

# Microsoft Teams Basics

## Contents

Microsoft Teams is your go-to tool for collaborating at WPS!.....	2
<b>How to Open Microsoft Teams</b> .....	2
Opening in Windows .....	2
Opening in Citrix .....	3
Microsoft Teams Replaces Skype for Business .....	3
Skype for Business .....	3
Microsoft Teams .....	5
Creating Teams .....	8
Team Setup and Customization .....	8
Joining a Team .....	10
Creating a Channel .....	10
Meetings in Microsoft Teams .....	12
Creating a Meeting .....	12
Joining a Meeting.....	13
Audio Options.....	14
Share Your Screen During a Meeting .....	14
Navigating Other Features in a Meeting .....	14
Ending a Meeting.....	16
Use Microsoft Teams and Start Chatting .....	16
Start a Chat.....	16
Pin, Hide, or Mute a Chat .....	18
Delete Messages.....	18
Send a Message to a Channel.....	19
Create, Edit, or Delete a Contact Group .....	20
Make Calls .....	21
How do I control my notifications in Microsoft Teams? .....	22
Audio Troubleshooting with Microsoft Teams.....	23
Adding Apps to Microsoft Teams.....	24
Using Microsoft Forms within Teams .....	24

# Microsoft Teams is your go-to tool for collaborating at WPS!

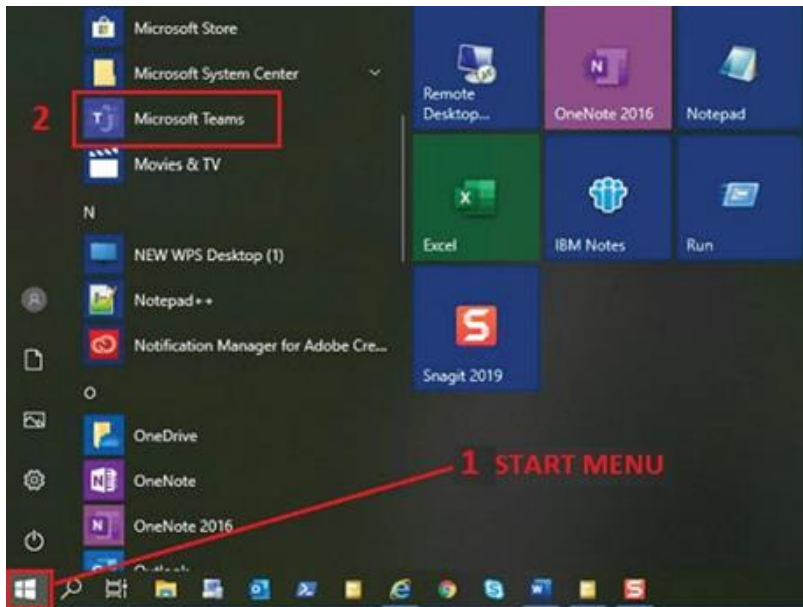
Because 90% of our workforce is working from home, we continue to find better ways for employees to communicate and collaborate with each other. Microsoft Teams is an easy-to-use resource, allowing us to streamline the way we work together, no matter where we are.

Microsoft Teams is a one-stop shop. This tool is equipped to host meetings, integrate your Outlook calendar, and be your team's project hub. You can share documents and chat with others on your team elsewhere in the company.

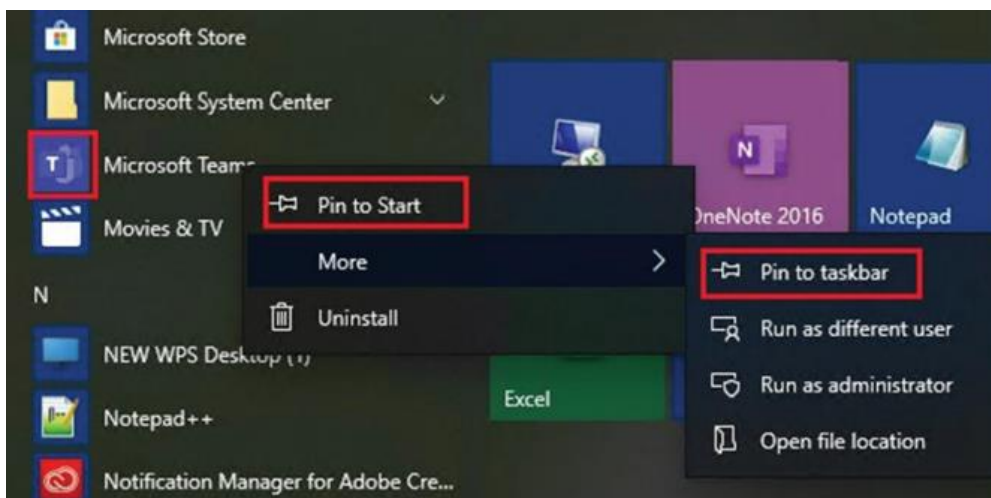
## How to Open Microsoft Teams

### Opening in Windows

1. To open Microsoft Teams, click on the **Start Menu**. Scroll down until you find **Microsoft Teams** and double click on it. This will launch the program.

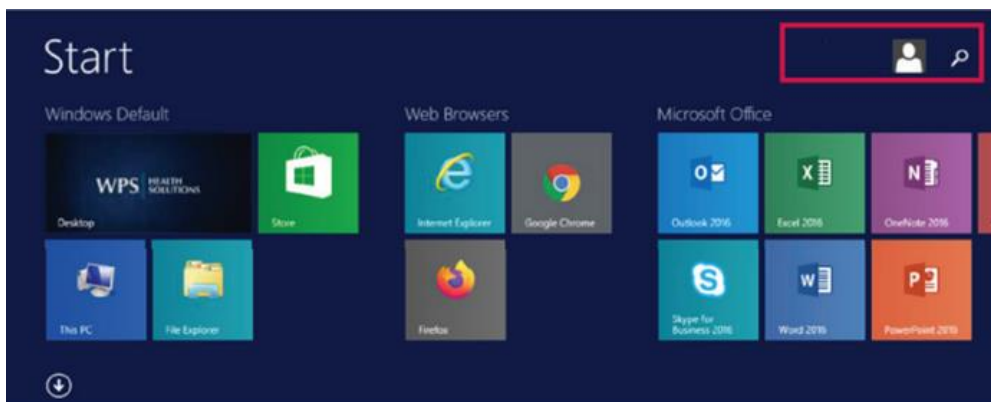


2. You can **pin** Microsoft Teams to the Start Menu or Taskbar (found at the bottom of your desktop) by right-clicking on it and selecting where you want it to be pinned. Once pinned, you do not have to search for the program every time you want to launch it.

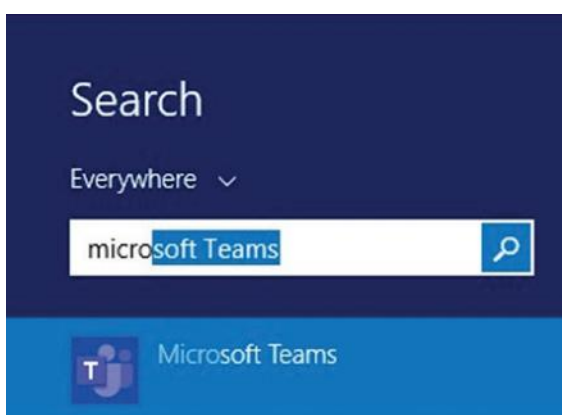


## Opening in Citrix

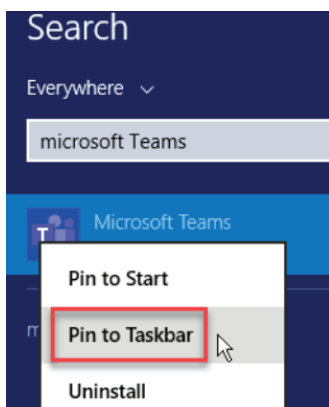
1. Select the **Start Menu**. In the upper right-hand corner, you will see the **Search** magnifying glass icon. Click on it.



2. Start typing "Microsoft Teams" in the search box. When it appears, double click to open it.



3. You can right click on **Microsoft Teams** and pin it to the Taskbar within your Citrix desktop. Then, it will show up automatically at the bottom of the screen when you log in.

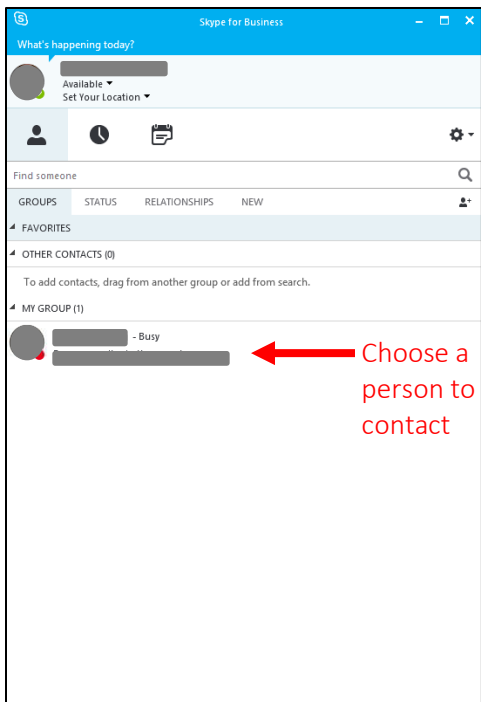


## Microsoft Teams Replaces Skype for Business

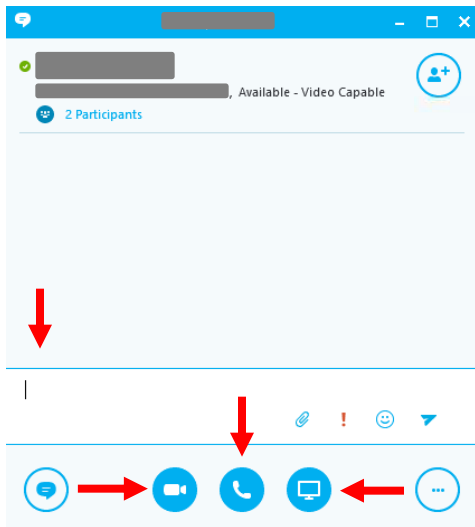
Microsoft Teams and Skype for Business have all the same functions, but they are laid out in different ways.

### Skype for Business

In Skype, the first thing that you choose from the home menu is **whom** you wish to contact.



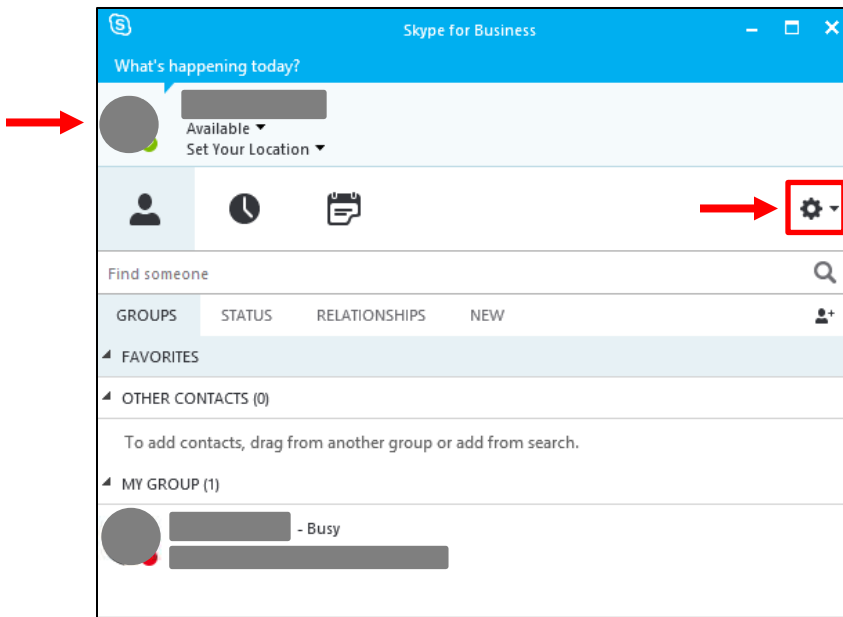
Once you have selected the intended contact by double clicking on their name, you choose **how** to contact them.



