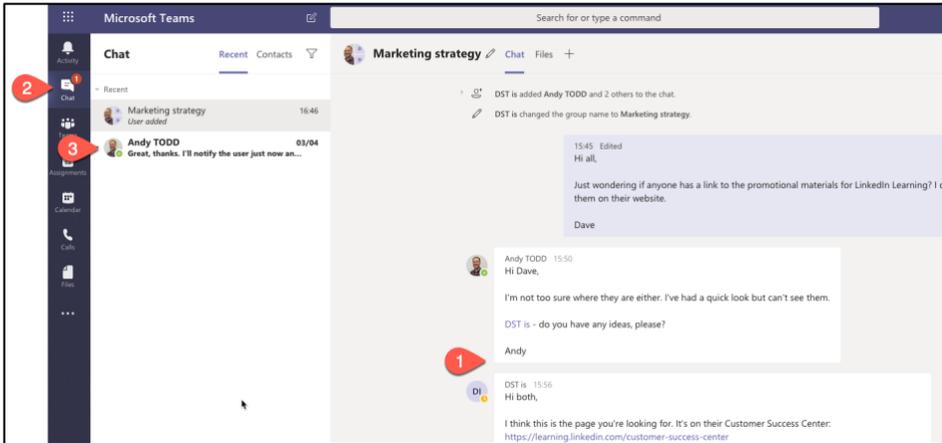
3. Once you've finished adding users, click on the down-pointing arrow on the right-hand side of the user list box and give your group chat a name. Press the **Return** key to apply the name. Applying a name to group chats makes it easier to quickly identify them within the chat list.



4. Type your message in the text entry box at the bottom of the chat area (1) and press **Send** (2). The options here are largely similar to those found within the text entry box for a channel.



As users within the chat begin to engage, their replies will appear below your original message (1). You will also see a red notification on the **Chat** button (2) and the chat will appear as unread (3) if a new reply has been added which you've not yet viewed.

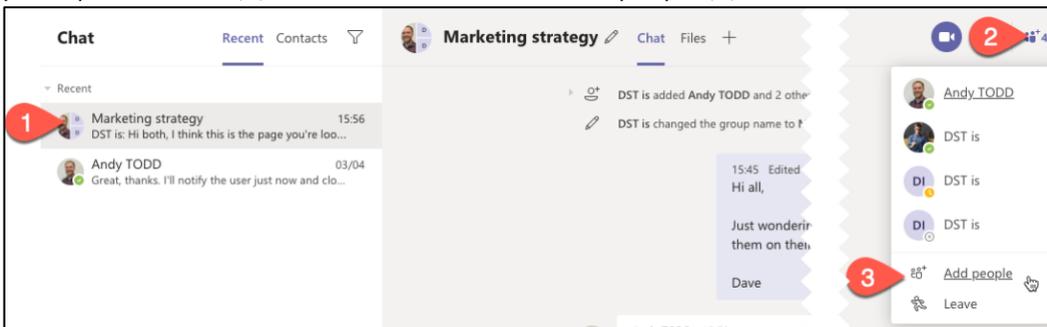


6.1.2 Adding users to an existing chat

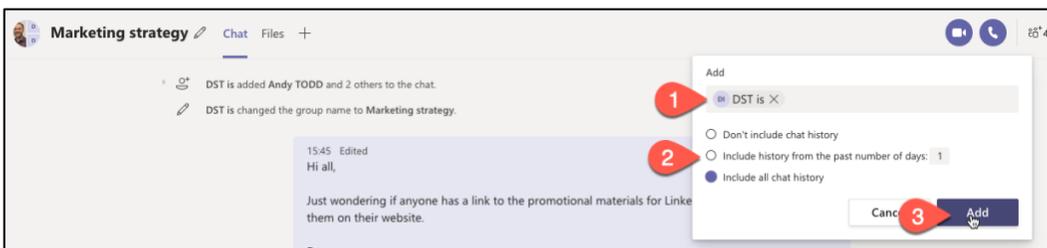
Other users can be added to an existing chat by any user who is already part of the group chat.

To add people to an existing chat:

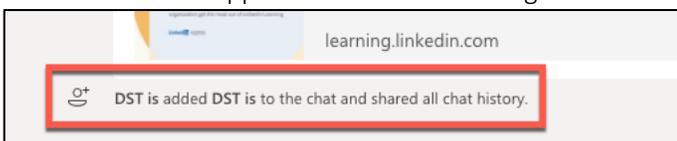
1. Open the chat group you wish to invite the user(s) to (1). Next click on the **View and add participants** button (2) and from the list choose **Add people** (3).



2. When the **Add** box appears, search for and select the user (1) and choose the chat history you want them to be able to view when they join (2). Finally, click the **Add** button (3) to add them to the chat.



A notification will appear as the latest message in the chat to confirm the user has been added.

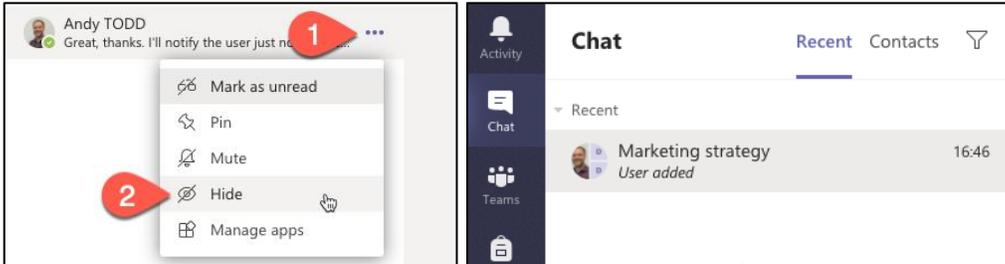


6.1.3 Hiding and leaving chats

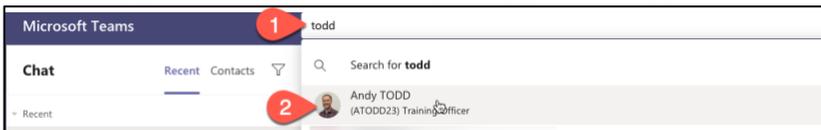
As your chat list begins to increase the more you use Teams, you may wish to hide certain chats or maybe even leave completely (group chat only).

To hide and unhide a chat:

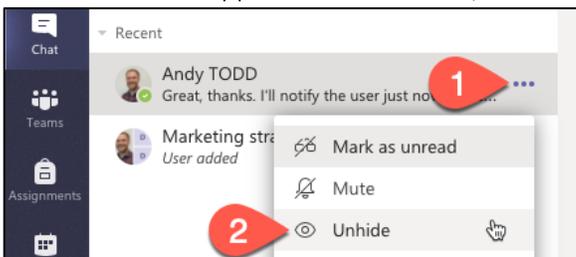
1. Click on the **More options** button next to the chat you wish to hide and choose **Hide**. The chat will now have disappeared from the list.



2. To unhide the chat, enter the name of the group chat or the contact in the search box at the top of Teams (1) and click on the contact/chat (2) when it appears.

