M365 Teams Overview

Accessing Teams

Microsoft Teams is a comprehensive collaboration platform that facilitates teamwork, communication, and project management. Team members can chat, hold virtual meetings, share files, and collaborate in real-time.

- Enables users to create channels for different projects and topics, schedule and join meetings, and collaborate on documents in real-time.
- Supports integration with numerous apps and services.

You can access **Teams** from your Desktop:

1. Type **Teams** in the **Search** field.
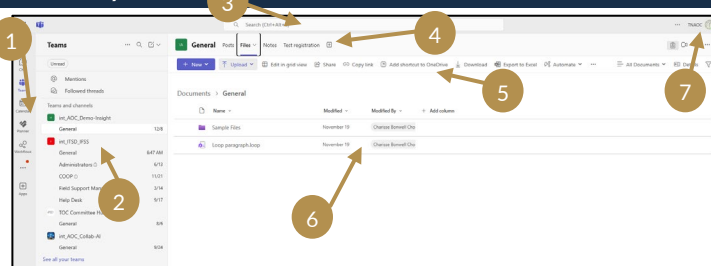2. To open Teams, click the Teams app.

OR

3. Right-click on the Teams app and select **Pin to start** and/or **Pin to taskbar.**
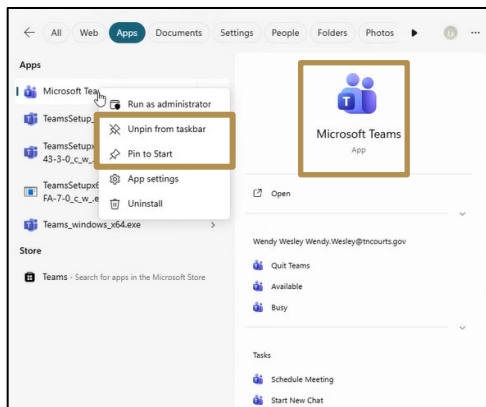
Pinning apps to the taskbar or start menu speeds up access to important tools.
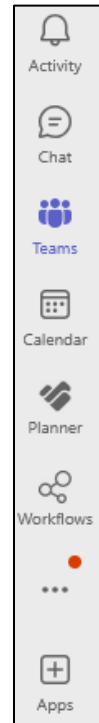
Teams Layout

1. Vertical Toolbar
2. Teams and Channels
3. Search Bar
4. Channel Tabs
5. Tab Menu Bar
6. Content Area
7. Status Indicators/Settings

Teams Functionality

The **Navigation** panel on the left-hand side offers a variety of tools:

- **Activity**: displays chats and actions by any team members.
- **Chat**: allows you to text with other members of the team.
- **Calendar**: provides access to your Outlook calendar. You can use the calendar to schedule meetings, including conference calls.
- **Calls**: allows you to place calls to others in your organization.
- **Teams**: lists all of your teams. Select a team to access that team's chat, calendar, and files.
- **OneDrive**: used to view all your files that are used in Teams and OneDrive.
- **Ellipsis**: offers access to additional apps including Help, OneNote, the Planner, Stream (where you can watch recordings of past meetings), and Who (which lets you search for and read colleagues' profile information).
- **Apps**: provides access to a larger array of apps available to be installed.

Use the **Search** field at the top of the screen to locate:

- Messages
- Files
- People
- Meetings and more....

Status Indicators help users understand the availability and activity status of their contacts.
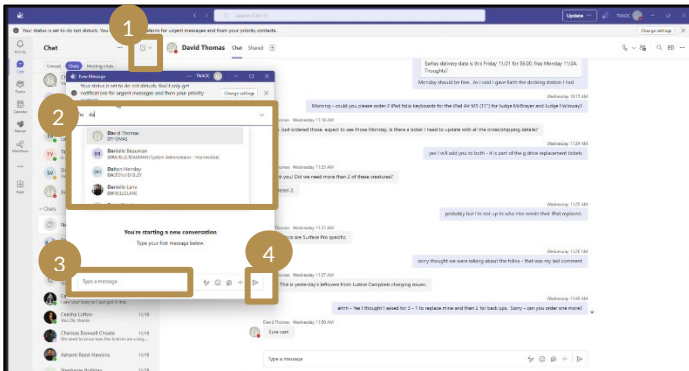
- Click on your profile picture located at the top right corner of the Teams window.
- Status options display.
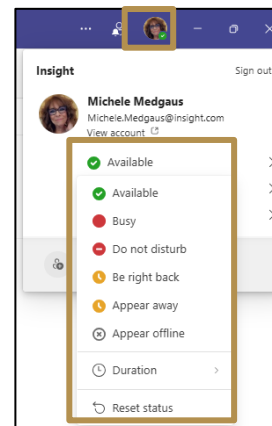
Participating in a Chat

Teams chat allows users to send and receive instant messages, facilitating quick exchanges and immediate responses.

1. Click **New chat** icon at the top of the screen or click **New chat** in the Recent list.


2. Type the name of the recipient or select from the recent list.
3. Enter the message in the **Type a message** field.
4. Click **Send**.

Note:
- Chat messages from the other people display in the chat window.
- If you already have a chat going with someone, you can begin typing in the Type a message box at the bottom of the window.

Live Chat Actions

- **Suggested Responses**: – Select one of the suggested responses for a quick reply.
- **Rich Text Formatting**: Users can enhance their messages with rich text formatting, including bold, italics, bullet points, and hyperlinks.
- **Emojis and GIFs**: To add a personal touch and express emotions, users can incorporate emojis and GIFs into their conversations.
- **File Sharing**: Seamlessly share files and documents within the chat, making it easier to collaborate on projects and access important information.
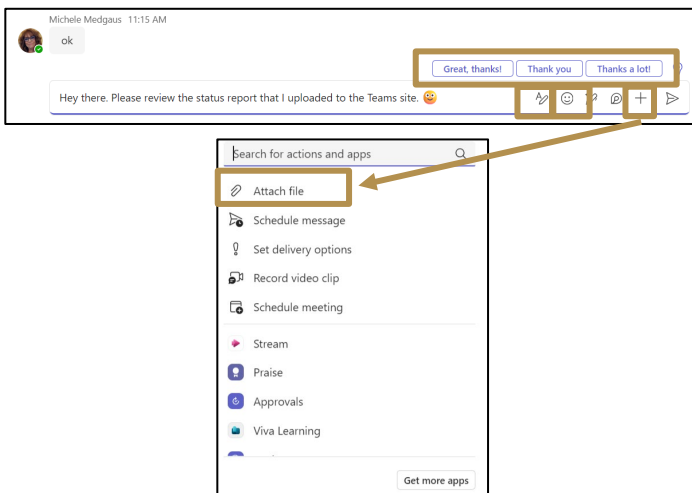
Shared Tab in Teams Chats

The **Shared** tab in a Teams chat is a dedicated section that displays all content exchanged within a conversation, including files, links, and media.

