

Microsoft Teams

Office 365 Training

Microsoft Teams

Microsoft Teams

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ABOUT THIS COURSE

COURSE PREREQUISITES

This manual assumes the user understands the basics of using a Windows-based computer. Students should be comfortable using the keyboard, mouse, start menu, and an internet browser.

COURSE OVERVIEW

Welcome to our Microsoft Teams courseware! This course is intended to help all users get started with Teams, use messages and channels, communicate in different ways, and customize Teams settings.

COURSE OBJECTIVES

By the end of this course, users should be comfortable using the Teams app in their day-to-day workflow.

HOW TO USE THIS GUIDE

This course is divided into five lessons. Each lesson focuses on several key topics, each of which are broken down into easy-to-follow concepts. At the end of each topic, you will be given an activity to complete. At the end of each lesson, we will summarize what has been covered and provide a few review questions for you to answer. Supplemental learning for selected topics is provided in the form of Lesson Labs at the end of this book.

Due to the nature of Microsoft Teams, limited exercise files are provided for this course. Therefore, it is recommended that students complete all lessons in order. Be sure that each student completes Activity 1-1 so they have access to a team where they are the owner. Students should also download the course's Exercise Files to a convenient location as they will be referenced throughout this course.

LESSON 1: GETTING STARTED

Lesson Objectives

In this lesson you will learn how to:

- Describe what Microsoft Teams is all about
- Use channels and post messages
- Get help in Teams

TOPIC A: Getting Started with Microsoft Teams

Welcome to Microsoft Teams! To begin this course, we will learn what Microsoft Teams is and how to get started.

Topic Objectives

In this section, you will learn:

- What Microsoft Teams is
- How to launch Teams
- About the Teams interface
- How to set up a new team, access different teams, and leave teams
- How to use the desktop and mobile apps for Teams

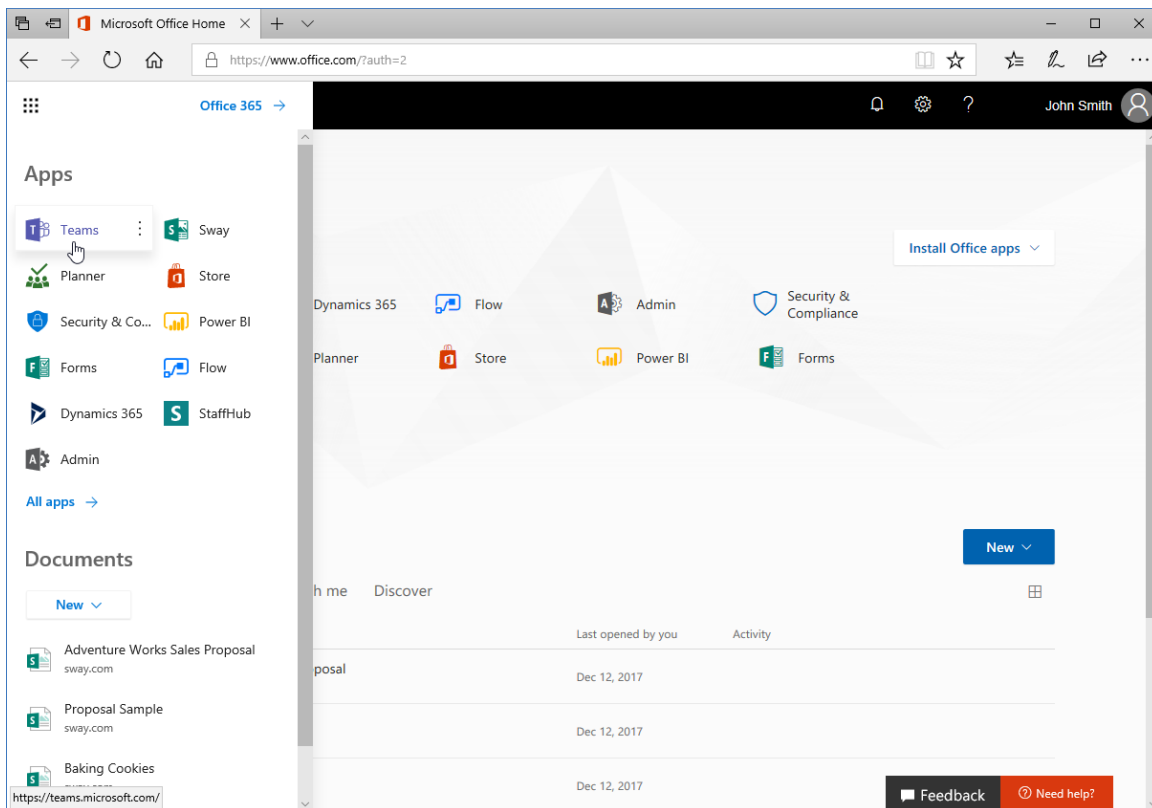
What is Microsoft Teams?

Microsoft Teams provides a collaborative, cloud-based workspace where Office 365 users can send messages, share files, and more. A team can be created for a department, a project, or for anything you like! Each team has access to **channels**, which are places where people can share messages, files, and more. Teams can be **public** (open to everyone) or **private** (accessible to invited users only). You can be part of as many teams as you like, and you can join or leave teams as needed.

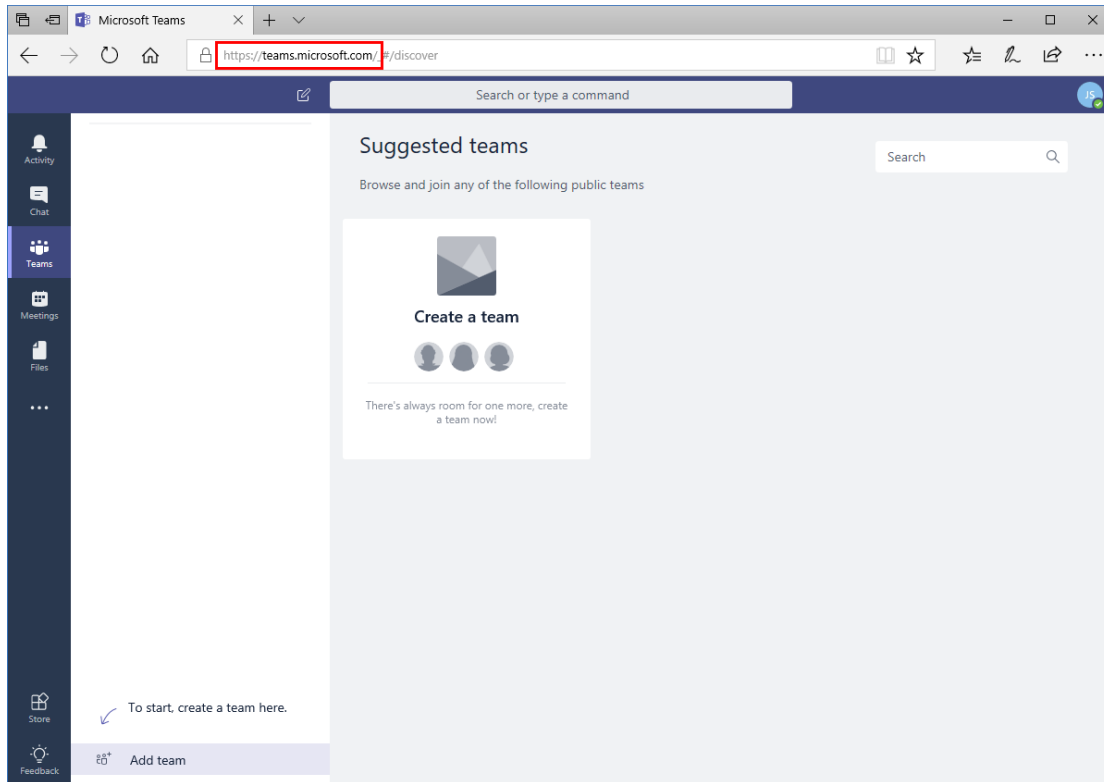
Microsoft Teams also provides additional communication tools, such as chat, meetings, file sharing, and more. We will learn about all these features during this course.

Launching Microsoft Teams

There are two ways to access the Microsoft Teams web interface. You will find an icon for it on the Office 365 home page and app launcher:

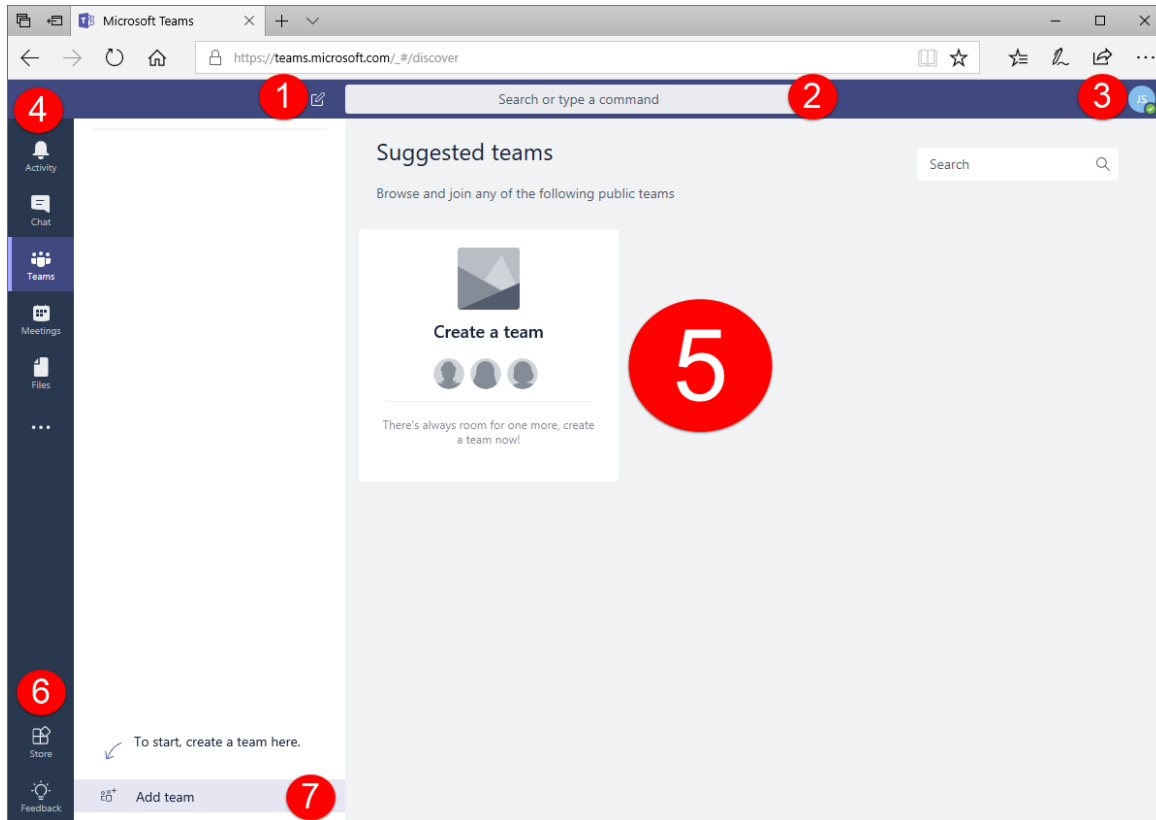


Or, simply enter “teams.microsoft.com” into the address bar of your web browser:



The Microsoft Teams Interface

Let's look at the Microsoft Teams interface:



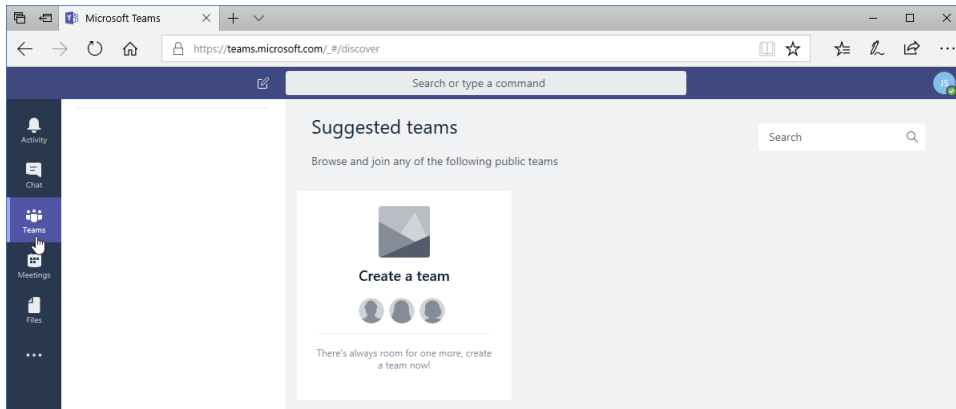
The top bar contains a command to start a **new chat (1)**, **search Teams or enter slash commands (2)**, and **access your Office 365 profile (3)**. (Note that this search field is different from search commands, which may appear in the main window.)

Along the left side of the window you will see the **sidebar (4)**. You can click each icon to access different features of Teams. The related content will be displayed in the **main window (5)**.

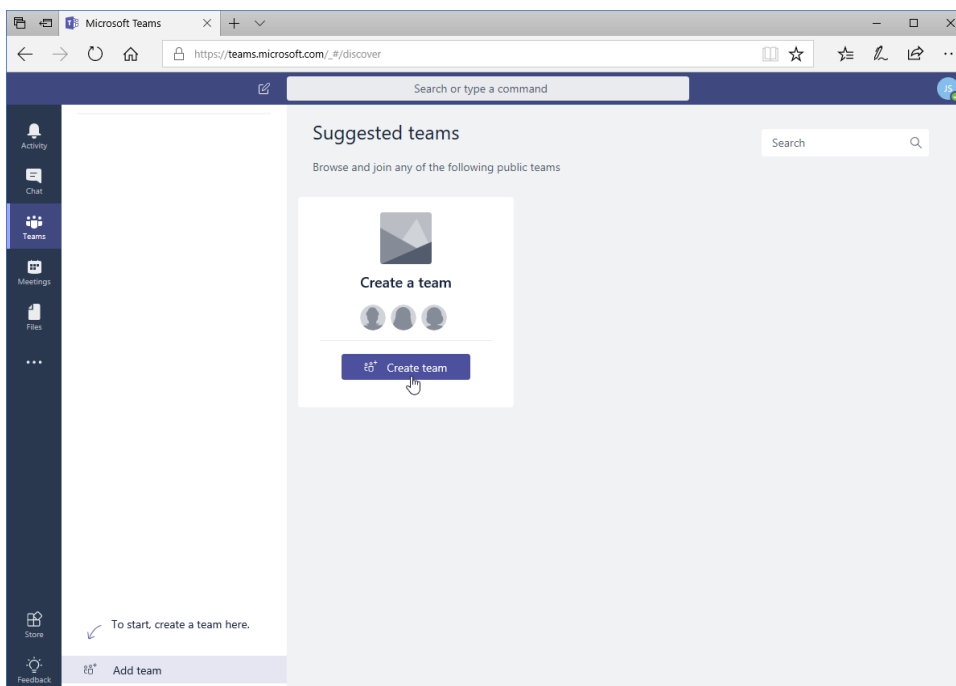
The **bottom part of the sidebar (6)** contains icons for the Store and Feedback. Next to this is a **contextual task pane (7)** with commands related to your current activity. (For example, here we are viewing the Teams icon, so we have commands for adding a team since we do not currently have one.)

Creating a New Team

To create a new team, ensure that the Teams icon is selected from the sidebar:

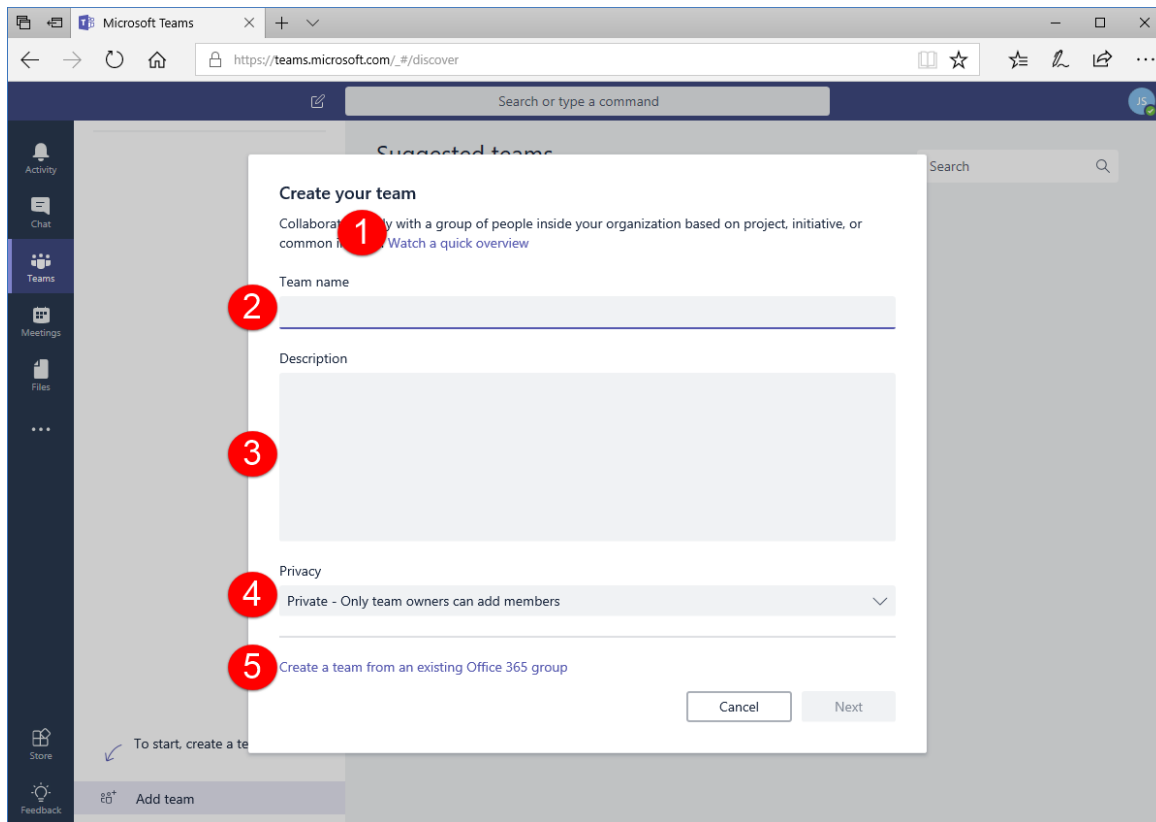


Now, click “Create team:”



(If you do not see this button, click the “Add team” shortcut in the contextual pane first.)

Now, the “Create your team” dialog will be displayed:



The top of the dialog contains a [link \(1\)](#) to an overview video, which you can watch if you need help. In the main part of the dialog, you can enter the **team’s name (2)** and a **description (3)**. You can also set the team’s **privacy (4)**; public teams allow anyone in your organization to join, while private teams require an invitation or approval. **Note that both types of teams are visible to all members of your Office 365 organization.**

You can also create a new team from an **Office 365 group (5)** by clicking the link at the bottom of the dialog box.

For this example, we will create a public team from scratch. Enter your information, and click “Next:”

Create your team

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Watch a quick overview](#)

Team name
Seattle Office ✓

Description
This team is for all users located in the Seattle office.

Privacy
Public - Anyone in your organization can join ▼

[Create a team from an existing Office 365 group](#)

Now, you will be prompted to add members. You can add people, groups, and distribution lists, which makes team creation quick and easy. As you type, suggestions will be displayed:

Add members to "Seattle Office"

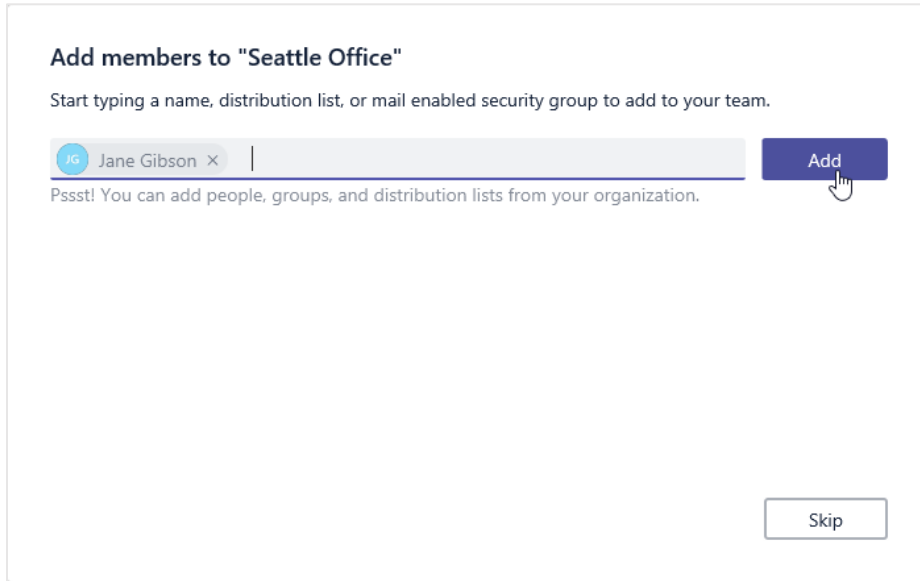
Start typing a name, distribution list, or mail enabled security group to add to your team.

Safe

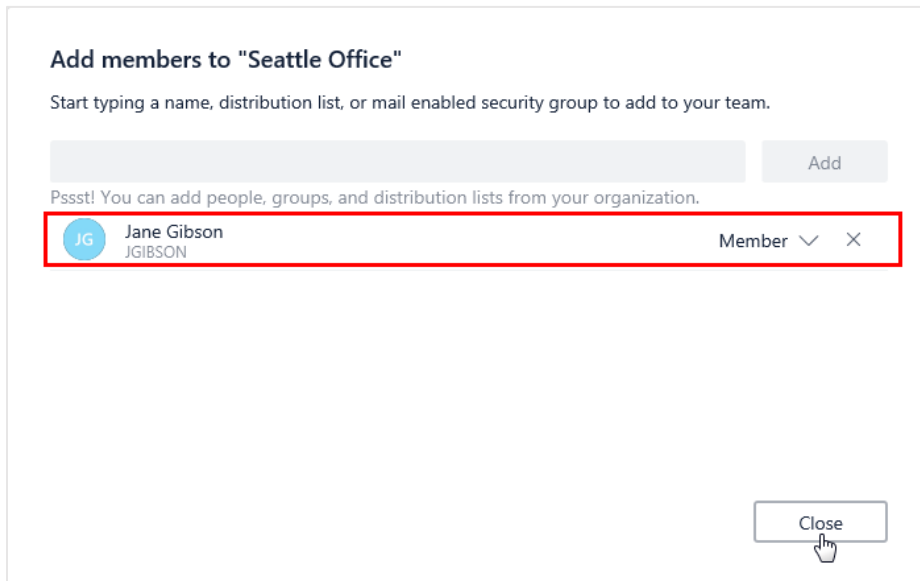
- Safety Team**
SAFETYTEAM
- Safety Committee**
Core members of our Safety Committee.
- Safety Questions**
SAFETYQUESTIONS

You can click these suggestions to add them, or use the arrow keys on your keyboard to select the desired entry and press Enter to add it. You can also skip this step for now, although by default you will be added as a team member.

For this example, let's add one user:

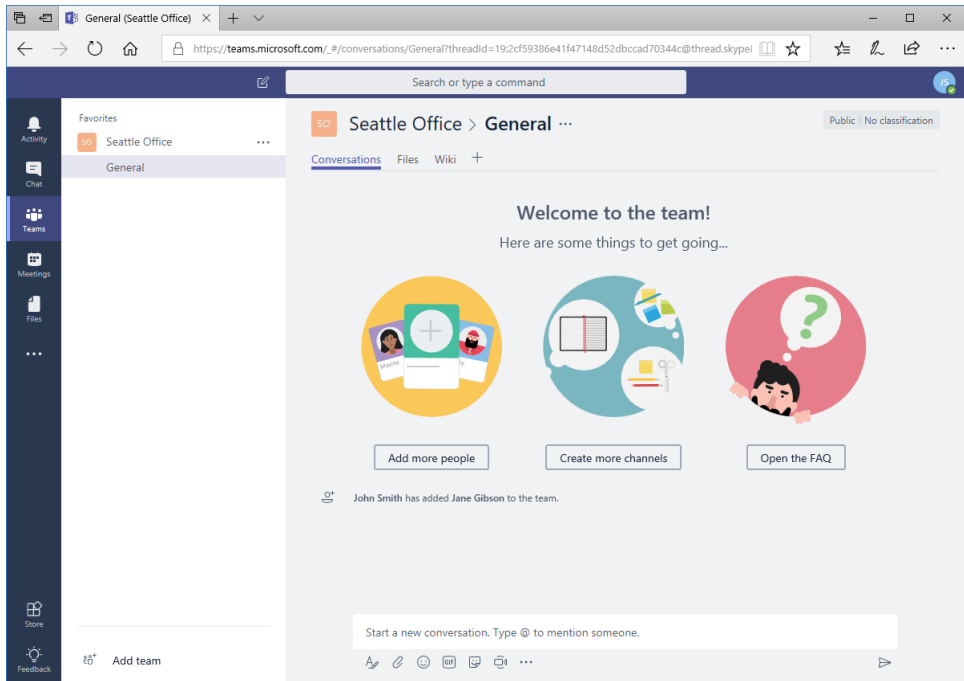


Once a team member has been added, the dialog will change slightly:



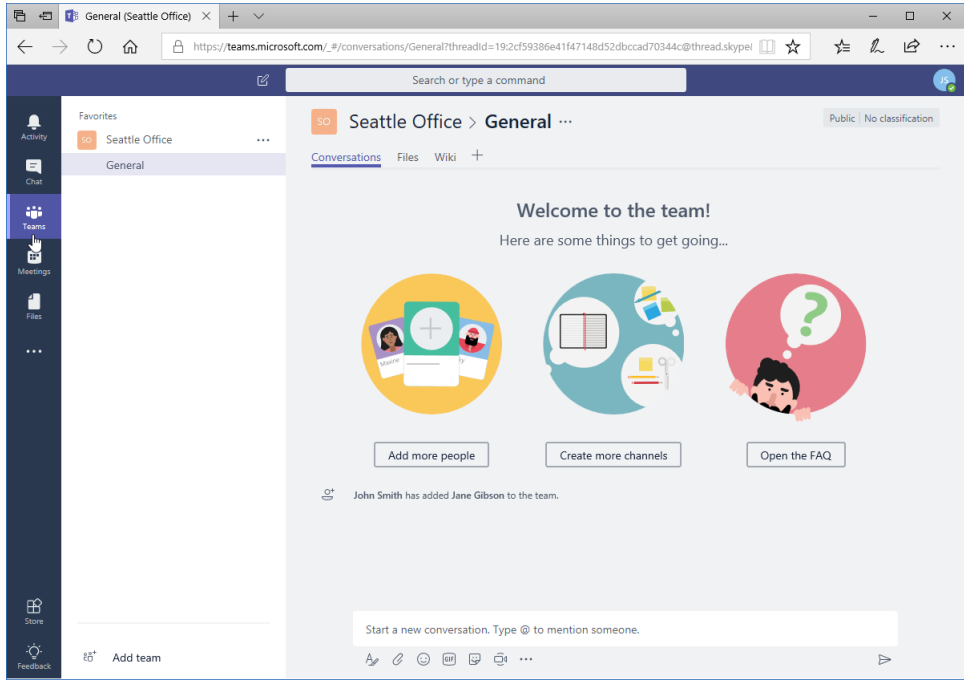
Each team member will be displayed in the main part of the window. You can click the chevron next to their name to choose whether you want to set their role as a member or owner (which has more control over the team), or click the X to remove them from the team list. When you are finished, click "Close."