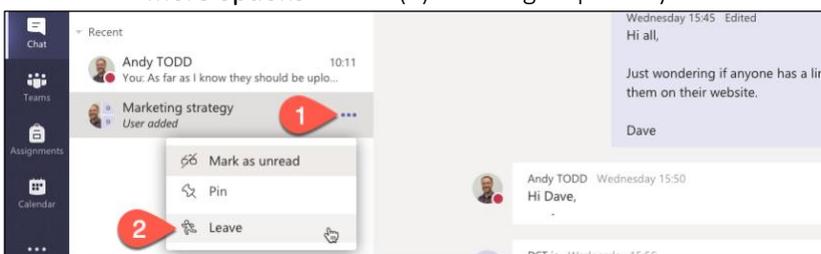


3. When the chat reappears in the chat list, choose **More options** (1) then **Unhide** (2) to reinstate it.



To leave a chat:

1. Click on the **More options** button (1) for the group chat you wish to leave and choose **Leave** (2).



2. When the **Leave the chat** dialog box appears, click **Leave**.

Although you have left the group chat and can no longer post within it, the chat will still be visible in the chat list. To hide it, use **More options > Hide**.

VIDEO: View the 'Use chats for private messages' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/use-chats-for-private-messages?u=50251009&auth=true>

6.2 Chat calls and meetings

One of the most commonly used features within MS Teams is virtual online meetings. These meetings can be initiated on an ad-hoc basis or scheduled in advance, allowing one or more team members to meet using audio, video or even share their desktop with participants.

If you are looking to actively participate in meetings using Teams, you'll require a microphone to share your audio and a webcam to share you video. That said, you can still join and view/listen to a meeting even if you don't have a microphone or webcam. For most users using a mobile device, the built-in microphone and camera can be used.

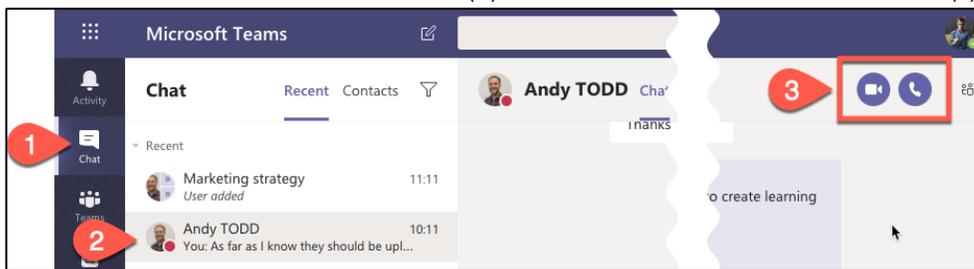
6.2.1 Initiating and receiving audio and video calls via chat

One-to-one or group audio or video calls can be initiated directly from within a chat. These calls differ slightly from a standard team meeting but the controls are generally quite similar.

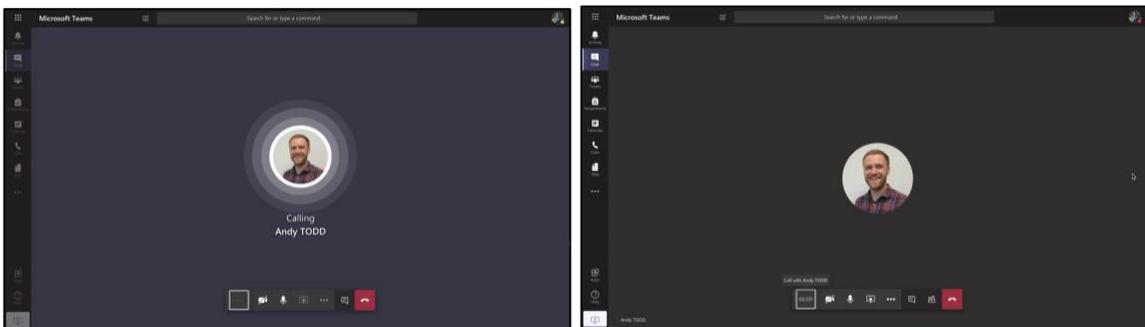
6.2.1.1 Initiating a call from within a chat

To initiate an audio or video call from the chat area:

1. Open **Chat** (1) from the left-hand menu and select the chat you wish to start the audio/video call within by clicking on it (2).
2. Click on the **video** or **audio call** buttons (3) to launch a call with the chat member(s).



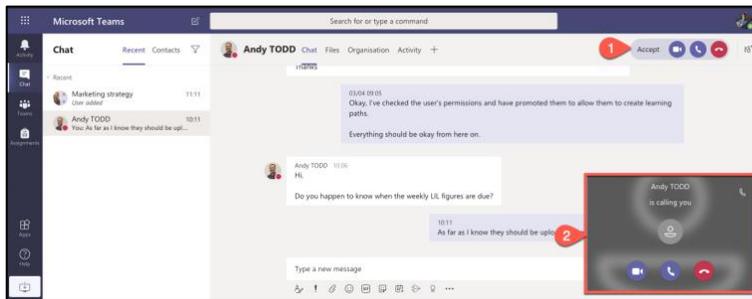
In the following example, I've initiated an audio call within the chat with Andy Todd. The images below show the 'Calling' and 'Connected' screens for an audio call.



Information detailing how to use the in-call options can be found in the 'Meeting controls and general settings' section of this guide on page 32.

6.2.1.2 Receiving an incoming chat call

If another user within your chat initiates an audio or video call with you then you'll be notified of the call via a pop-up at the bottom of the screen. The calling options at the top of the chat will also turn into options to accept or decline incoming calls.



The call answering options are as follows:

	Accept with video: Accept the call and share your video (camera) feed with participants.
	Accept with audio: Accept the call but only share your audio feed.
	Decline call: Decline the call. The caller will be given the option to leave you a voicemail if you decline the call. If the caller leaves a voicemail it will appear within your Activity feed.

VIDEO: View the 'Make audio and video calls from the Chat section' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/make-audio-or-video-calls-from-the-chat-section?u=50251009&auth=true>

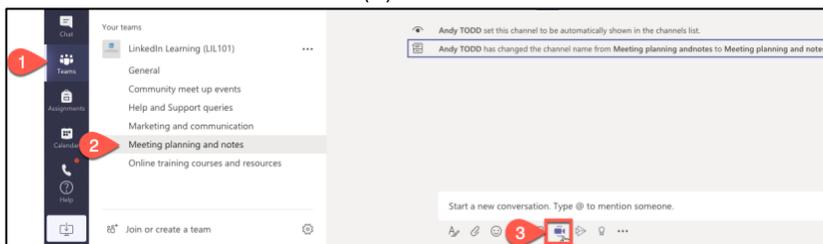
6.3 On-demand meetings

On demand meetings can be launched from any channel within any of the teams you are a member of. Participants can be invited to take part after the meeting has been launched or can join from the channel the meeting was created within. Invited users don't need to be members of the team.