- View of everything that has been shared, including the **Date shared** and who it was **Shared by** making it easier to find not only documents but also links and other resources posted during the chat.

Meeting Chats

**Meeting Chats** are dedicated conversation threads automatically created for scheduled meetings.

- These chats enable participants to communicate before, during, and after the meeting, sharing messages, files, and links relevant to the discussion.
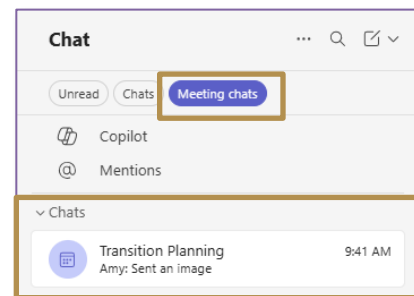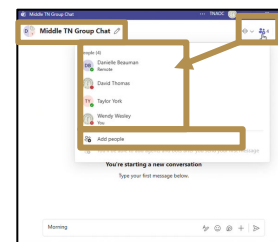

Group Chats

Group chats are a powerful tool for enhancing communication, collaboration, and team building.

1. Click the **New Chat** button and add members to the group chat.
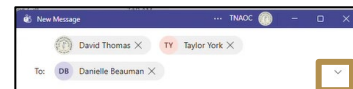
2. To name the group, click the drop-down arrow.
3. Once you click into the message box, the individual names are hidden, and the group name displays.

4. To see who is in the group or to add new people, click the **View** and **Add Participants** button.

The **@mention** allows you to quickly add a user or group to a work item or start a request discussion.

Teams Phone

Microsoft Teams makes it easy to connect with colleagues through audio or video calls directly from Chat.
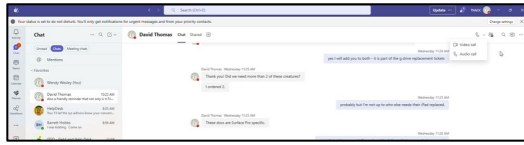
- At the top right corner of the chat window, click the phone icon.
- From the drop-down menu, select **Video** or **Audio** call.
- When someone calls you, a notification pops up on your computer.
- The notification provides buttons for you to answer or decline the call:
  - o Accept with video
 - o Accept with audio
  - o Decline call
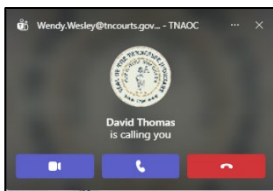
Working with the Teams Calendar

The calendar feature in Microsoft Teams directly integrates with Outlook, ensuring that any meetings or events scheduled in one application are automatically reflected in the other.

From the calendar, you can:
- View calendar entries.
- Use the **<** and **>** arrows to move forward and backward
- Change the display from Work week to Day or Week
- Create an online meeting
1. To create a meeting, open **Teams** and navigate to the **Calendar**.
2. Click on any event to view details, join the meeting directly, edit the appointment
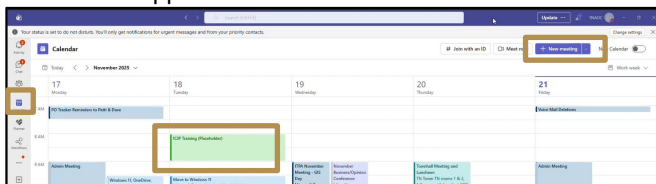
3. Click on **+ New Meeting** to open the meeting details form.
4. Enter the meeting title, date, time, and location and add participants.

Note:
- When the participants are added, the **Teams meeting** button automatically activates and a link is generated with audio call-in information.
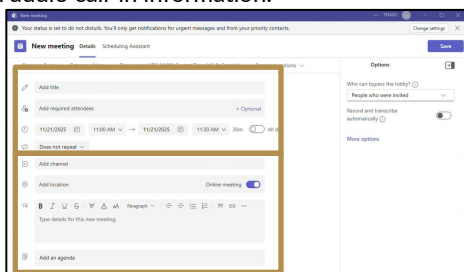
5. Attach any necessary files or documents.
6. To send the invitation to participants, click **Send**.

The Teams Section of a Teams Site

The **Teams** section of a Teams site serves as the central hub for group collaboration within Microsoft Teams.
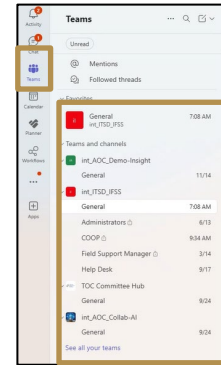
Teams Channels

Teams channels are sections within a team where specific topics, projects, or departments can have focused discussions. Teams can have multiple channels, each with a specific purpose.
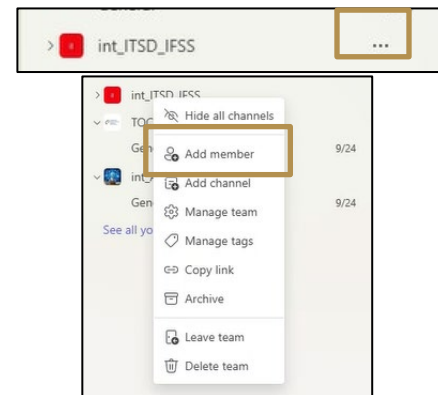
Channel Features:
- Standard and Private
- Conversation Threads
- File Sharing
- Meetings

Create a Teams Channel

Go to the team where you want to create a channel.