The team is now created, with the default channel (General) displayed:

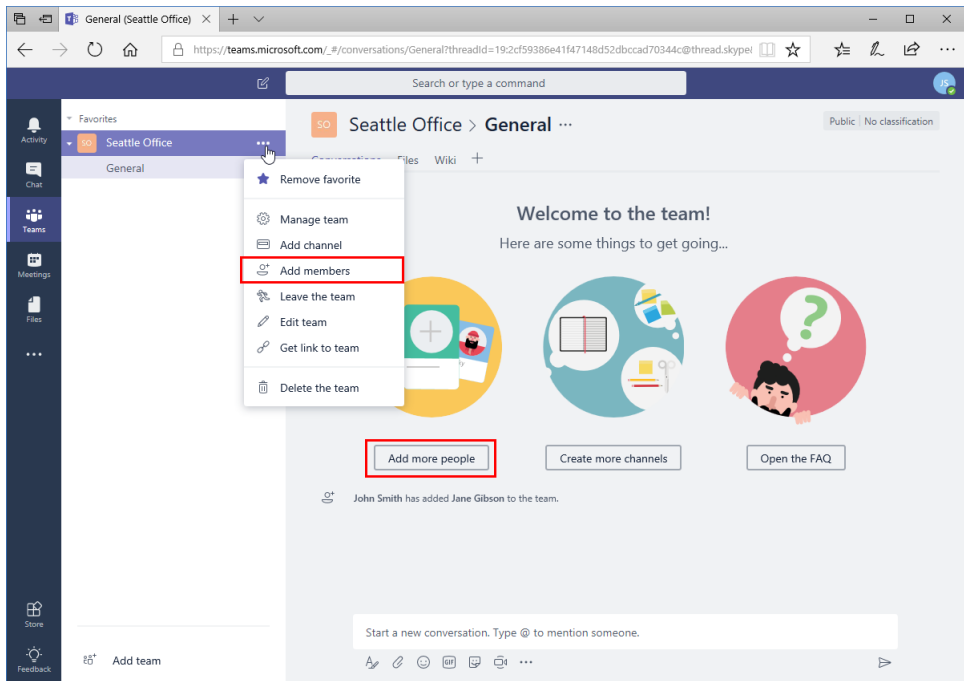


Adding Members to Your Team

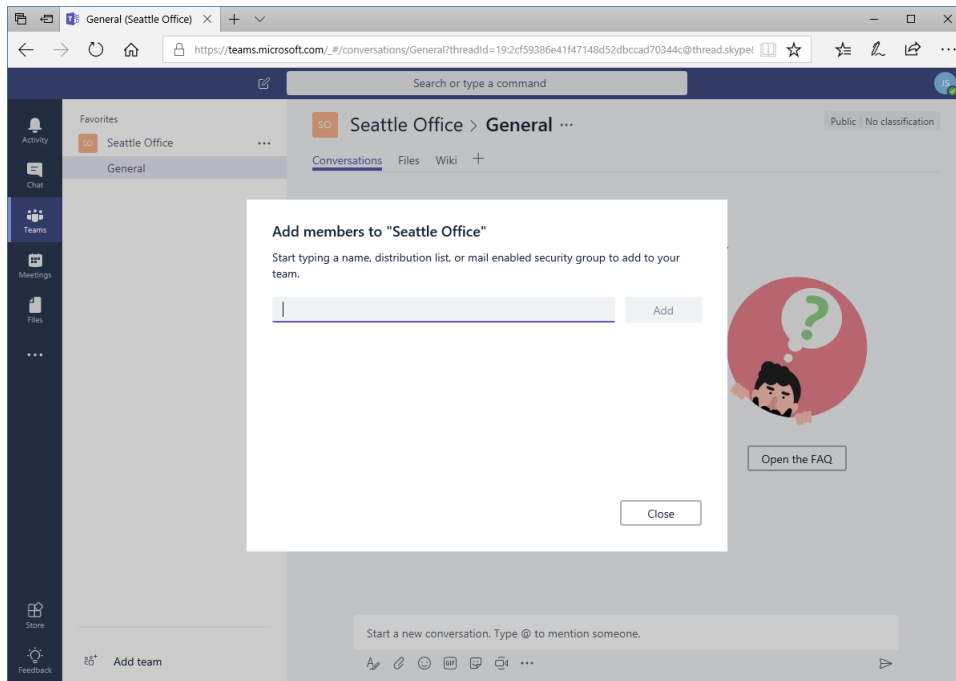
To add members to your team after creating it, ensure the Teams icon is selected from the sidebar:



Now, you can click “Add more people” from the main screen, or click the ellipses next to the team name and click “Add members:”



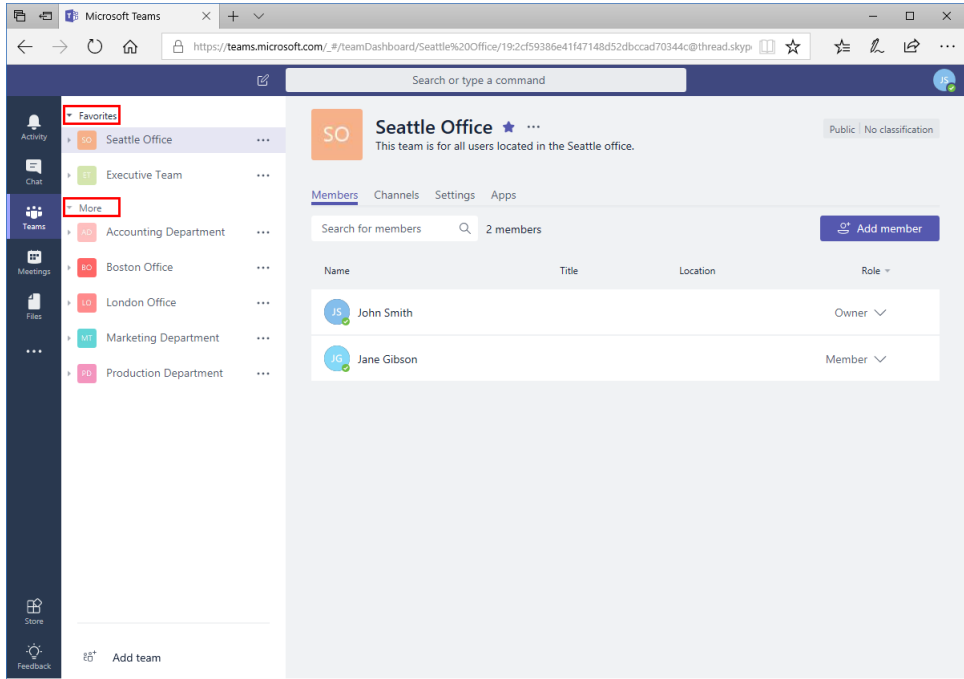
Either action will open the “Add members” dialog box, which works the same way as during signup:



Once you have added the required members, click “Close” to return to Teams.

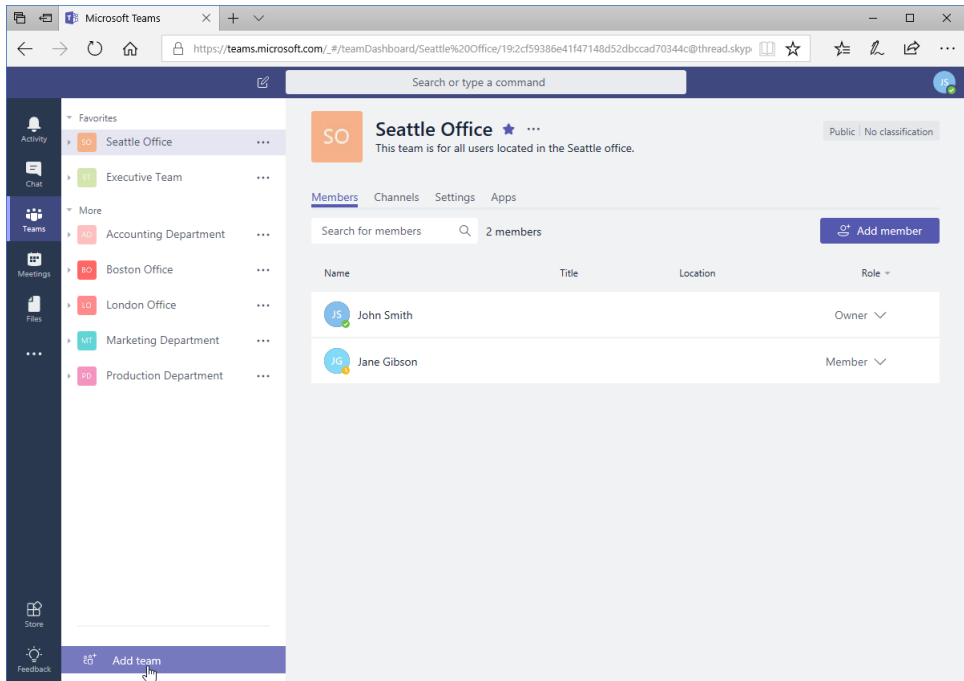
Changing Teams

You can view your teams using the Teams icon in the sidebar. In this view, any teams of which you are a member are listed in the contextual task pane:

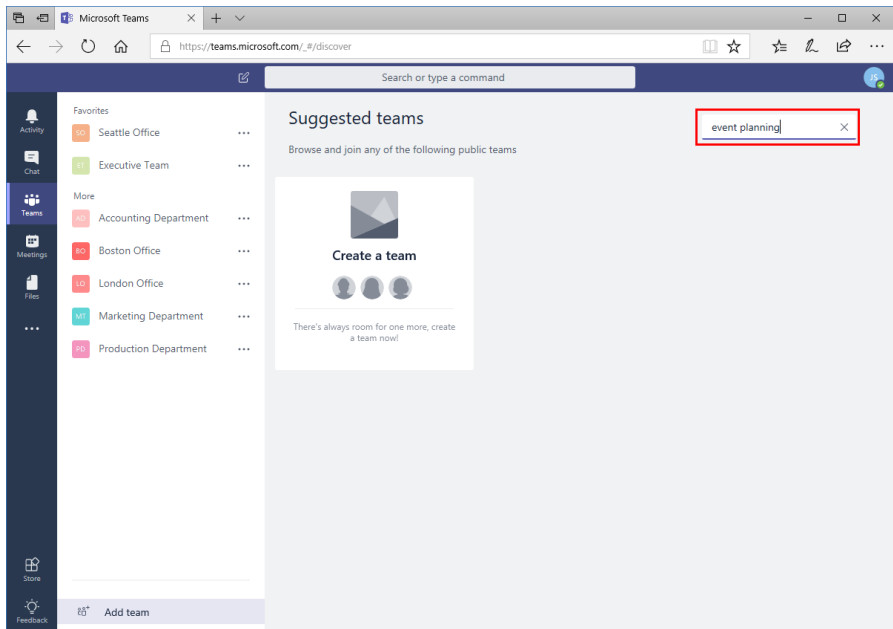


Note that the teams are separated into two categories: Favorites and More. If a category is collapsed, simply click its heading to view all contents.

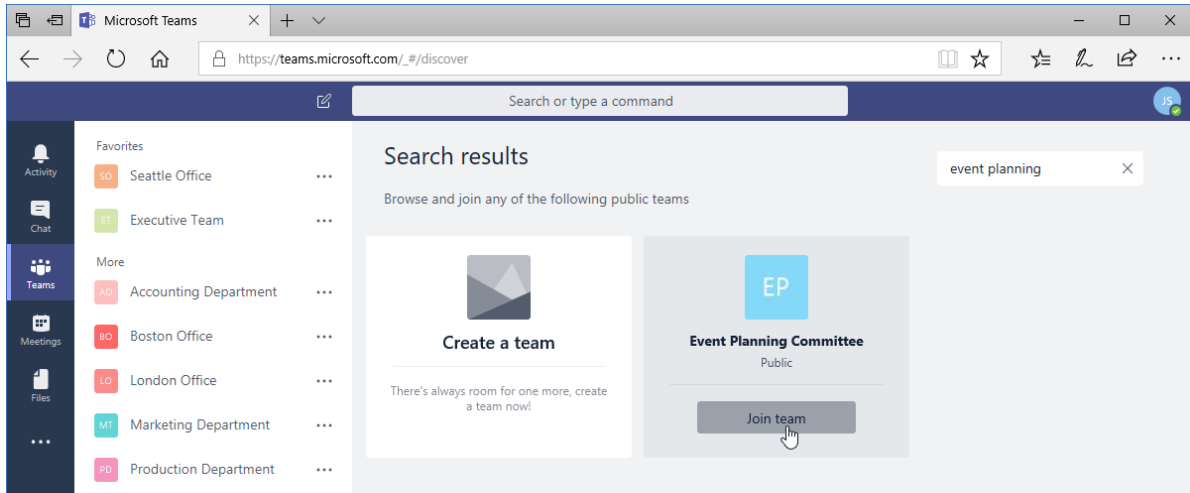
To search for a team, click the “Add team” shortcut at the bottom of the task pane:



Now, type your search term(s) in the search field and press “Enter:”



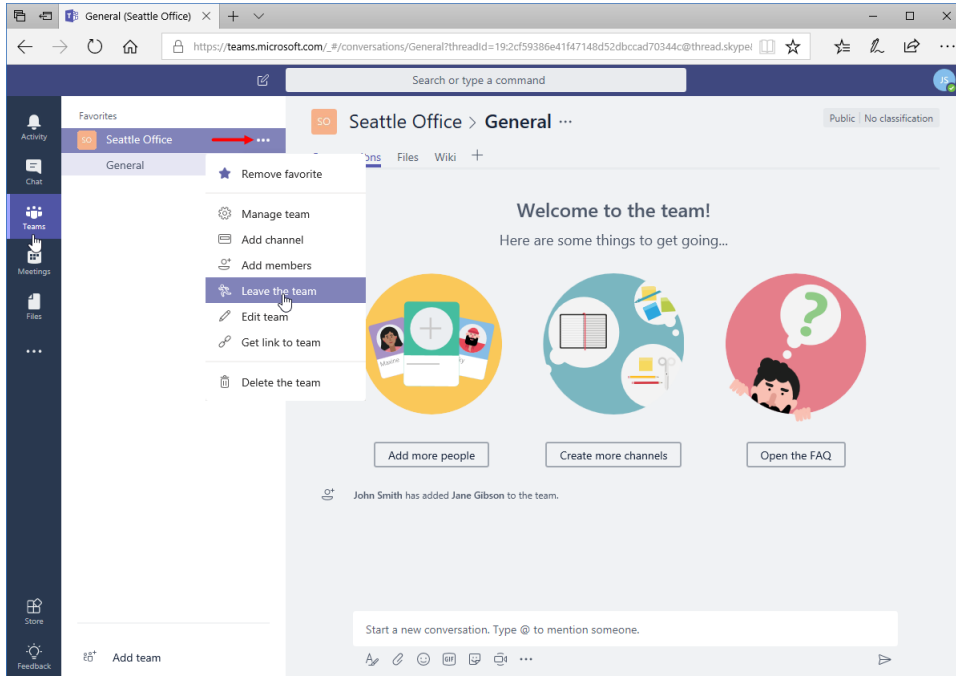
The related results will be displayed, as well as a tile to add a team. You can move your mouse over the tile to join it (or, if it is a private team, request to join it):



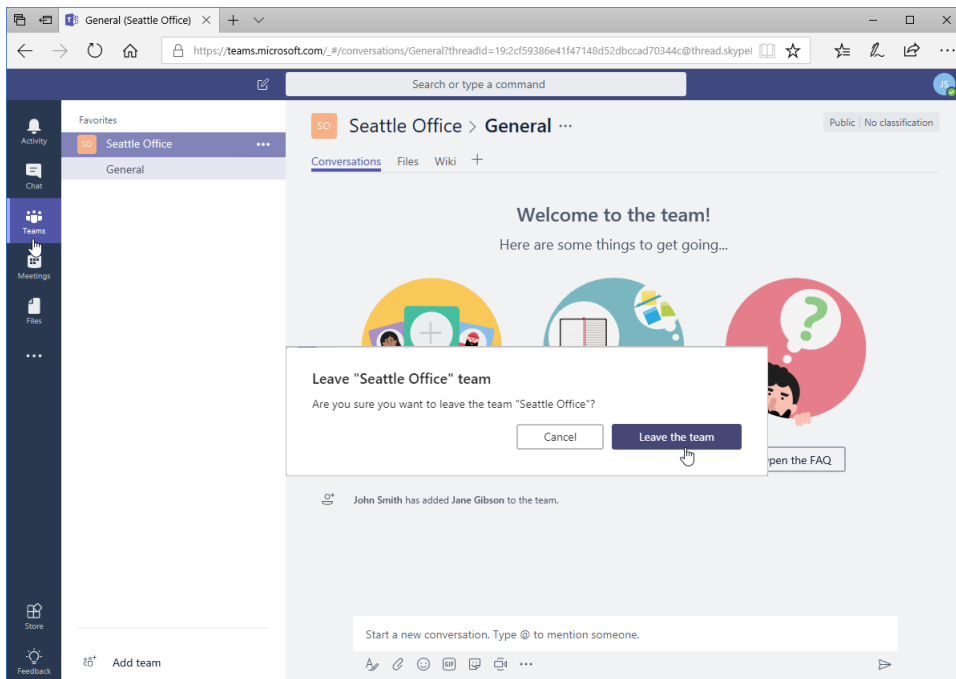
Once the process is complete, the team will be available in the task pane. (If it is a private team, your request must be approved first.)

Leaving a Team

To leave a team, move your mouse over its name, click the ellipses, and click “Leave the team:”



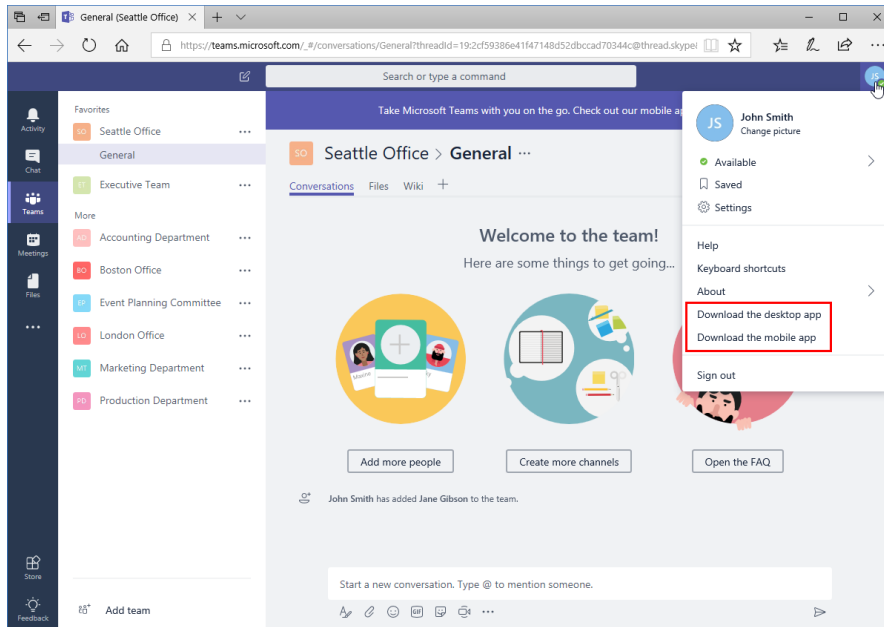
Then, click “Leave the team:”



You will now be removed from the team.

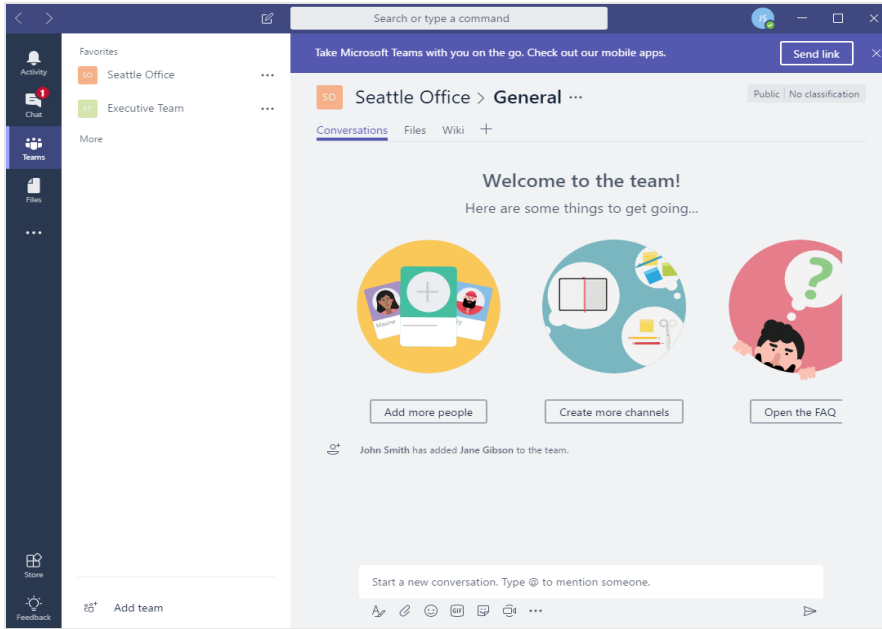
Using Microsoft Teams Desktop and Mobile Apps

Teams also offers desktop and mobile apps. To download either app, click your profile icon in the top right corner of the window and click the appropriate link:

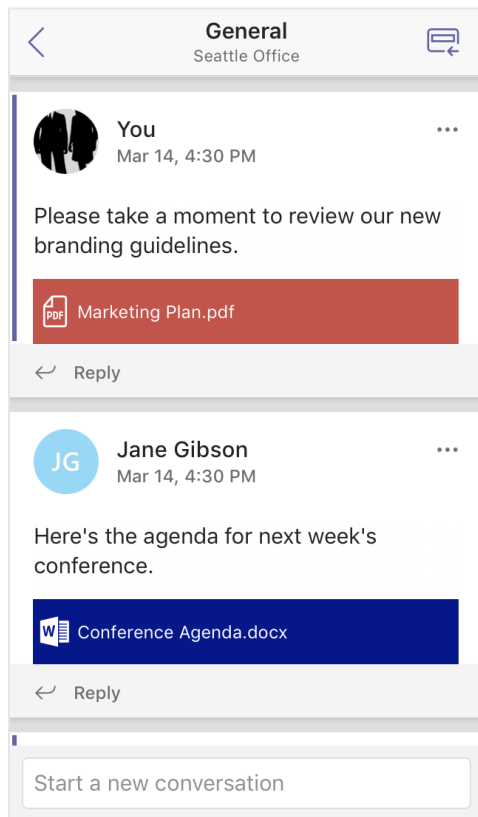


The desktop app link will immediately start a download, while the mobile app link will prompt you for your email address.

As of this writing, the desktop app interface is almost the same as the web version:



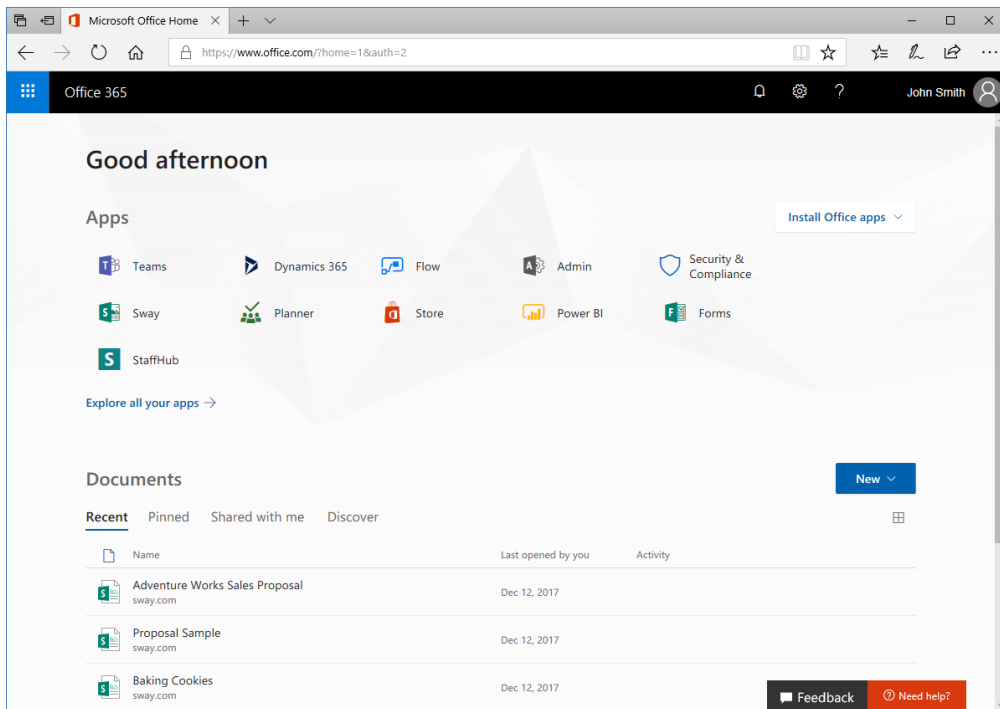
The mobile app provides a focused view on the currently selected content. Here, you can see a channel:



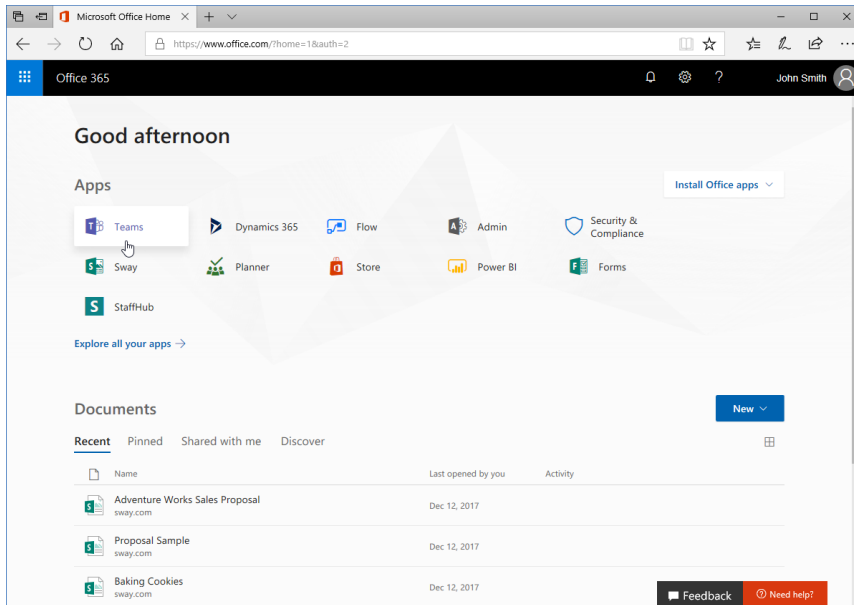
Activity 1-1: Getting Started with Microsoft Teams

In this activity, you will set up a team.

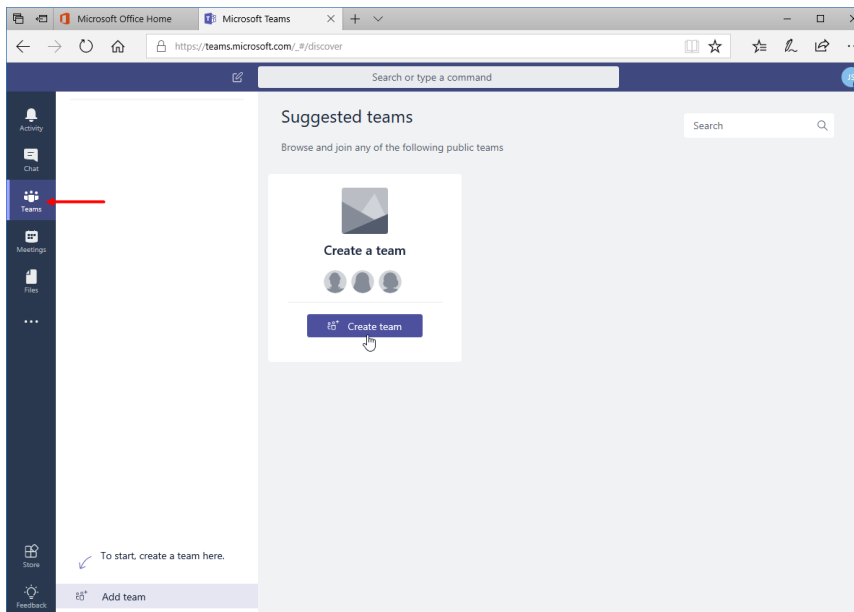
1. Open Microsoft Edge and log into your Office 365 site:



2. Click the “Teams” tile on your landing page:

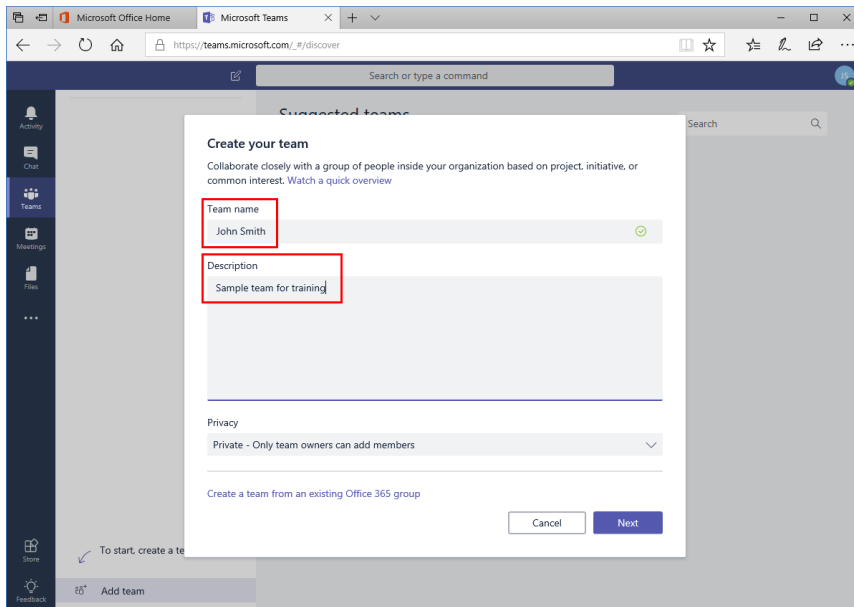


3. The Teams app will launch. Ensure the Teams icon is selected from the sidebar. Click “Create team:”

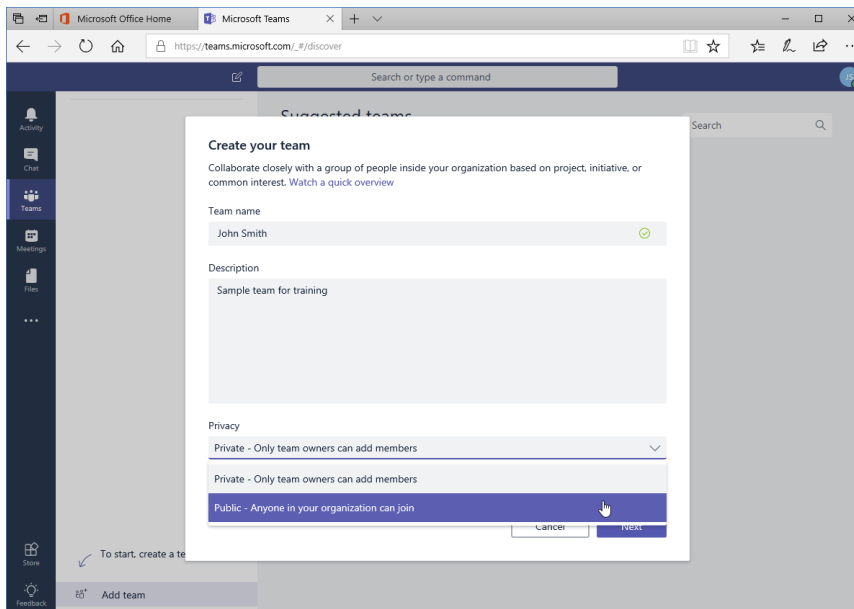


(If you do not see this command, click “Add team” in the task pane on the left.)