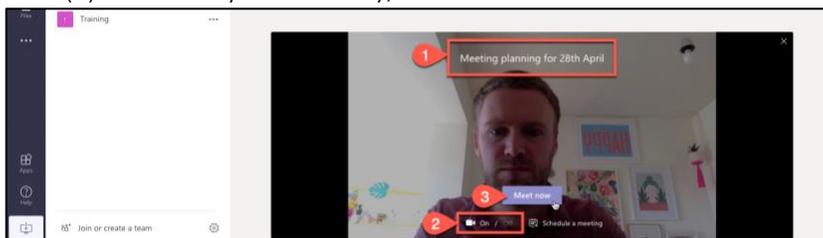
6.3.1 Initiate an on-demand meeting

To start an on-demand meeting:

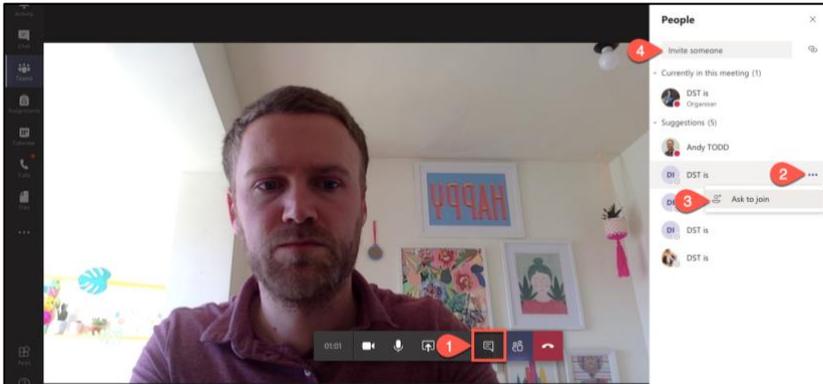
1. Click on **Teams** (1) within the left-hand menu.
2. Open the team and the specific channel within it that you wish to create the meeting within (2).
3. Click on the **Meet now** button (3) underneath the conversation box at the bottom of the channel.



4. When the meeting window opens, enter a subject (1), choose whether or not to show your video feed (2) and when you are ready, click **Meet now**.



- If it's not already visible, open the **People** pane by clicking on the **Show Participants** button (1). You can either invite participants using **More options** (2) > **Ask to join** (3) or by searching for users in the **Search** box (4). This method is useful for inviting users who are not already team members.



Any users added to the meeting or currently being added will appear within the **Currently in this meeting** section of the **People** pane.

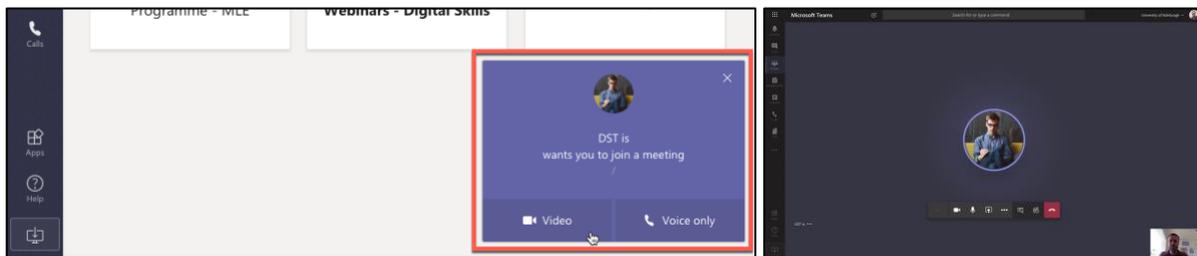


6.3.2 Joining an in-demand meeting

There are two ways to join an in-demand meeting. You can either be invited to the meeting or join via the channel if you are a member of the team the meeting was created within.

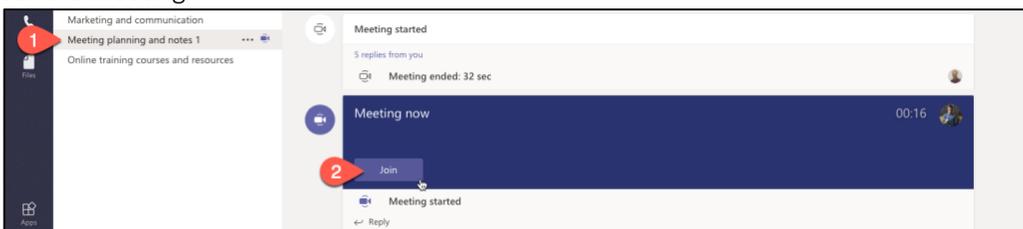
To join via an invite:

When the meeting invitation appears on screen, choose either **Video** or **Voice only**. You will now be added to the meeting.

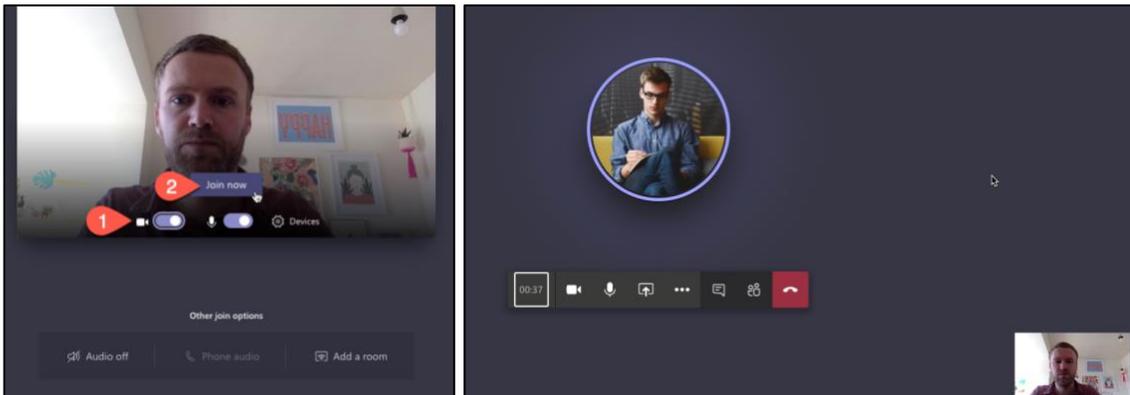


To join via the channel:

- Locate the channel the meeting is taking place within and open it (1). Click on the **Join** button (2) for the meeting.



2. When the meeting window is displayed, choose your audio and video settings (1) and click **Join now** (2).



VIDEO: View the 'Initiate a video or audio meeting on-demand' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/initiate-a-video-or-audio-meeting-on-demand?u=50251009&auth=true>

6.4 Scheduling meetings

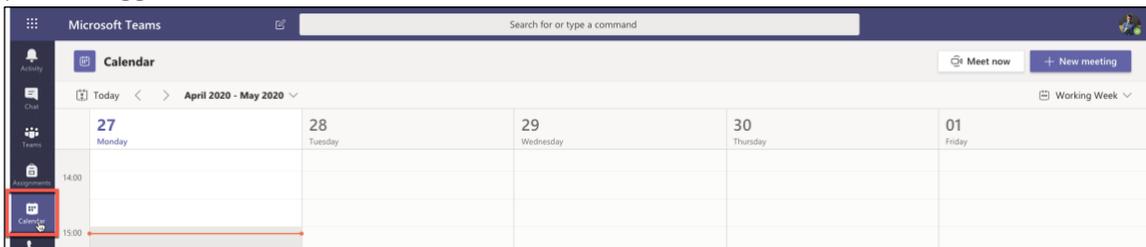
It's likely that you will want to schedule a meeting at some point using Teams. The main benefit of a scheduled meeting is that it will be added to the calendar of anyone invited, but users can also join from within a team if the meeting is added to a channel too. Team meetings also provide an area for chat and an option to create a video recording of a meeting. As with most Microsoft applications there are several ways to schedule a Teams meeting, for example, from Outlook, but let's look at doing it within Teams.