1. Right-click the Team name or click **More options (three dots)** to the right of the Team name.
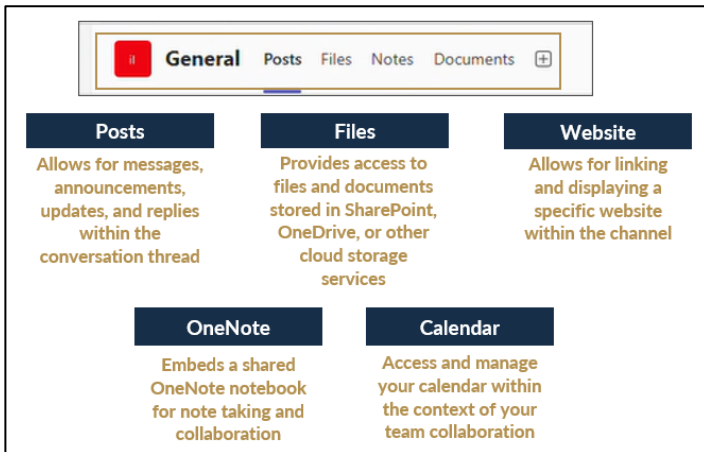

2. From the menu, select **Add channel** and enter the channel name and description.

3. Add the **Channel name** and description and choose the channel type (**Standard** or **Private**).
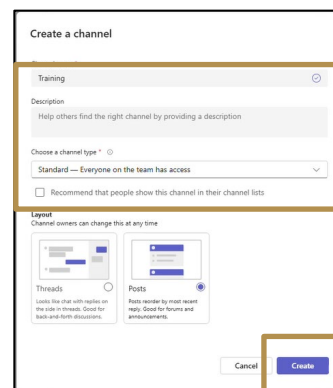
4. Click **Create** to add the channel.

Channel Tabs

Channel tabs serve as a way to bring external content and tools into the Teams environment

Posts	Files	Website
Allows for messages, announcements, updates, and replies within the conversation thread	Provides access to files and documents stored in SharePoint, OneDrive, or other cloud storage services	Allows for linking and displaying a specific website within the channel

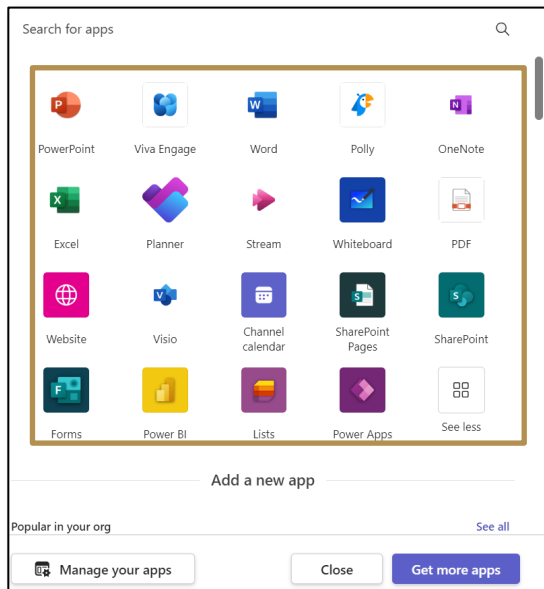| OneNote	Calendar
Embeds a shared OneNote notebook for note taking and collaboration	Access and manage your calendar within the context of your team collaboration

Add a Channel Tab

1. Navigate to the channel in Teams where you want to add the tab.
2. Click on the **Add a tab (+)** icon.
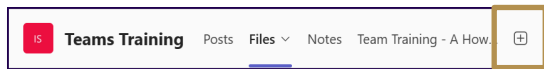
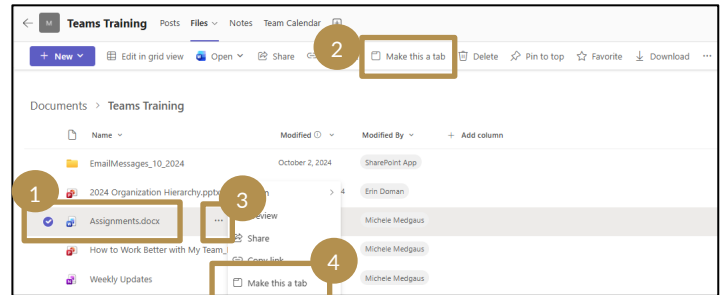3. From the list of available tab options, select the appropriate item.
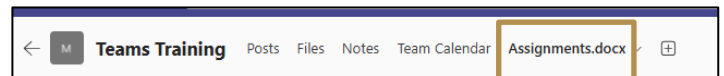

4. Follow the prompts for the selected tab.
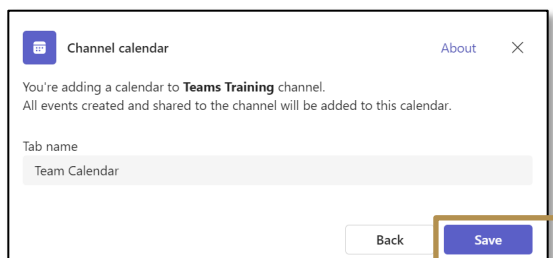
5. Click **Save**.

Tab Access to an Important Document

1. Navigate to the file in the channel.
2. From the ribbon, click **Make this a tab**.
   OR
3. Click the **Show more actions for this item** (...) icon.
4. From the menu, select **Make this a tab**.

5. Navigate to the file in the channel.

Teams Posts

Teams Posts serve as communications that can be distributed within a channel or chat, providing a centralized means of interaction among team members.

- Posts can include text, multimedia, files, links, and even integrations with other apps.
- They enable structured, searchable team conversations.

At the top of the screen, select **Posts**.
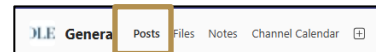

Read any messages in the feed.

Create Posts

The channel Posts tab acts as a central hub where team members can share updates, discuss ideas, and post important information in an organized and accessible manner.

1. Select the channel and then select the **Posts** tab to view the conversations.
2. From the **Posts** tab, click the **Post in channel** button.