4. The “Create your team” dialog will open. Enter your name for the “Team name” and “Sample team for training” as the description:



5. Click the Privacy menu and click “Public:”



6. Click "Next:"

Create your team

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Watch a quick overview](#)

Team name
John Smith ✓

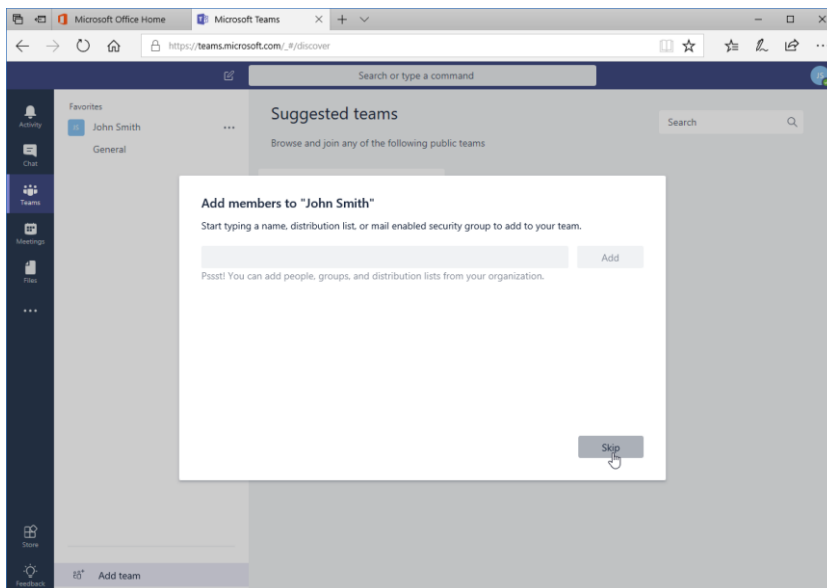
Description
Sample team for training

Privacy
Public - Anyone in your organization can join

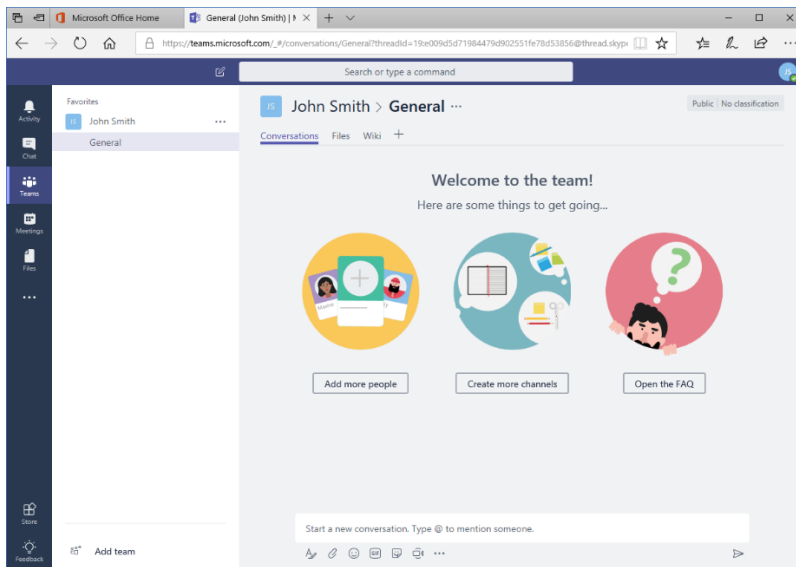
[Create a team from an existing Office 365 group](#)

Cancel Next

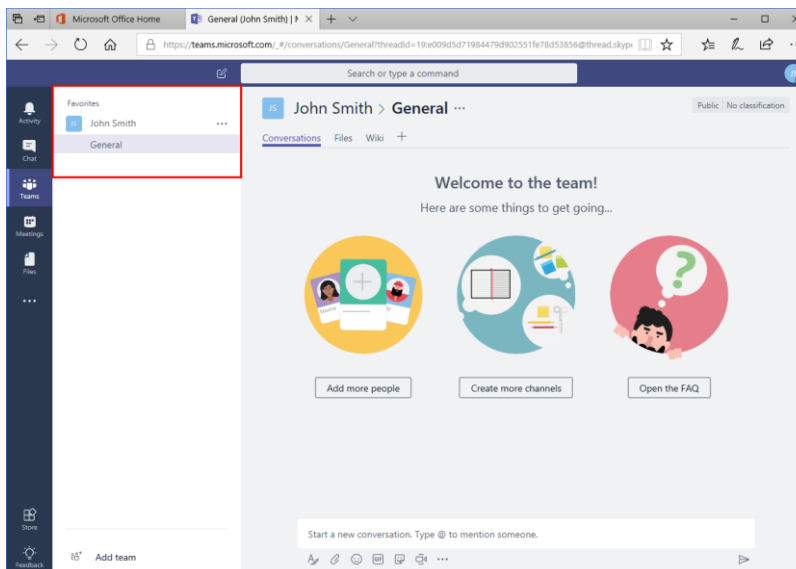
7. Next, you will be prompted to add members. Skip this step:



8. Your team is now created and the default General channel will be displayed:



9. Take a closer look at the task pane. Are any other teams displayed?



(If so, take a moment to explore them by clicking their names. Return to your team when you are finished.)

10. Leave Teams open for the next activity.

TOPIC B: Using Channels

Earlier, we learned that each team has access to **channels**, which are places where people can share messages, files, and more. Let's take a closer look at this important feature.

Topic Objectives

In this section, you will learn how to:

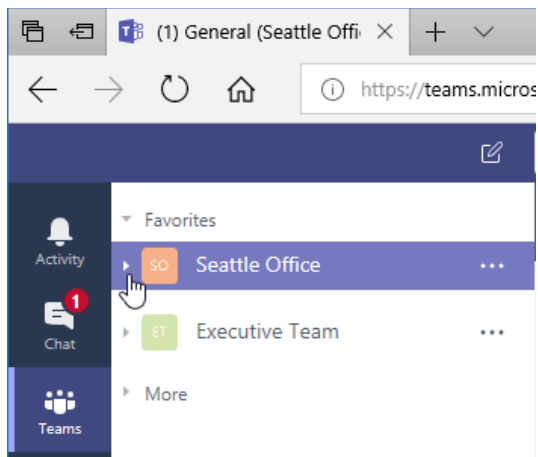
- Create, view, and use channels
- Mark a channel as a favorite
- Follow and unfollow channels

About Channels

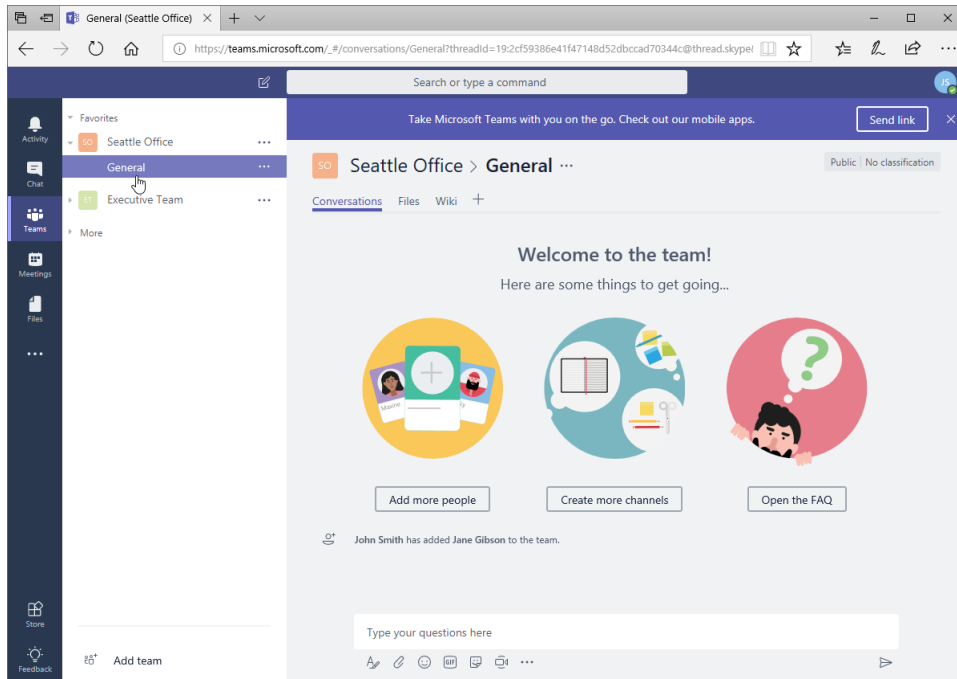
In Microsoft Teams, a **channel** is a central place where users can talk to each other. By default, a General channel is created for team-wide communications and announcements. Microsoft Teams users can also create their own channels for different topics. All team members will automatically be added to all channels.

Viewing Channels

To view a list of channels in a team, move your mouse over the team and click the chevron to expand it:

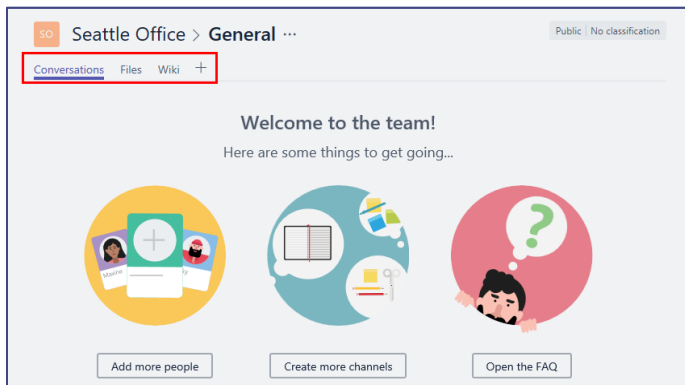


Now, click the channel you want to display:

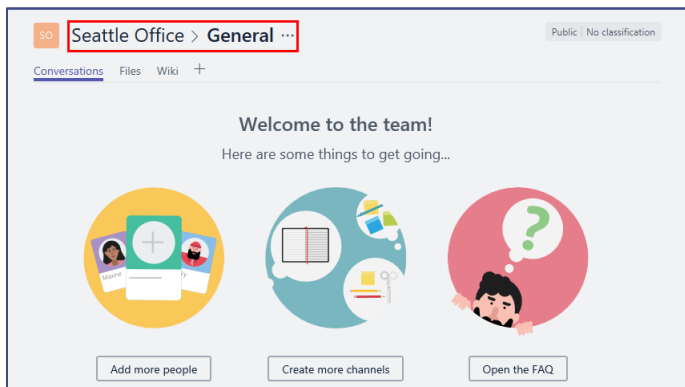


The channel contents will then be displayed in the main window, including messages and activity (like member changes or edits to the name). In the next section, you will learn how to post messages in a channel.

Note the three tabs at the top of the window. These allow you to view different aspects of the channel, and can be customized:



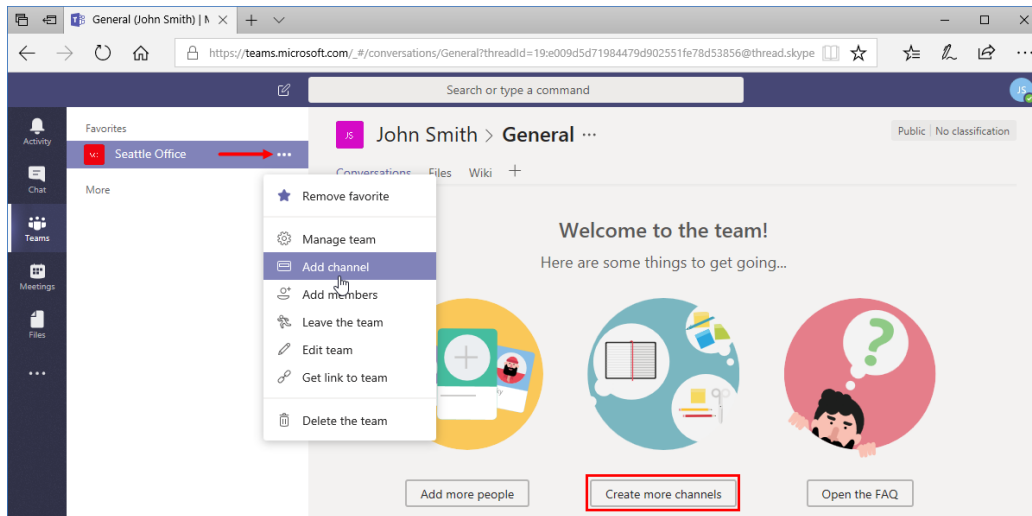
(See Lesson 4 for more information.) Also note the breadcrumb trail at the top of the window:



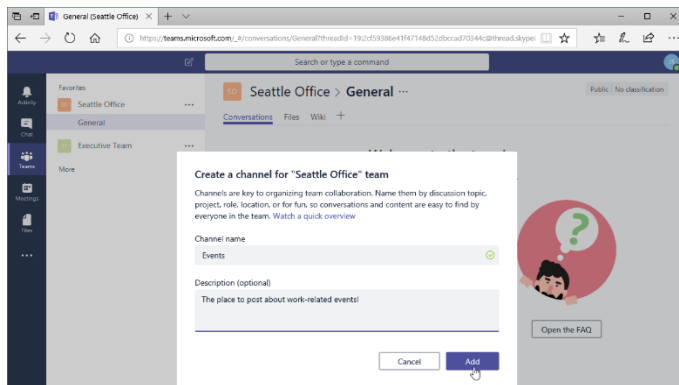
This shows where you are in the team. You can click any item to go to it; for example, you could click “Seattle Office” to view the team settings page. Or, click the ellipses to access channel and team options. (You will learn more about these options later in the course.)

Creating a Channel

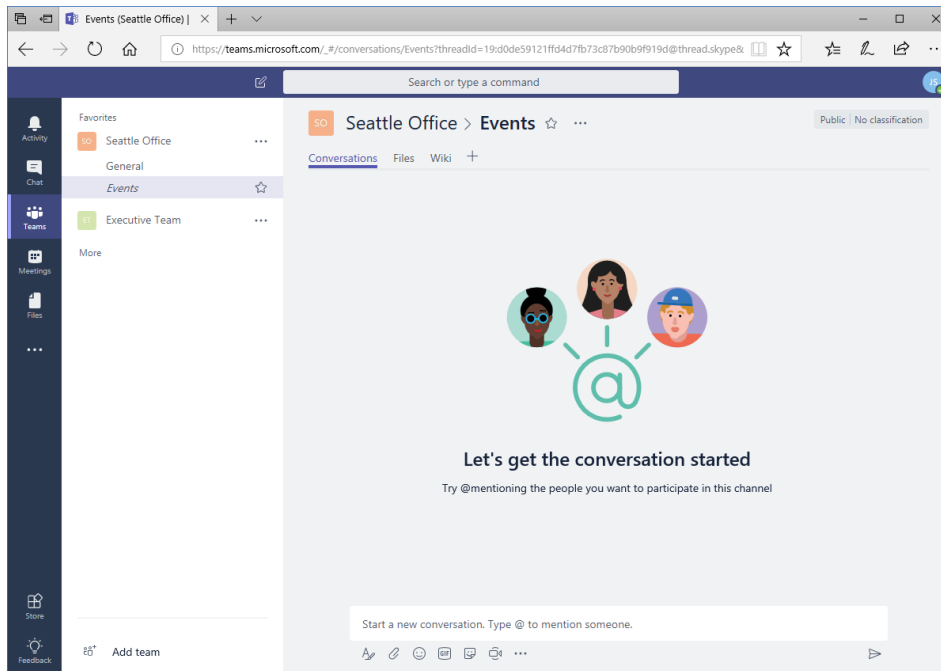
There are two easy ways to create a channel. You can click the ellipses next to the team name and click “Add channel,” or click “Create more channels” at the top of the General channel page:



With either action, you will see the “Create a channel” dialog box:

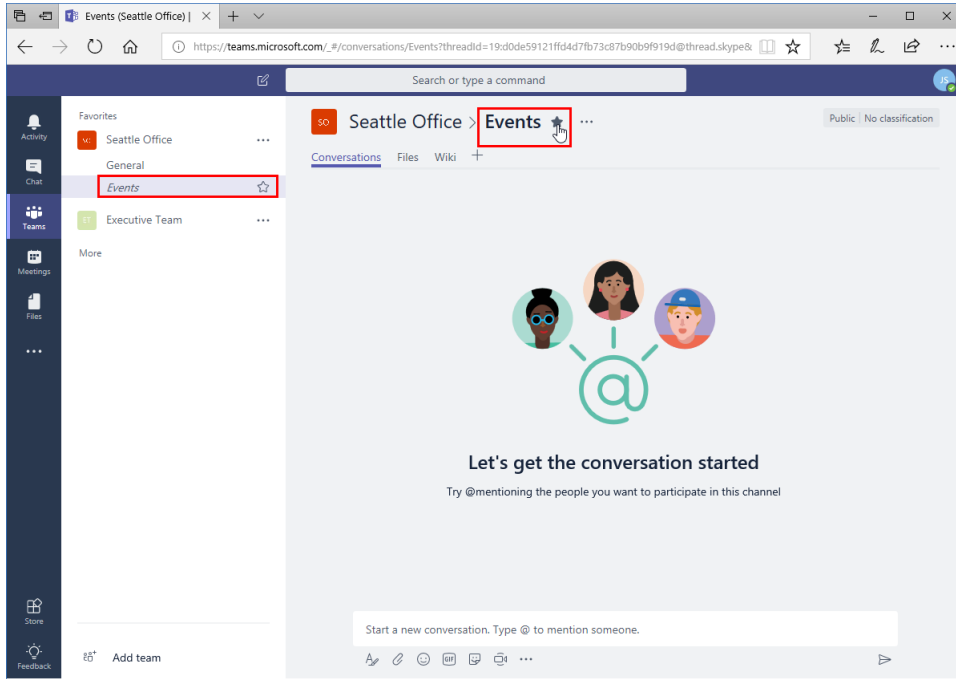


Simply enter the channel name and description, and click Add. The new channel is now created and displayed:



Marking a Channel as a Favorite

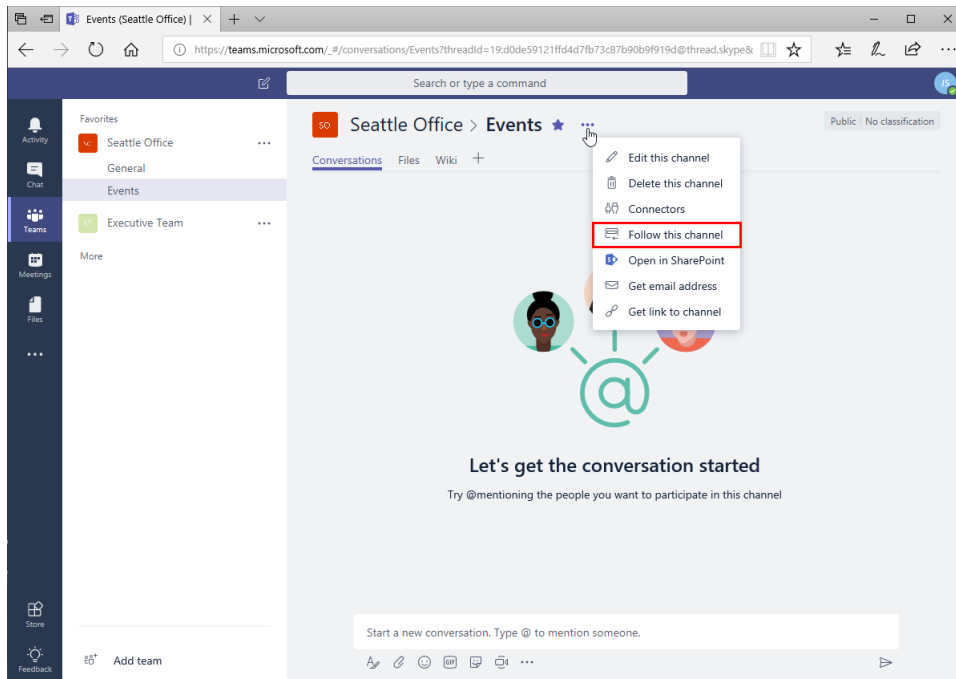
You can mark a channel as a favorite, or remove this indicator, by clicking the star icon next to the channel name in either the task pane or the main window:



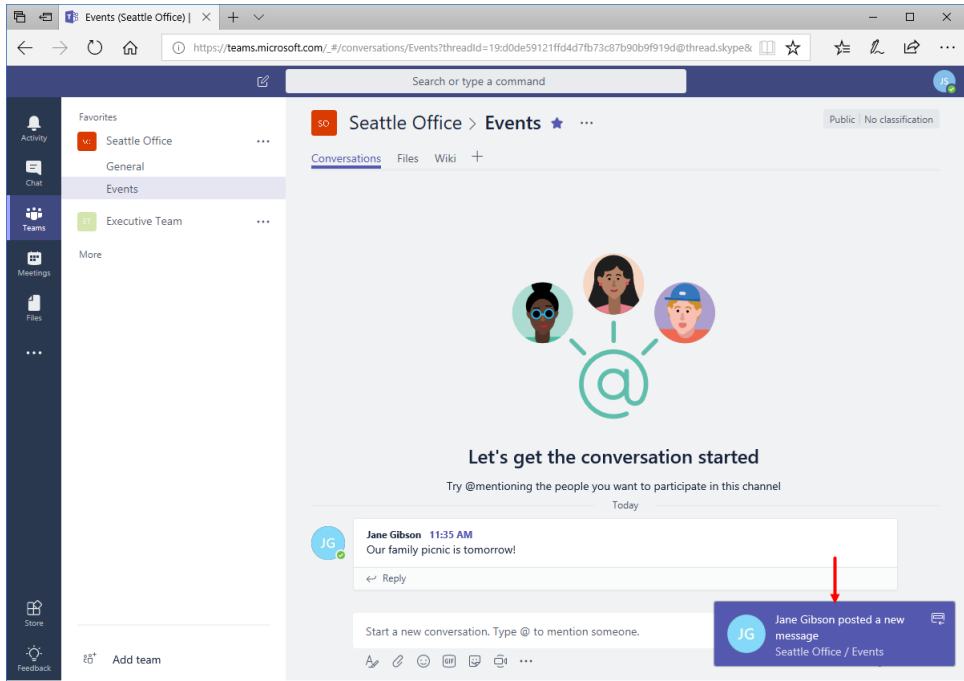
When a channel is not a favorite, it will be placed at the bottom of the list and displayed in italics.

Following and Unfollowing a Channel

You can show notifications for your favorite channels and add their activity to your Activity tab by following them. To do this, open the channel, click the ellipses next to its name, and click “Follow this channel:”



You will now receive a notification when someone posts in this channel, and the activity will be recorded on the Activity tab (which you will learn about later):

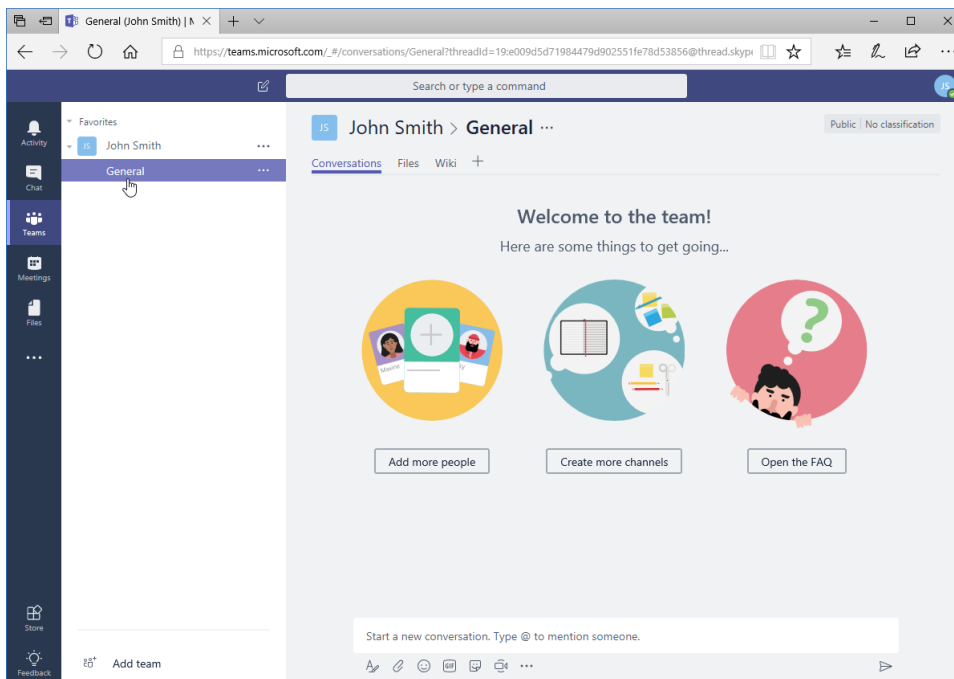


To change this behavior, click the ellipses again and click “Unfollow this channel.”

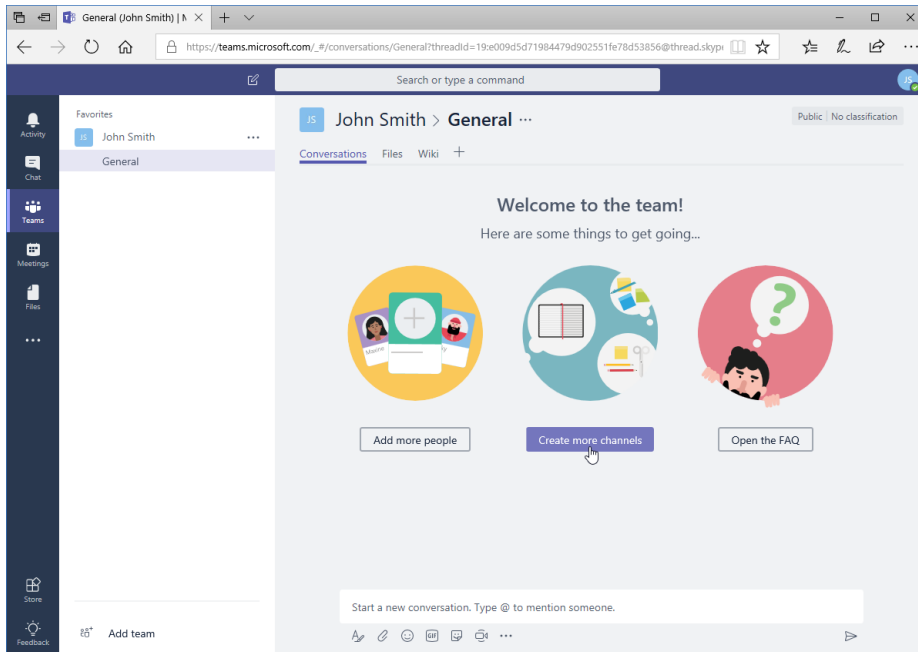
Activity 1-2: Using Channels

In this activity, you will create a new channel, set it as a favorite, and follow it.

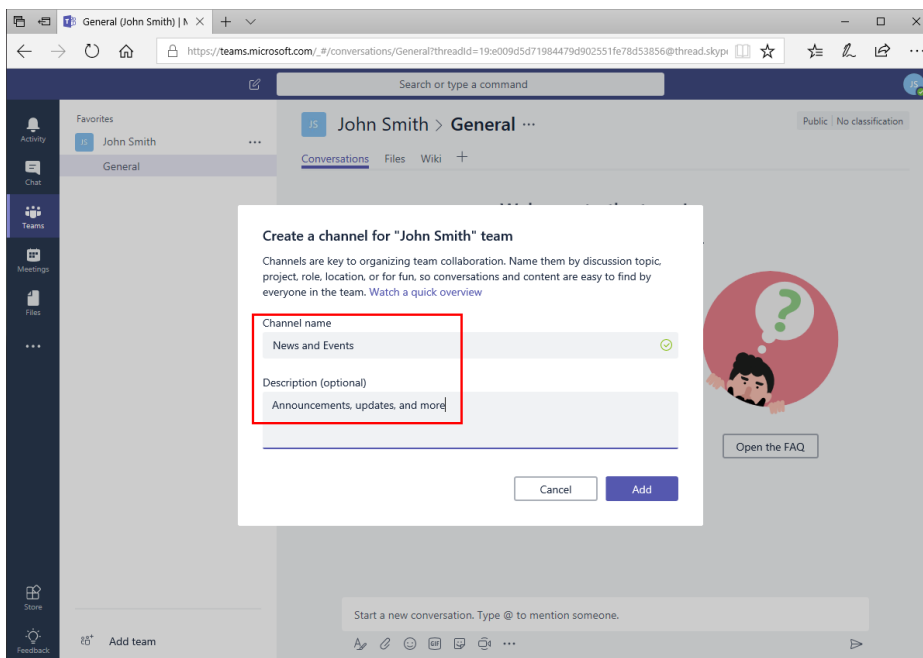
1. Ensure you have completed Activity 1-1. Your team's General channel should be displayed. (If not, navigate to it using the task pane.)



2. Click “Create more channels:”



3. The “Create a channel” dialog box will be displayed. Type, “News and Events” for the channel name. Type, “Announcements, updates, and more” for the description:



4. Click "Add" to complete the process:

Create a channel for "John Smith" team

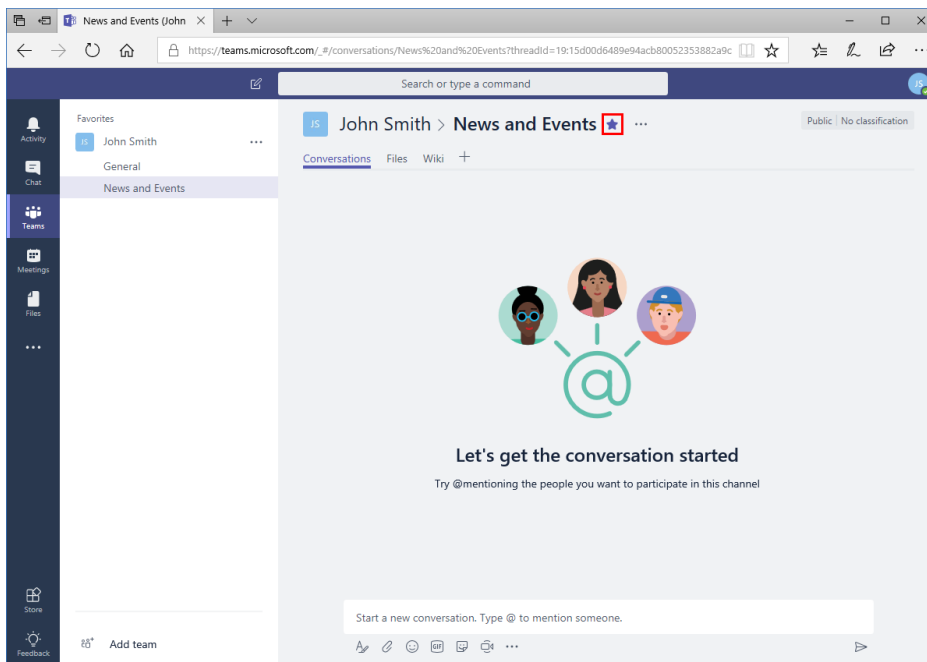
Channels are key to organizing team collaboration. Name them by discussion topic, project, role, location, or for fun, so conversations and content are easy to find by everyone in the team. [Watch a quick overview](#)

Channel name

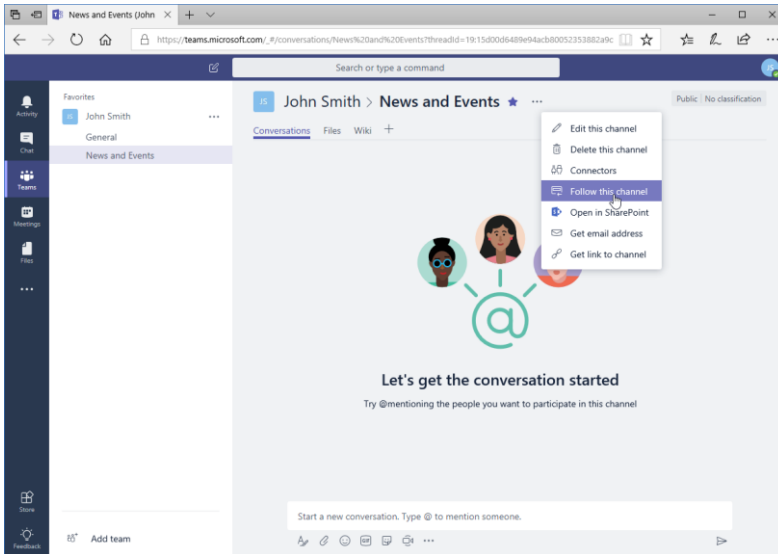
 ✓

Description (optional)

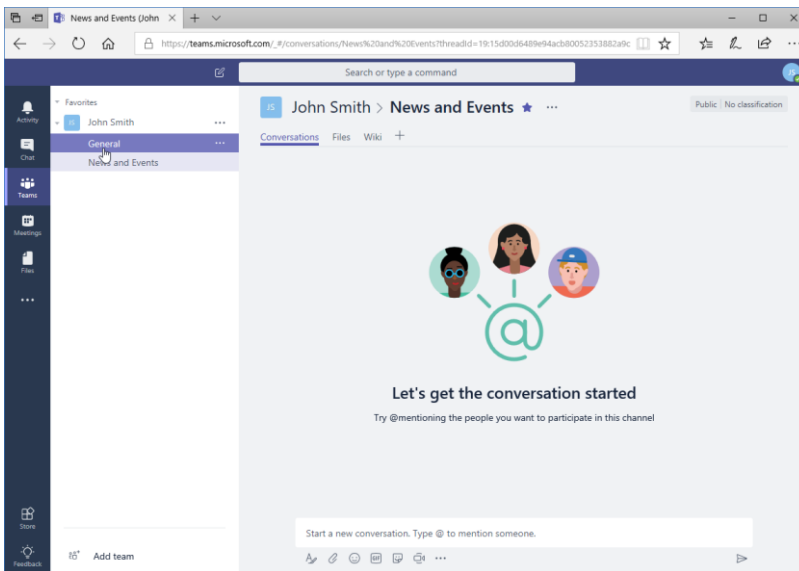
5. You will now see the channel. Notice that it is marked as a favorite since you created it:



6. However, by default this channel is not being followed. Click the ellipses and click “Follow this channel:”



7. Now, switch back to the General channel by clicking its name in the task pane:



8. Leave Teams open for the next activity.

TOPIC C: Posting Messages

Microsoft Teams' main communication feature is based around **messages** created in **channels**. You will find many message creation features (such as mentions and emojis) that are similar to other web-based messaging apps.