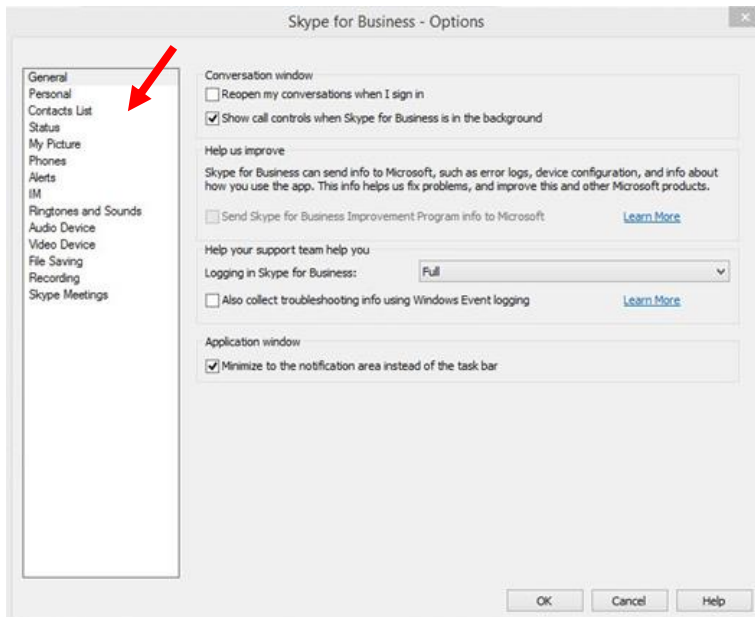
Methods of contact:

1. **Chat** by typing in the text box.
2. **Video call** by clicking on the camera icon.
3. **Voice call** by clicking on the phone icon.
4. **Share screen** by clicking on the computer monitor icon.

In Skype for Business, **Settings** are accessed by either clicking on your profile picture or on the gear icon.

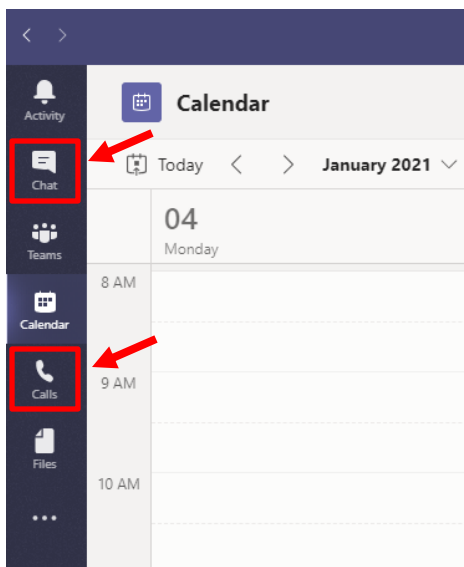


The list of settings features sub-menus to help you navigate to the area you are trying to reach.



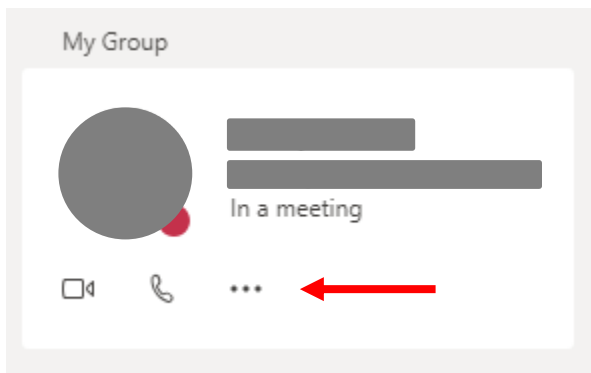
## Microsoft Teams

In Microsoft Teams, one first chooses **how** to contact another person (e.g., call or chat) using the menu bar on the left side of the screen.



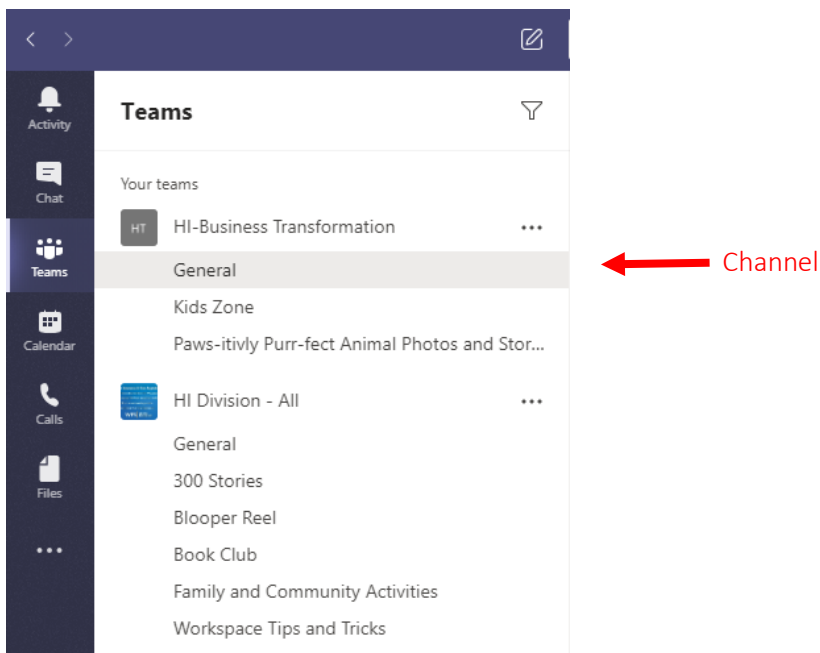
Once you have chosen your preferred mode of communication, you then chose **whom** you wish to contact. **Chat** is specifically for conversations with other individuals or groups, much like the Skype for Business chat function.

**Calls** displays a laid-out list of contacts with the option to video call, voice call, or chat (if you click on the ellipses).

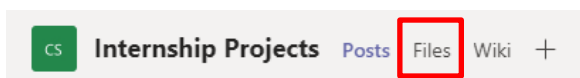


To learn more about using chat and making calls within Microsoft Teams, move ahead to the section titled **Use Microsoft Teams and Start Chatting**.

The **Teams** function is unique to Microsoft Teams and is a major reason why Teams will be replacing Skype for Business. On the left, you can view your teams. Under each team is a list of **channels**, each of which is dedicated to a particular topic. As a team can have multiple channels, different projects can be handled separately.

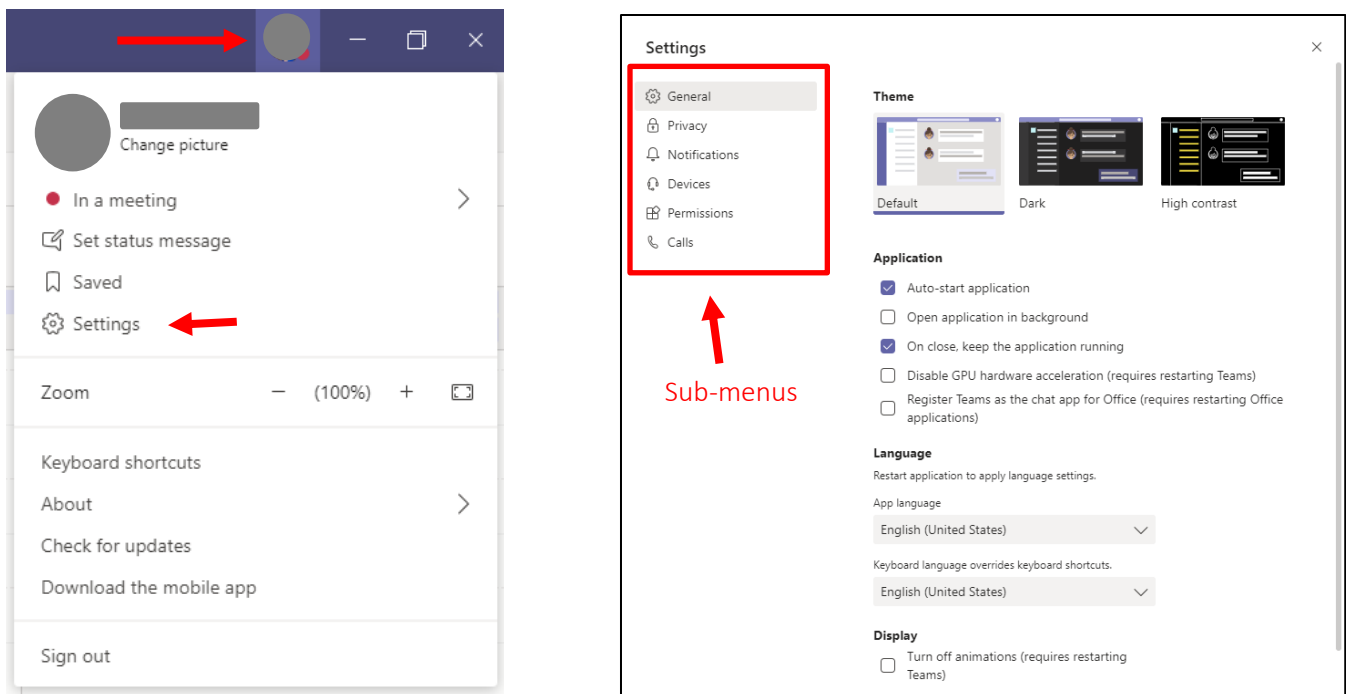


Any posts within a channel represent communication about that channel's topic. Posts may include documents that the rest of the team can view. These documents, as well as any other files that are uploaded by team members, can be viewed under the **Files** tab within a channel.



To learn more about messaging a team and posting within a channel, skip ahead to **Send a Message to a Channel**.

In Microsoft Teams, **Settings** is accessed by clicking on your picture in the top left-hand corner of the screen. Then, click on the gear icon in the drop-down menu.



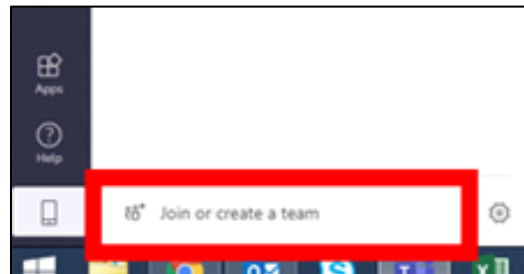
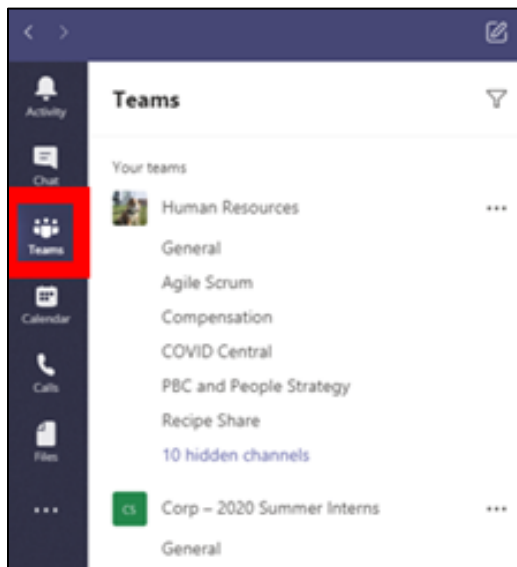
Like Skype for Business, the list of settings features sub-menu options to navigate to whatever setting you wish to change.

# Creating Teams

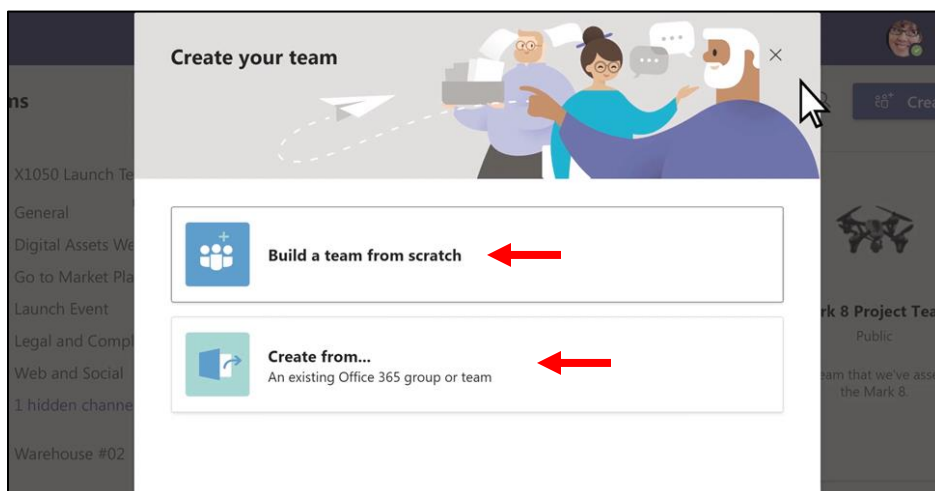
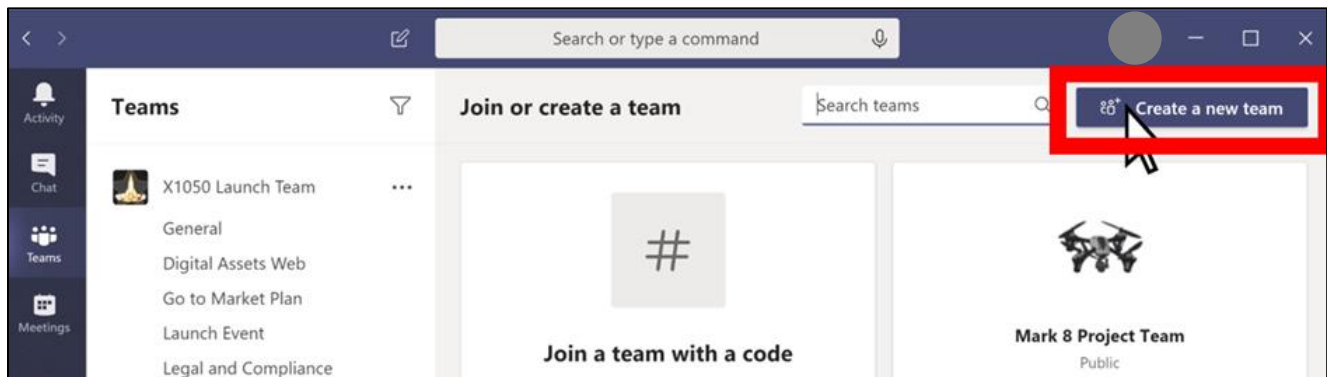
## Team Setup and Customization

To create a Team, select **Teams** in the menu bar on the left-hand side of Teams. This is where you can create your own team or discover existing ones.