3. Add a subject and compose your message.
4. Use formatting options or add Emojis, Gifs or stickers or click the **+** to attach files to the post.
5. Once you are satisfied with your message, click **Post** to publish your post in the channel. Your team members will be notified and can start interacting with your post.
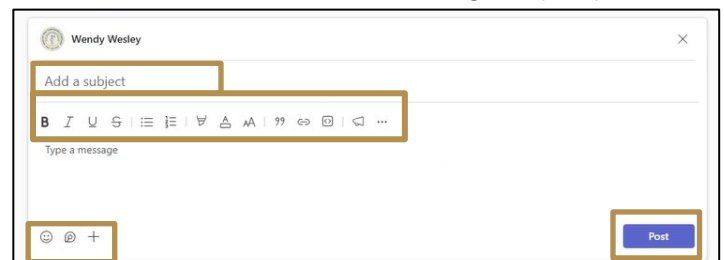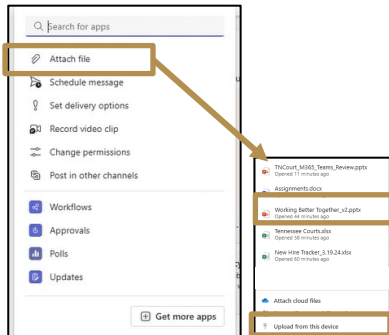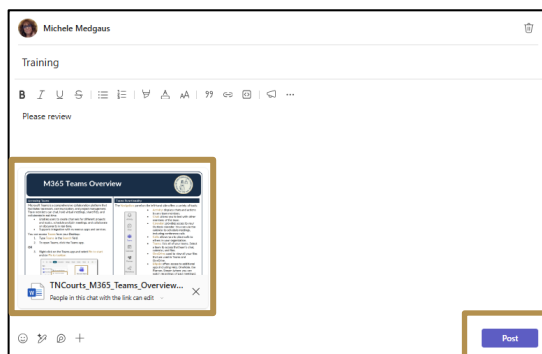
Attach Files to Posts

1. To attach a file to the post, click the **Actions and apps** icon (**+ sign**).
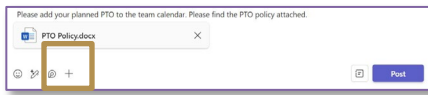
2. Select **Attach file (paperclip).**
3. Select the file from the list of recent files or select **Upload from this device**.
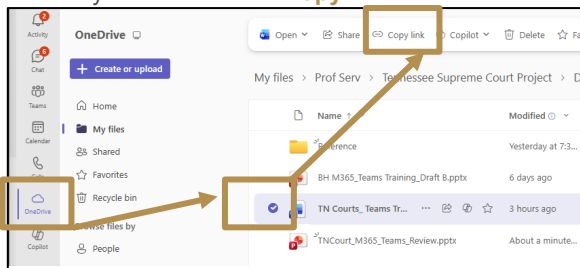

4. The selected file displays in the post and will be saved to the Files tab of the channel.
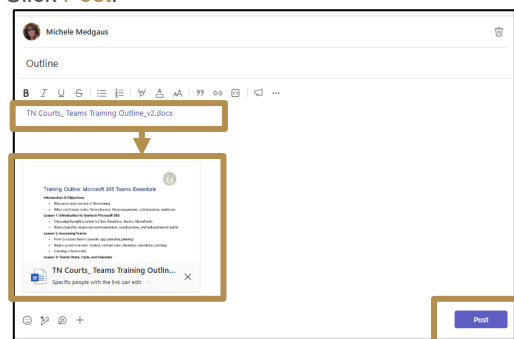

5. Click **Post**.

Link Files from OneDrive to a Post

1. Open **OneDrive**.
2. Select your file and click **Copy link** from the ribbon.

Return to your Team / Channel and create a **Post**.
3. Paste the link in the body of the post.
4. Click **Post**.


Tag People in a Post

Tagging people in posts ensures that the tagged individual receive notification, drawing their immediate attention to the post.

1. Start a new post.
2. In the message portion, type **@<name>**.
3. Select the name from the list.
4. Type the message.
5. Click **Post**.

Receive Notifications

To receive notification when someone is available:

1. Hover over the name of the recipient and click **More option** for the person.
2. Select **Notify when available**.
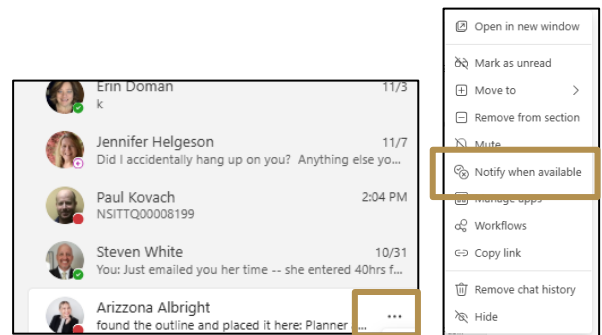
You will receive a confirmation:

The Files Tab in a Teams Channel

Microsoft Teams uses SharePoint to store and manage files. When a new Team is created, it automatically creates a corresponding SharePoint site, which is linked to the Team. Files can be shared with other members of the team.

- Each Team has its own set of channels, files, and other resources.
- Channels are sub-sections within a Team helping to organize conversations and content by specific topics, projects, or departments.

1. Select **Teams** in the left-hand panel.
2. Choose the team whose files you want to view.
3. At the top of the screen, select **Files**.

A list of the files and folders stored on the team's site displays:

4. To open a file, double-click its name.
5. You can work with files in three ways:
   a. Hover your cursor over the file name, click the **Ellipsis** to the right of the file name, and select an option from the pop-up menu.
   b. **Right-click** the file name and select an option from the same pop-up menu displayed by the **Ellipsis**.
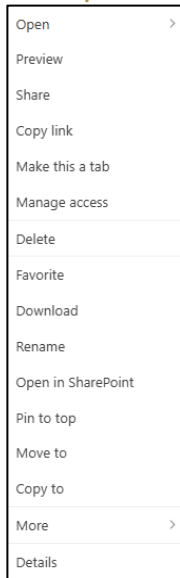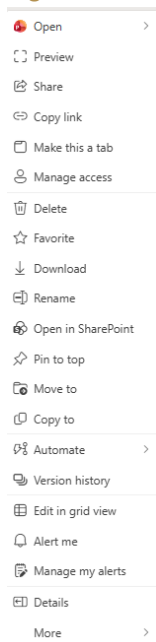

   c. Select the file and use the tools above the list of files.
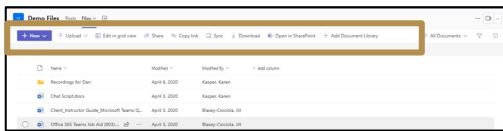
Right-Click / More Options Menus In Teams

By right-clicking on a file or selecting the **three dots (●●●)** next to a file name, a context menu displays, offering options such as "Open," "Edit," "Download," "Share," "Copy link," "Rename," "Delete," and "Open in SharePoint."