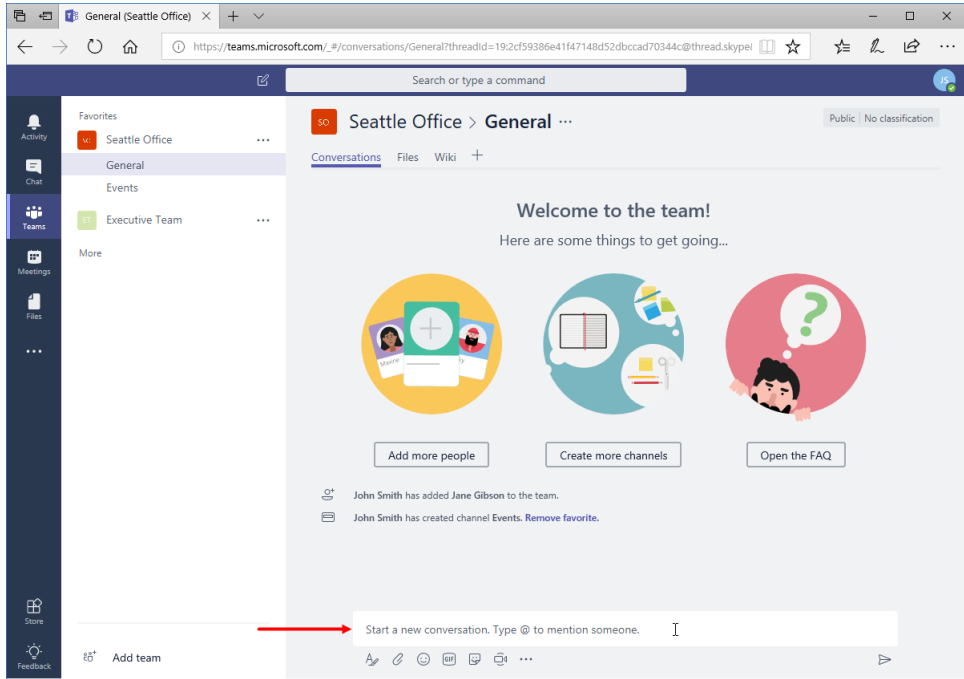
Topic Objectives

In this section, you will learn how to:

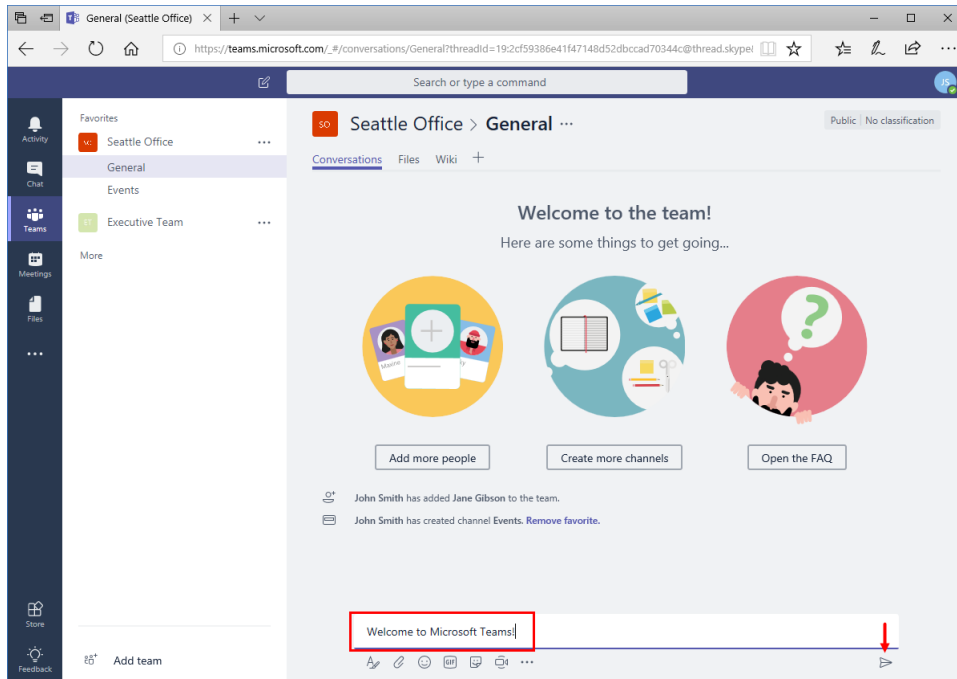
- Post, edit, reply to, and delete messages
- Expand the compose box to access additional options
- Add files to a message

Posting a Message

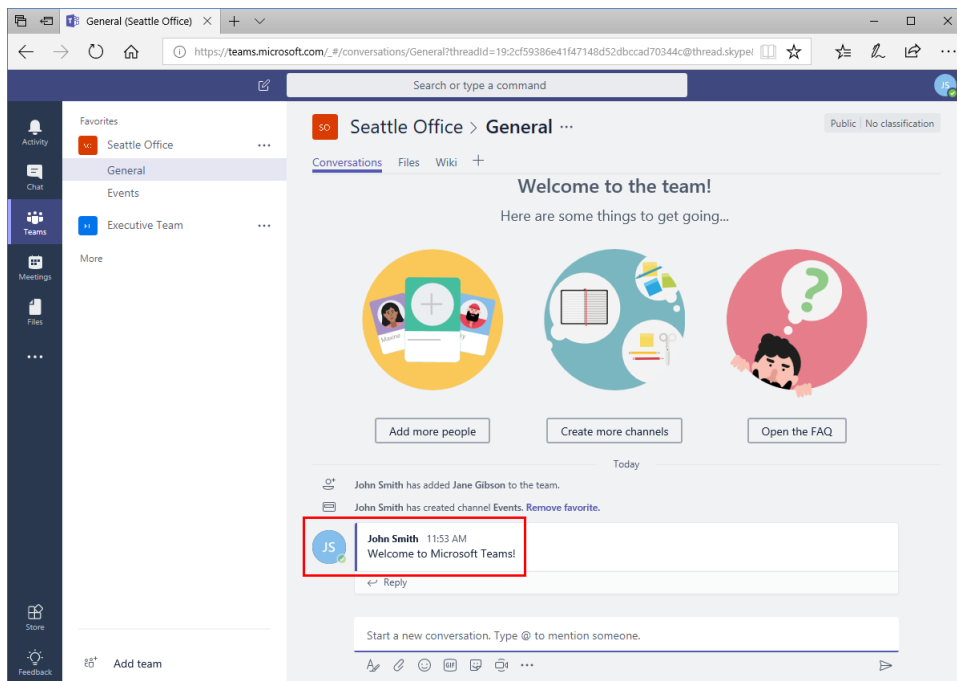
By default, when you open a channel, the Conversations tab will be displayed. This is where you will post and view messages. To post a message, click in the compose box:



Now, type your message. When you are finished, press “Enter” or click the arrow to send it:



Once you have created your message, it will appear in the channel, visible to all members:



Expanding the Compose Box

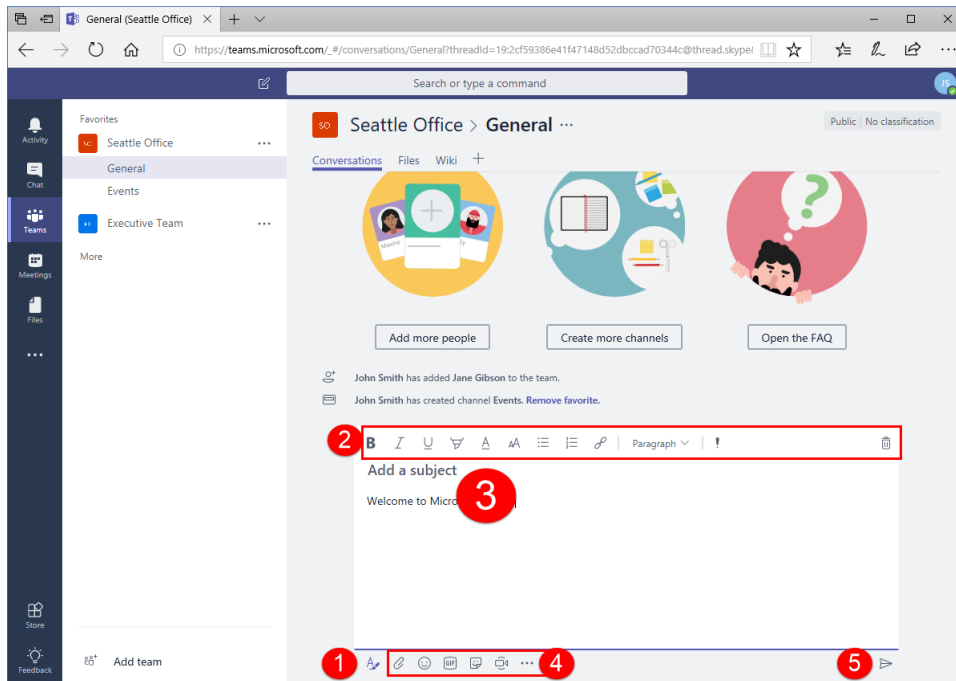
Let's take a closer look at the commands below the compose box:



From left to right, they allow you to:

- Expand the compose box, giving you more room to type and access to additional formatting commands
- Add a file to the message
- Insert an emoji
- Add a GIF
- Add a sticker
- Start a meeting (audio or video call)
- Access content from other sources, such as news and Wikipedia articles

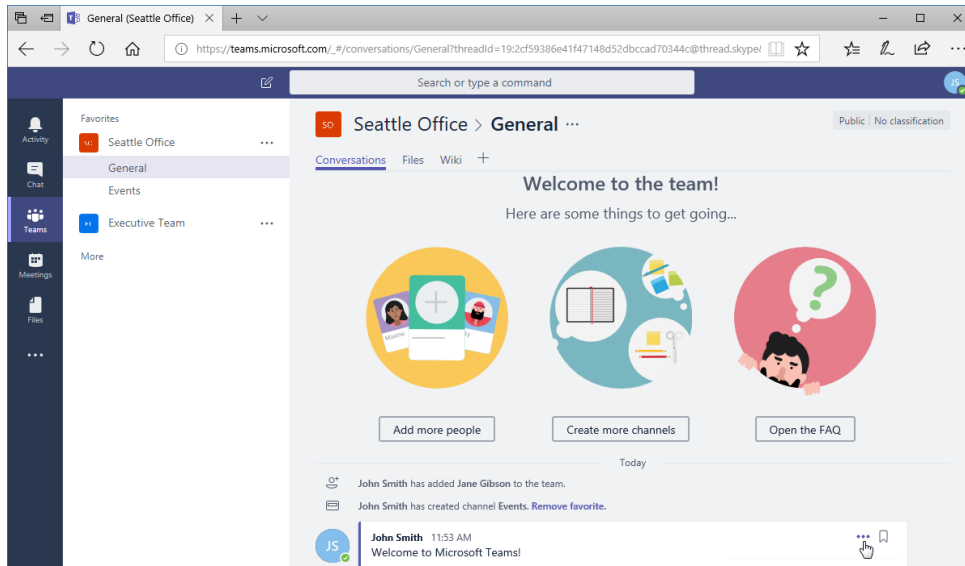
Below, you can see the expanded compose box. Notice that you can click this **icon (1)** to toggle the window on or off:



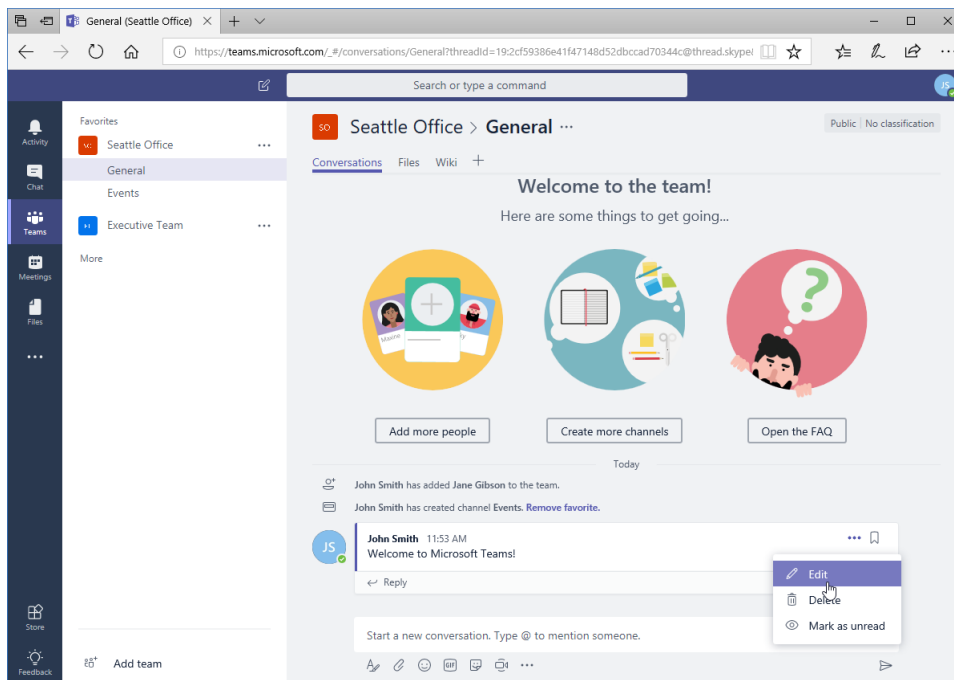
The **top bar (2)** contains commands to add formatting, apply styles, set importance, and discard the message. In the **main body (3)**, you can add a subject and type your message. You still have access to **message features (4)** like emojis and GIFs and the **Send button (5)**. Note, however, that the shortcut to send the message is now Ctrl + Enter.

Editing a Message

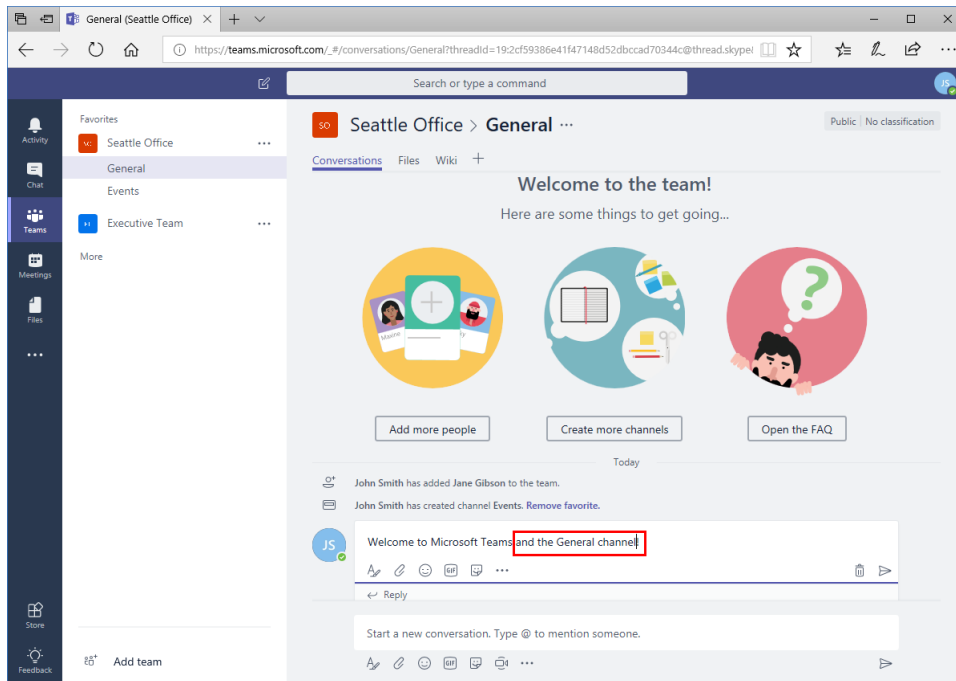
To edit a message you have posted, move your mouse over it and click the ellipses in its right corner:



Click “Edit” from the menu that opens:



The compose box will now reopen, with fewer commands. Simply make your changes and press “Enter” to update the message:

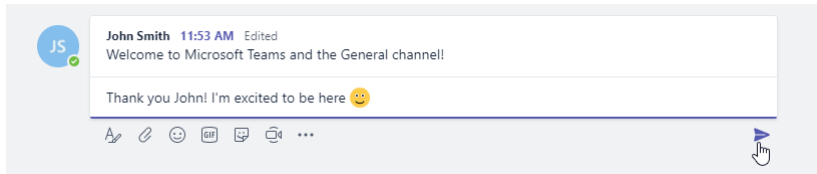


Replying to a Message

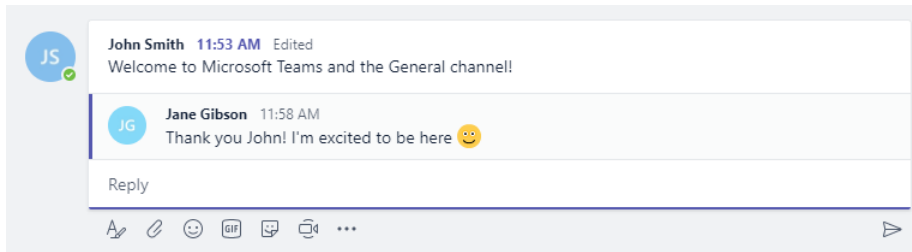
To reply to a message, click the “Reply” link below it:



Now, type and send your message. Note that the same commands are available as when sending a message, including the expanded compose box:

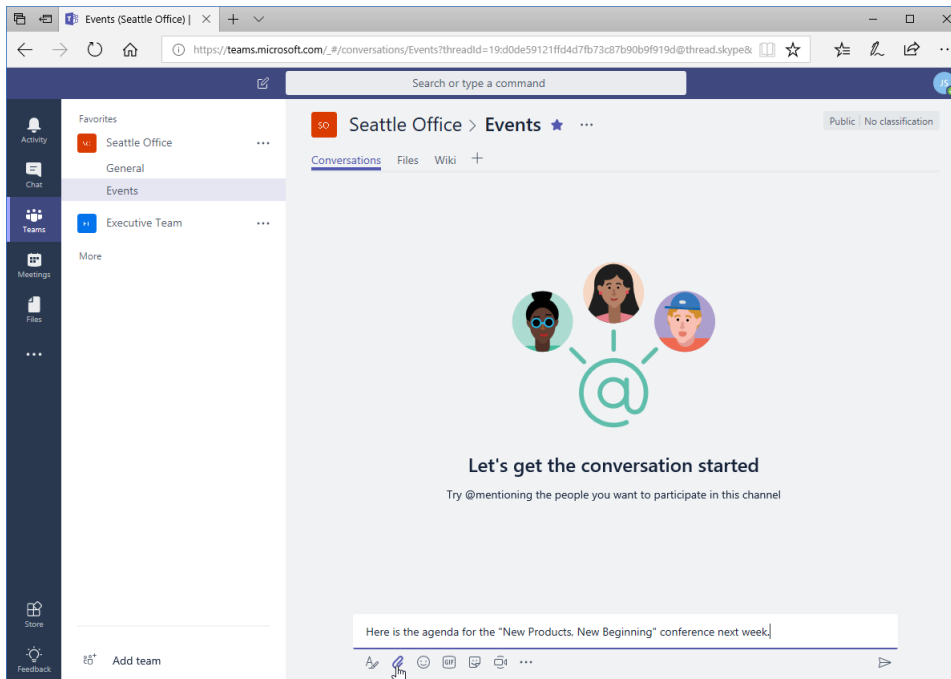


Your reply will now be visible in the channel, indented under the original message:

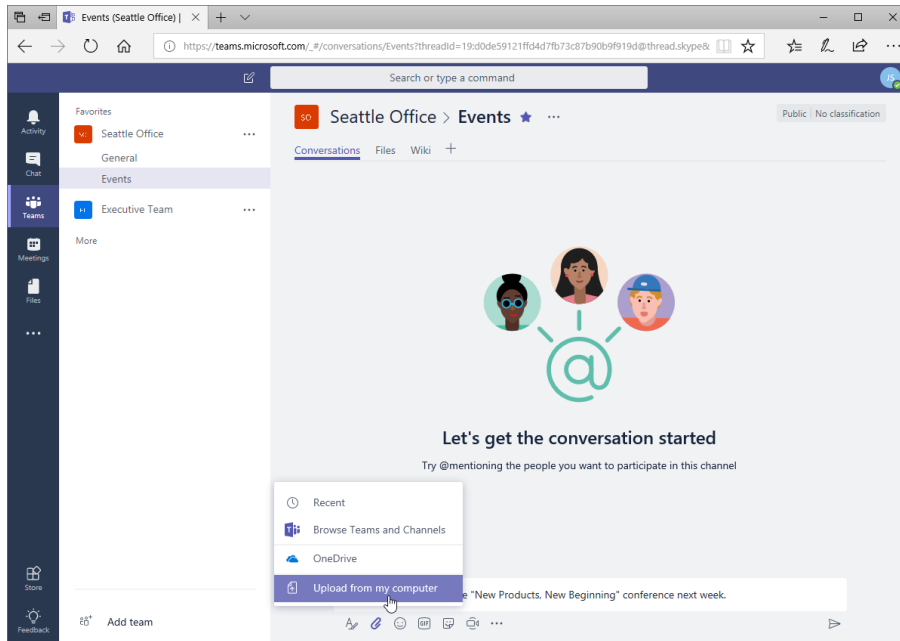


Adding Files to a Message

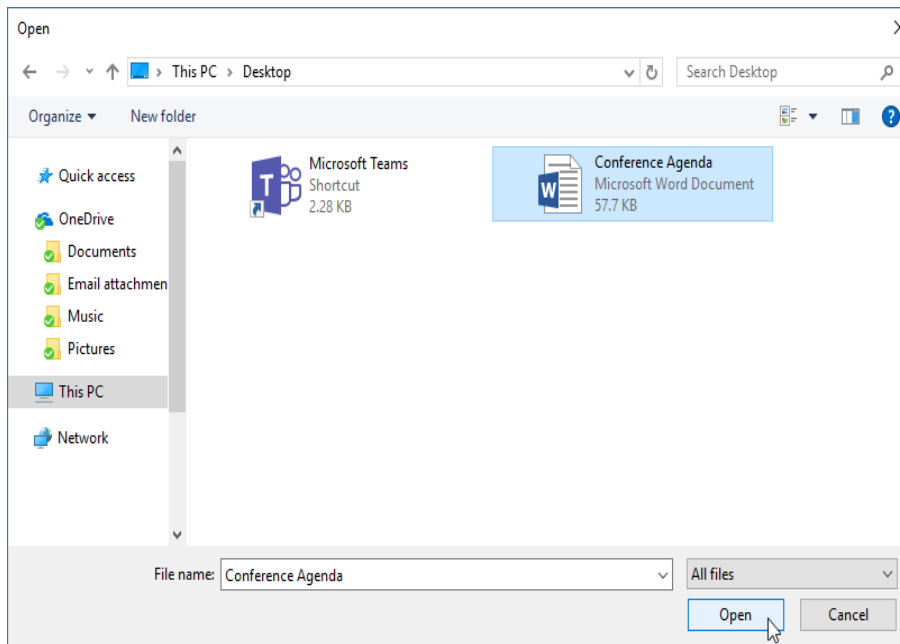
To add a file to a message, click the paperclip icon:



Then, choose where to add the file from. Here, let's upload a local file:

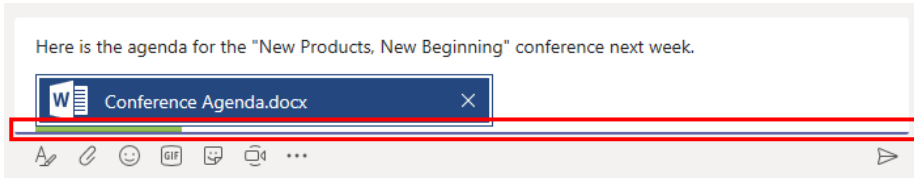


You can now browse to and choose the file. Click "Open" to start uploading it:

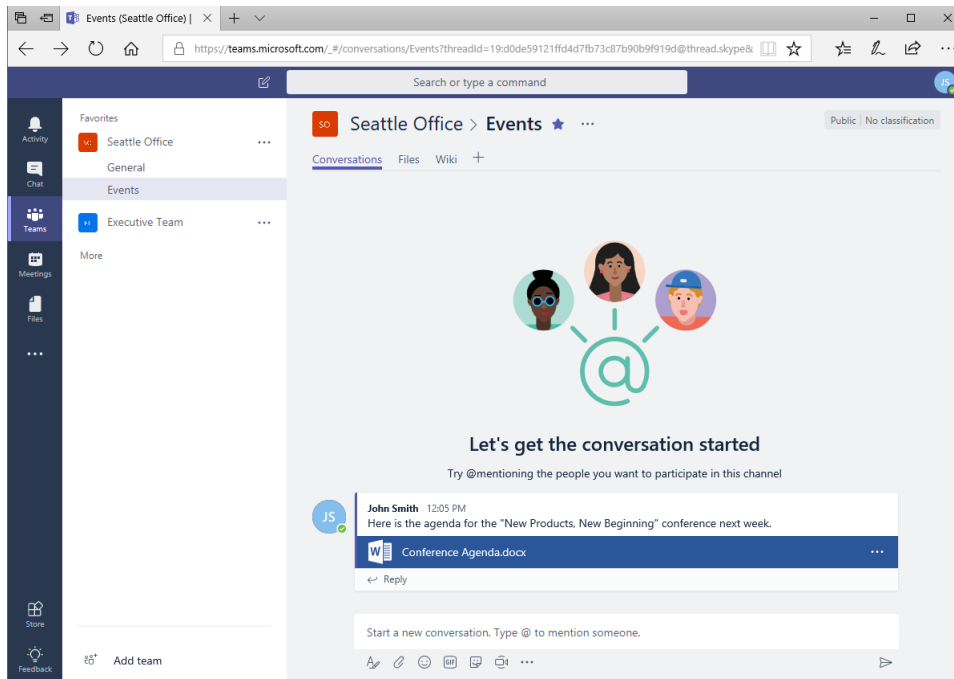


(This step will look different depending on where you are adding the file from.)