6.4.1 Scheduling a new meeting

A scheduled meeting can be created by any Microsoft Teams user.

To schedule a meeting:

1. From the left-hand menu, choose **Calendar**. This will open the Office 365 calendar for the account you are logged into Teams with.

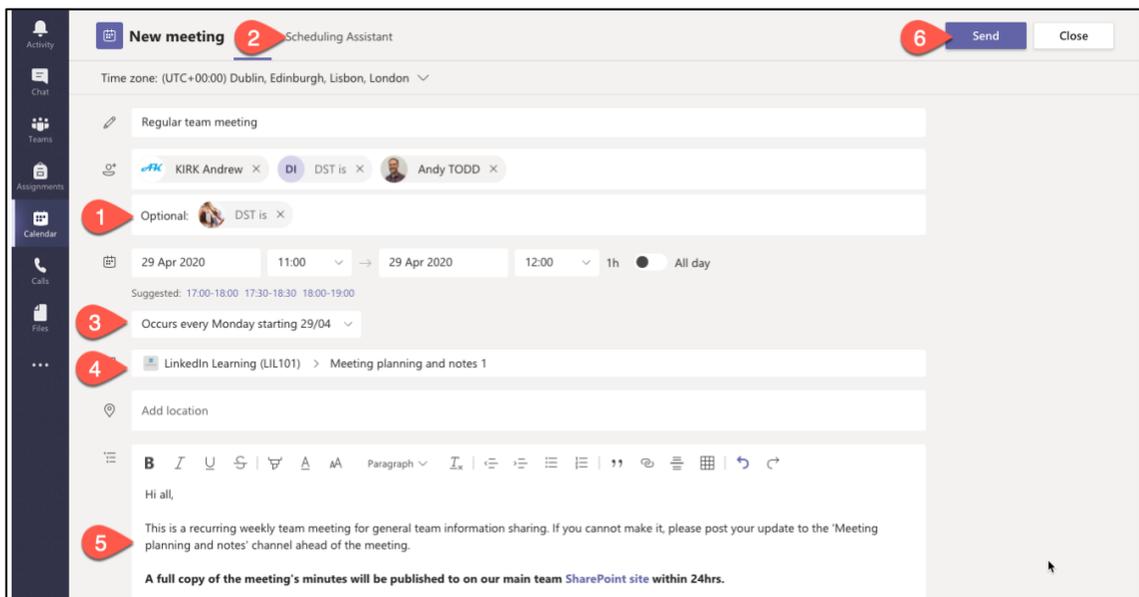


2. Either navigate to the time/date slot when you want the meeting to take place and double click or click on the **+ New meeting** button at the top-right to create a new meeting.



- Fill out as many details for your meeting as possible. In the example below, the **Optional** option (1) was used to give some recipients the option to attend. The **Scheduling Assistant** (2) was used to quickly find the most suitable meeting time/date time for all attendees.

The **Series** option (3) turned this into a recurring weekly meeting and the meeting was added to an existing **channel** (4). Adding a meeting to a channel allows users within the team (and channel) who haven't been added to the invite list to join the meeting and provides a place for all chat messages and recordings to be stored. If scheduling a meeting from Outlook, this option won't be available. Finally, a description was added (5) with some basic text formatting and a hyperlink added.



- Once you've finished entering the details for your meeting, press **Send** (6).

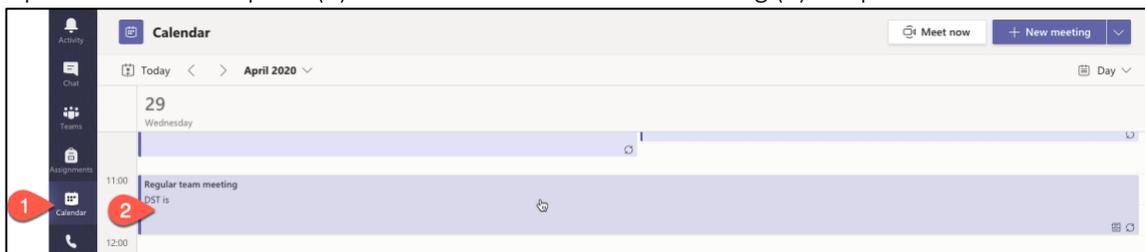
The meeting will now be added to your calendar within Teams (and Office 365). Recipients will receive an invitation to add to their calendar and the meeting will appear within the channel it was added to.

6.4.2 Joining a scheduled meeting

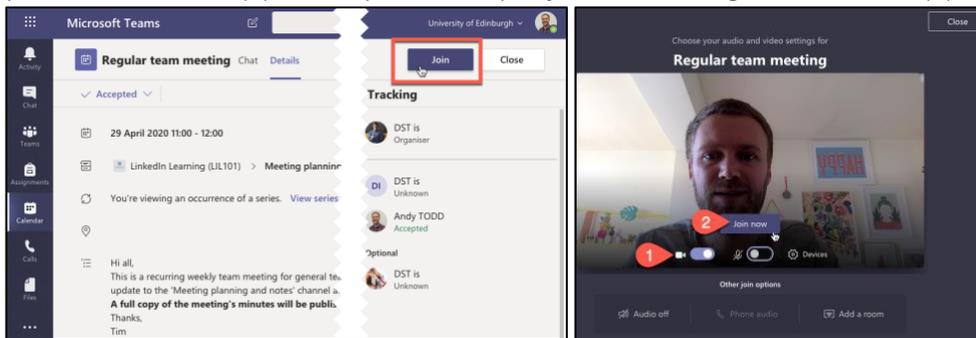
If you were invited to the scheduled meeting then you can join from the **Calendar** within Teams or your Office 365 calendar. If you weren't invited but it was published to a channel within a team of which you are a member then you can join from there.

Joining via invite:

- Open the **Calendar** option (1) and click on the scheduled meeting (2) to open it.

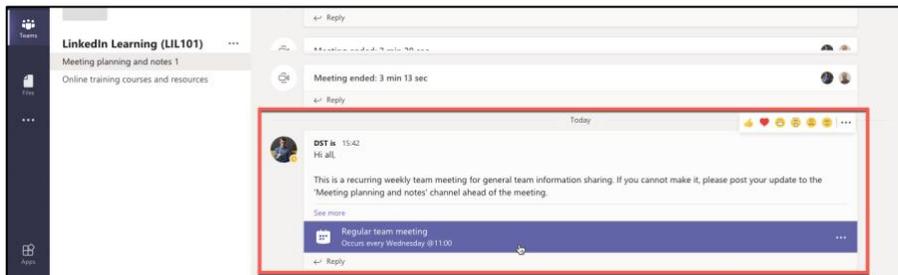


- Click on the **Join** button at the top of the meeting event and choose which inputs (audio/video) you wish to turn on (1). When you're ready to join the meeting, click **Join now** (2).