Right-click on File

Common Actions Available:

- **Share**: Share the selected file or folder with others, set permissions, or generate a sharing link.
- **Pin to Quick Access**: Pin frequently used files or folders for easy access.
- **Copy Link**: Generate a link to the file or folder for sharing via email, chat, or other platforms.
- **Move to / Copy to**: Move or copy the selected item to another location within OneDrive.
- **Delete**: Remove the file or folder (moves it to the Recycle Bin).
- **Rename**: Change the name of the file or folder.
- **Manage Access**: View and adjust who has access to the file or folder and change or revoke permissions.
- **Version History**: View and restore previous versions of the file.

Right-click on Folder
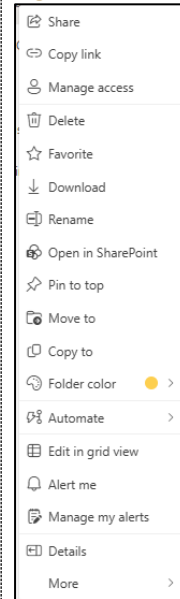
- **Folder Color**: (For folders) Assign a color to help organize and visually distinguish folders.
- **More Actions**: Access additional options, such as downloading, automating with Power Automate, or viewing details.

Create a New Folder

To create a new folder, select the **Team**, the **Channel,** and the **Files** tab.

1. Click the **New** button.
2. Select **Folder**.
3. Enter a filename.
4. Select a color for your folder.
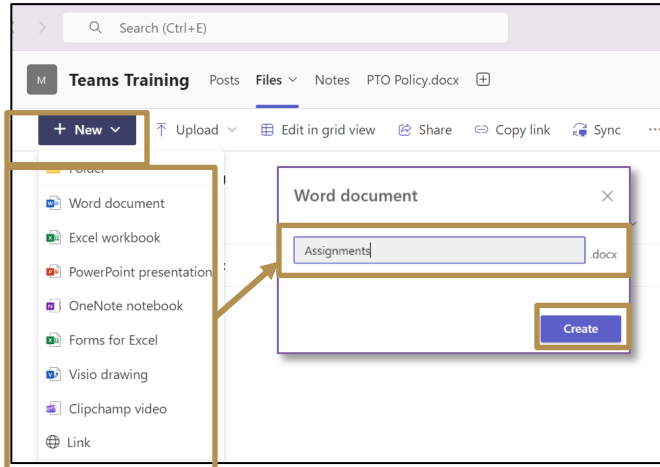5. Click **Create**.
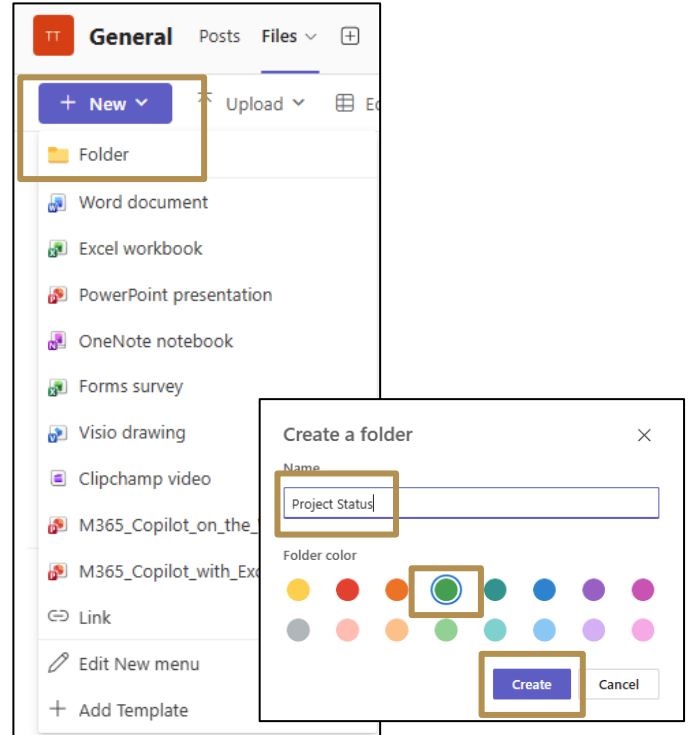
Create a New File

To create a new file, select the **Team**, the **Channel,** and the **Files** tab.

1. Click the **New** button.
2. Select the type of file to create.
3. Enter a filename.
4. Click **Create**.

The new file opens in Teams, is saved to the current folder, and is available for team members to edit as well.

Open a File in Desktop Version

The desktop version of applications often comes with more advanced editing tools and functionalities. This is useful for complex tasks that require detailed formatting, specific plugins, or extensive editing options.