Then, click on **Join or create a team** in the bottom left-hand side of the screen.

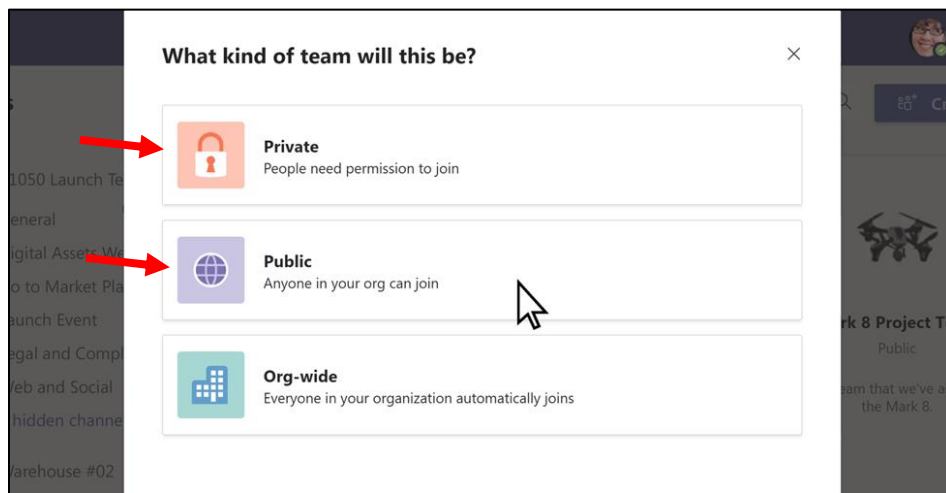


Select **Create a new team**. Then, select **Build a team from scratch** to build an entirely new team, or select **Create from...** to create a team from an existing group.

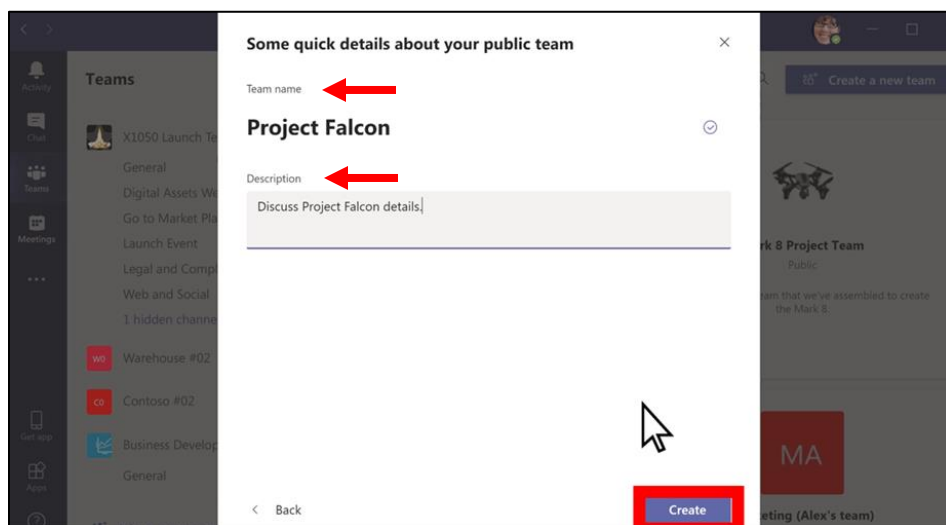




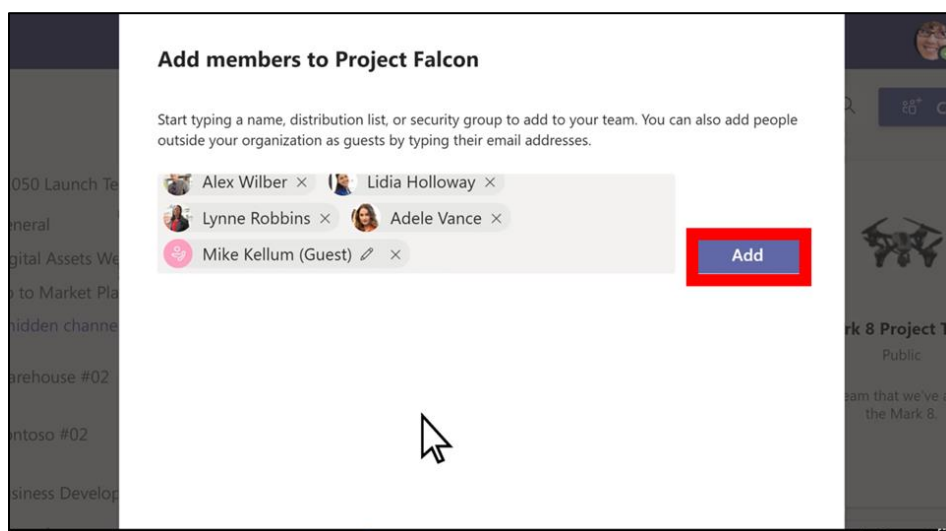
Select **Private** if you'd like people to request permission to join or select **Public** if anyone in your organization can join.

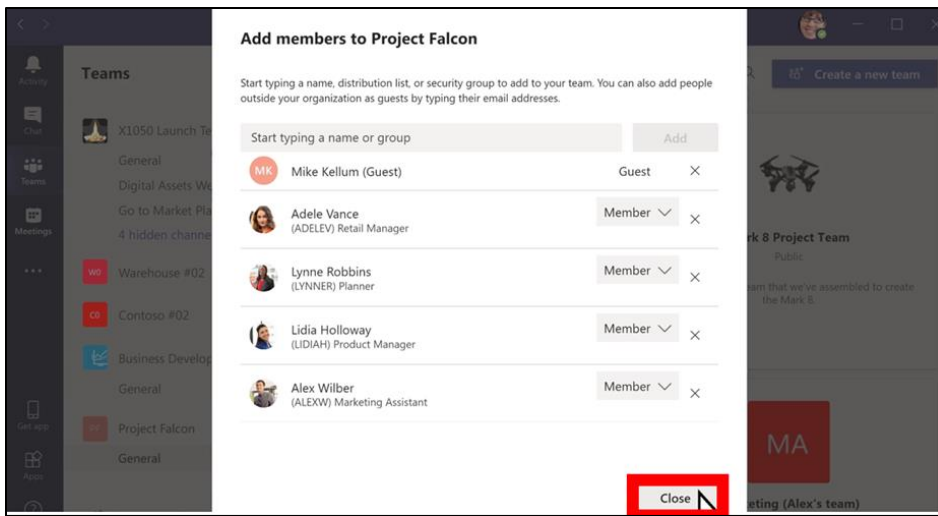


Give the team a name and add a short description if you'd like. Then, select **Create**.



Add members. You can add people, groups, or even entire contact groups. If you need to add people from outside your organization, use their email address to invite them as guests. Add a friendly display name for them too. When you're done adding members, select **Add** and then **Close**.

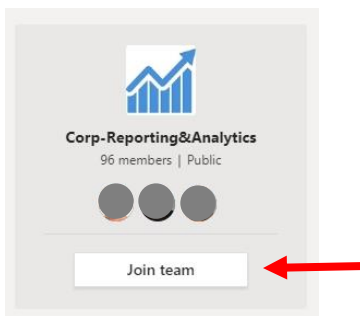




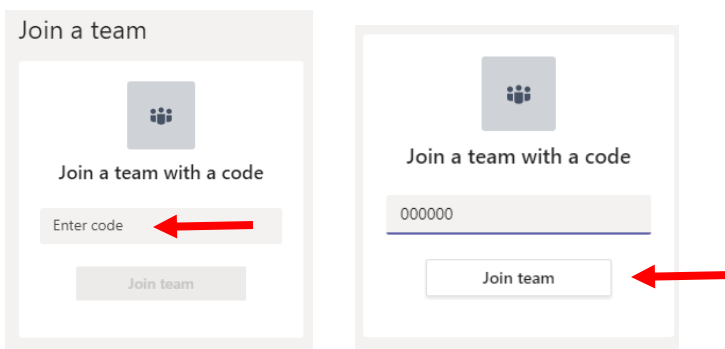
## Joining a Team

To join an existing team, click on **Join or create a team** near the bottom left-hand corner of the Teams page.

Any *public* teams within your organization will be listed. Hover over the team you would like to join and click **Join team**.



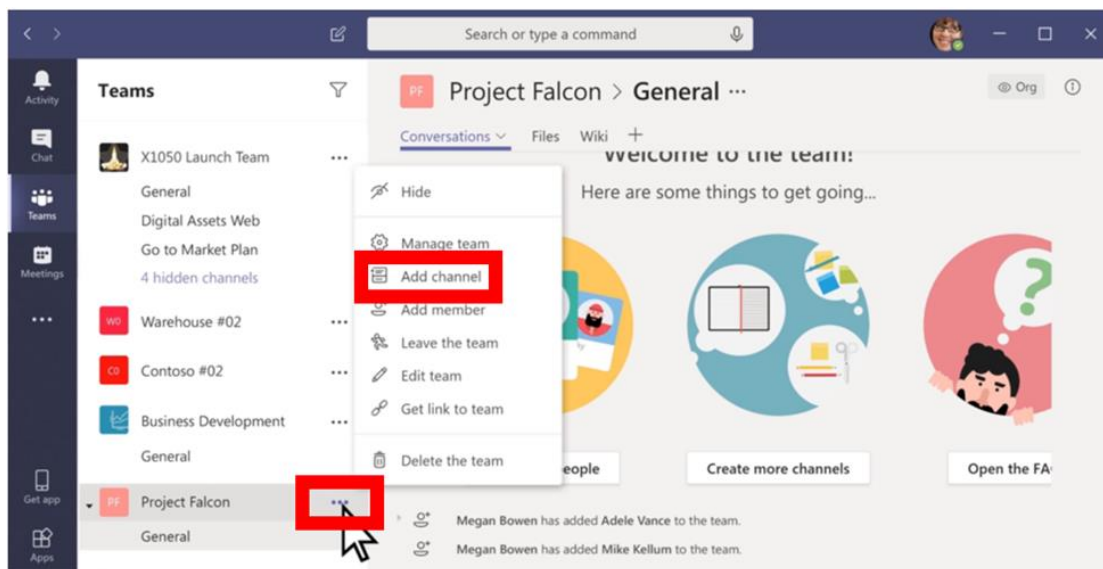
If you have been given a code to join a *private* team within your organization, type the code you have been given into the **Enter code** field under **Join a team with a code**. Then, select **Join team**.