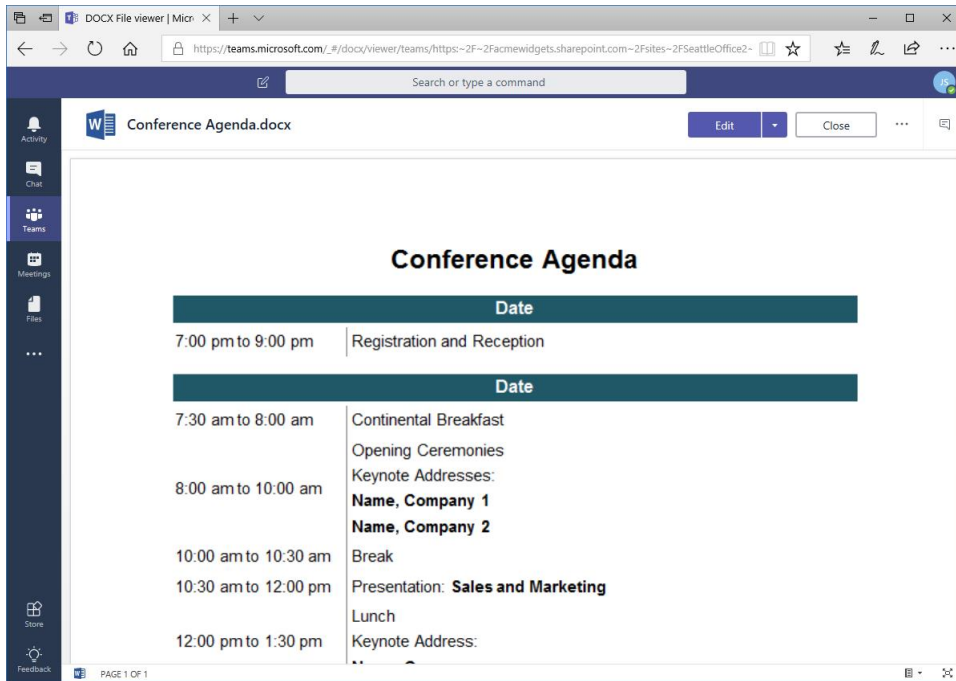
Teams will then start the upload process:



When it is finished (the green bar will disappear), click the arrow or press “Enter” to send your message. It will then be added to the channel:



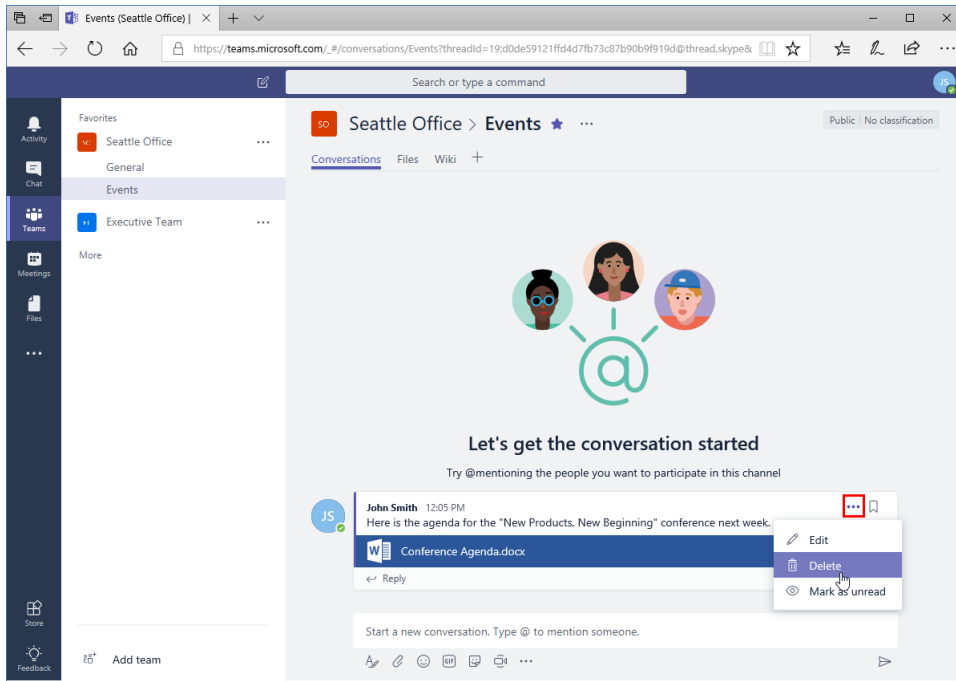
Users can click the file to view it within Teams:



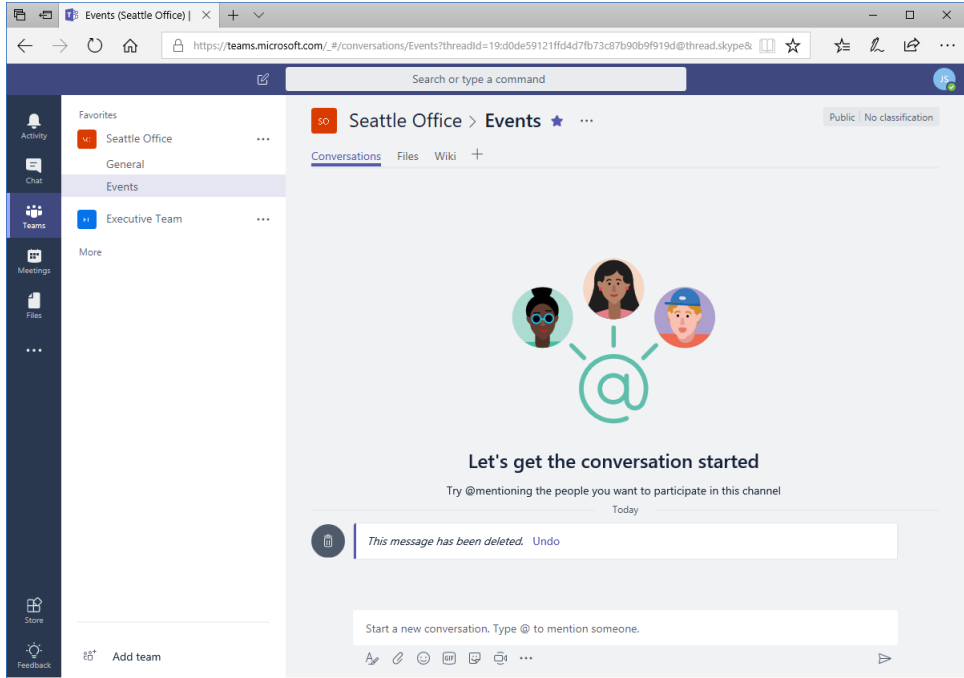
(Since this is a Microsoft Word file, you also have the option to edit it.) You will learn more about using files in Lesson 2.

Deleting a Message

If needed, you can delete a message you created by moving your mouse over it, clicking the ellipses on the right of it, and clicking “Delete:”



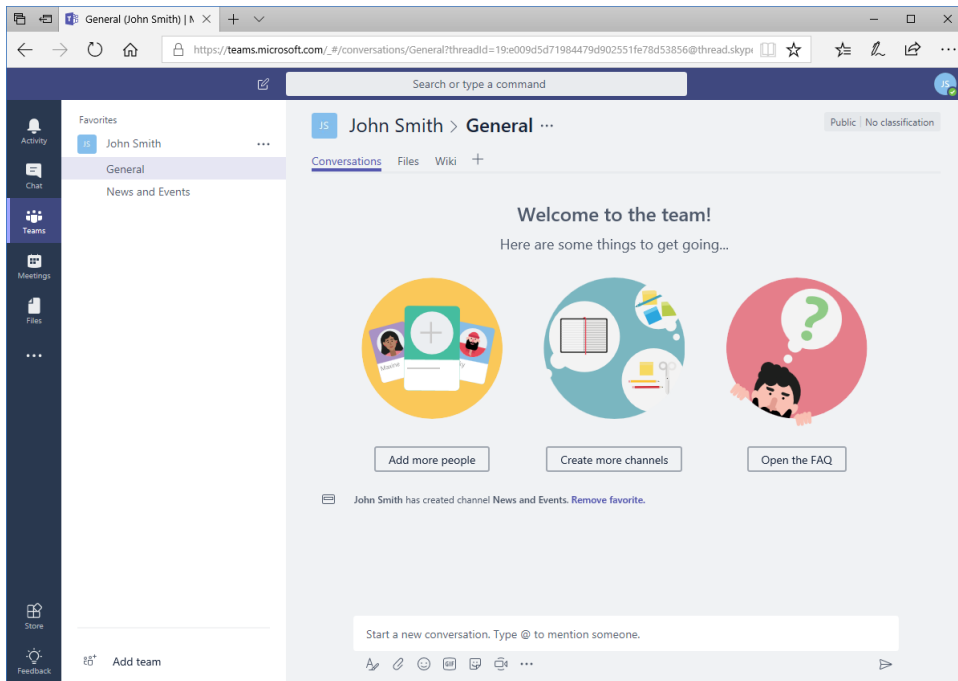
The operation is now completed. You will be able to undo it for a short period of time:



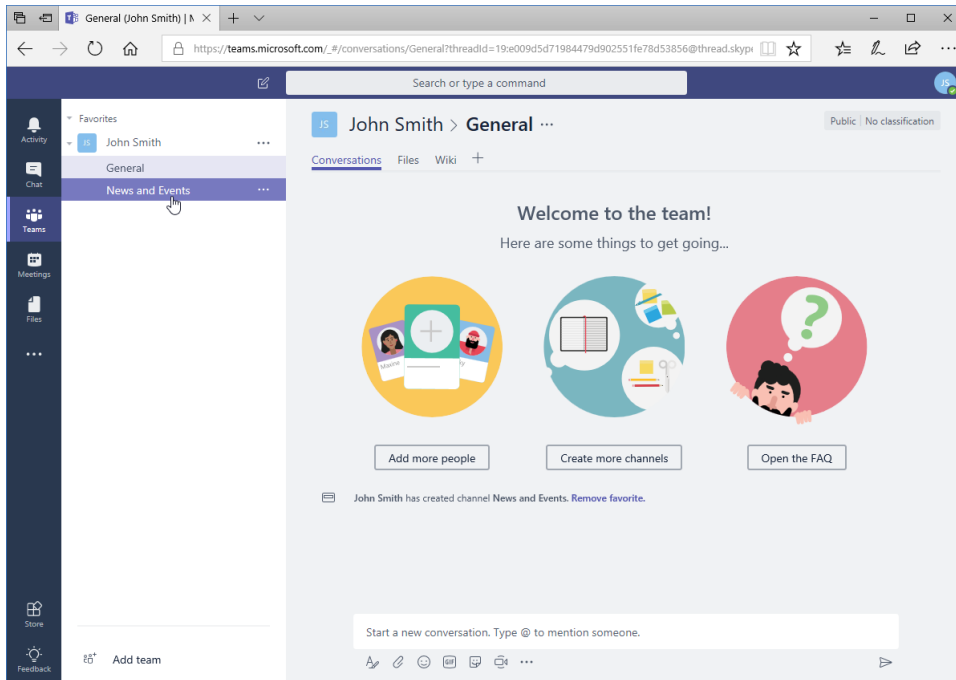
Activity 1-3: Posting Messages

In this activity, you will create and edit a message.

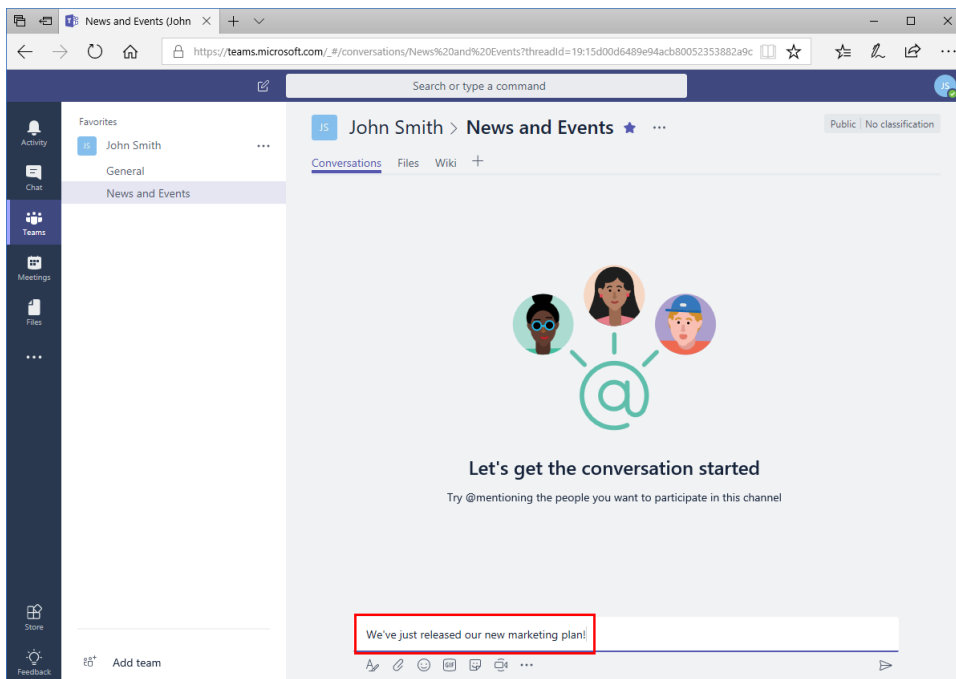
1. Ensure you have completed Activity 1-1 and Activity 1-2. Your team's General channel should be displayed. (If not, navigate to it using the task pane.)



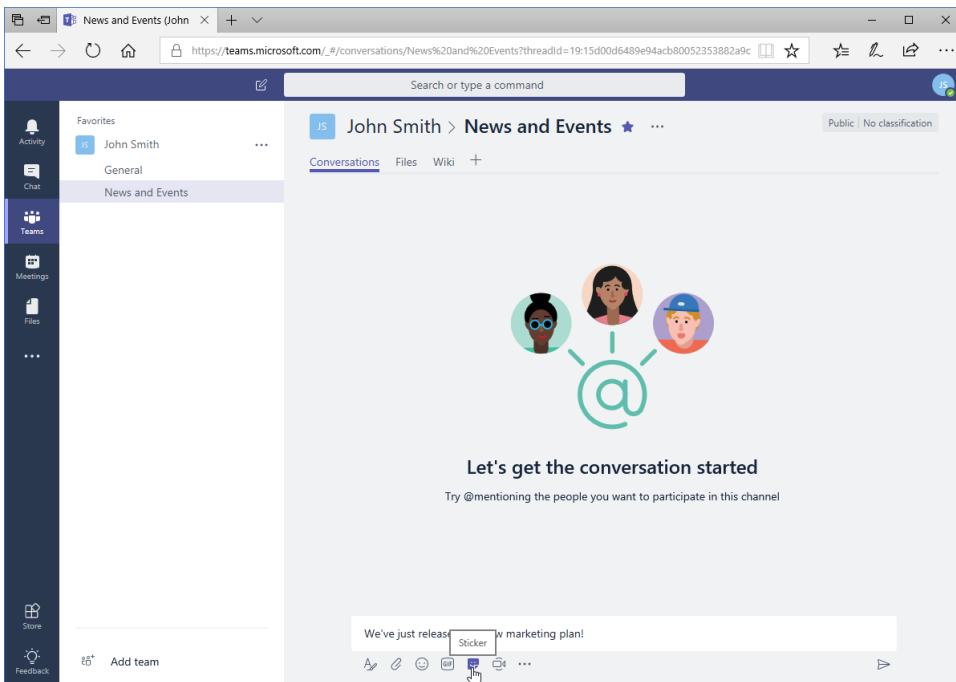
2. Click the “News and Events” channel to navigate to it:



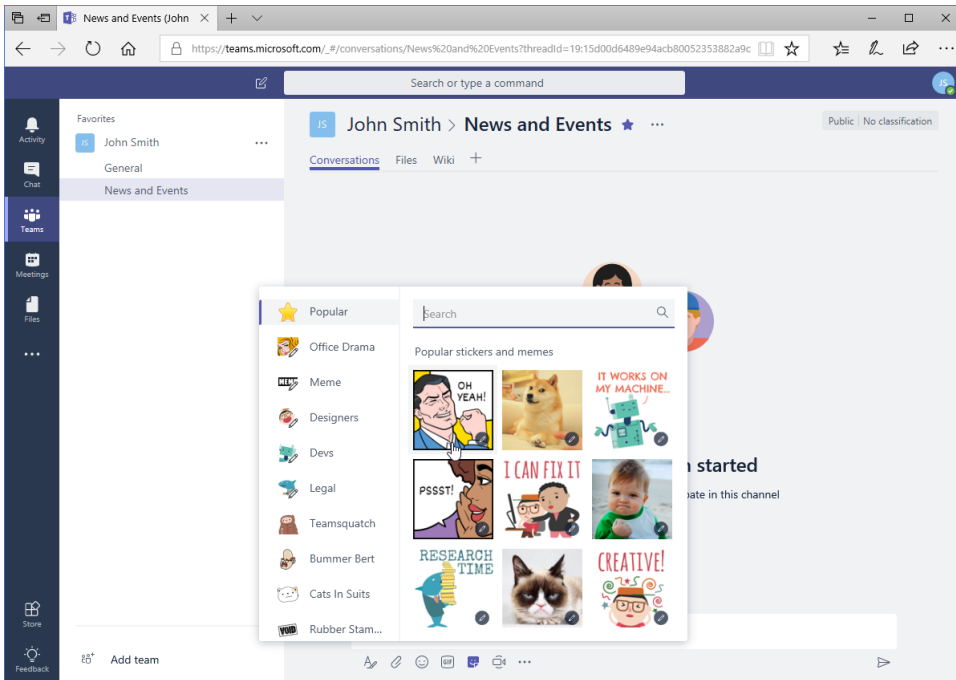
3. Click inside the compose box and type, “We’ve just released our new marketing plan!”



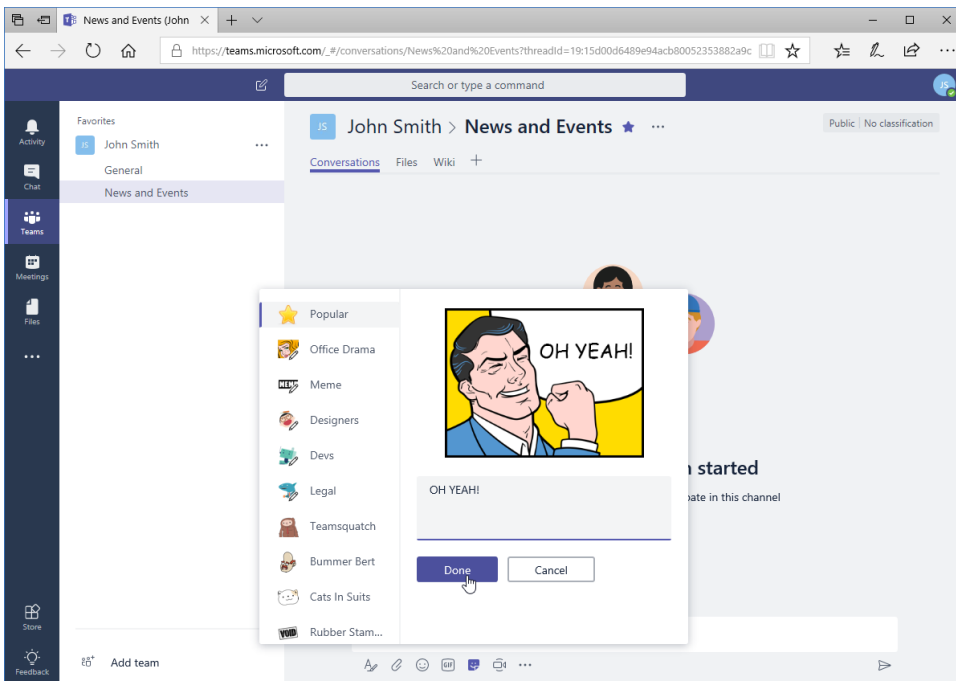
4. Click the “Sticker” button below the compose box:



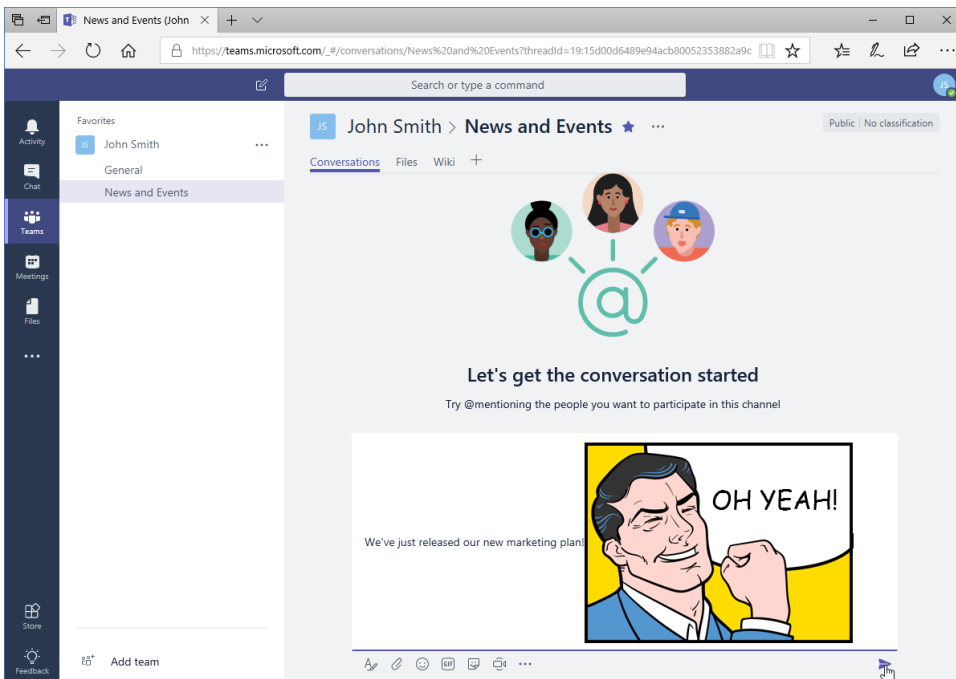
5. Click any sticker you like to add it to your message:



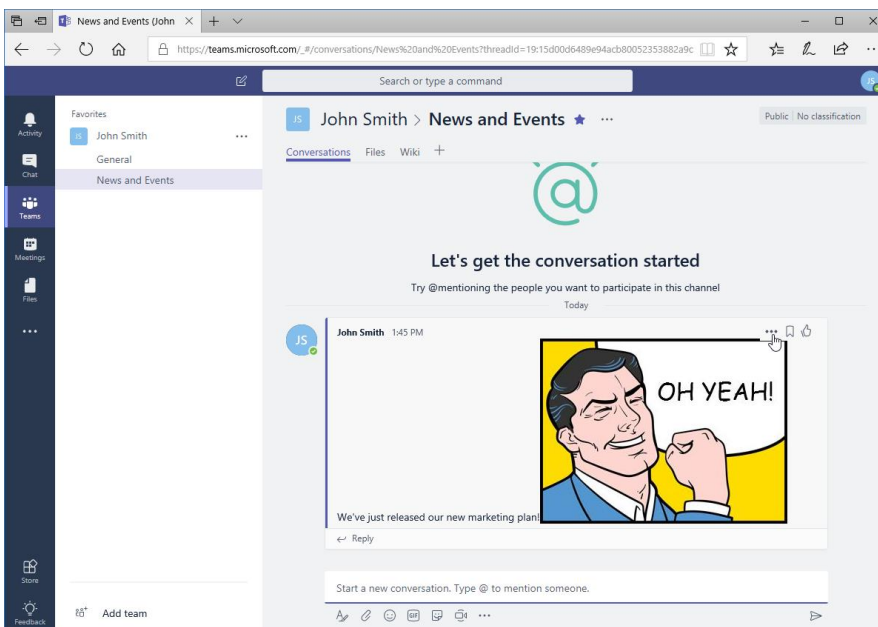
6. Click "Done" to confirm the operation:



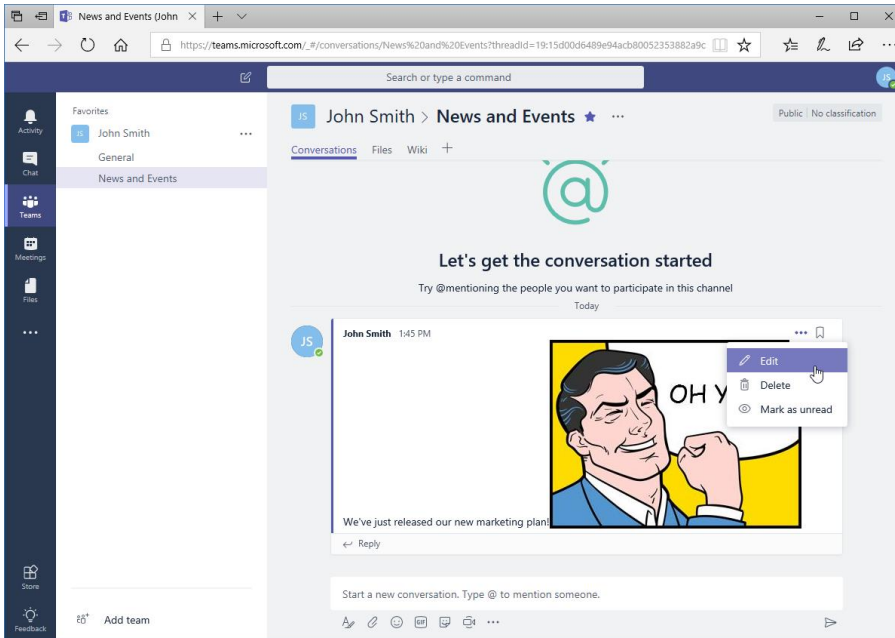
7. Click the arrow to send the message:



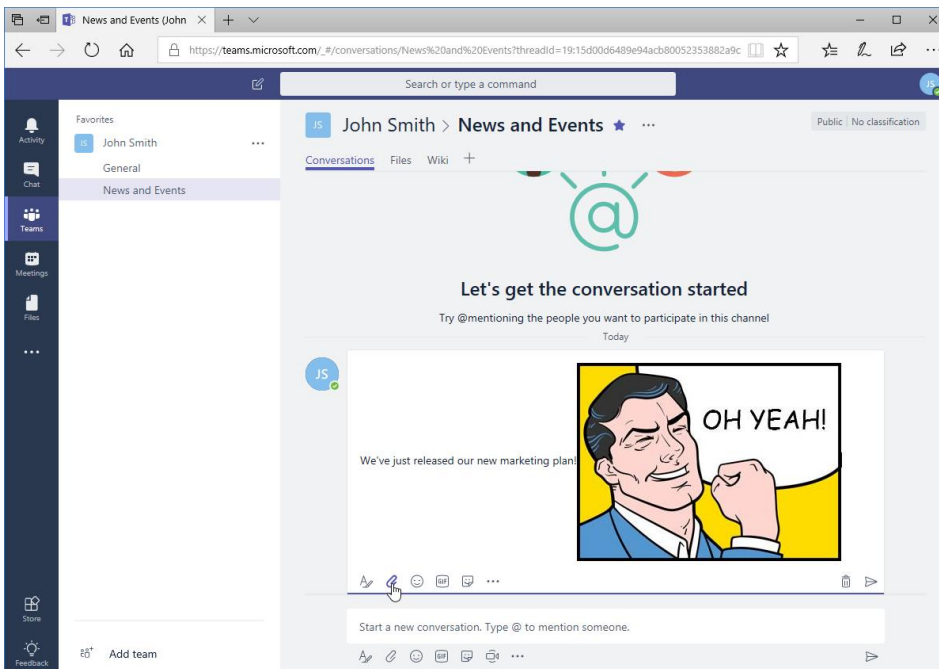
8. The message is now posted, but we forgot to add the plan document! Move your mouse over the message and click the ellipses icon:



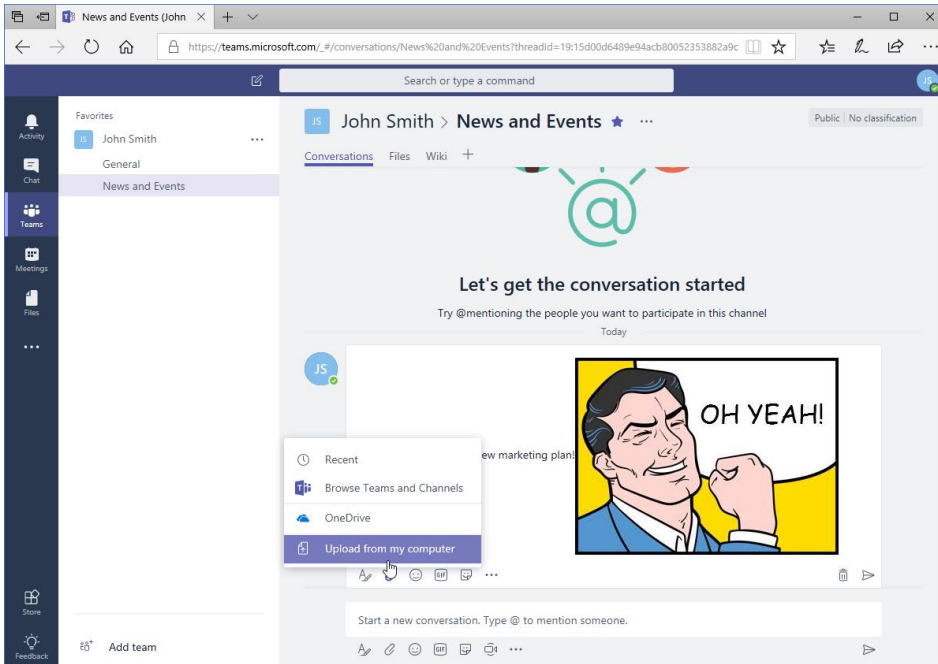
9. Click "Edit:"



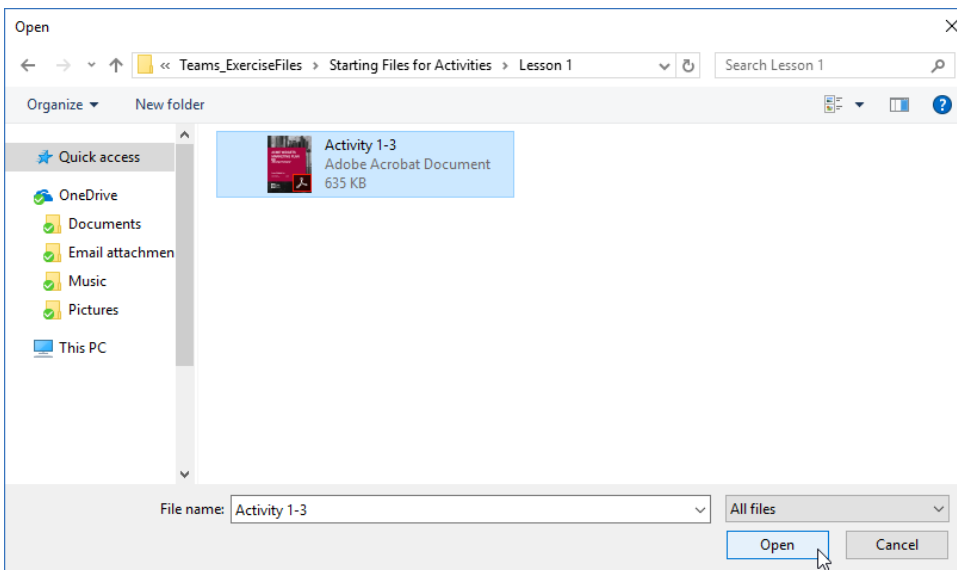
10. Click the paperclip icon:



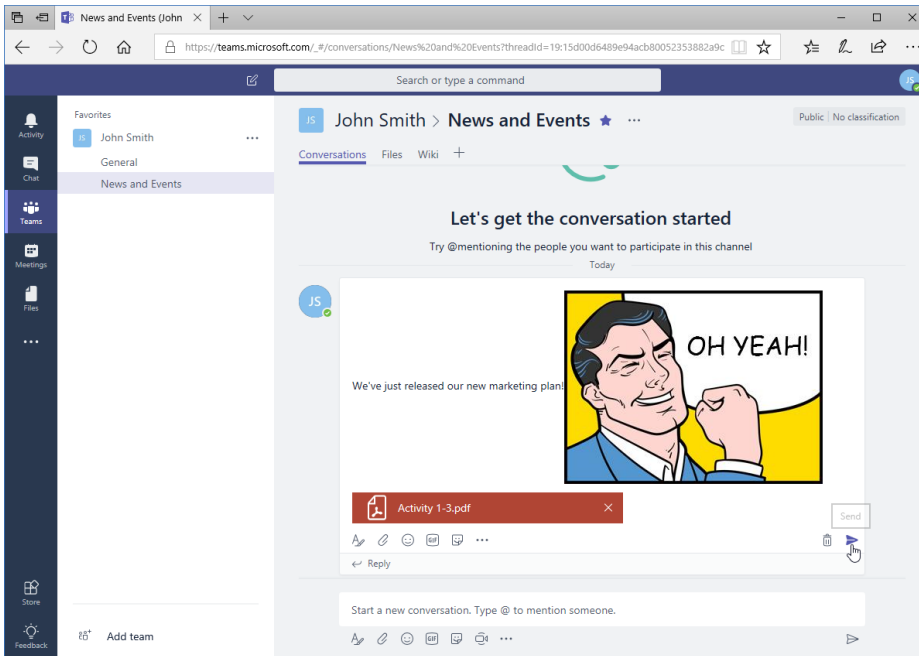
11. Click “Upload from my computer:”



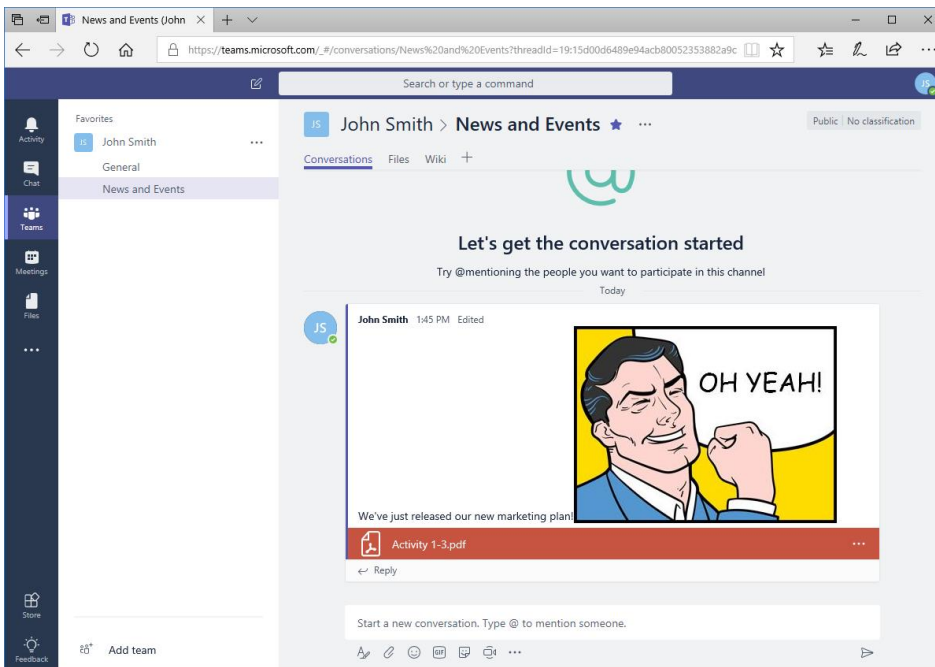
12. In the finder dialog that opens, locate your Lesson 1 folder. Select Activity 1-3.pdf and click “Open:”



13. Back on the channel page, you will see a green bar below the file as it uploads. When the upload is completed, click the arrow to update the message:



14. Your post is now complete – and so is this activity!



TOPIC D: Getting Help with Microsoft Teams

You will find Microsoft Teams easy and straightforward, especially once you get into using it. However, if you need help, there are plenty of resources you can use.