1. Hover your cursor over the file name, click the **Ellipsis** or right-click the file name and select an option from the same pop-up menu.
2. From the menu options, hover over **Open** and select **Open in App** from the sub-menu.
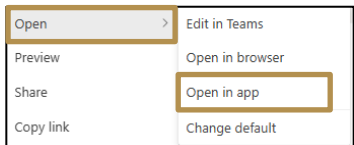

OR

If the file was opened in Teams, select **Editing** from the document Tool bar and choose **Open in Desktop**.
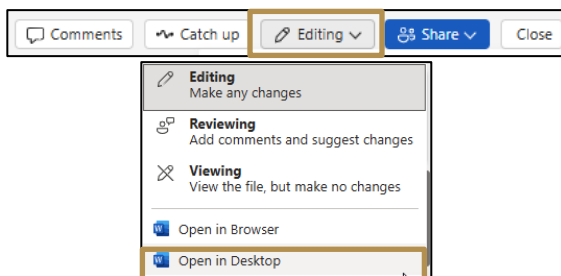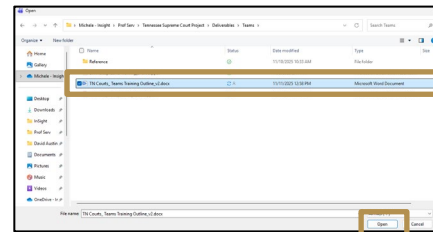

Upload a File to a Teams Channel

Files uploaded and shared to a channel are accessible to every member of the team. Files can be added to the General channel of a Teams site by attaching them via the Posts tab.
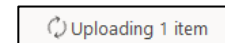
1. From the **Files** tab of the team where you wish to upload a file, click **Upload** and select **Files**.
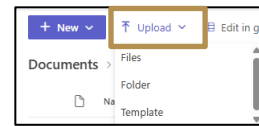
2. Locate and select the file you wish to upload, then click **Open**.

3. A message in the upper-right corner lets you know that the upload is in process.

When the upload is complete, a notification displays and the file is listed in the folder.

4. Alternatively, you can open a **File Explorer** window with the folder where the document is stored and then click and drag it into the Teams folder.
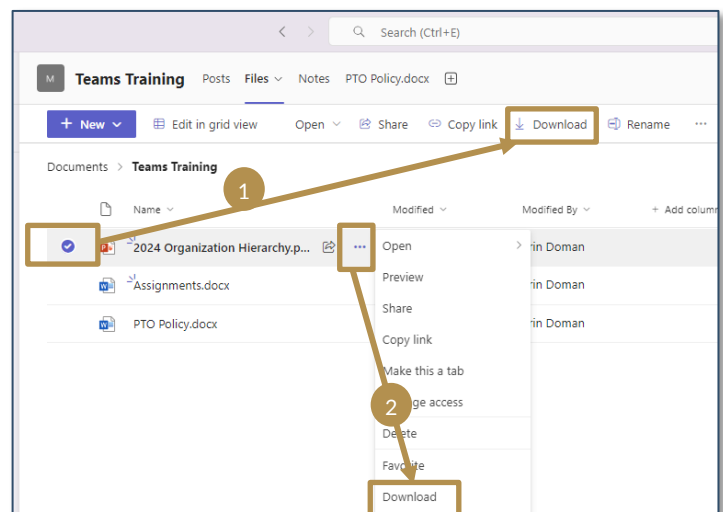
Download a File from Teams

Downloading a file from Teams allows you to work with it offline, share it outside of Teams, or make edits using your preferred applications.

1. Select the file and click the **Download** button.

OR

2. Click **Show more actions for this item (ellipsis)** next to the file and select **Download**.

Sharing Files on Teams

Sharing files from Teams is not only convenient but also enhances collaboration, increases productivity, and ensures the security of your data.

- Sharing a file involves granting specific permissions to other users to access and potentially modify the file.
- When you share a file, you can control who can view, edit, or comment on the document.

1. Select the file and click the **Share** icon on the ribbon.

OR

2. Click **More actions (three dots)** or right-click the file name and select **Share** on the menu.
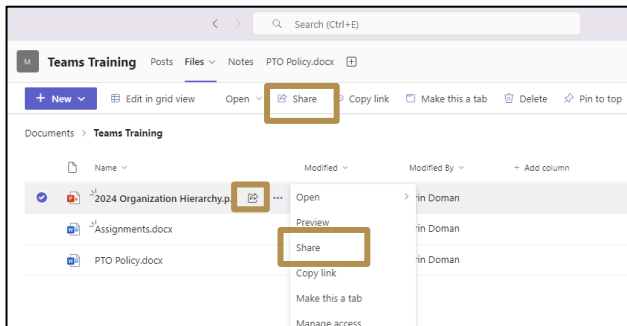
3. Choose the team or channel member to share the file with.
4. Enter a message, if necessary.
5. To change permissions, select the drop-down adjacent to the name. You can specify whether recipients can view, edit, or comment on the file.
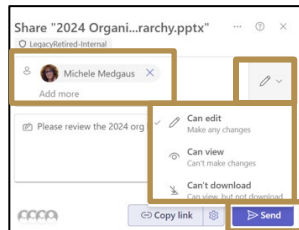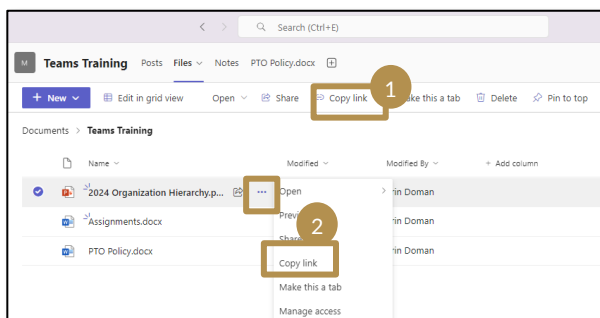

6. Click **Send**.

The recipient will receive an e-mail with a link to the document you shared.

Copy a Link to a File in Teams

Copying a link in Teams involves generating a link that can be shared via email, chat, or other communication methods.
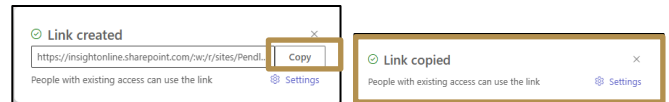
1. Select the file and click the **Copy link** icon on the ribbon.

OR

2. Click the **More actions (three dots)** or right-click the file name and select **Copy link** on the menu.

3. A message displays with the link. Click **Copy**.

4. Paste the link into an email, message, or any other platform to share it with others.

Copied links do not automatically notify users.

- Sending a link minimizes the size of sent emails and working on the file outside of Teams.
- When a file is shared in Chat the file is usually view-only and permissions need to be changed for collaboration.

Collaborate with Word, Excel, and PowerPoint

Sharing from within a document, spreadsheet or presentation ensures immediate collaboration or co-authoring.

1. Open the document, spreadsheet, or presentation you intend to share.
2. Click the **Share** button in the top-right corner of the interface.