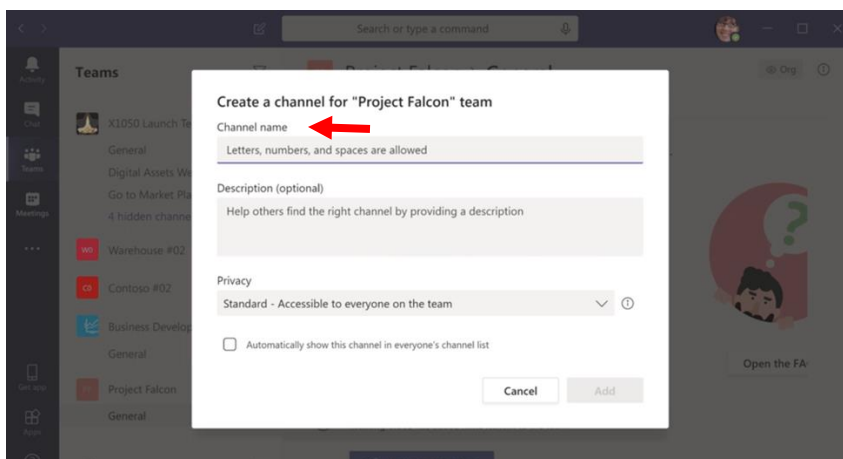
## Creating a Channel

By default, every team gets a **General** channel, which is a good channel to use for announcements and information the whole team needs. To add more channels:

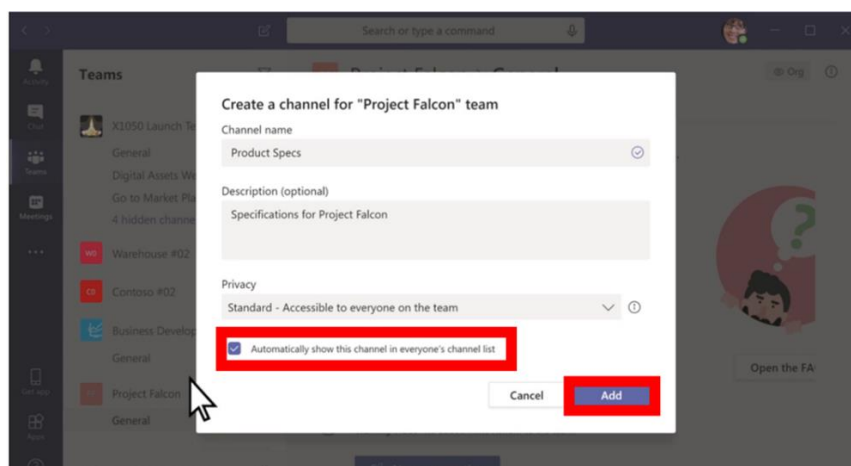
1. Select **More options** next to the team name in the column on the left-hand side of the screen. Then, click on **Add channel**.



2. Enter a name and description for your channel. You can build a channel around a topic, project, department name, or whatever you would like.



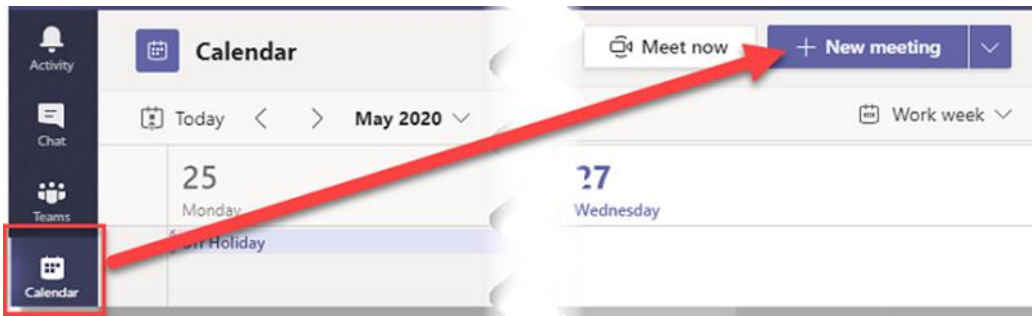
3. Select **Automatically show this channel in everyone's channel list** if you want this channel to appear in everyone's channel list. Then, click **Add**.



# Meetings in Microsoft Teams

## Creating a Meeting

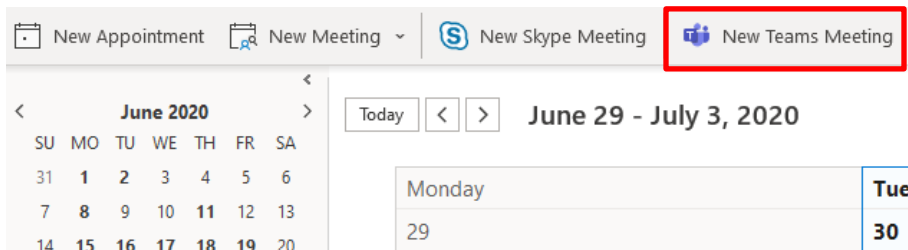
Choose **Calendar** from your menu, then click **+ New meeting**. Your meeting will automatically be added to your Outlook calendar.



1. Enter a title for the meeting in the **Add title** field.
2. In the **Add required attendees** field, enter the names of those you wish to attend the meeting. On the far right side of the field, you can add optional attendees if you click on **+ Optional**.
3. When setting up a meeting with others, you can use the **Scheduling Assistant** function within the **+ New meeting** tab to see others' availability.
4. In the fields immediately below **Add required** attendees, you have the option to change the date and time of the meeting as well as the option to make it a recurring meeting.
5. In the text box, you can add a message for attendees to be sent with the meeting invite.

A screenshot of the 'New meeting' form in Microsoft Teams. The form is titled 'New meeting' and has tabs for 'Details' and 'Scheduling Assistant'. The 'Details' tab is selected. The form includes the following fields: 'Add title' (highlighted with a red box), 'Add required attendees' (highlighted with a red box), '+ Optional' (highlighted with a red box), 'Jun 30, 2020' (highlighted with a red box), '8:30 AM' (highlighted with a red box), 'Jun 30, 2020' (highlighted with a red box), '9:00 AM' (highlighted with a red box), '30m' (highlighted with a red box), 'All day' (highlighted with a red box), 'Does not repeat' (highlighted with a red box), 'Add channel' (highlighted with a red box), 'Add location' (highlighted with a red box), and a text box for 'Type details for this new meeting' (highlighted with a red box). The text box contains a rich text editor toolbar with various formatting options.

To create a Teams meeting through Outlook, open your calendar and click on **New Teams Meeting**.



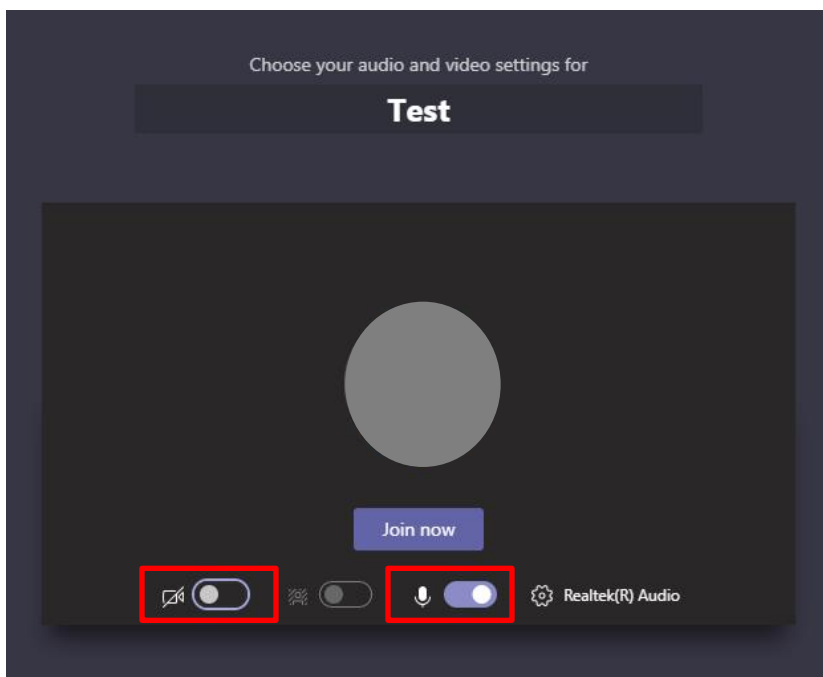
If you are working in Citrix, you may need to download the **New Teams Meeting** option daily. Click on this [link](#) for more instructions.

## Joining a Meeting

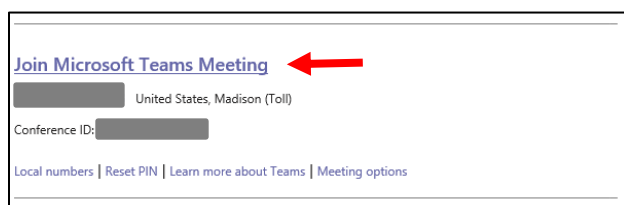
From within Teams, choose **Calendar** and click **Join** on an in-progress meeting displayed on the Calendar. If you would like more options watch [this Join a Teams meeting video](#).



After clicking **Join**, you will be able to choose your audio and video settings. Then, select **Join now** to enter the meeting.



If you don't have the Teams app, you can join through Outlook. In the email invite, you will see on the bottom **Join Microsoft Teams Meeting**. Click on the link and it will bring you to the meeting via web, if you choose.



## Audio Options

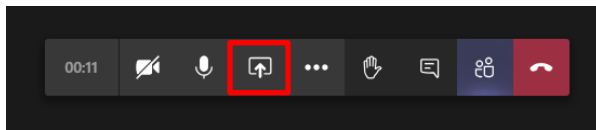
Within Microsoft Teams, you have three audio choices for your meeting:

1. If everybody in the meeting will be using their computer for audio, choose the PC audio instructions, or VoIP.
2. If you'd prefer to have everybody call in, you can use the Unify line, but no one will be able to access audio through their computers.
3. If you want people to be able to choose to receive audio through their computers by calling in, you can request an MS Audio line. Those calling in should turn off the audio in the MS Teams meeting.

**Reminder:** Refrain from using video in Citrix. If you are a Citrix user, be sure to block incoming video.

## Share Your Screen During a Meeting

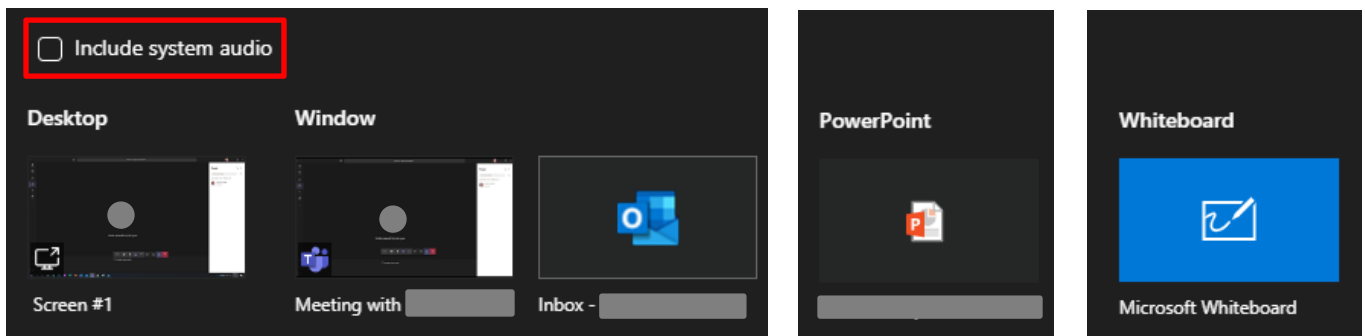
Once you are in a meeting, click on the **Share** icon in the toolbar toward the bottom of the screen.



Several options for sharing should appear.

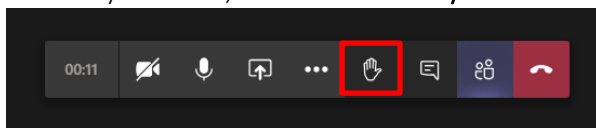
1. You can share your **Desktop**, which displays your entire screen and allows you to move between windows.
2. You can share a **Window**. This option will only allow meeting participants to view a single window on your screen (e.g., Outlook) rather than your entire screen.
3. You can share a **PowerPoint**.
4. You can share the **Whiteboard**.

If you plan to show a video or want to share your sound, select **Include system audio**.

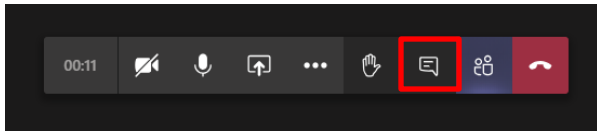


## Navigating Other Features in a Meeting

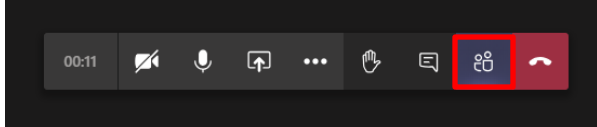
To raise your hand, click on the **Raise your hand** icon. Click on the icon again to lower your hand.



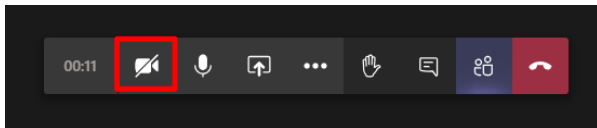
To view the meeting chat, click on the **Show conversation** icon. The chat should appear on the right-hand side of the screen. Click on the icon again to hide the chat.



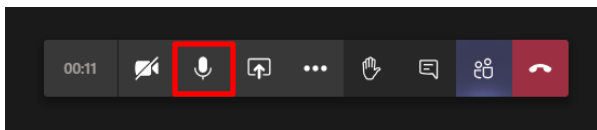
To view the participants in a meeting, click on the **Show participants** icon. A list of the meeting participants should appear on the right-hand side of the screen. Click on the icon a second time to hide the list of participants.