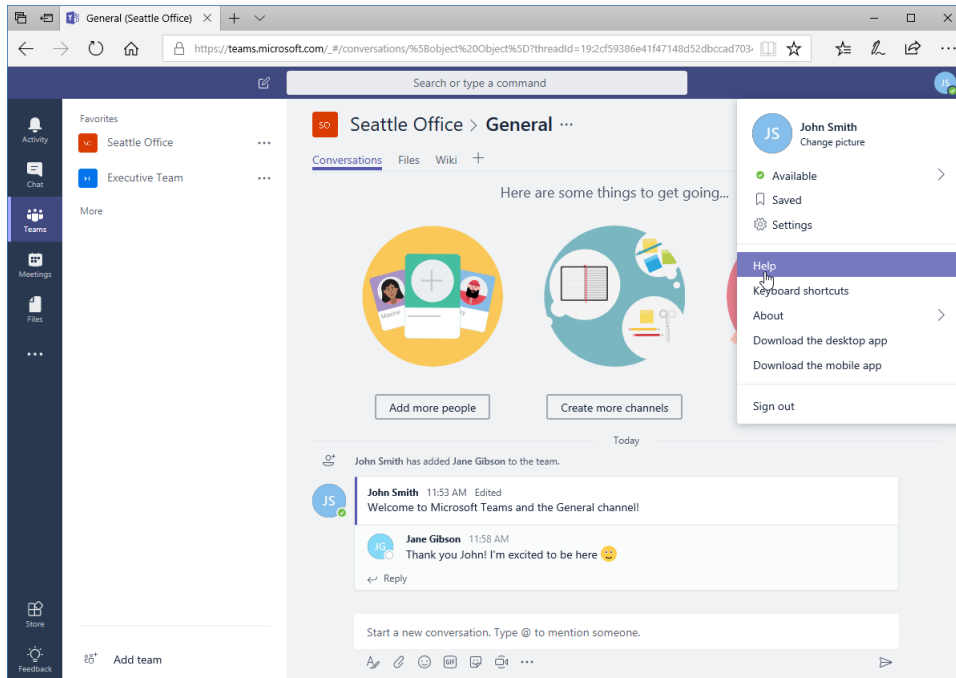
Topic Objectives

In this section, you will learn:

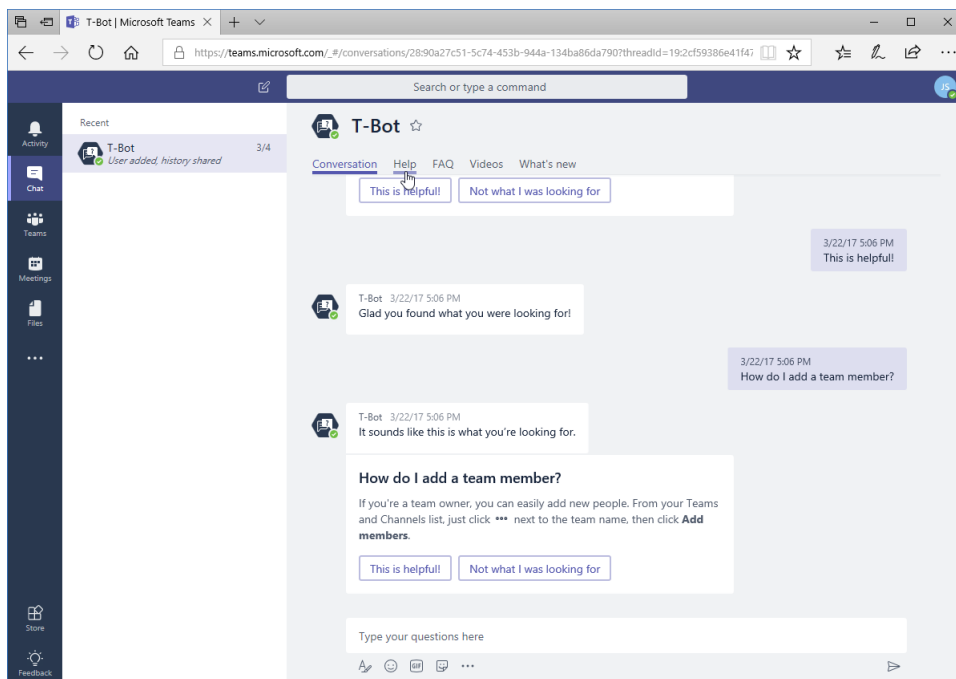
- How to access the Help Center
- How to find out about new features
- How to use T-Bot
- About slash commands and keyboard shortcuts

Using the Help Center

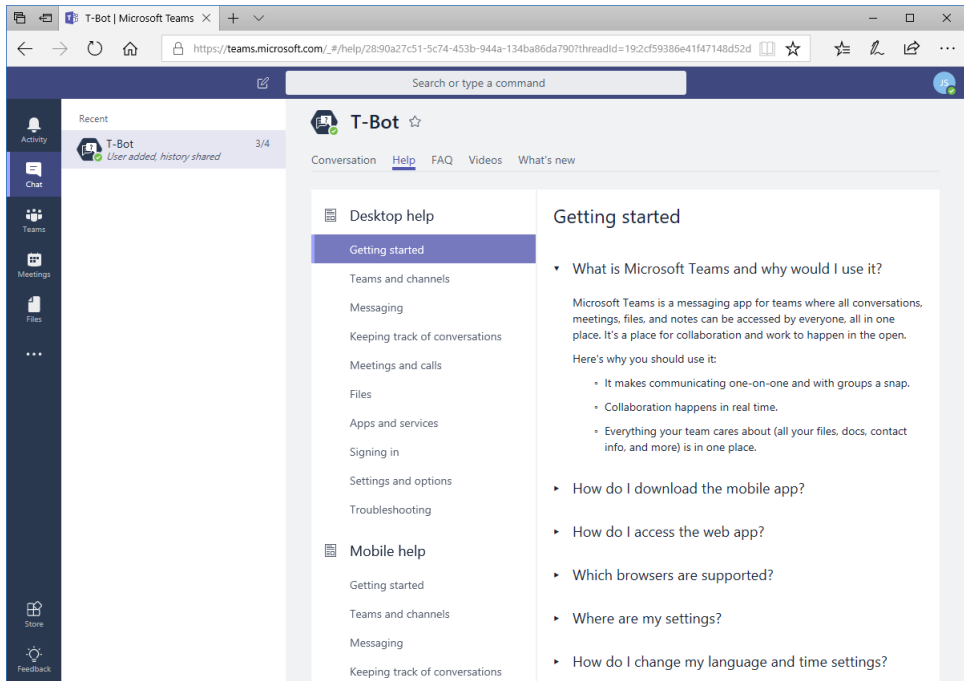
To access the Help Center, click your profile icon and click “Help:”



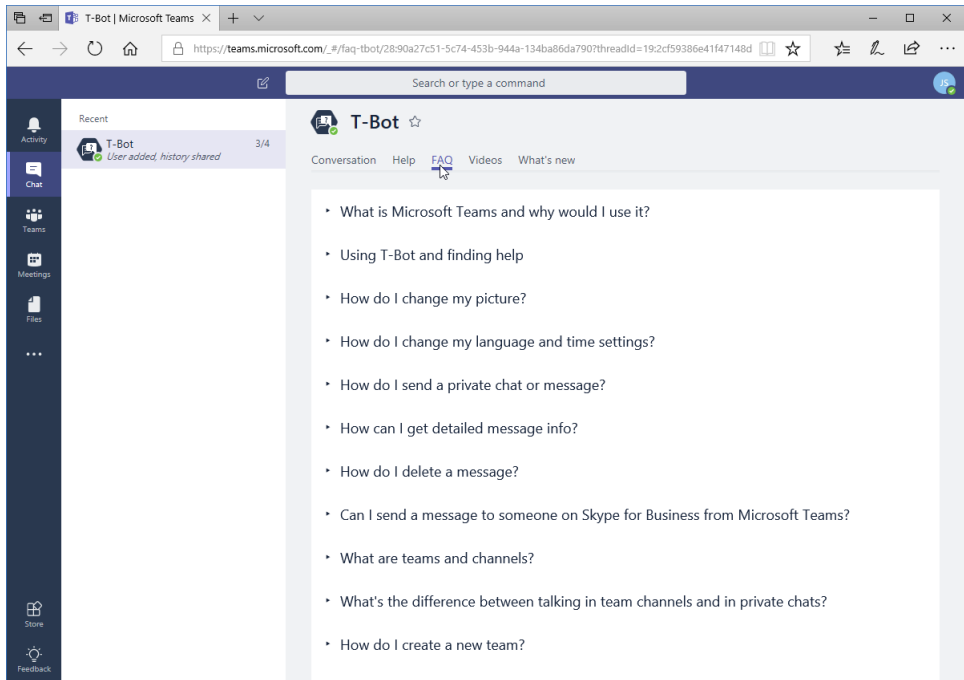
This will take you to T-Bot, which we will learn more about in a moment. Click the “Help” tab:



This will show you a traditional Help window, where you can browse categories and articles:

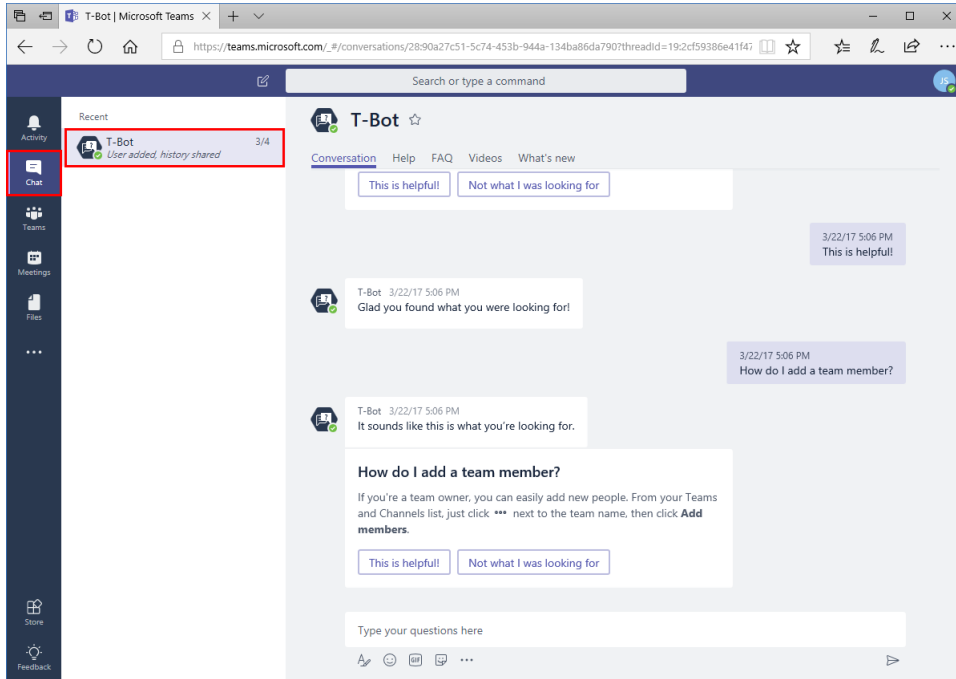


You can also click the FAQ tab to see common questions. Click any question to display its answer:

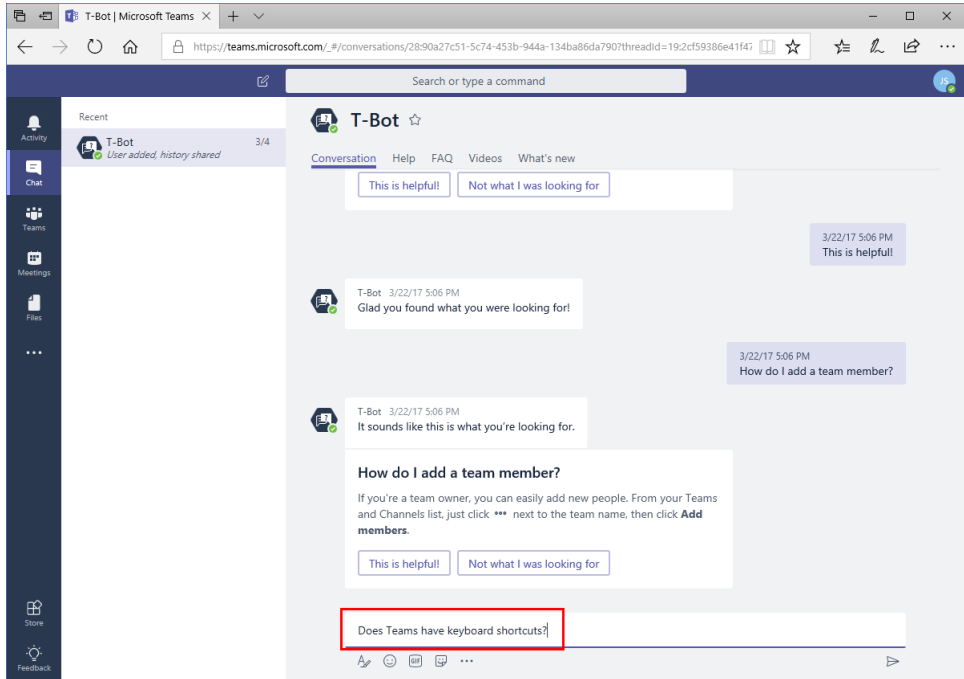


Using T-Bot

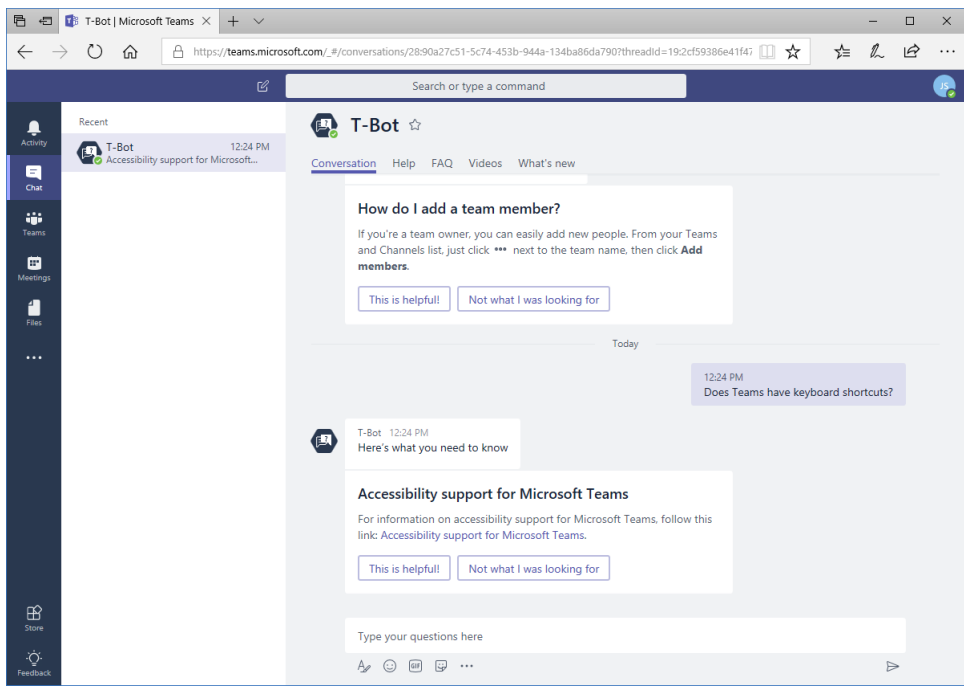
Let's take a closer look at T-Bot, your personal assistant within Microsoft Teams. We just accessed T-Bot by opening Help, but you can also click "Chat" and click the entry for T-Bot:



To ask T-Bot a question, type a message just as you would in a channel:



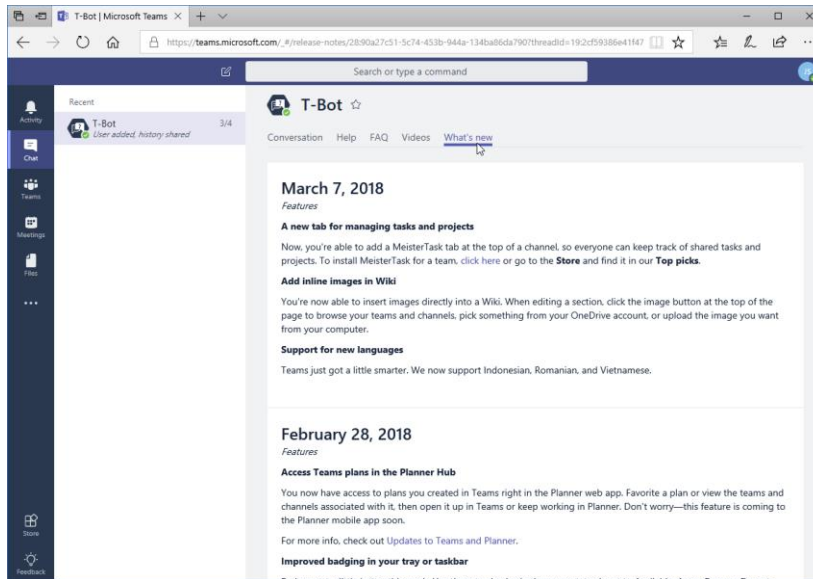
T-Bot will then reply with the appropriate link:



Be sure to let T-Bot know if this information was helpful or not, since it learns from feedback.

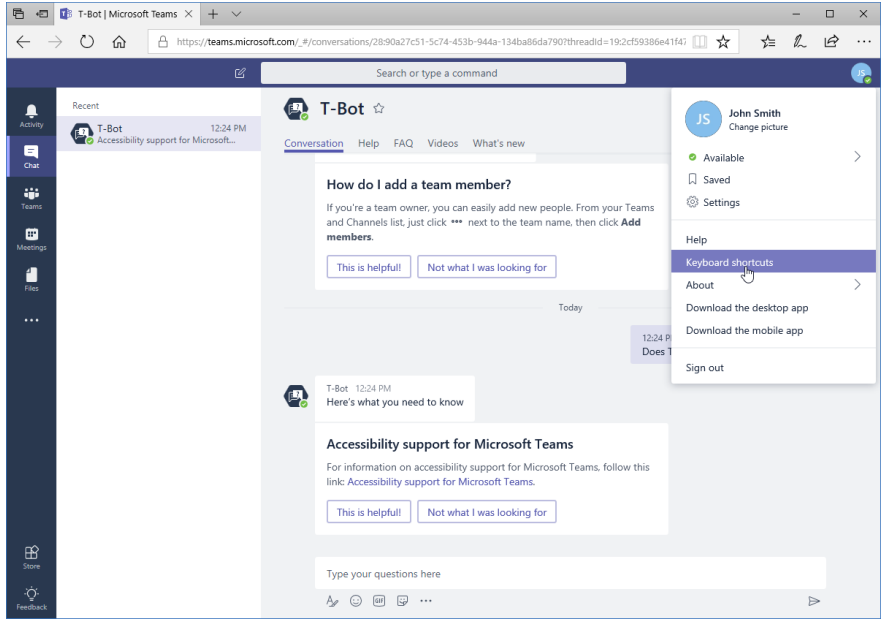
Viewing New Features

T-Bot also offers a “What’s new” tab, where you can quickly see new features and updates, sorted by date:

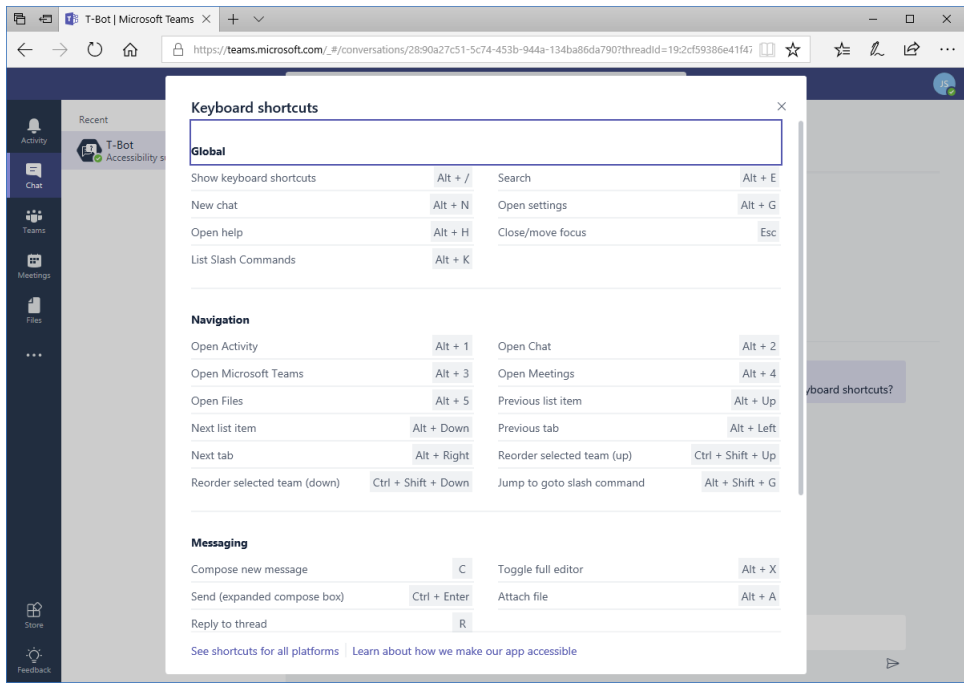


Viewing Keyboard Shortcuts

To view a list of keyboard shortcuts, click your profile icon and click “Keyboard shortcuts,” or use the Alt + / command:



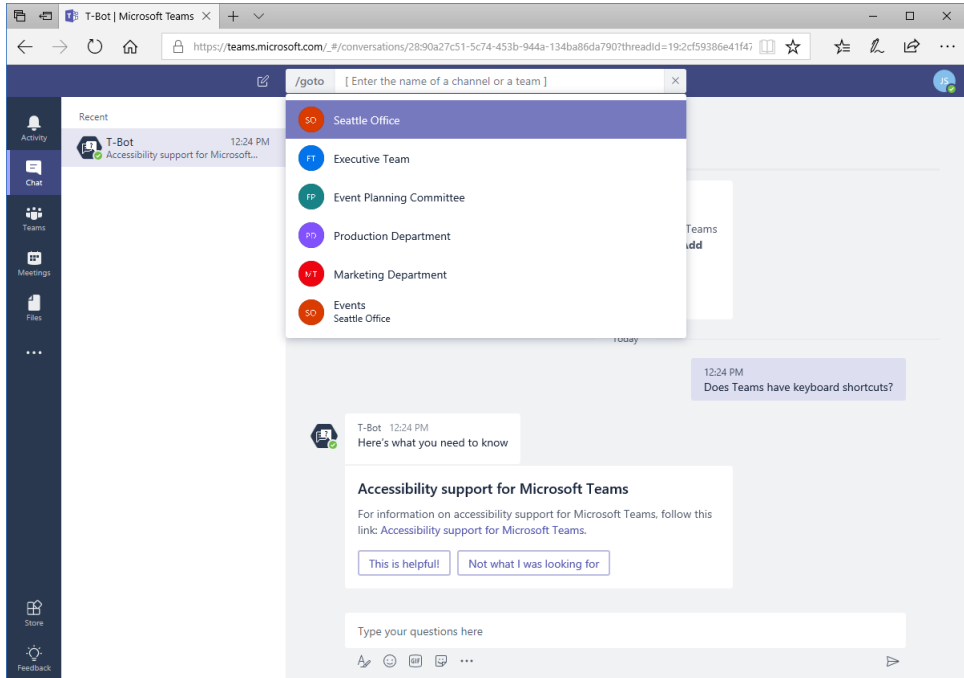
A list of shortcuts will open:



When you are finished viewing the list, click the "X" to return to Teams.

Using Slash Commands

Microsoft Teams also offers many text-based commands. (If you have used 1990s chat applications or command line prompts, the concept is the same.) These commands let you perform shortcuts from the field at the top of the Teams window. Here, we have entered the command “/goto” and are being prompted to choose the channel or team that we want to jump to:



Here is a list of the slash commands currently available in Microsoft Teams.

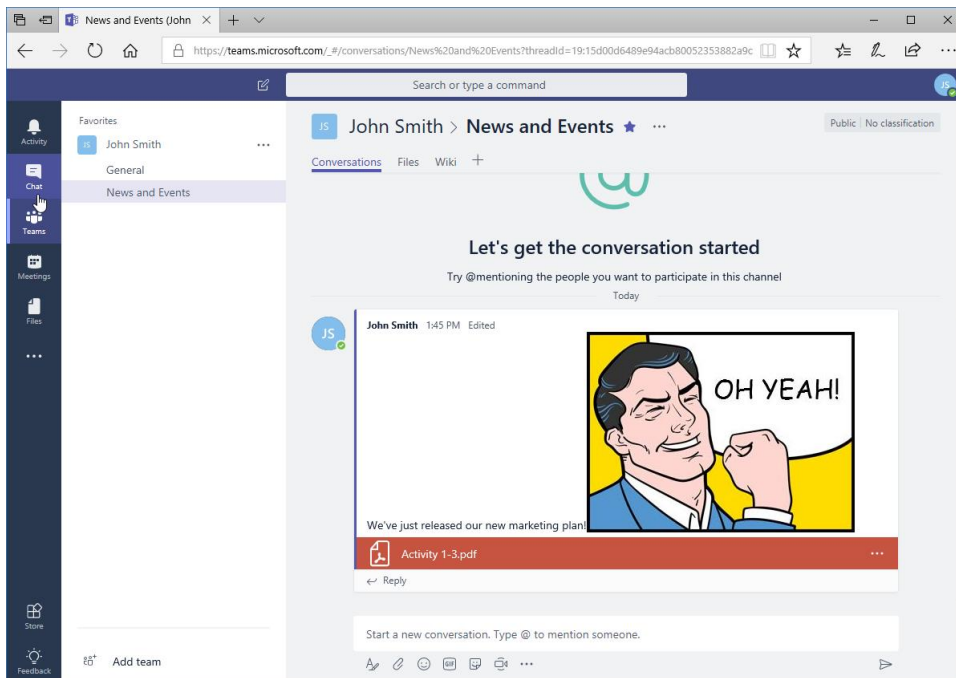
Slash Command	Action
/activity	View someone's activity
/available	Changes your Teams status to "Available"
/away	Changes your Teams status to "Away"
/busy	Changes your Teams status to "Busy"
/call	Initiate a call
/dnd	Changes your Teams status to "Do Not Disturb"
/files	See your recent files
/goto	Go to a certain team or channel
/help	Get help
/join	Join a team
/keys	View keyboard shortcuts
/mentions	See all of your mentions
/org	View an org chart
/saved	View your saved list
/unread	See all of your unread activity

Slash Command	Action
/whatsnew	Check what's new in Teams
/who	Ask Who a question

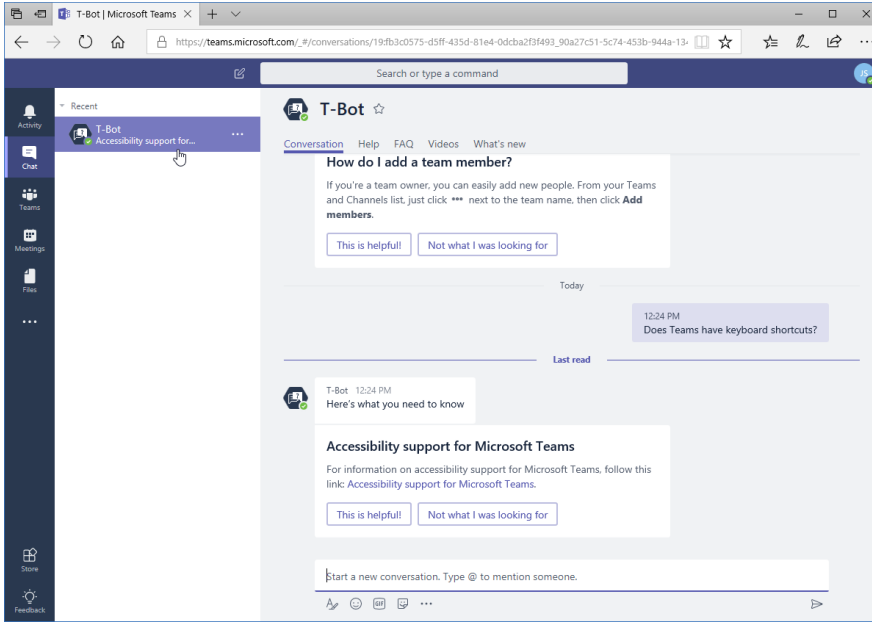
Activity 1-4: Getting Help with Microsoft Teams

In this activity, you will explore help features in Teams.