Joining via a channel:

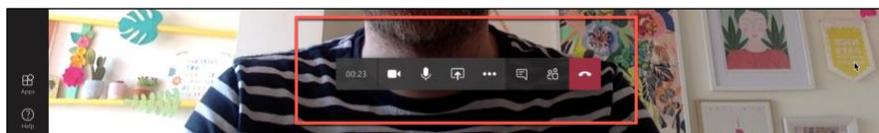
If the meeting was assigned to channel you have access to then you can also join it by opening the relevant channel, clicking on the meeting and pressing the **Join** button.



VIDEO: View the 'Schedule a meeting and invite attendees' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/schedule-a-meeting-and-invite-attendees-2?u=50251009&auth=true>

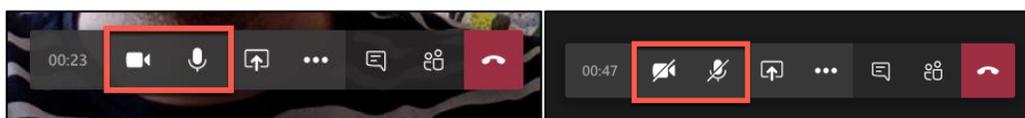
6.5 Meeting controls and general settings

A range of different controls are available to users during meetings. You can toggle your audio and video camera feeds, share your screen or a presentation with others, chat and view participant lists, record the meeting, leave the meeting and, if you're the organiser, end the meeting. All of these controls can be accessed from the main meeting control bar.



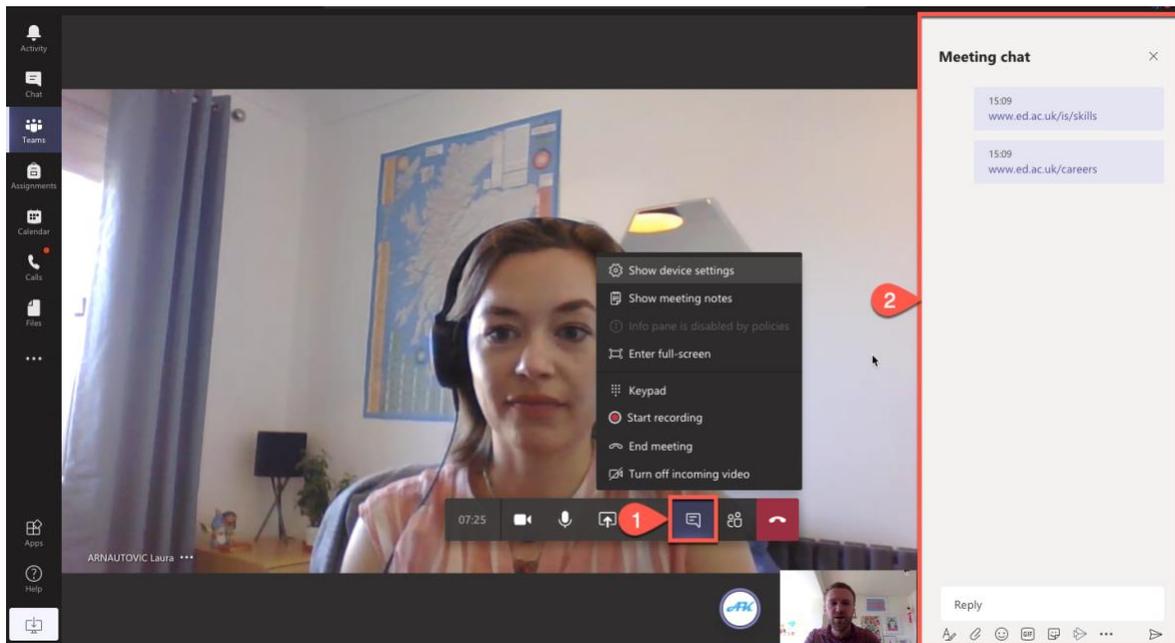
6.5.1 Toggle your audio/video feed

There may be times during a meeting when you want to turn your webcam or microphone on and off quickly. This can be achieved using the **Camera** and **Mute** buttons. When inactive, the button will be displayed with a line through it.



6.5.2 Meeting conversations

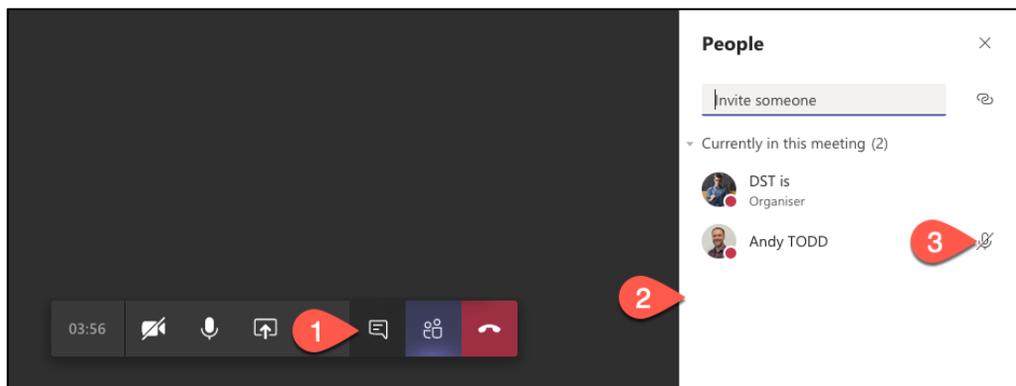
The **Conversation** (1) option opens a **Meeting chat** pane (2) on the right-hand side of the screen during the meeting. The chat is not private as it can be viewed by everyone involved in the meeting. It's most commonly used for URL and file sharing but it's also a useful place for attendees to share technical issues e.g. "I'm having connection issues" or "I can't get my microphone to connect". A full history of the chat will either be available within the channel the meeting was assigned to or created within, or a group chat between the meeting's participants if the meeting was not assigned to a channel.



6.5.3 Participants list

The **Participants** option (1) opens the People panel (2) on the right-hand side of the screen which allows you to view who is currently in the meeting, users who are in the process of joining and also provides options to invite other users to the meeting on an ad-hoc basis.

Occasionally in meetings, participants will unintentionally leave their microphone switched on when they're not speaking, often producing unwanted background noise. The panel also shows whether or not a participant has their microphone muted or not (3), making it easier to identify where the noise is coming from. Microphones can also be muted for attendees within this panel.