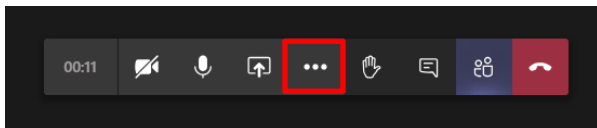
To turn on your video, select **Turn camera on**. Click on the camera icon again to turn off your video. (*Reminder: Do not turn on your video if you are working in Citrix.*)



To mute yourself, select **Mute**. Click on the microphone icon again to unmute yourself.

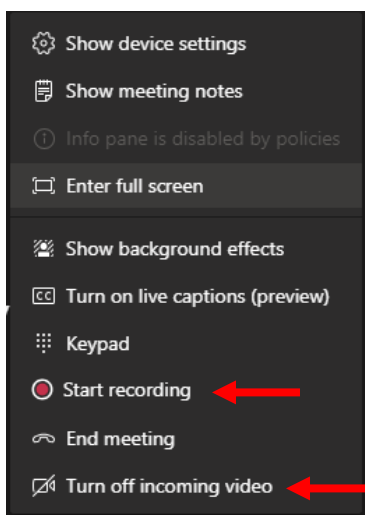


For more options, click on **More actions**.



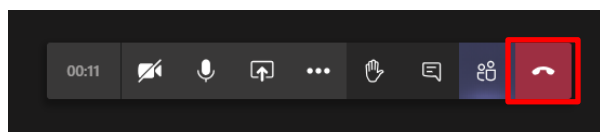
A window will appear above the **More actions** icon with several options. Here you can:

1. Record a meeting by selecting **Start recording**.
2. **Turn off incoming video**. By selecting this option, Teams will turn off the video of anyone entering the meeting. *This is an important feature for those working in Citrix.*



## Ending a Meeting

To end a meeting, click on the **Hang up** icon.

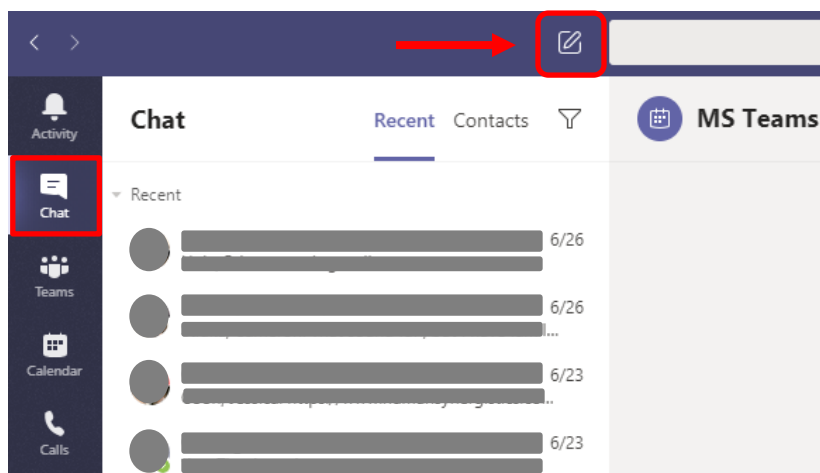


## Use Microsoft Teams and Start Chatting

You can use Microsoft Teams to chat with people just as you would with Skype for Business.

### Start a Chat

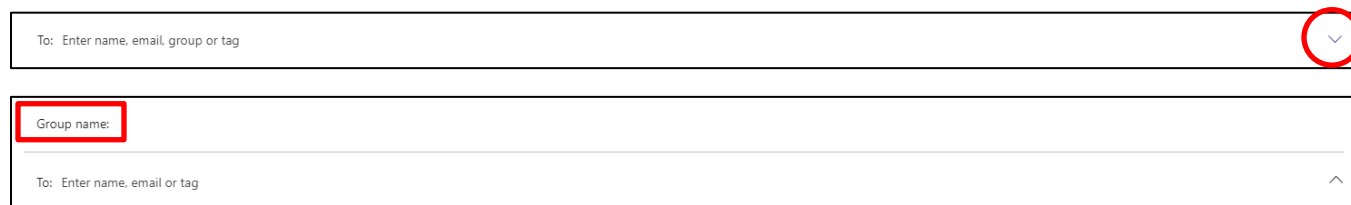
Both one-on-one and group chats can be started in the same way. Click on the **New Chat** symbol at the top of your screen.



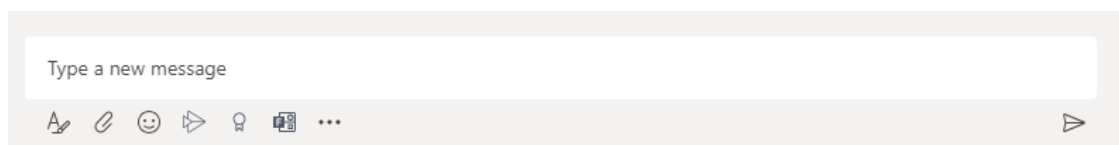
Once you have selected **New Chat**, enter the name(s) of the recipient(s).



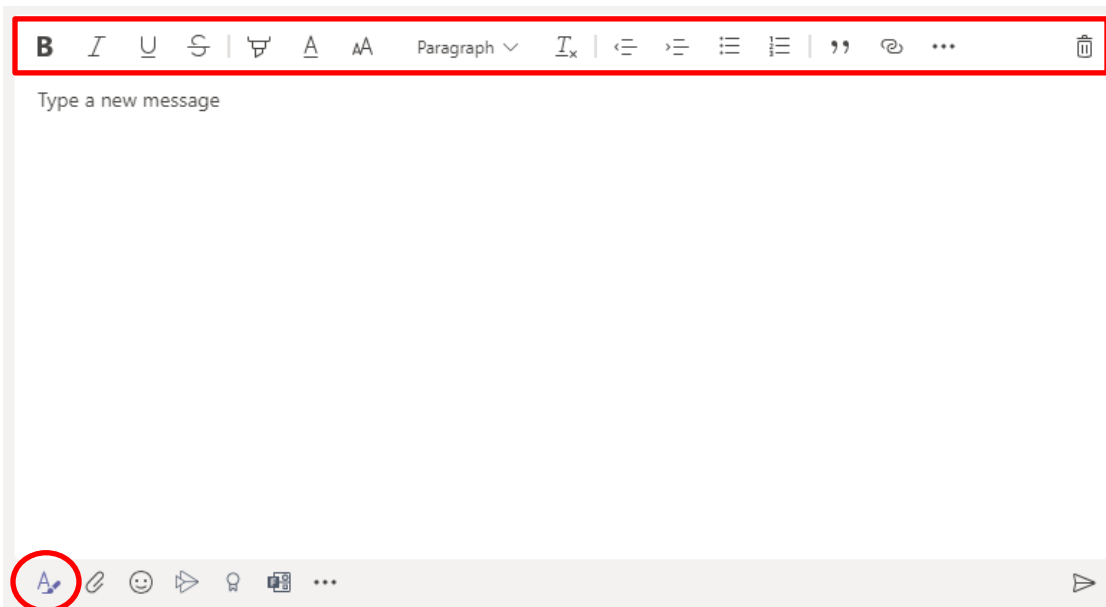
To name a group chat, click on the drop down arrow to the far right of the **To** field. Then, type a name for the chat in the **Group name** field.



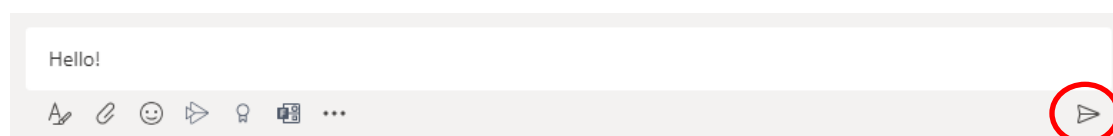
Next, compose your message in the box at the bottom of the chat. To open your formatting options, select **Format** beneath the box where you type your message.



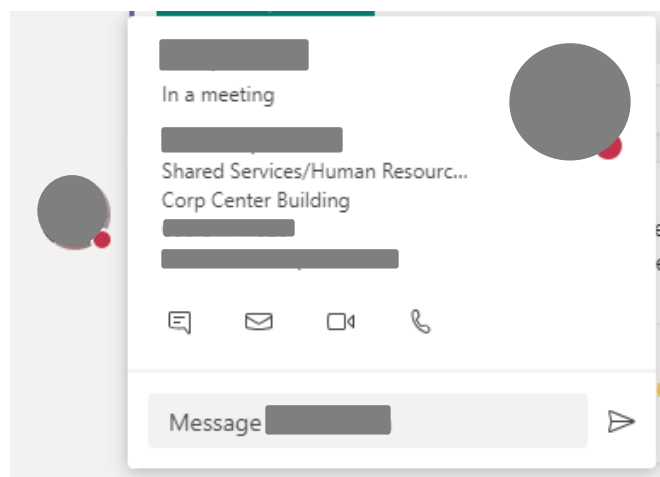




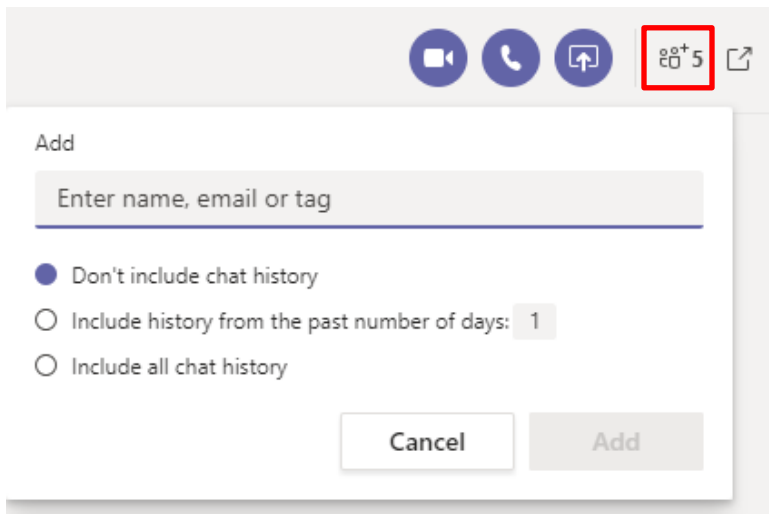
When you have finished typing your message, hit the **Enter** key or click on the **Send** icon. This starts the chat.



You can also start a one-on-one chat from someone's profile card. Begin the chat by clicking their picture in a channel or from a search and typing in the message box.



To add people to a conversation, click on **Add people** in the top right corner of Teams. In a group chat, you will have to click on **View and add participants** first and then drop down to **Add people**. Type the names of the people you would like to include in the conversation and select how much of the chat history to include. Then, click **Add**.

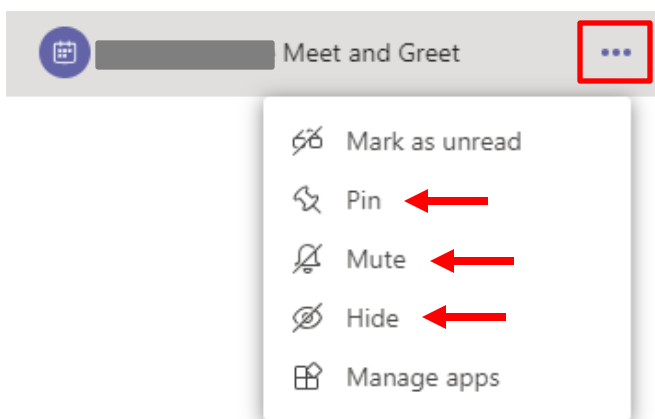


**View and add participants** also allows you to see everyone included in a group conversation.

## Pin, Hide, or Mute a Chat

When in **Chat**, you will see a list of your most recent conversations on the left-hand side of Teams. If you want quick access to a chat, you can pin it. This will keep the conversation at or near the top of your list.

To pin a conversation, hover over the chat with your mouse. The chat will become highlighted and three dots should appear on the right. Click on the **More options** icon, then select **pin**.



If you no longer want a conversation to appear in the **Pinned** list, repeat the above steps selecting **unpin**.

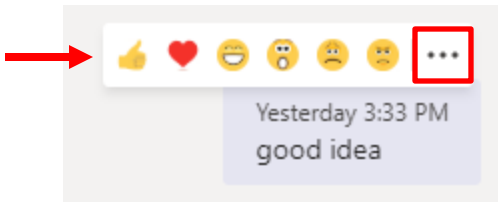
If you no longer want a chat to appear in your **Recent** conversations list, you can hide it. To hide a chat, select **Hide** under **More options**. The chat will reappear in your list the next time someone sends a message in the group.