1. Ensure you have completed all the previous activities and that Microsoft Teams is open.
2. First, let's get to know T-Bot. Click "Chat" on the sidebar:

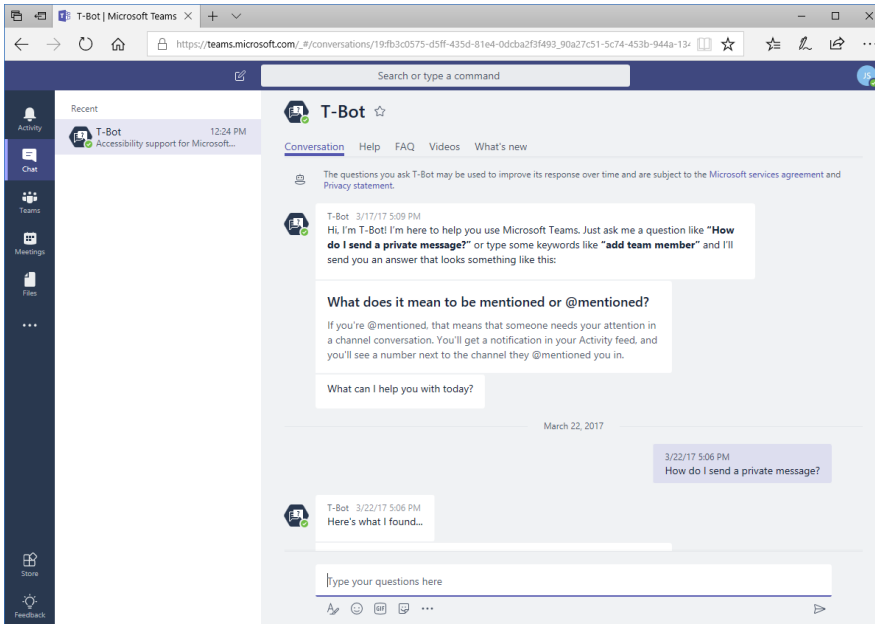


3. Click T-Bot if its contents are not already displayed:

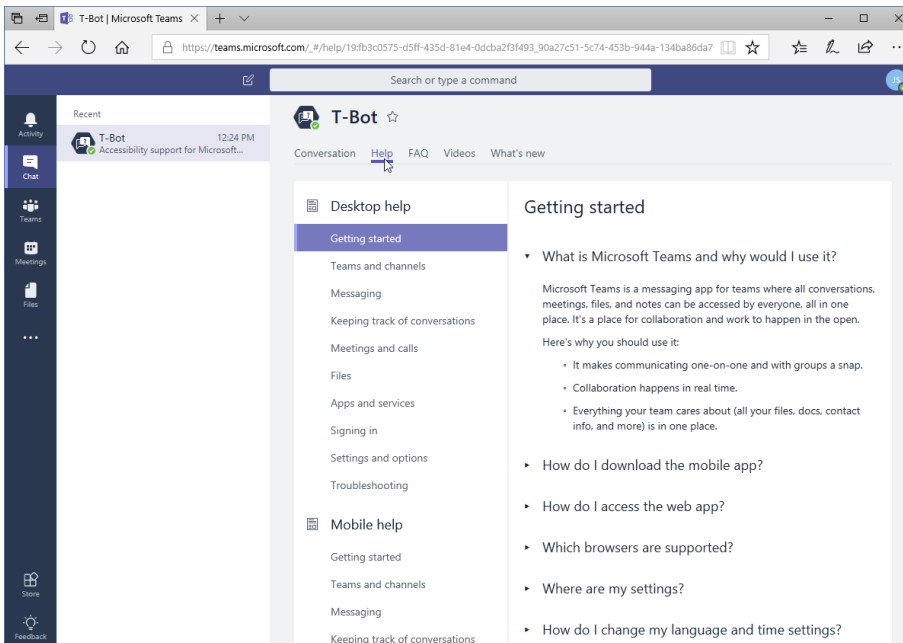


(If T-Bot is already selected, skip this step.)

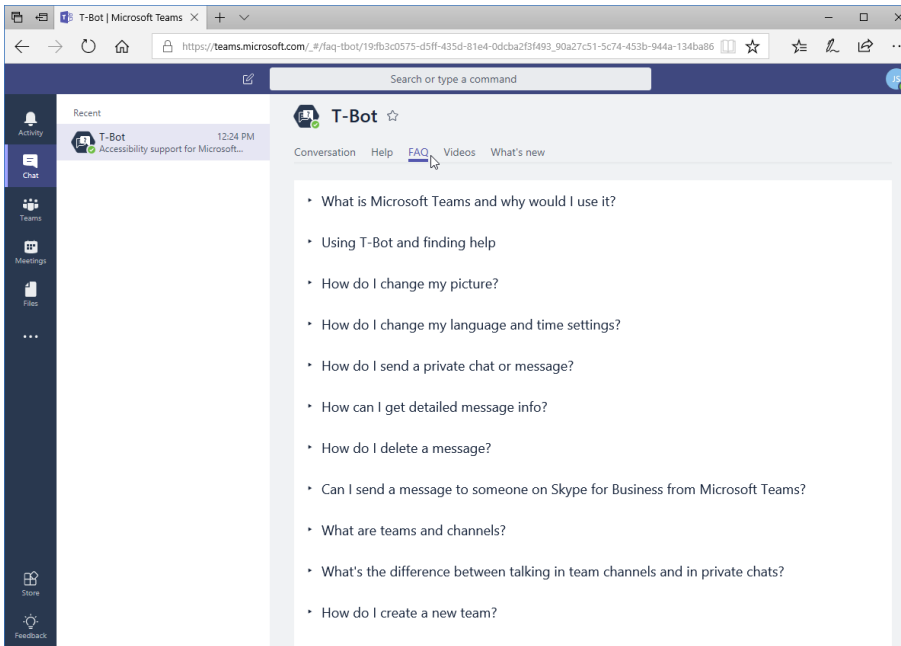
4. The Conversation tab should be displayed by default. Review any information provided:



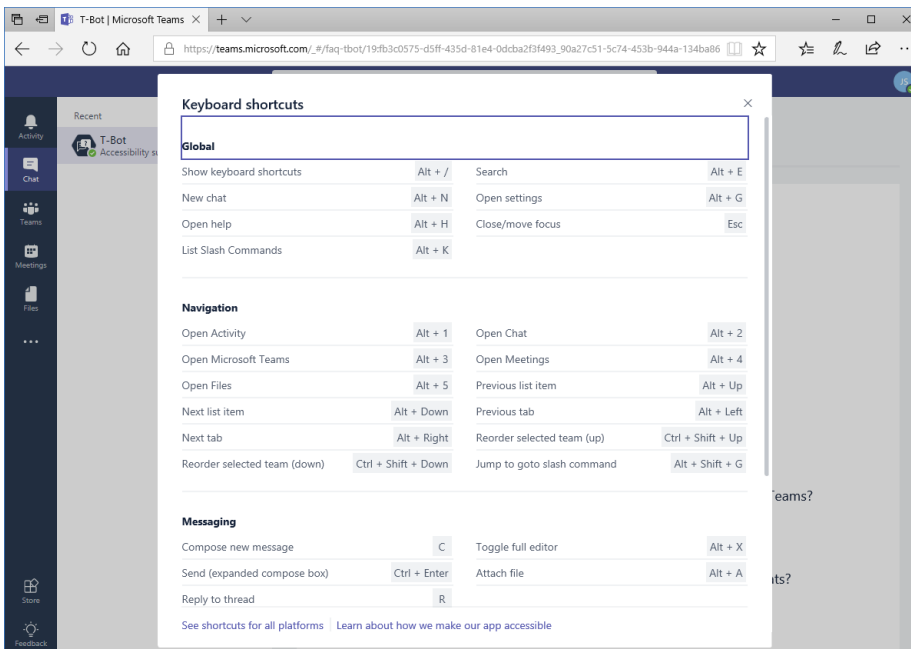
5. Next, click the "Help" tab and review its contents:



6. Finally, review the FAQ tab:



7. To find more information about keyboard shortcuts, try pressing Alt + /. The Keyboard Shortcuts dialog will open:



8. Review the list of shortcuts. You should see that you can dismiss open dialogs by pressing the Esc key on your keyboard. Try it now to complete this activity!

Summary

In this lesson, you learned how to use the Teams interface and its key elements (including teams, channels, and messages). You also learned how to get help in Teams.

Review Questions

1. **How do you open Microsoft Teams?**
2. **What command sequence displays a list of keyboard shortcuts?**
3. **How do you access T-Bot?**
4. **You just posted a message and you realize there is a typo in it! How do you edit it?**
5. **List one way to create a new channel.**

LESSON 2: COMMUNICATING IN CHANNELS

Lesson Objectives

In this lesson you will learn how to:

- Manage messages
- Do more with messages
- Manage files in a channel
- Use the wiki

TOPIC A: Managing Messages

In the last lesson, we learned how to create messages in channels. However, there is a lot more you can do! This topic will introduce you to some of the most common tasks you will perform when working with messages.

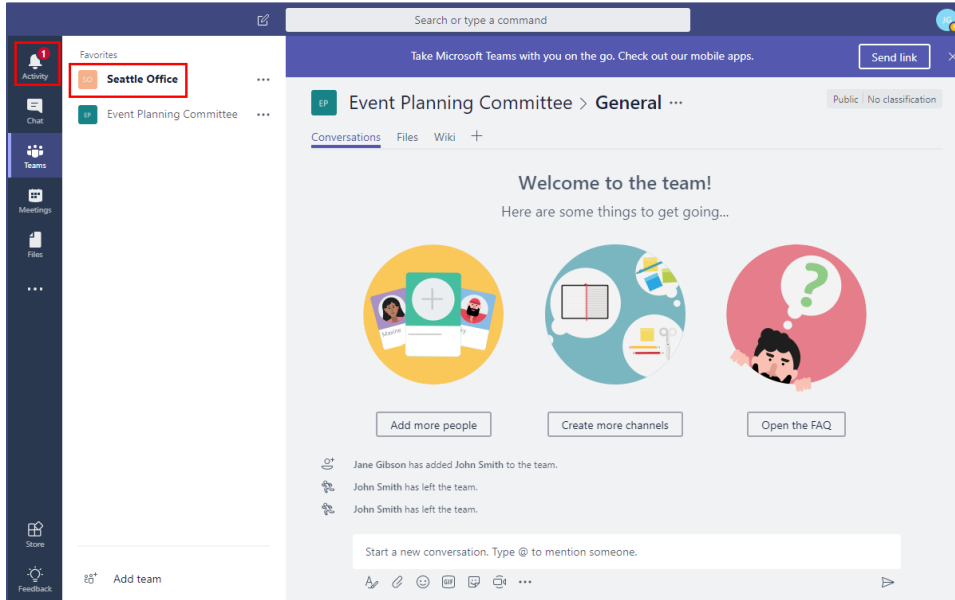
Topic Objectives

In this section, you will learn how to:

- Identify new messages
- Mark messages as read or unread
- Like and save messages

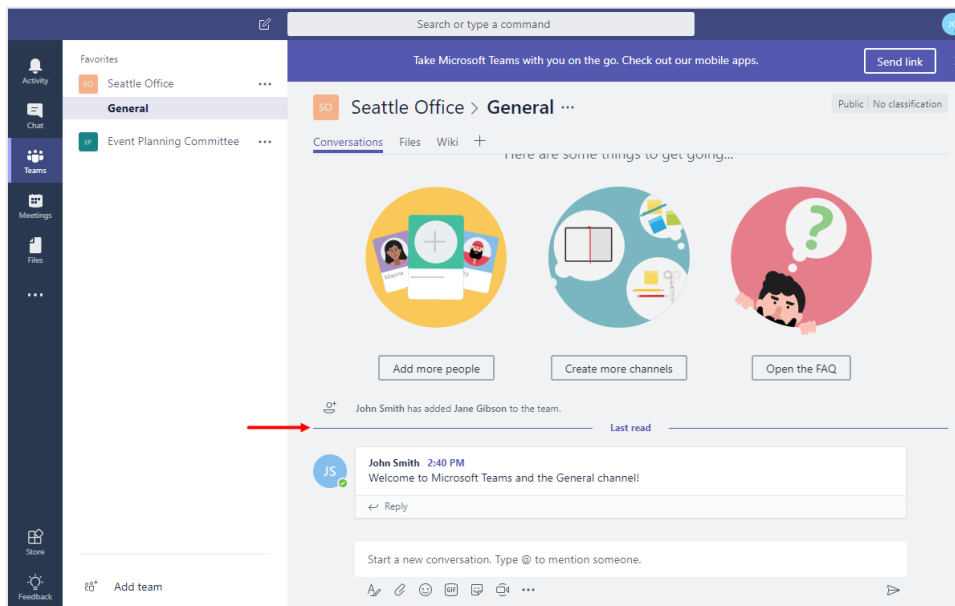
Identifying New Messages

Teams with new messages will be bolded in the task pane:



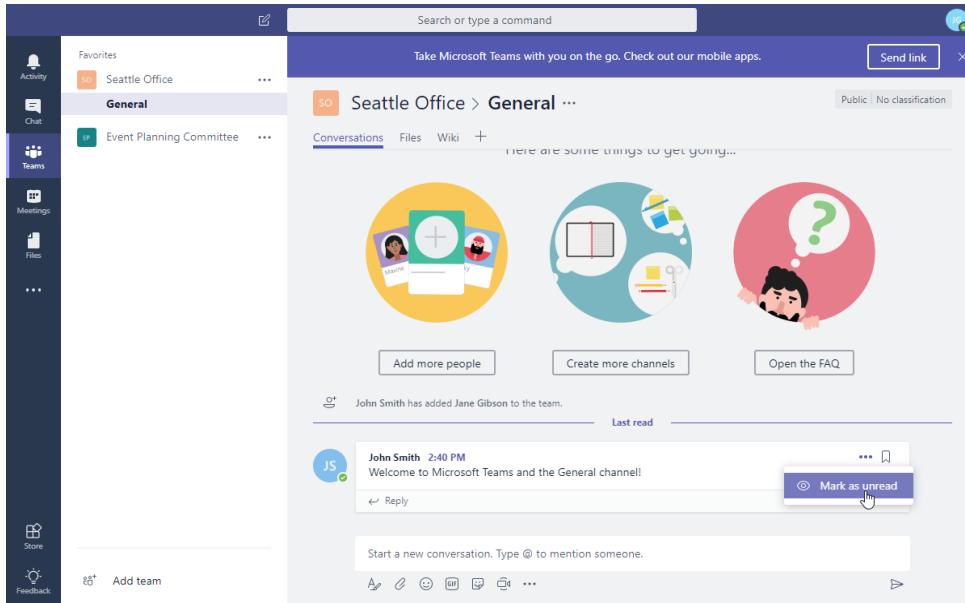
As well, a badge will be displayed on the Activity icon in the sidebar. You may also see a notification if you have followed the channel that the message was posted in.

When you open the channel, a line will indicate where your new messages start:



Marking Messages as Read and Unread

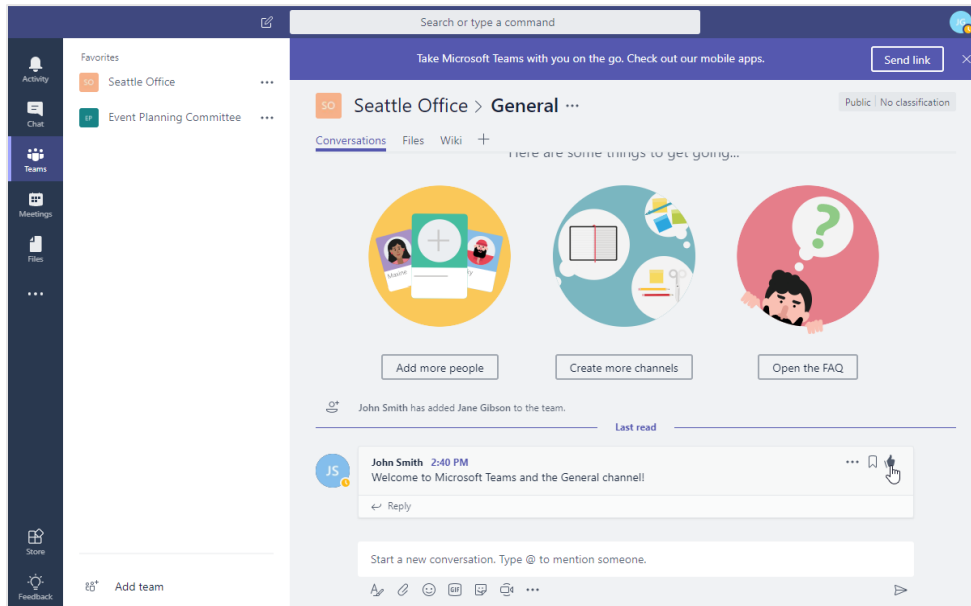
You can mark a message as unread (and control the position of the “Last read” bar) by moving your mouse over the message, clicking the ellipses in its right corner, and clicking “Mark as unread:”



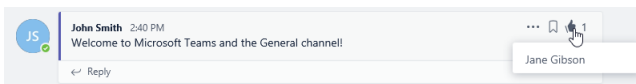
To mark the message as read, repeat this process.

Liking a Message

Sometimes, you may want to indicate you have read a message but there is no need to reply with a full message of your own. In this case, you can like a message. Simply move your mouse over it and click the thumbs-up icon:



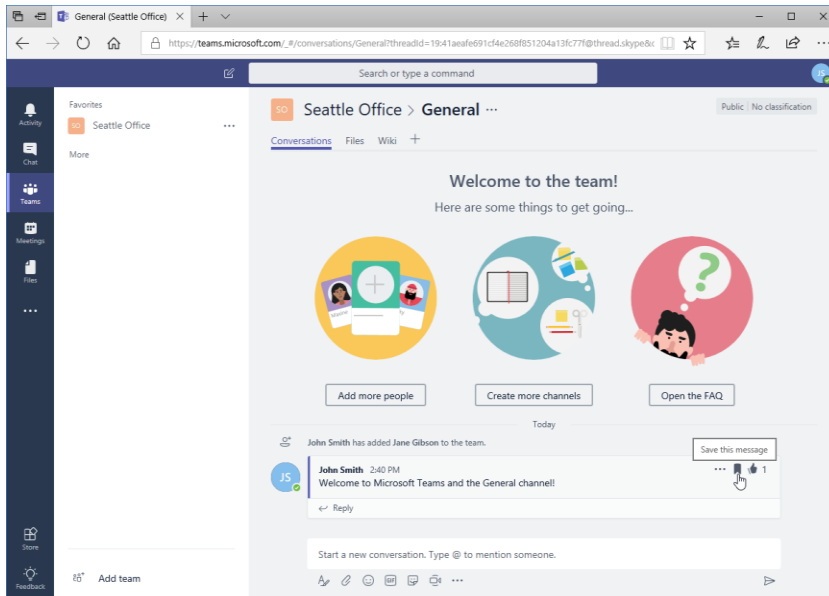
The number of likes will now be displayed beside the message, and you can move your mouse over the icon to see who has liked it:



To remove a like, click the thumbs-up icon again.

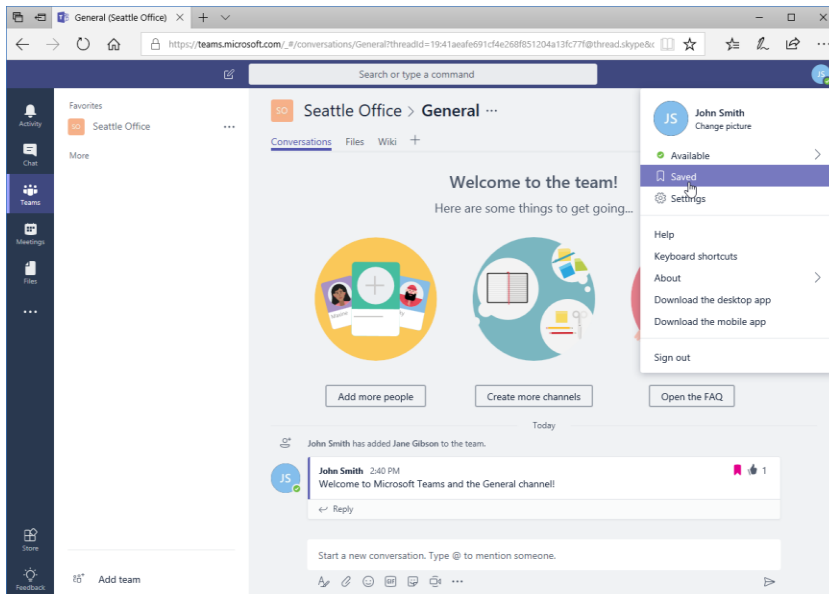
Saving a Message

To save a message for easy access, move your mouse over the message and click the bookmark icon:

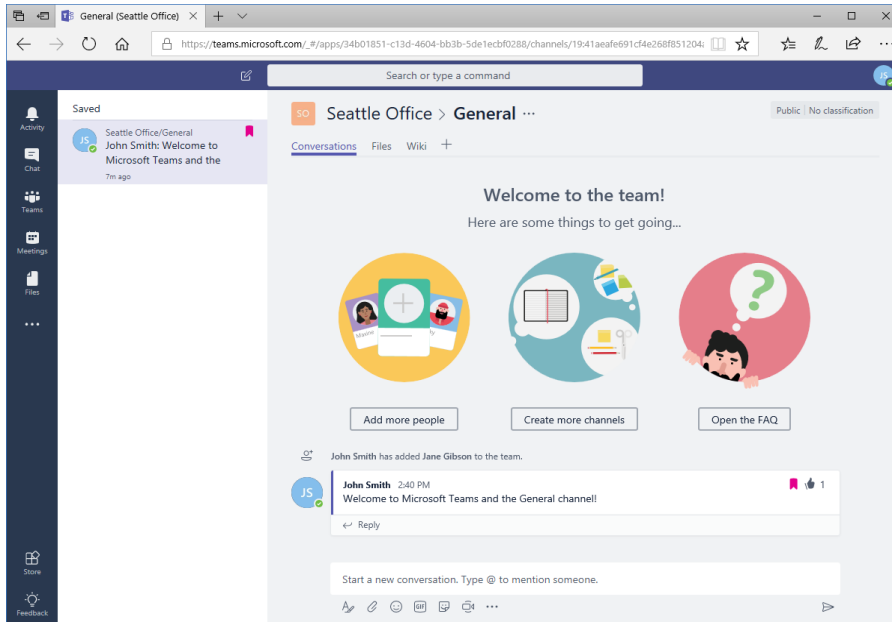


The item will be immediately saved.

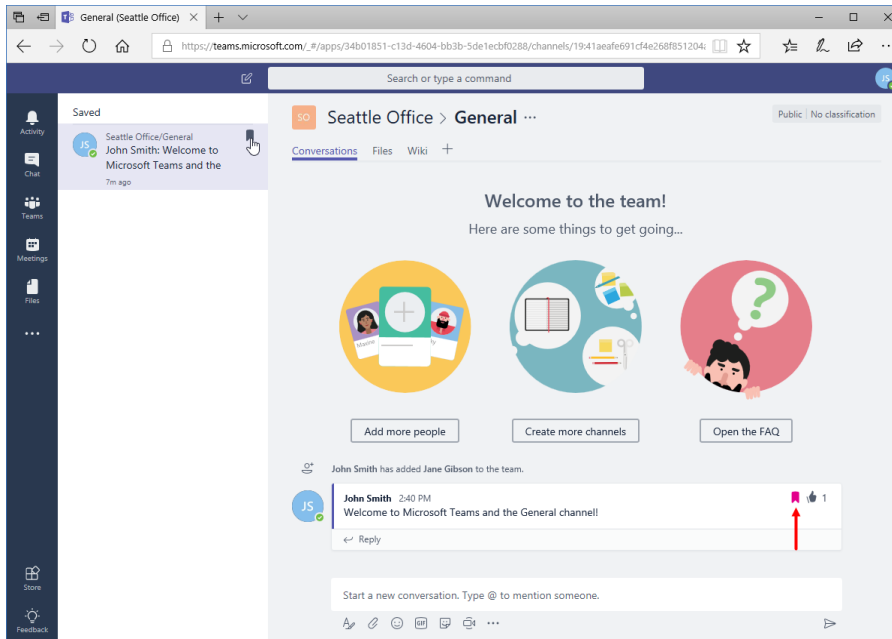
You can view saved items by clicking your profile icon and clicking “Saved:”



This will show your saved items in the contextual task pane. The details of the selected item will be shown in the main window:



To remove this item from your Saved list, click the bookmark icon in this window or from the channel:

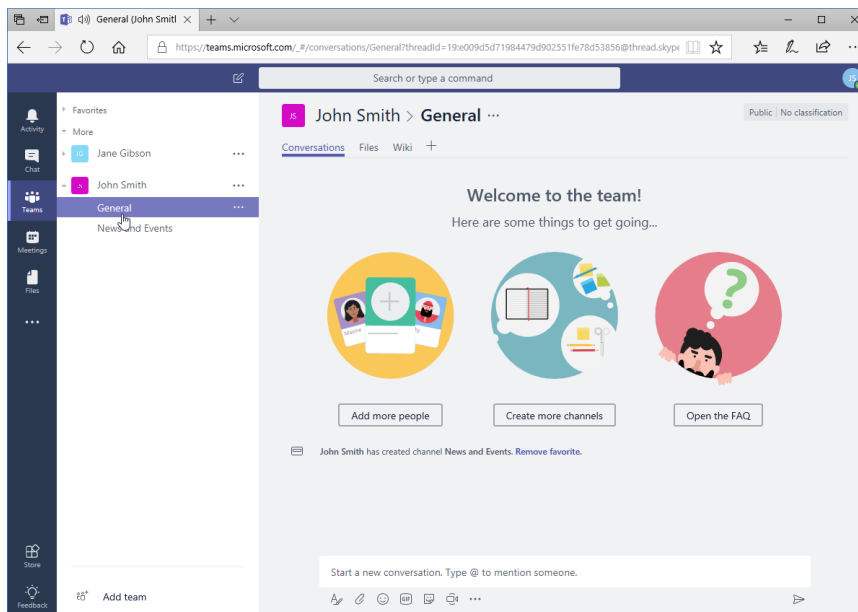


Activity 2-1: Managing Messages

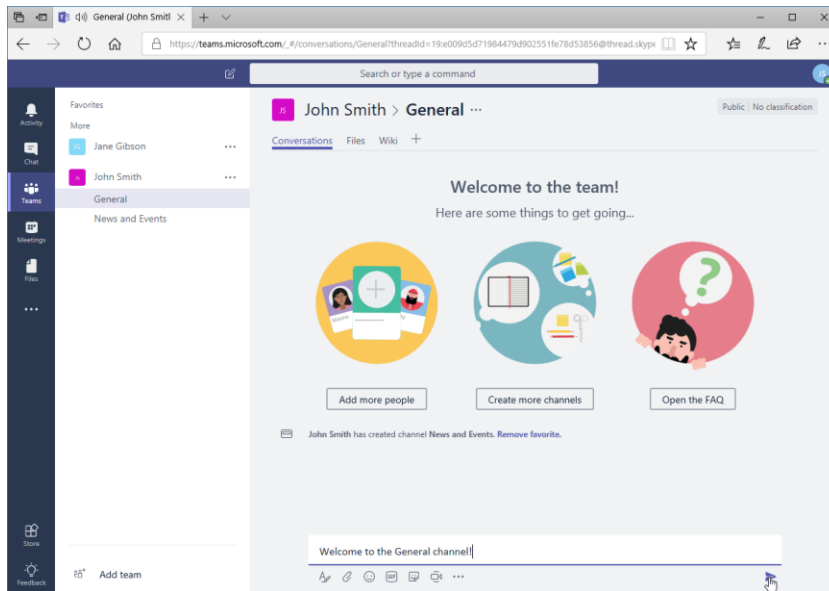
In this activity, you will practice liking and saving messages.

1. Ensure you have completed all Lesson 1 activities and that Microsoft Teams is open. Choose a partner from your class, or ask a friend to help you out. Ensure you are members of each other's teams.