Application	Symbol
Word	Share
Excel	Share
PowerPoint	Share
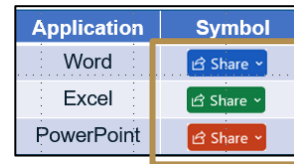
3. Select **Share** from the Menu.
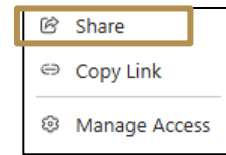
4. Enter the email addresses of the individuals you wish to share the document with or choose from your contacts.
5. Specify the permissions (e.g., can view or can edit).
6. Add a message to provide additional context, if desired.
7. Click **Send** to share the document.
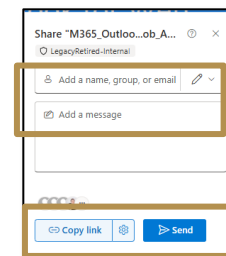
Click **Copy link** to send a more flexible method of sharing.

- This option generates a URL that can be distributed through various channels.
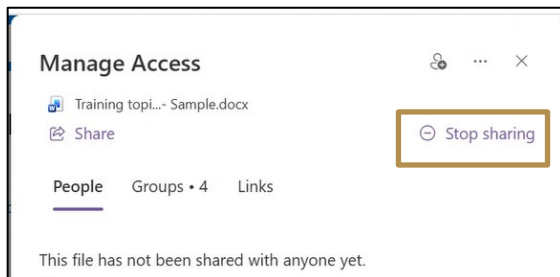
Stop Sharing with Manage Access

If you are the file owner, the **Manage Access** option allows users to view the list of people who have access to a shared document and to change permissions or revoke access at any time.
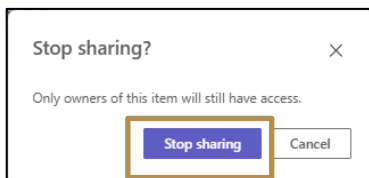
1. Navigate to the file or folder on **Teams**.

2. Click the **More actions (three dots)** or right-click the file name and select Manage access from the menu.
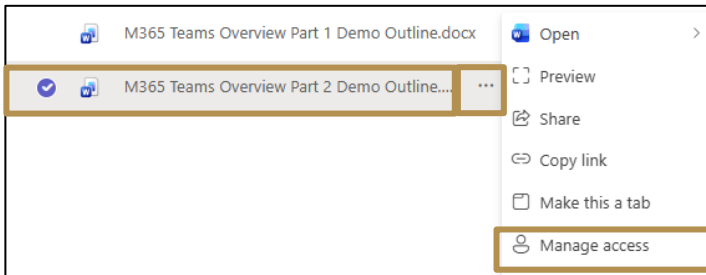
3. The **Manage Access** dialog box displays, click on **Stop sharing**.

4. A confirmation message displays, click on **Stop sharing**.


In Microsoft Teams, when you use the **Stop sharing** link in the **Manage Access** dialog box for a file, it removes any sharing links that were previously created for that file. This means that anyone who accessed the file via those links will no longer have access, effectively revoking external sharing permissions

Presence Indicators

When your files are stored on Teams, it is easier to collaborate in real-time with others because you and your teammates can be working in the same file at the same time, which is known as **co-authoring**.

- The **Presence indicators** show who has the file open and where in the file they are working.
- For co-authoring to work effectively, everyone working on the document must be working on the same uploaded file.
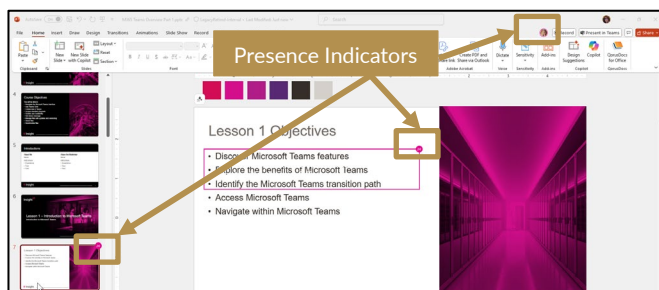
Version History from Teams

Version history allows users to track and manage changes made to their files over time. Users can view previous versions of a file, restore it to a particular version, and understand the evolution of their documents. Current file versions are accessed through Teams, but previous versions are accessed through version history.

1. Find the file you want to open in **Teams**.

2. Click the **Show more actions for this item (three dots)** icon next to the file name or right-click the file to open the file menu.

3. Select **Version History**.
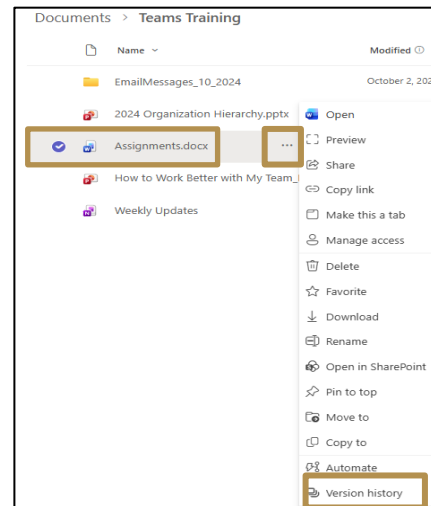
Viewing Version History

Version history in Teams allows users to view, restore, or even compare previous versions of a document that has been edited over time.

1. Most recent version displays at the top - click the column header to change the order.

2. Hover your mouse over the file version you wish to review.
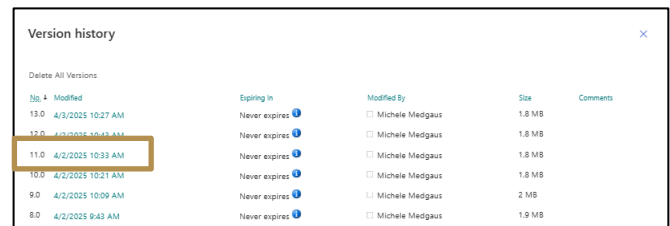
3. Click the dropdown arrow to show the available actions.
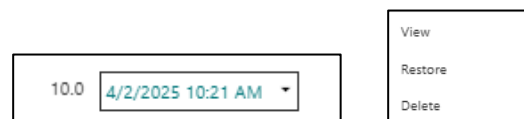
- **View** – Open the document
- **Restore** – Overwrite the current version with the selected version
- **Delete** – Remove the selected version

Note:

- You cannot delete the current version.
- If a previous version is deleted, it cannot be used as a restore point.