If you no longer want to receive notifications for a group, you can mute a conversation. Select **Mute** under **More options**.

## Delete Messages

To delete a sent message, hover over the message within the chat. Click on **More options**, then select **Delete**. You will see that the message has been deleted, and others in the chat will no longer be able to view it.

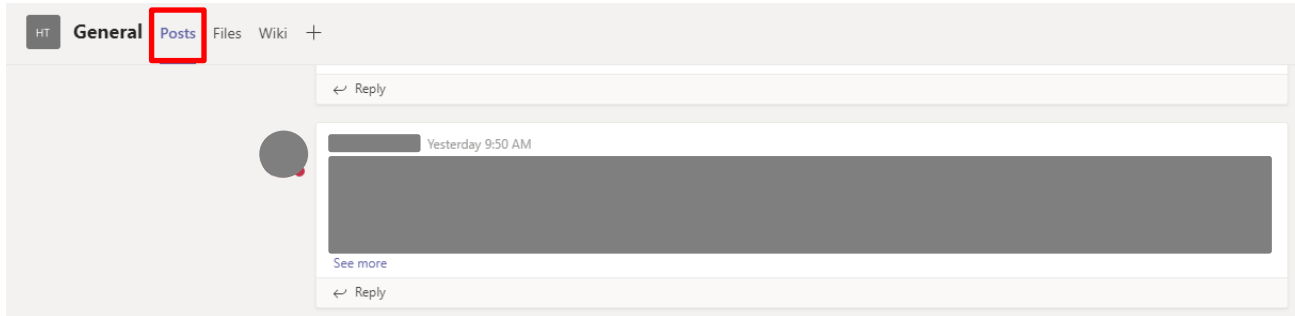
From **More options**, you can **Edit** a sent message as well.



Also, you can react to a message by hovering over it and selecting one of the **React** emojis.

## Send a Message to a Channel

When you open any channel in Teams, the very first tab is **Posts**. Think of this as one big group chat. Everyone who has access to the channel can see the messages on the **Posts** tab.

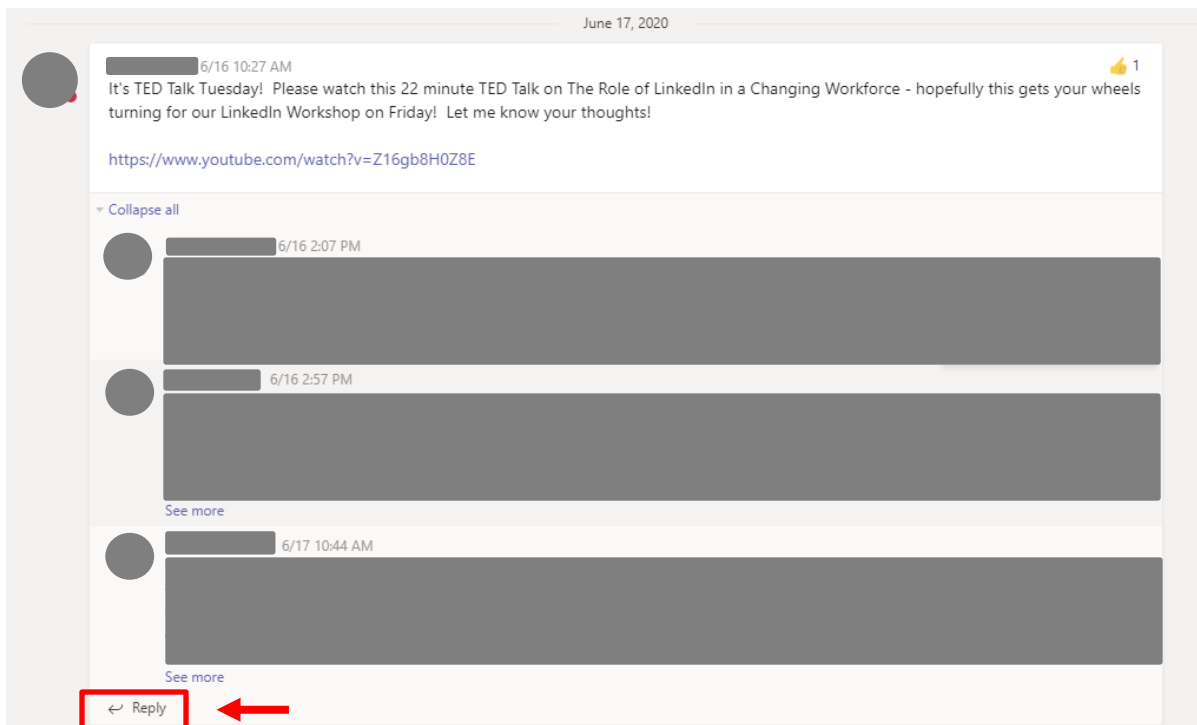


To send a message to everyone in a particular channel (the whole team), type in the field titled **Start a new conversation**. When you have finished typing your message, hit **Enter** or click the **Send** icon.



You can **tag** individuals and teams in your message by typing the **@** symbol before typing their name(s).

To reply to a channel message, select **Reply** underneath the message.



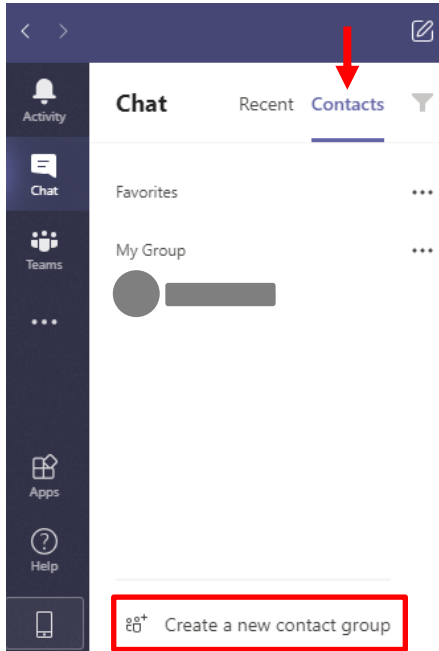
Note that replies to a channel message stay attached to the original message. This way, the whole thread of the conversation can be easily followed by anyone reading it.

## Create, Edit, or Delete a Contact Group

You can organize your contacts into groups to find them more easily.

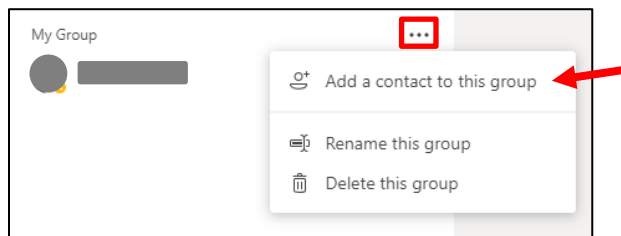
### Create a group

Click on **Chat**, then click on the **Contacts** tab. At the bottom of the tab, select **Create a new contact group**. Name your group and click **Create**. You can always rename or delete your group later.



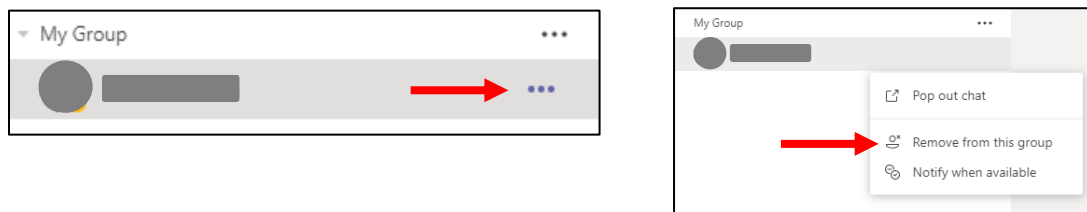
### Edit a contact group

To add people to a contact group, click on **More options** beside the group's name. Then, click **Add a contact to this group**. Type the name of the desired team member, and then click **Add**.



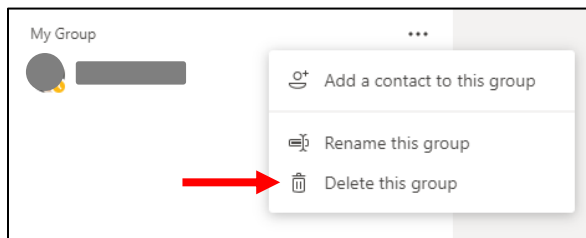
To rename a contact group, select **Rename this group**. Type a new name and click **Save**. (Note: You can't change the name of the **Favorites** group.)

To remove someone from a contact group, click on **More options** beside the person's name. Then, click **Remove from this group**.



## Delete a contact group

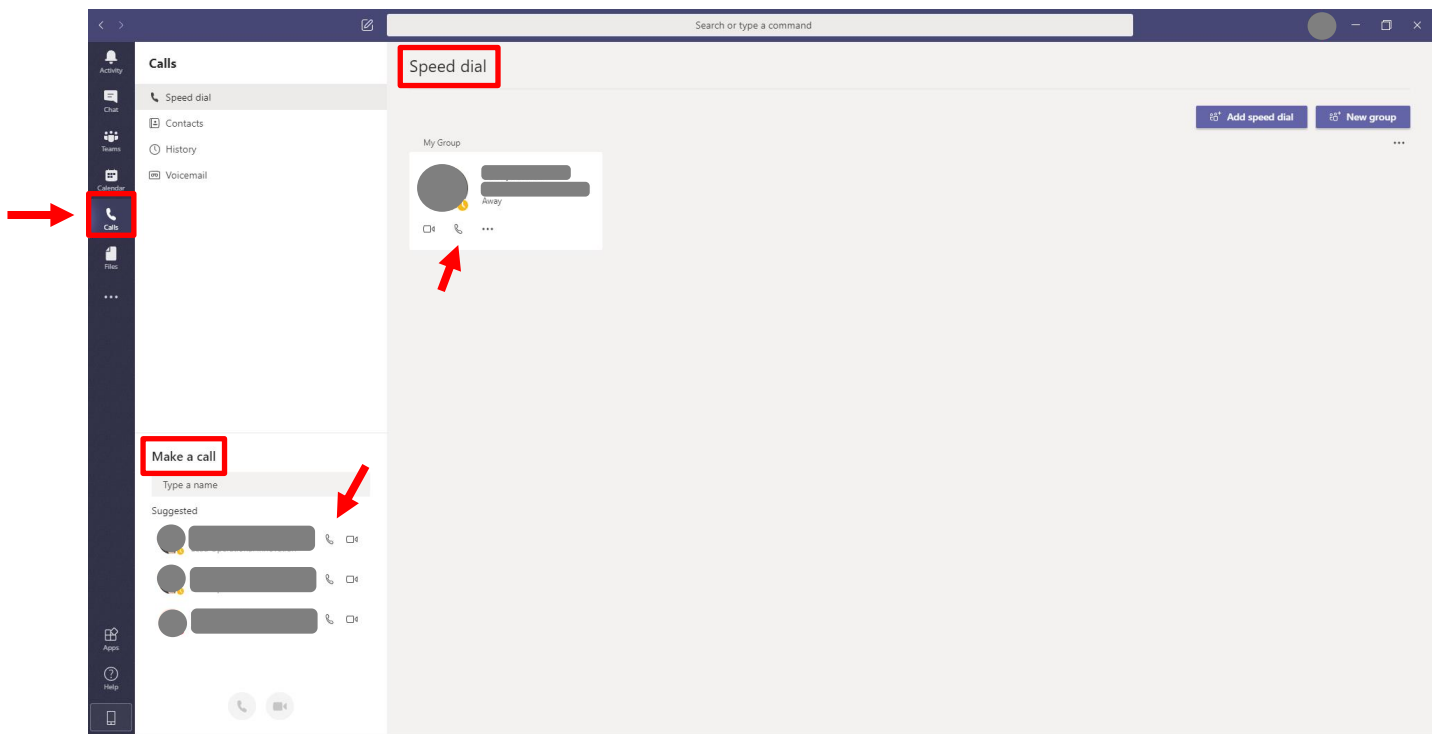
To delete a contact group, click on **More options** beside the group's name. Then, select **Delete this group**.



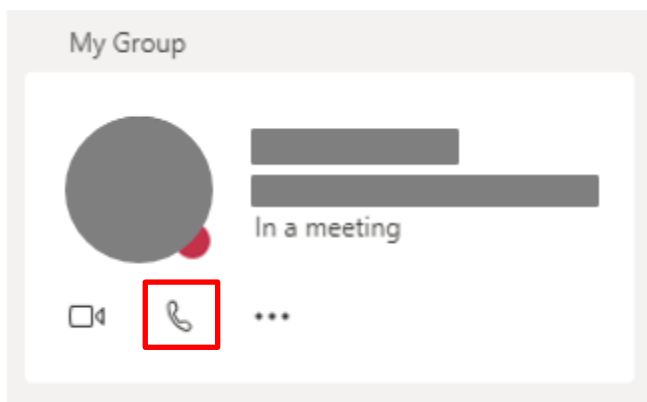
## Make Calls

Select **Calls** in the menu bar on the left-hand side of Teams.