6.5.4 Sharing your screen and presentations

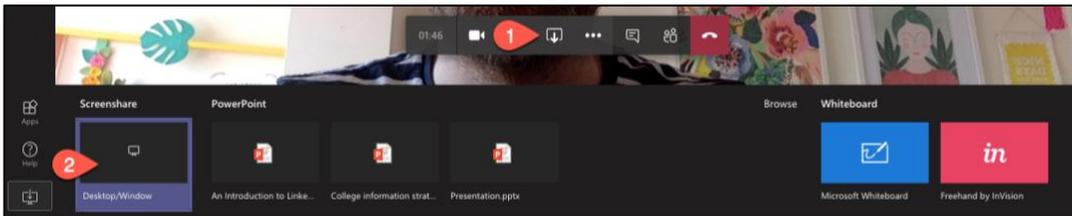
During a meeting you can share your desktop, an open application, a PowerPoint presentation or a whiteboard with other participants. If you are the web version of Teams then you'll only be able to share your screen if you are using Google Chrome or the latest version of Microsoft Edge.

6.5.4.1 Screenshare

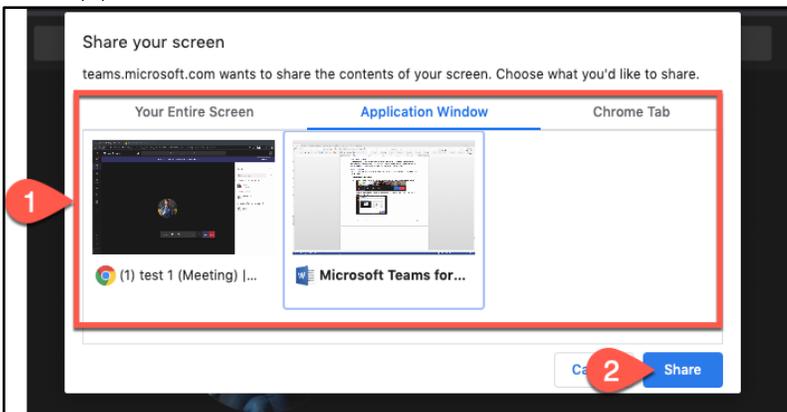
The Screenshare option allows you to share your entire screen, an open application or a specific tab from your web browser.

To share your screen with others:

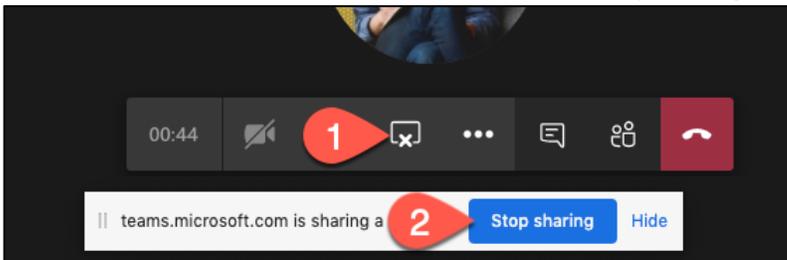
1. Click on the **Share** button (1) from the meeting control bar and click on **Desktop/Window** (2).



2. When the **Share your screen window** opens, choose what you would like to share (1) and click **Share** (2). In the situation below, a Microsoft Word document will be shared with participants.



3. To end the screen share, click on either of the two **Stop sharing** buttons (1 and 2).

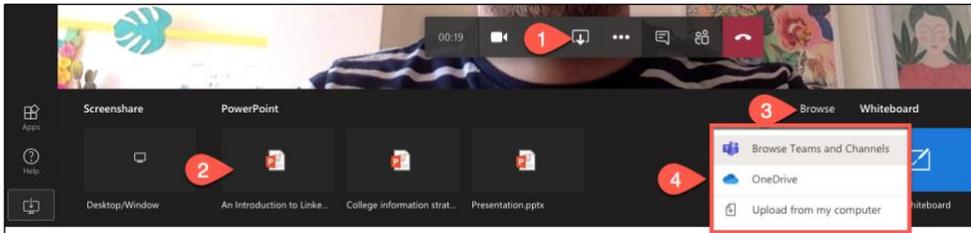


6.5.4.2 Presentation sharing

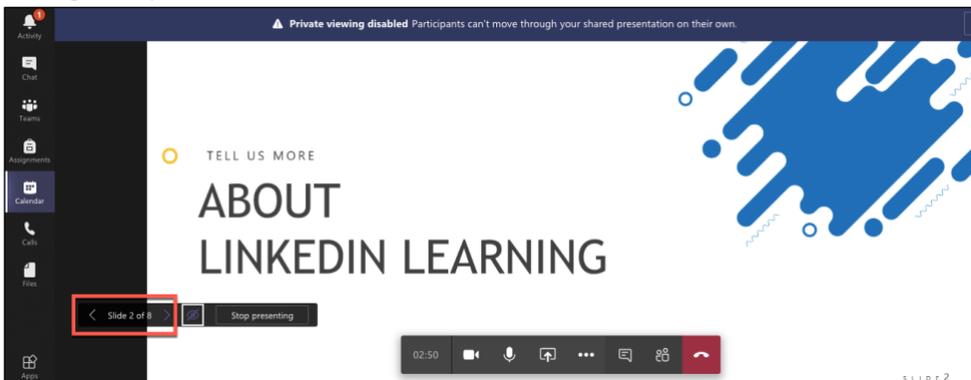
Teams also allows you to share a presentation with other participants within a meeting. Although you can open the presentation within PowerPoint then share your screen, it's recommended you always use the dedicated PowerPoint sharing option instead. This option will allow participants to move through your presentation at their own pace if you allow private viewing or in sync with you.

To share a presentation:

1. Click on the **Share** button (1) and either launch a previously opened PowerPoint presentation (2) or use the **Browse** option (3) to load a presentation from Teams, OneDrive or your computer (4).

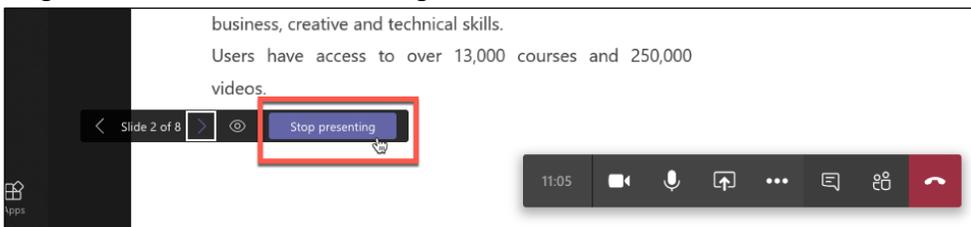


2. Once your presentation loads on screen it will be visible to other participants. Use the **Navigate forward** and **Navigate back** options, click your mouse button or use the arrow keys to move through the presentation.



To prevent participants from moving through the presentation on their own, click on the **Private viewing** button (👁).

3. When you're finished presenting, click on the **Stop presenting** button. The presentation will no longer be shared within the meeting.



VIDEO: View the 'Share your screen during a call, meeting or chat' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/share-your-screen-during-a-call-meeting-or-chat?u=50251009&auth=true>

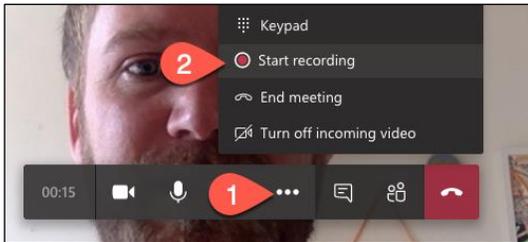
6.5.5 Recording a meeting

A recording of a meeting can be initiated by any of the meeting's participants once it has started. The recording will appear within the channel the meeting was assigned to. If the meeting was not assigned to a channel then the recording will be posted within a new chat between all of the participants.