Version History from an Opened File

You can also access the history version directly from an opened file on Teams. This convenient feature allows users to review and restore previous versions without needing to close the document.

It is important to note that you can only access Version History from within the online version of the file.

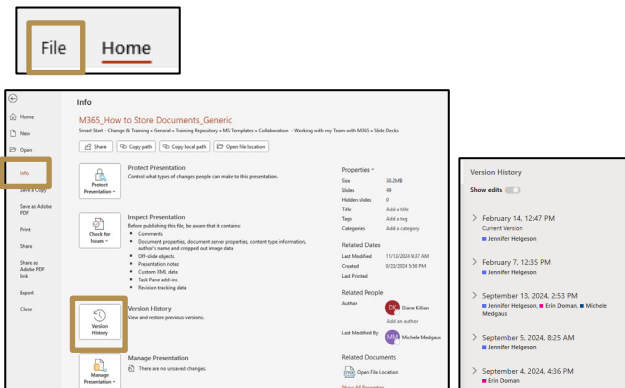Open the file in Word, Excel or PowerPoint online.

Option 1:

1. Click on the drop-down adjacent to the title.
2. Select **Version History** from the display.
3. The **Version History** panel displays on the right.
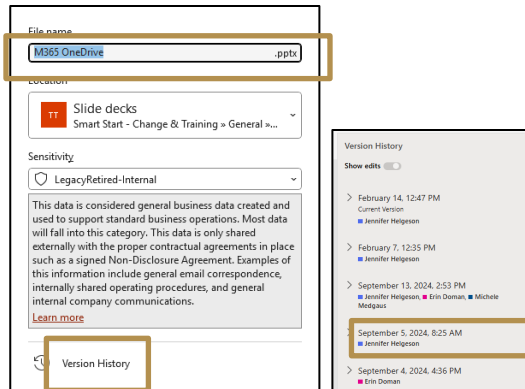
Option 2:

1. From the online version, go to **File** in the top menu.
2. From the menu click on **Version History**.
3. The version history panel displays on the right.

Accessing OneDrive from Teams

You can access **OneDrive** from Teams allowing you to open, share, and collaborate on documents without leaving Teams.

1. From the navigation toolbar click the **OneDrive** icon. OneDrive displays.

2. This integration streamlines your workflow, making it easy to collaborate on files, organize content, and maintain secure access to your cloud storage in one place.
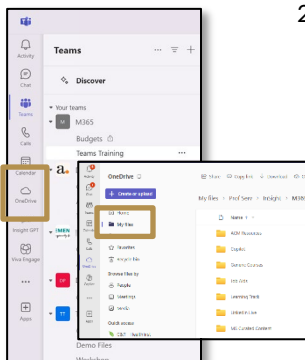
Syncing Files from Teams to OneDrive

The **Sync** icon on the Teams Files toolbar allows you to synchronize files and folders from a Teams channel to your OneDrive/File Explorer.

1. Navigate to the **Files** tab within your desired Teams channel.
2. Click **More commands (three dots)** on the toolbar and select **Sync** on the menu.
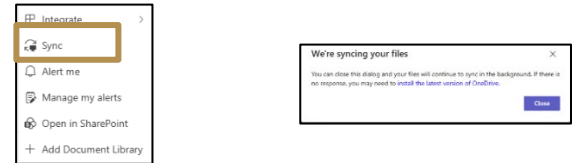
3. When you click the **Sync** option, it connects the channel to your OneDrive, so you can access, edit, and manage files directly from OneDrive/File Explorer even when you're offline.
4. Any changes made are automatically updated in Teams and SharePoint when you reconnect to the internet, ensuring your files stay consistent across all devices.

When you click the **Sync** option, it connects the channel to your **OneDrive**, so you can access, edit, and manage files directly from OneDrive/File Explorer even when you're offline.
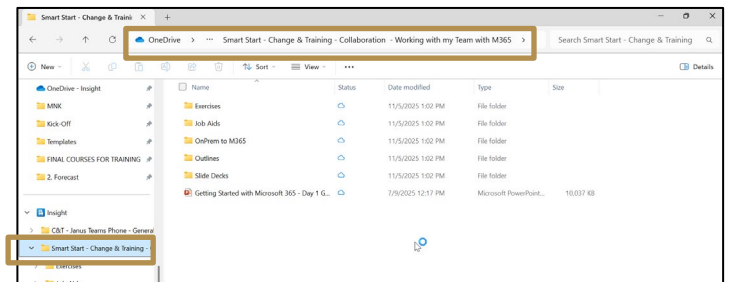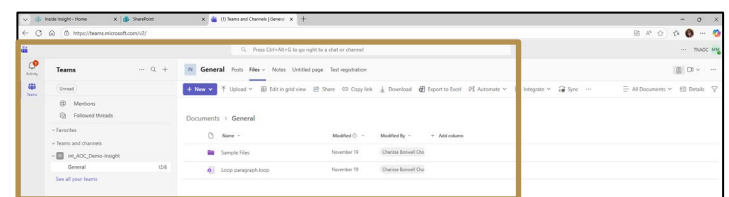
Teams - Web

The Teams web version and the Teams desktop version share most core functionality, including chatting, meetings, file sharing, and collaboration tools. **Microsoft 365 for the web** lets you view and edit documents stored in Teams directly from your web browser.

1. Type **myaccount.Microsoft.com** into your internet browser, **M365** opens..
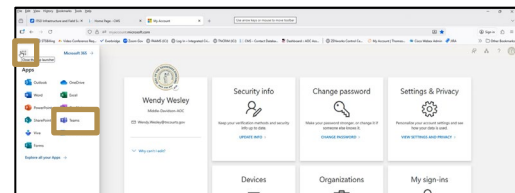
1. From the Navigation Pane select the **App Launcher (nine dots)** and then select **Teams**.

3. Your **Teams** displays.