Under **Make a call**, find the name of the individual or group you would like to call. Then, click on the **audio call** icon.

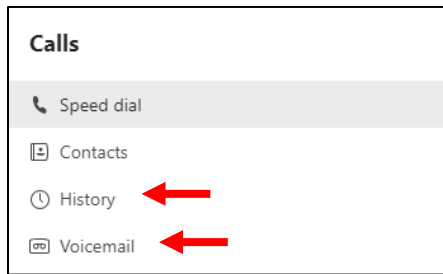


You can also make a call by finding the contact card of the individual you would like to call under **Speed dial**. Once again, click on the **audio call** icon to begin the call.



If the intended recipient does not answer your call, you can leave a voicemail.

If you miss a call, you can view missed calls under **History**. To listen to a voicemail, click on **Voicemail**.



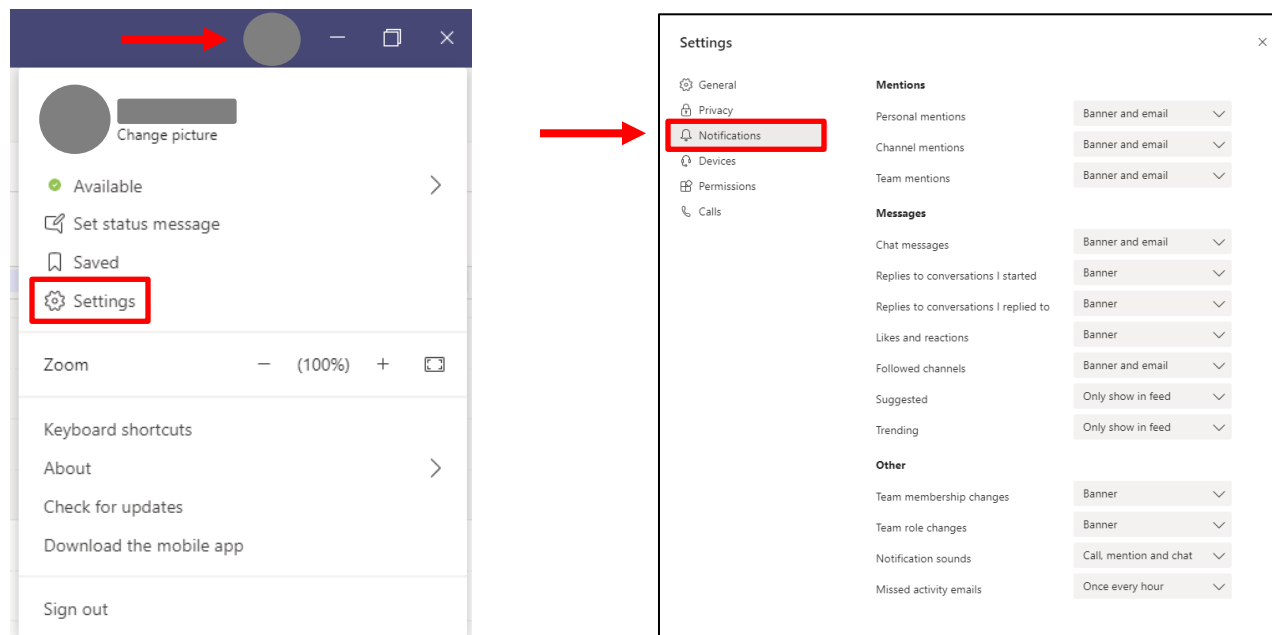
For other ways of starting a call, click on this [link](#).

## How do I control my notifications in Microsoft Teams?

### How do I know when someone sends me a message in Microsoft Teams?

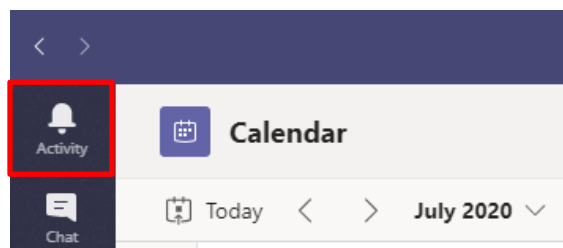
The default setting is for a user to receive emails or pop-up notifications. You can turn these settings on and off and make other adjustments within the Microsoft Teams application.

1. Select your initials or profile picture in the upper right-hand corner of the screen.
2. Select **Settings**, then click on **Notifications**.
3. Make your changes.



### What if I turn off notifications? How do I know when someone sends me a message in Teams?

No matter how you adjust your settings, your notifications will always appear in your taskbar within the Microsoft Teams app. Just click on the **Activity** icon to see @mentions and other activity.

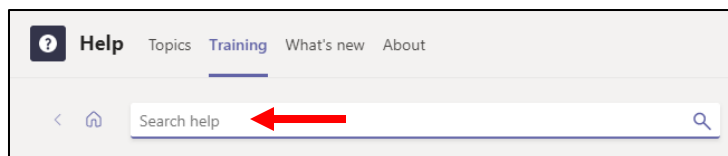
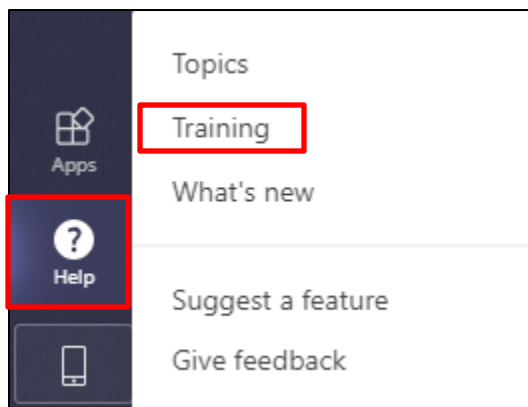


## Can Skype for Business and Microsoft Teams communicate with each other?

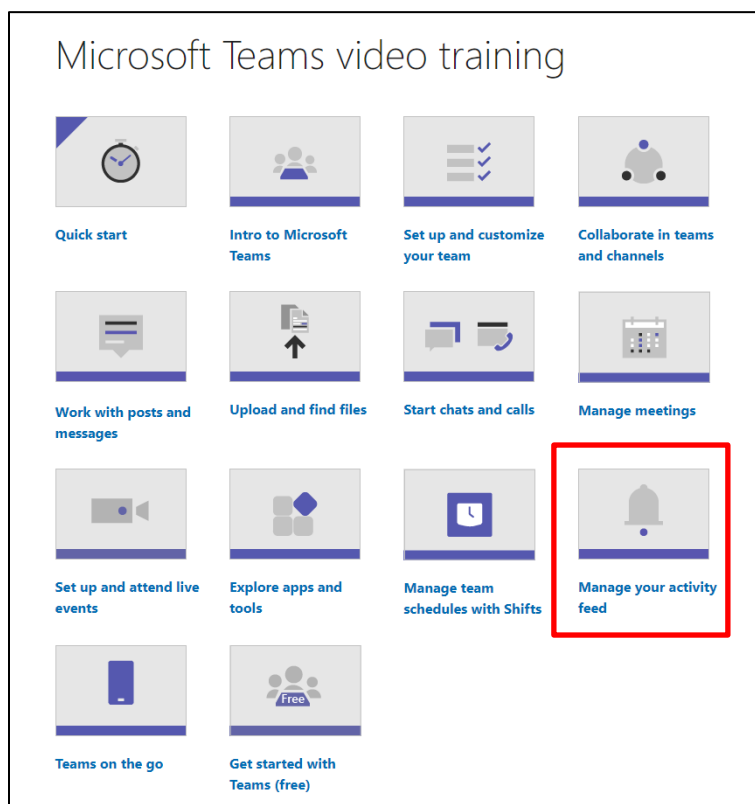
The short answer is **no**. If you are in Skype for Business and send an instant message or chat to another user, that message will appear *only* in the other user's Skype for Business. If you use Microsoft Teams to IM or chat, the message will appear *only* in the user's Microsoft Teams chat window.

## Find out more about notifications

If you'd like to know more about tailoring notifications to suit your needs, click on the **Help** icon in the bottom left-hand corner of the Microsoft Teams taskbar. Click on **Training** and search for **Manage Notification Settings**.



You can also visit [this site](#) and click on **Manage your activity feed**.



## Audio Troubleshooting with Microsoft Teams

If you're having trouble with audio in Teams, here are some steps you can take before reaching out for support:

1. Verify the audio is working on your device settings
2. Perform a test call in Teams
3. Create a test meeting with one of your co-workers

If you are still having issues, use this [Audio Self-Help Guide](#) to learn how to adjust your sound settings for the best audio experience.

If you have further questions about audio on your device, please contact the Help Desk.

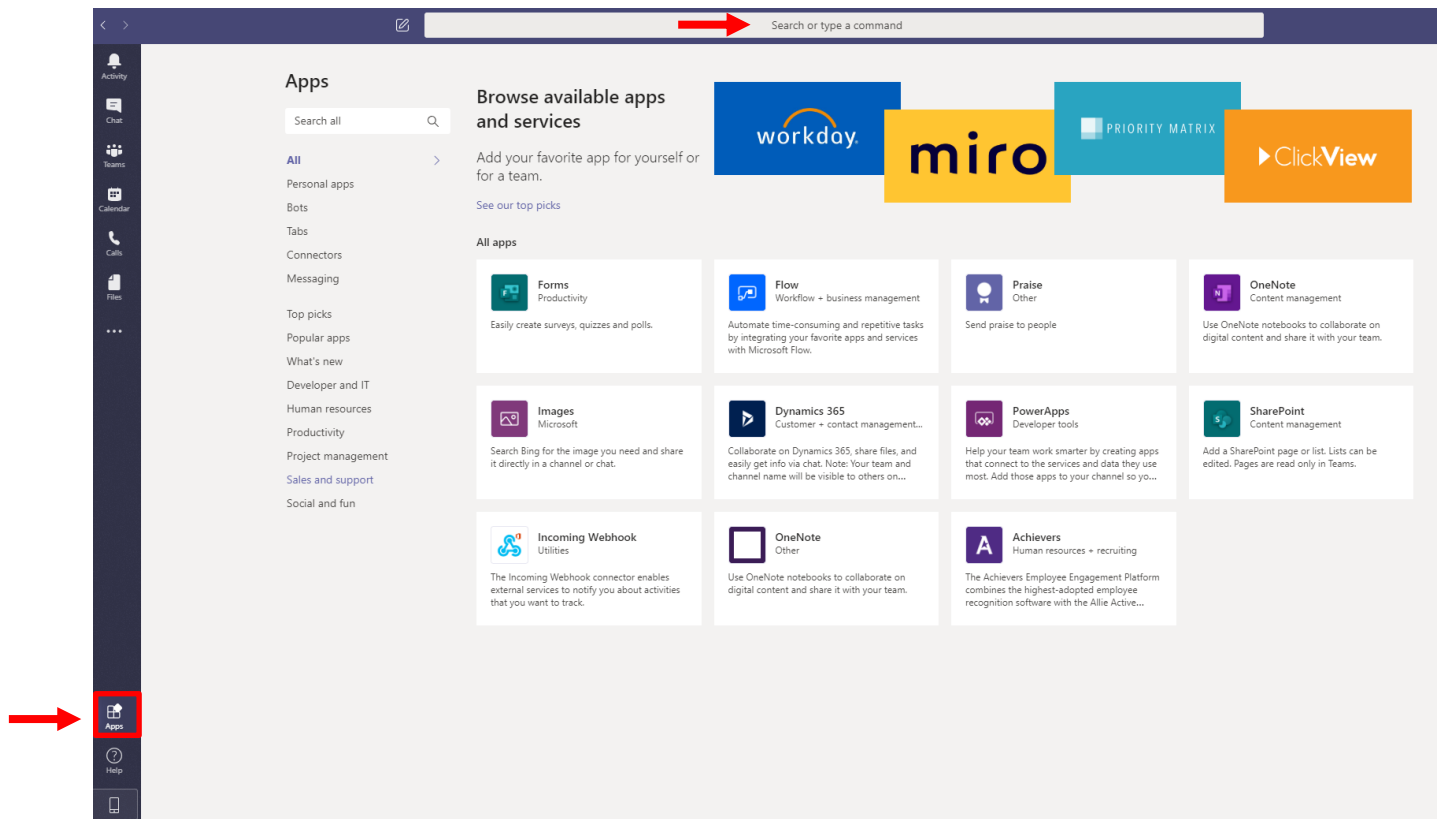
## Tips

If you are experiencing feedback during a meeting, **turn your speaker volume down**.