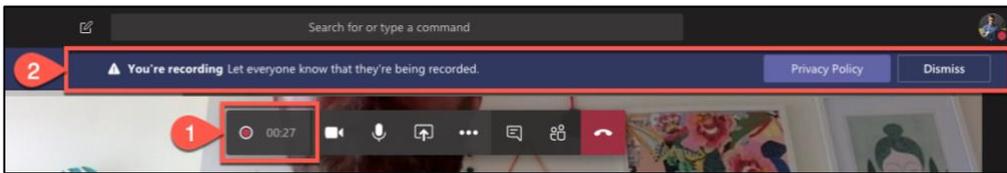
Always notify all of the meeting's participants that you will be recording the meeting and that any audio, video or screen sharing will be captured as part of the recording.

To record a meeting:

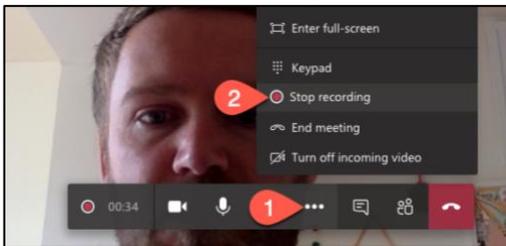
1. Notify all participants that you are about to start recording the meeting.
2. Click on the **More options** button (1) and choose **Start recording** (2).



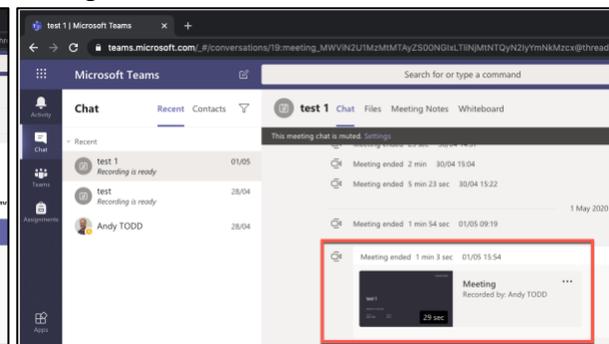
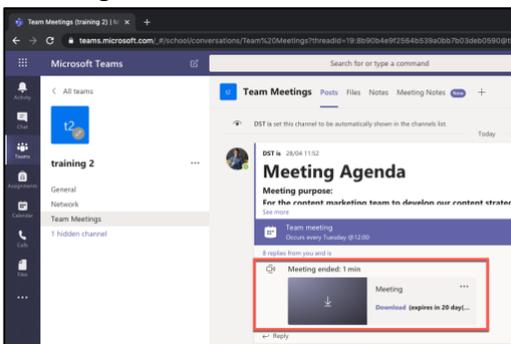
Confirmation the recording has started will be provided via a small recording symbol next to the meeting duration counter (1) and a purple message box at the top of the screen (2).



3. To end the recording, choose **More options** (1) and **Stop recording** (2). When asked to confirm, click on the **Stop recording** button.



4. After the meeting has been recorded you can view and download from the channel the meeting was assigned to or the chat created for the meeting.



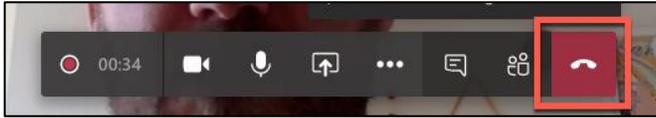
VIDEO: View the 'Record a video meeting or a call' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/record-a-video-meeting-or-call?u=50251009&auth=true>

6.5.6 Leaving and ending a meeting

There are two main ways in which you can leave a Teams meeting. You can either leave the meeting yourself at a time convenient to you or the meeting can be ended for everyone, but only by its organiser.

To leave a meeting as a participant:

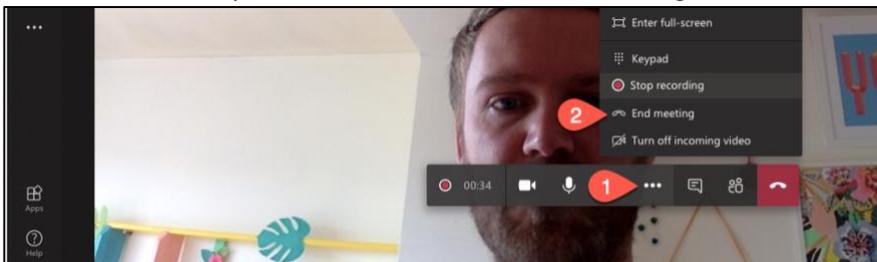
You can leave the meeting using the **Hang up** option. You won't be asked to confirm that you wish to leave so if you click this accidentally then you'll leave the meeting and will need to re-join.



To end a meeting for all participants as the organiser:

As the meeting's organiser you have an extra option to end the meeting for everyone. This is a useful way of closing the meeting room so that no participants remain afterwards.

1. Click on the **More options** button and choose **End meeting** from the menu.



2. When the **End the meeting?** Dialog appears, click **End**. The meeting will now end for all participants.

7 Status, settings and notifications

You can personalise your experience when using Teams by changing your current status, altering the look and feel of the interface and managing notifications.

7.1 Changing your current status

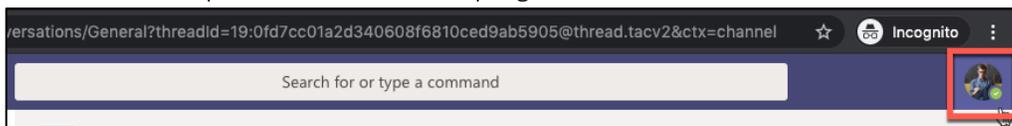
Changing your status is the quickest and easiest way to let other users of Teams know if you are available or not. Knowing whether a user is available is use to know before sending message or trying to start a meeting with them, so it's important to keep your status updated. Your status will be inherited from the current event in your calendar. For example, if you are in a meeting then your status will likely show as 'Busy' because this is the default status for most Office 365 calendar events.

The following explains the different statuses and when they should be used:

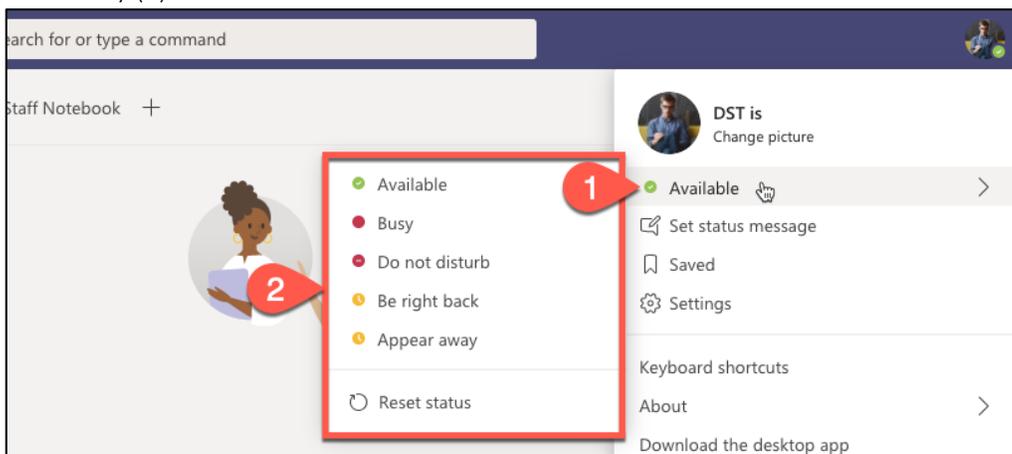
 Available	Use this status to let others know you're currently free and happy to be contacted.
 Busy	Use when you're focusing on something but do still want notifications to pop up.
 Do not disturb	Use when you're focusing on something and do not want notifications to pop up.
 Be right back	Use when you want to let others know you're temporarily away from the computer.
 Appear away	Use when you need to work on something without responding right away or if you will be away for a period of time but don't wish to log out of Microsoft Teams.

To change your current status manually:

1. Click on the user profile button at the top-right of the screen.



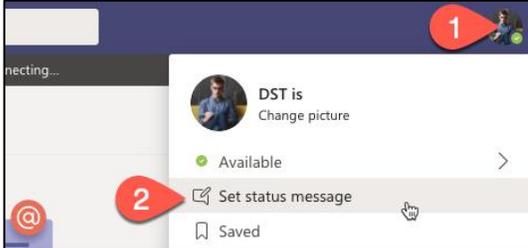
2. Hover over the **Status** option (1) and choose the new status which best represents your current availability (2).



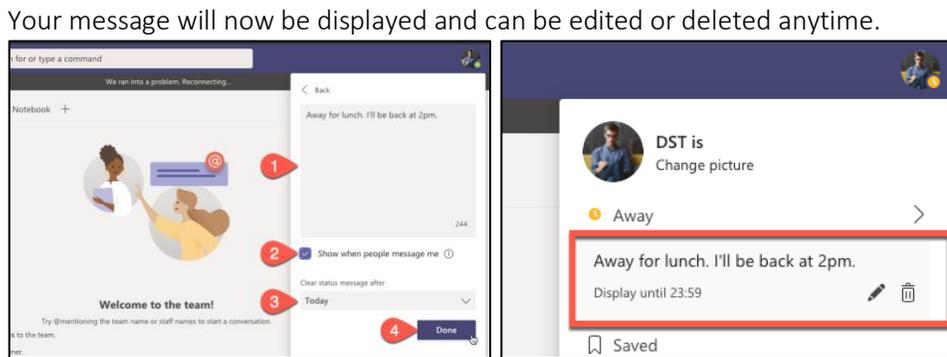
As well as changing your status, you can also create a status message for other users to see. This is useful if for example you are away but only for a few minutes.

To set a status message:

1. Open the user profile options (1) and choose **Set status message** (2).



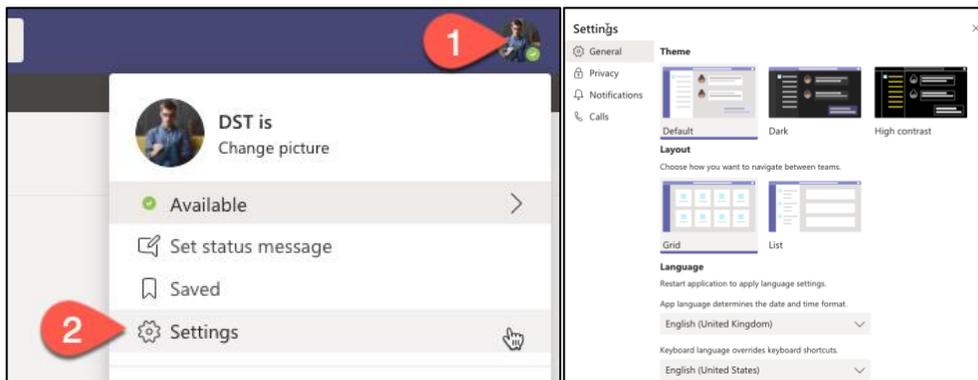
2. Type your message into the box (1) and choose whether or not to automatically show the message to users who try to message you (2). Select how long you want the message to be displayed for (3) and click **Done** (4).



VIDEO: View the 'Set your status message' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/set-your-status-message?u=50251009&auth=true>

7.2 Changing your general settings

When it comes to settings in Teams, they're very straight forward. To access the **Settings** menu, click on the user profile button (1) and choose **Settings** (2). The **General** settings group allows you to change your theme, layout and language.



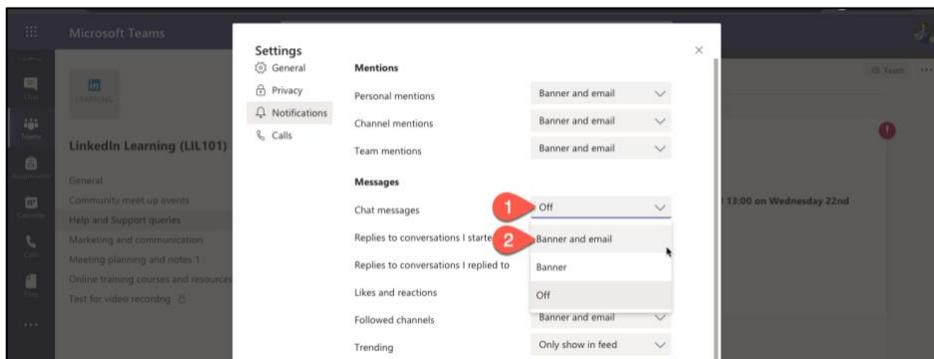
- The **Theme** option allows you to change the look between the 'Default' colouring (light background with dark text), 'Dark' (dark background with light text) and 'High contrast'.
- The **Layout** option allows you to change how teams are displayed. They can either be tiled (Grid) or appear in a vertical list (List).
- The **Language** options allow you to change the language used to determine the time and date format and the keyboard language.

A few of additional options can also be found within the **Privacy** group of the **Settings** menu including managing priority access for notifications, blocking contacts and enabling/disabling Microsoft surveys.

7.3 Configuring notifications

Notifications are used within Microsoft Teams to alert you to any changes within a team you are part of or new messages/invitations you have been sent. There are 15 different notifications in total, each of which can be customised based on your preference. It will become clearer which notifications you wish to enable and which you'd like to disable the more you begin to use Teams.

You can change notifications through your use profile option > **Settings** > **Notifications**. In the following example, notifications for new chat messages have been changed from 'Off' (1) to 'Banner and Email' (2). This means an email notification will be sent every time a new chat message is received as well as an on-screen pop-up banner.



VIDEO: View the 'Adjust user settings' video on LinkedIn Learning:
<https://www.linkedin.com/learning/microsoft-teams-essential-training-5/adjust-user-settings?u=50251009&auth=true>