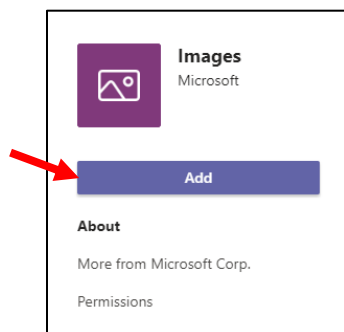
**Muting yourself** while someone else is talking also works to eliminate feedback.

## Adding Apps to Microsoft Teams

To add an app to Microsoft Teams, select **Apps** near the bottom of the toolbar on the left-hand side of Teams. Then, search for the app you wish to add if it does not already appear on the screen.



Click on the app to open, then select **Add**.



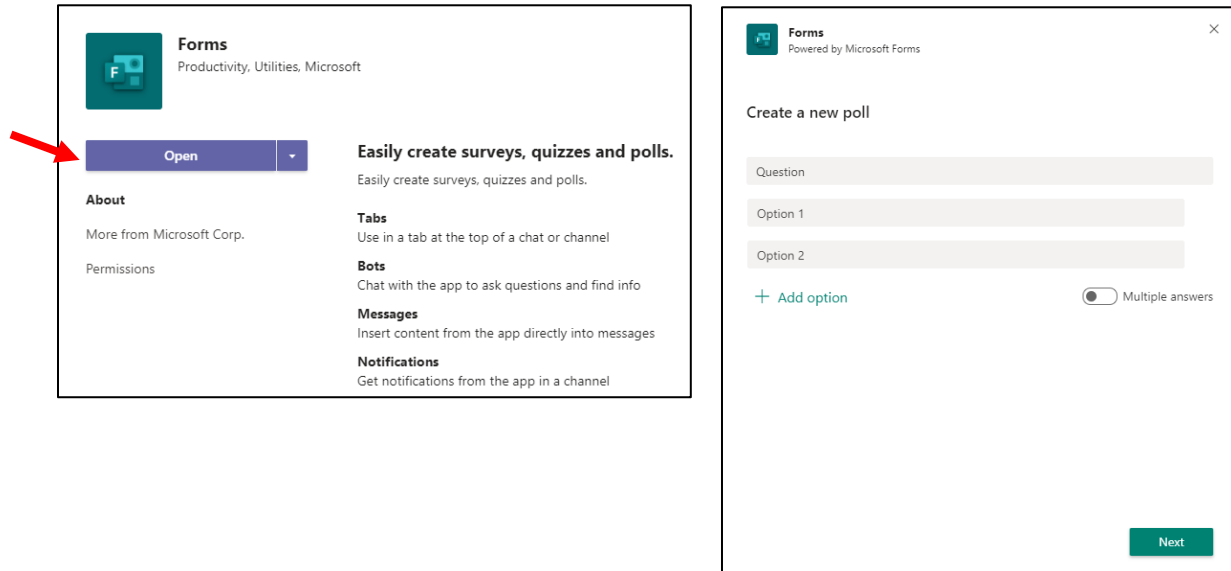
## Using Microsoft Forms within Teams

Follow the steps above to add the **Microsoft Forms** app to Teams.

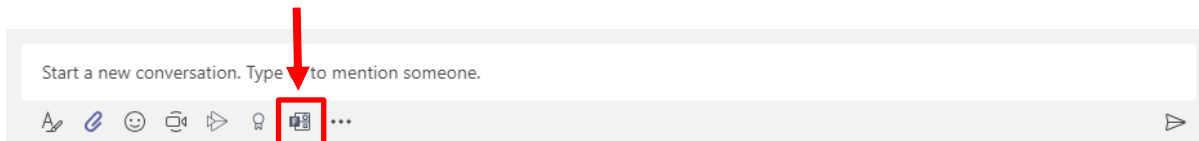
Once you have added the Forms app to Teams, you have two options for creating a poll:



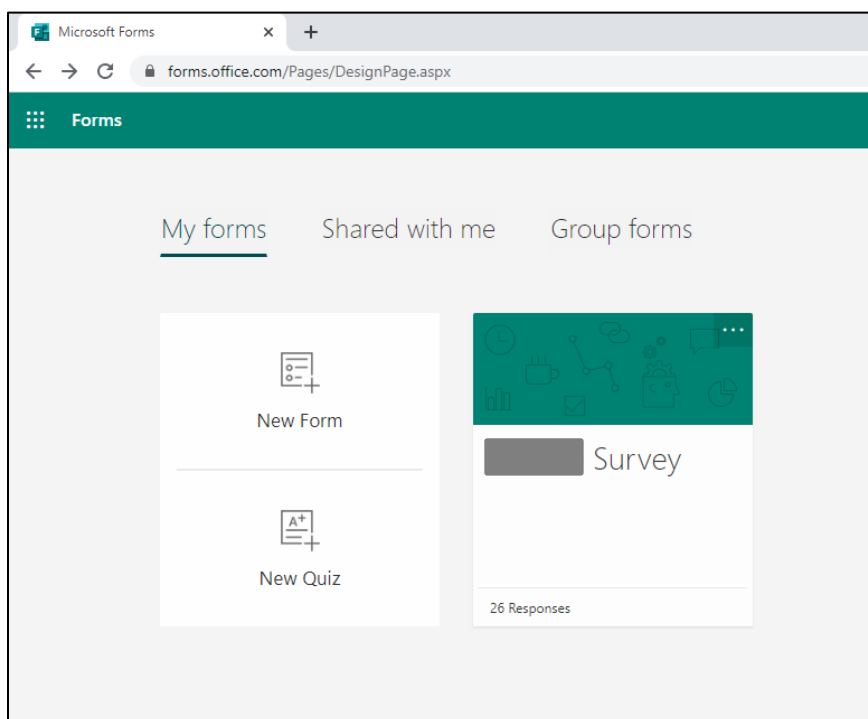
1. Within the **Apps** tab, click on **Forms** and select **Open**. Then, follow the prompts on the screen to **create a new poll**.



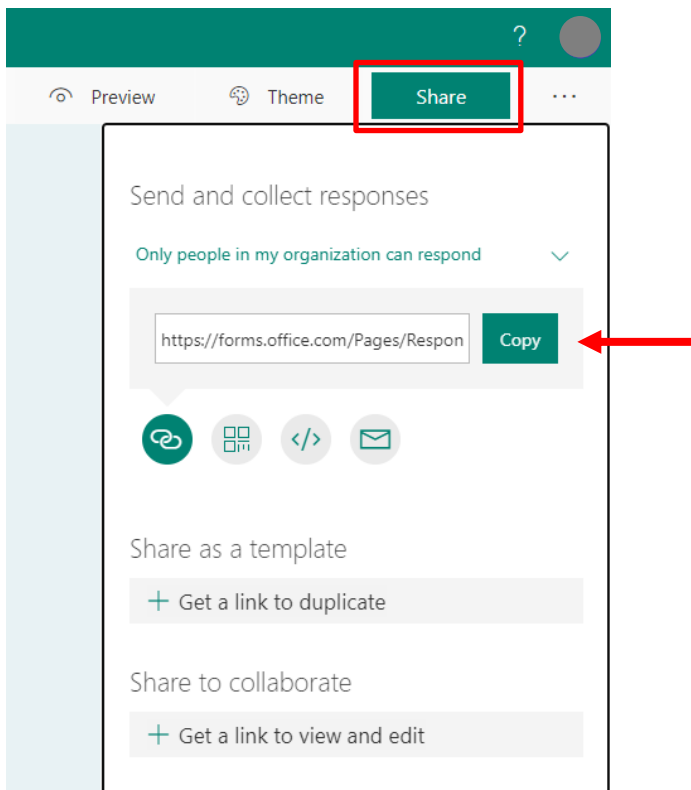
2. Within the Team/channel you wish to poll, click on the **Forms** icon underneath the **Start a new conversation** field. The **Create a new poll** window should pop up. Follow the prompts on the screen to create your poll.



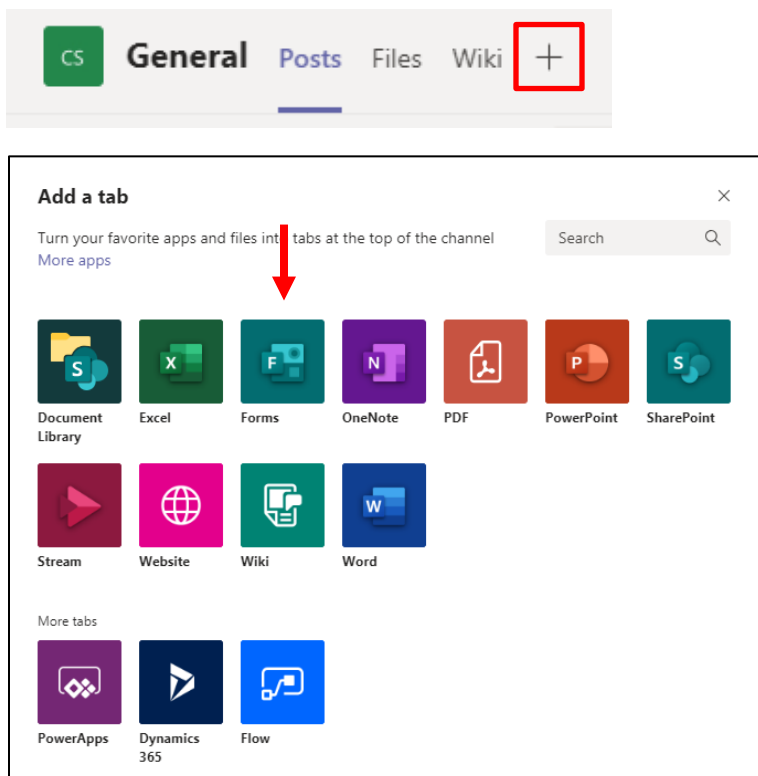
If you want to post a more involved poll, such as a quiz or survey with fill in the blank responses, go to the Microsoft Forms [website](https://forms.office.com) and create your poll from there. You will need to log in using your userID#@wpsic.com email address, LAN password, and RSA Token code. Once logged in, select **New Form** or **New Quiz** and follow the prompts on the screen to create your poll.



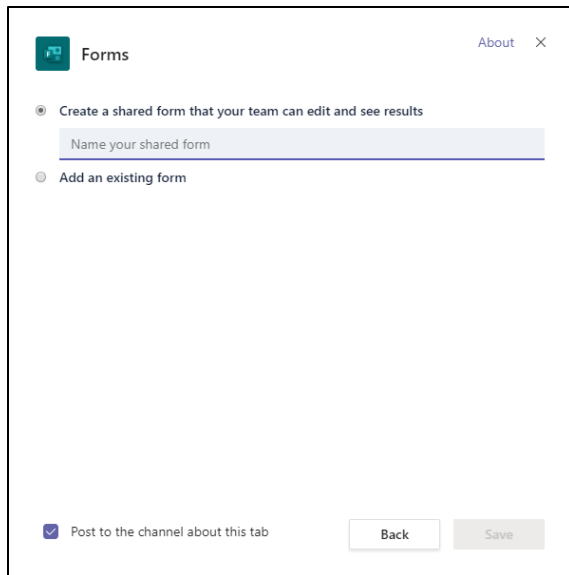
Once you have created your poll, click on **Share** in the top right-hand corner of the screen. Then, **Copy** the link below. In the channel in which you wish to post the poll, **Paste** the link in the **Start a new conversation** field. In the same field, you can add a message to be sent with the link. Finally, hit **Enter** or click **Send** to post the poll. Members of the channel will be able to click on the link to take the poll, which will open through a browser. You can view responses on the Microsoft Forms website.



A form can also be added as a **tab** within a channel on Teams. Click the **Add** icon on the toolbar at the top of the channel. Then, select **Forms** in the pop-up window.



A new window will pop up from which you can **Create a shared form** or **Add an existing form**.



The screenshot shows a 'Forms' dialog box with a teal header bar containing the Forms icon, the word 'Forms', and links for 'About' and a close 'X' button. The main content area has two radio button options: 'Create a shared form that your team can edit and see results' (which is selected) and 'Add an existing form'. Below the first option is a text input field with the placeholder text 'Name your shared form'. At the bottom left, there is a checked checkbox labeled 'Post to the channel about this tab'. At the bottom right, there are two buttons: 'Back' and 'Save'.

To create a new shared form, select **Create a shared form** and follow the prompts on the screen.

To add an existing form, the form must already have been created through the Microsoft Forms website. If you select **Add an existing form**, a list of existing forms connected to your account will appear. Select the form you wish to post as a tab to a Teams channel and click **Save**.

\*\*If you have any remaining questions regarding Microsoft Teams, we have a group of Teams Champions who can help you. Ask your manager for more information or reach out to the project team using the MS Teams Feedback form found in the WPS Service Portal.\*\*