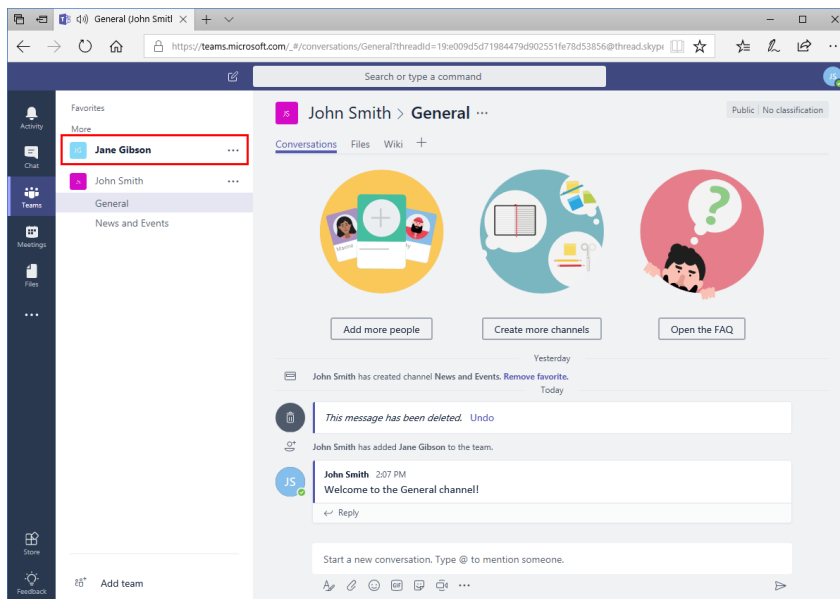
2. Ensure your team's General channel is displayed:



3. Type the following message: “Welcome to the General channel!” Press “Enter” or click the Send icon:

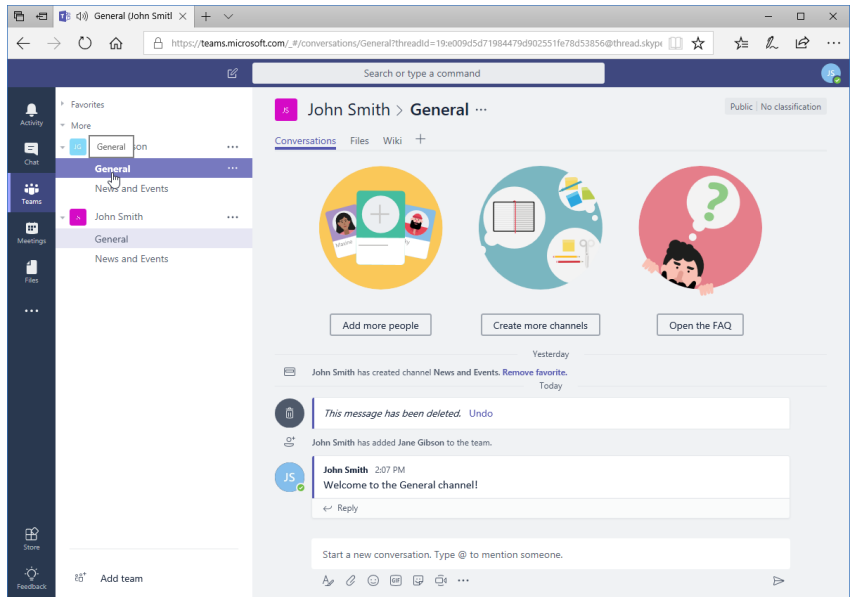


4. You should see your partner’s channel name turn bold, indicating there is a new message. Click it:

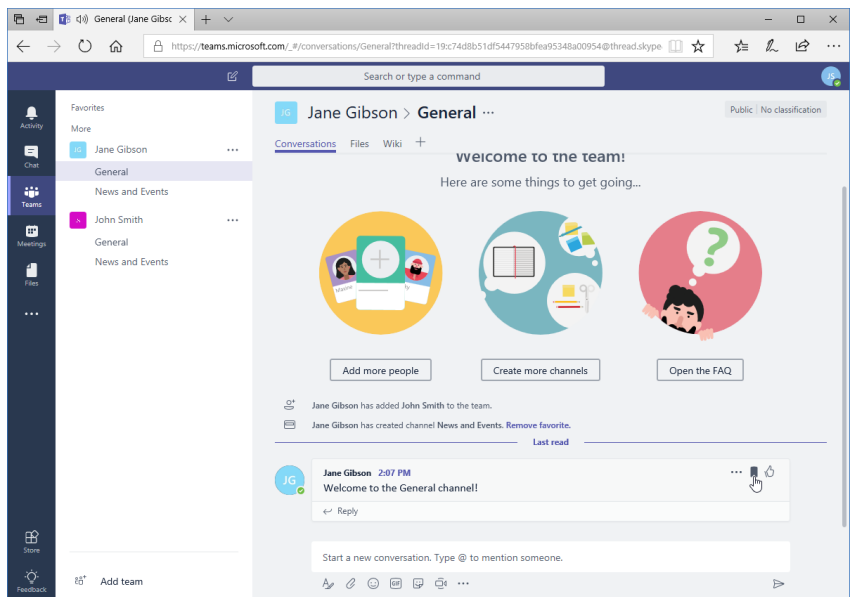


(You will also get a notification if the team is marked as a favorite.)

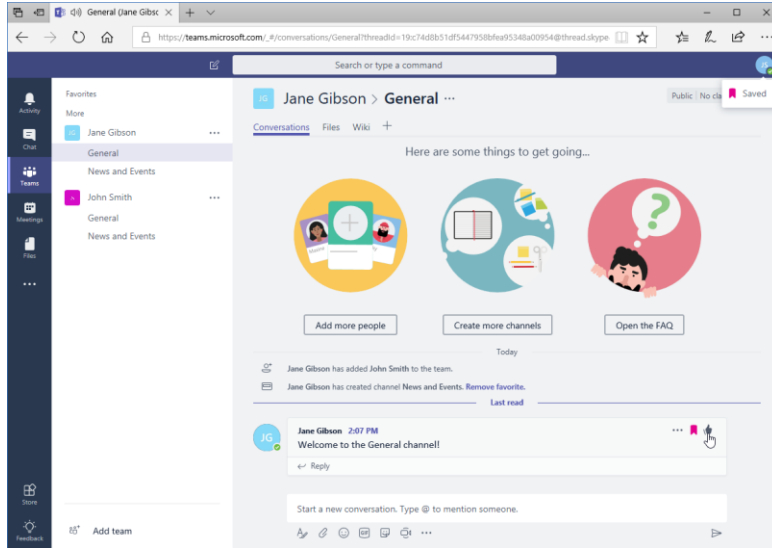
5. Now, click the General channel, which is also bold:



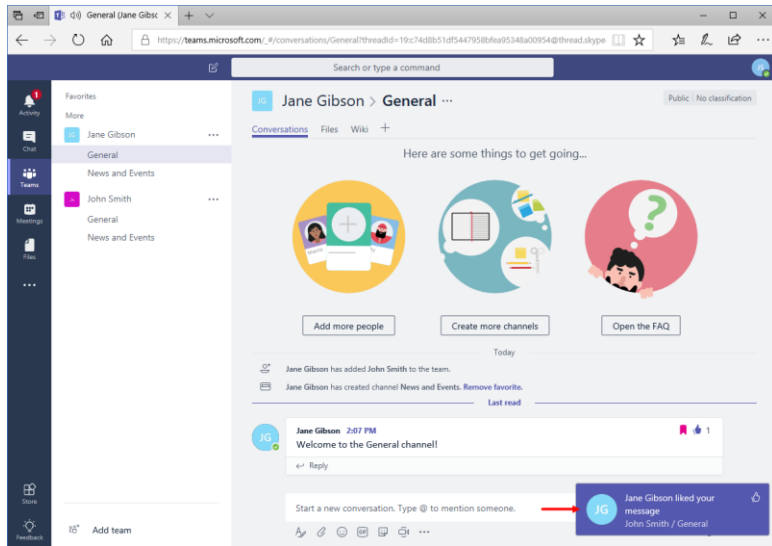
6. You will now see the new message. (Notice the “Last read” bar indicating where the unread messages begin.) Click the bookmark icon to save it:



7. Now, like it:



8. You will also get notifications as your partner completes this activity:



9. Leave Teams open for the next activity.

TOPIC B: Doing More with Messages

Microsoft Teams also allows you to tag users in a message to help ensure they see it. You can manage this activity through notifications and the Activity pane. Teams also features a search tool to help you find past messages.

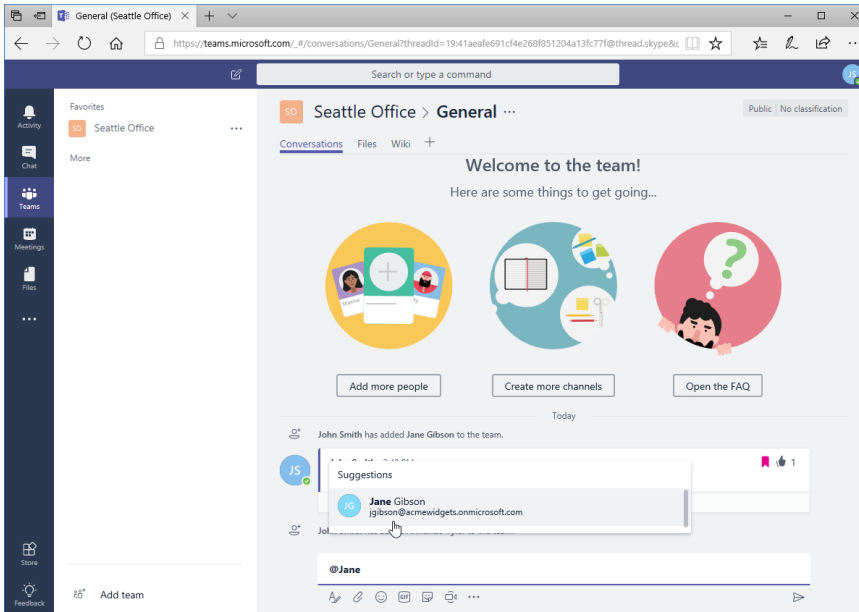
Topic Objectives

In this section, you will learn how to:

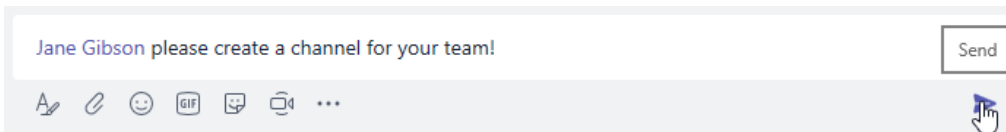
- Use mentions and announcements
- View your activity
- Search in Teams

Using Mentions

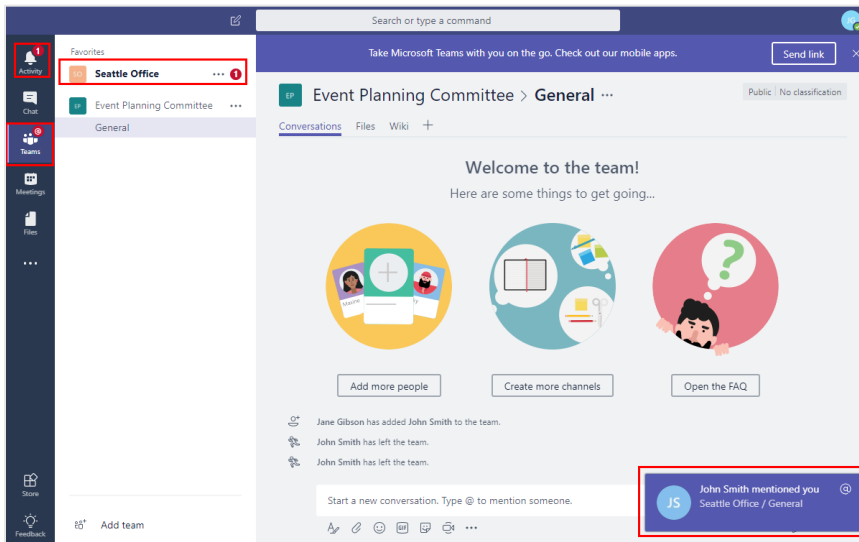
Mentions allow you to bring a message to a specific person's attention. To create a mention in a message, type the at symbol (@) followed by the user's name, or click their name in the menu that pops up:



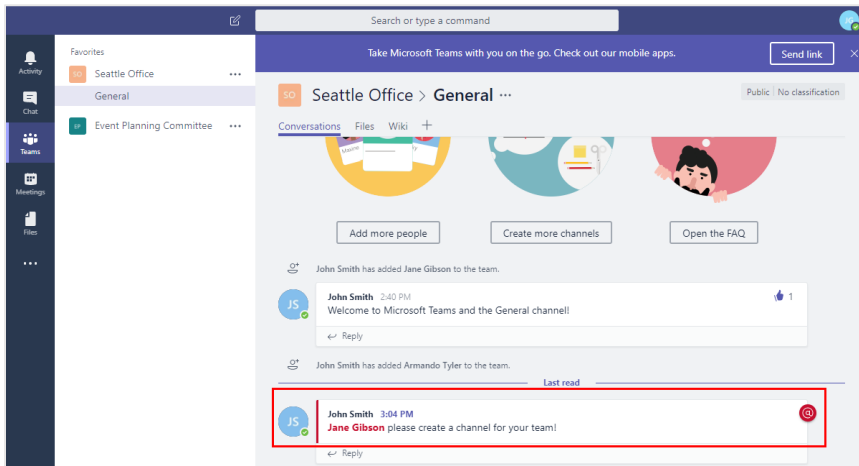
You can now complete the message as usual:



The user will be notified that they have been mentioned with several indicators, including a pop-up notification:

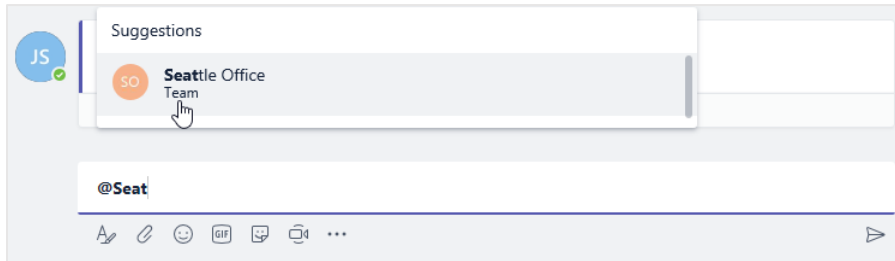


When the user opens the channel, their mention(s) will be highlighted:



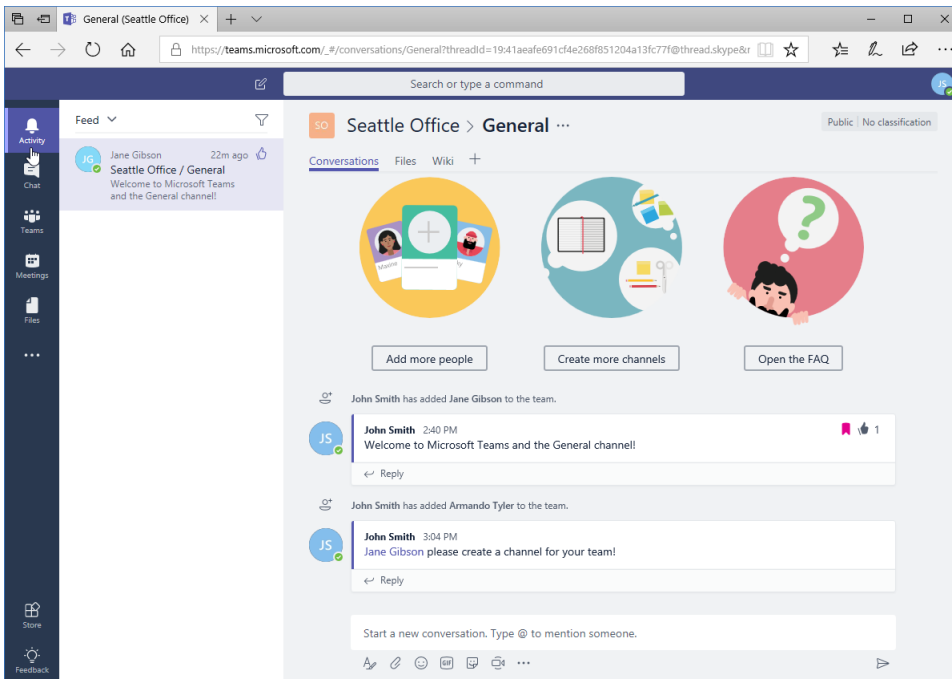
Using Announcements

Announcements work the same way as mentions, but they allow you to direct a message to a group rather than one person. Simply type the at symbol (@) followed by the channel or team you want to address:



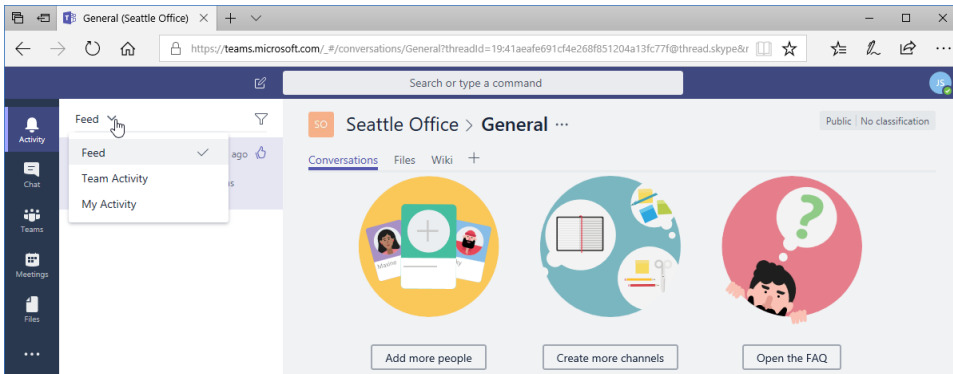
Viewing Your Activity

To view your activity, click the Activity icon from the sidebar:

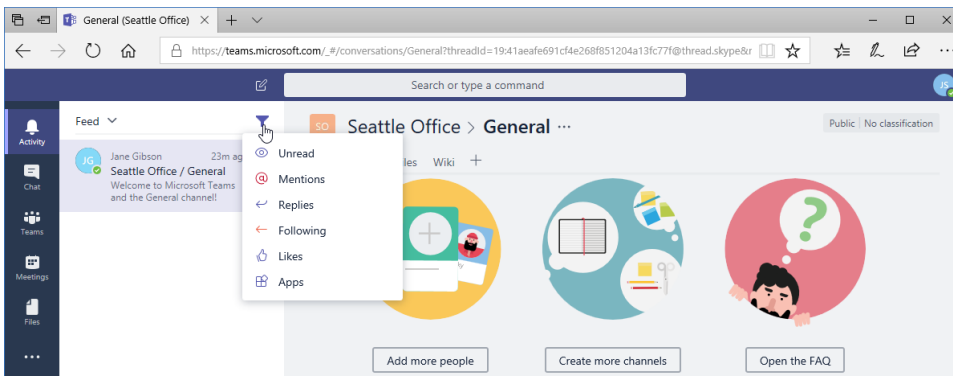


In this case, you can see that an item we liked is listed in the task pane. Since it is selected, its contents are displayed in the main window.

You can use the Feed menu at the top of the task pane to narrow down the display:

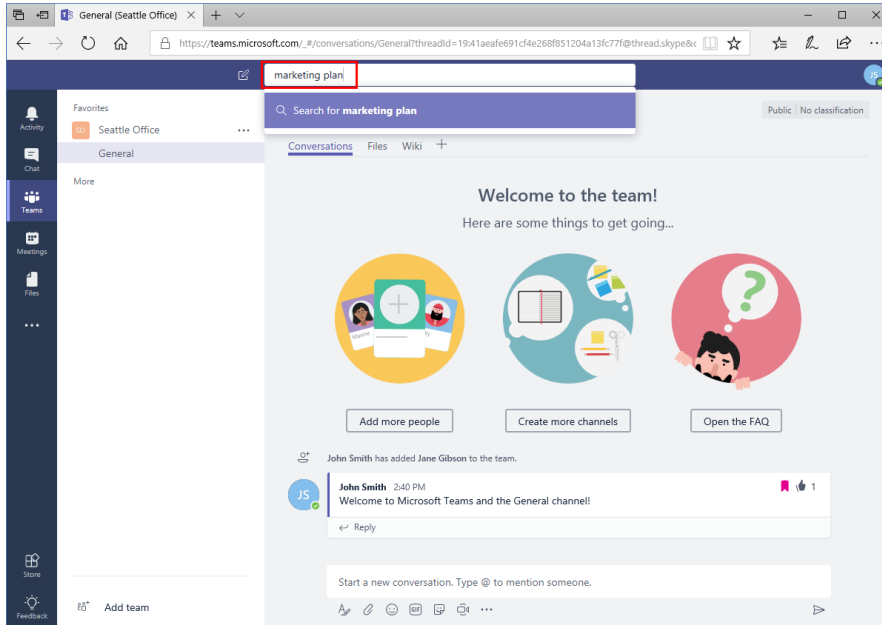


Or click the Filter icon to customize the results even further:

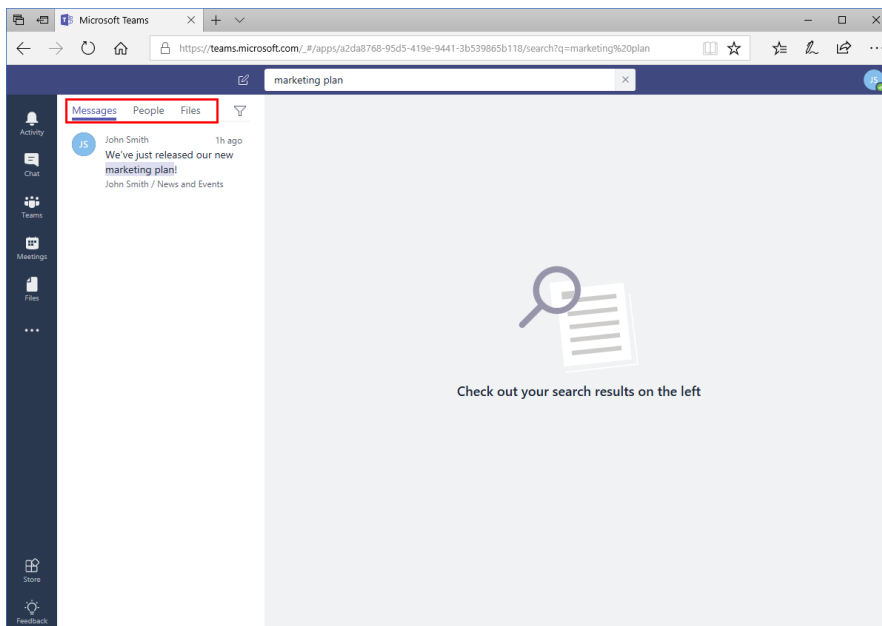


Searching in Teams

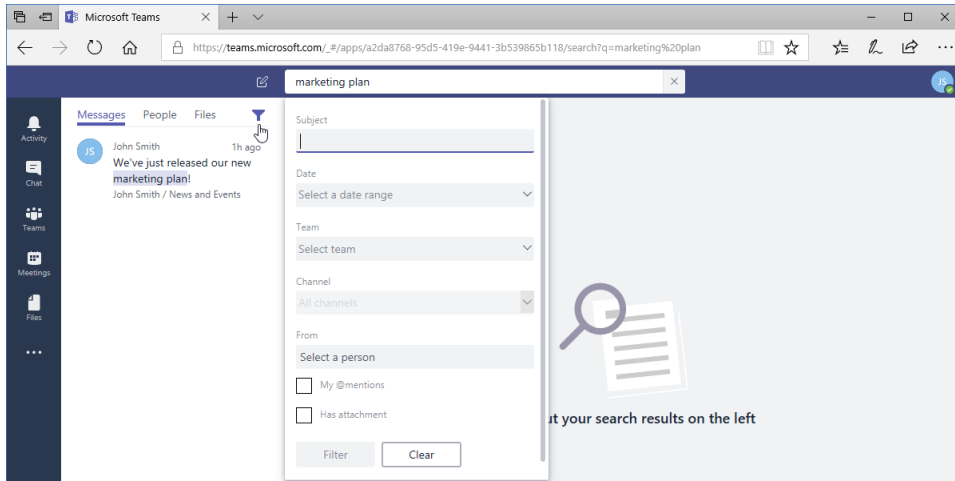
Searching in Microsoft Teams is easy: just click in the Search field, type your terms, and press “Enter.”



Your results will be displayed in the contextual task pane:



Click any item to see it, or use the tabs at the top to filter your results by messages, people, or files. You can also click the Filter icon for more advanced options:

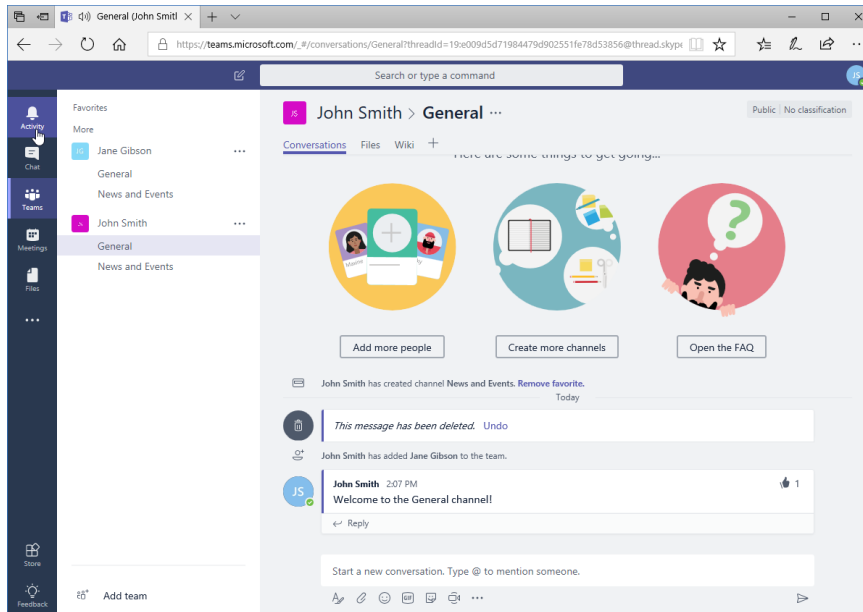


Activity 2-2: Doing More with Messages

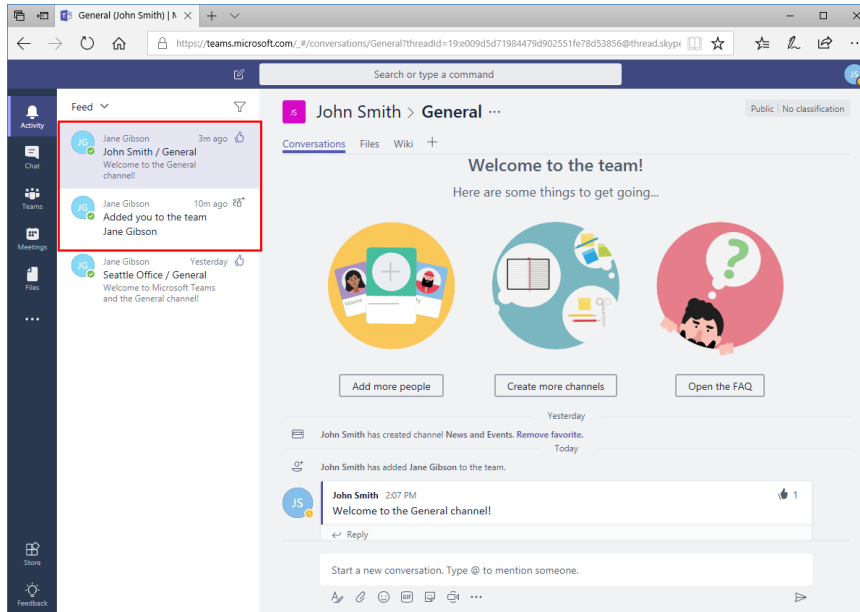
In this activity, you will practice using messaging features and viewing your activity.

1. Ensure you have completed Activity 2-1 and that Microsoft Teams is open. Continue working with your partner for this activity.

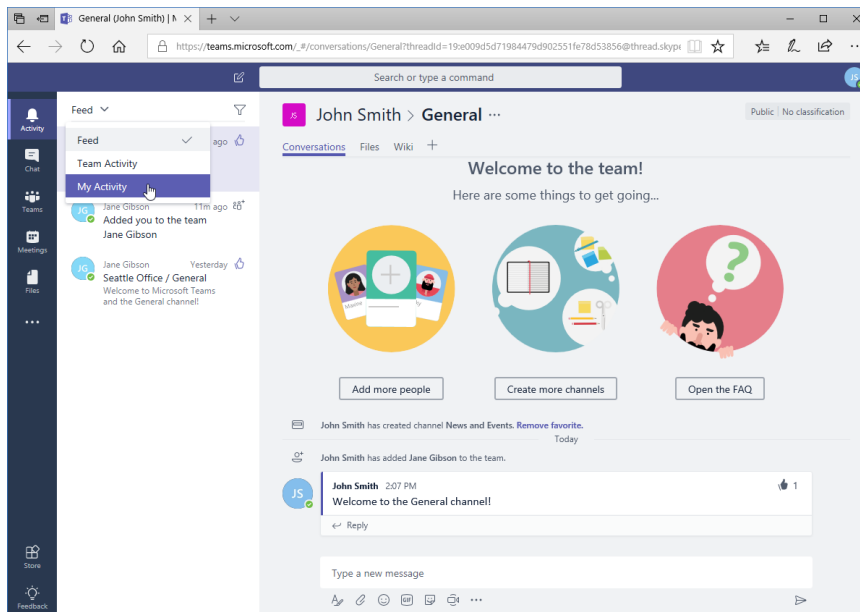
2. Click the Activity icon in the sidebar:



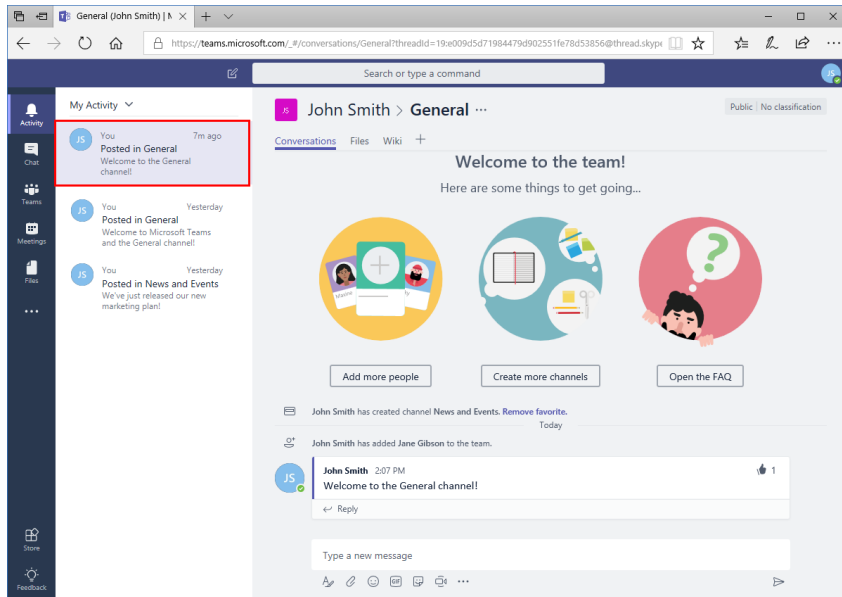
3. You should see the activity from the last lesson (your partner adding you to their team and sending a message):



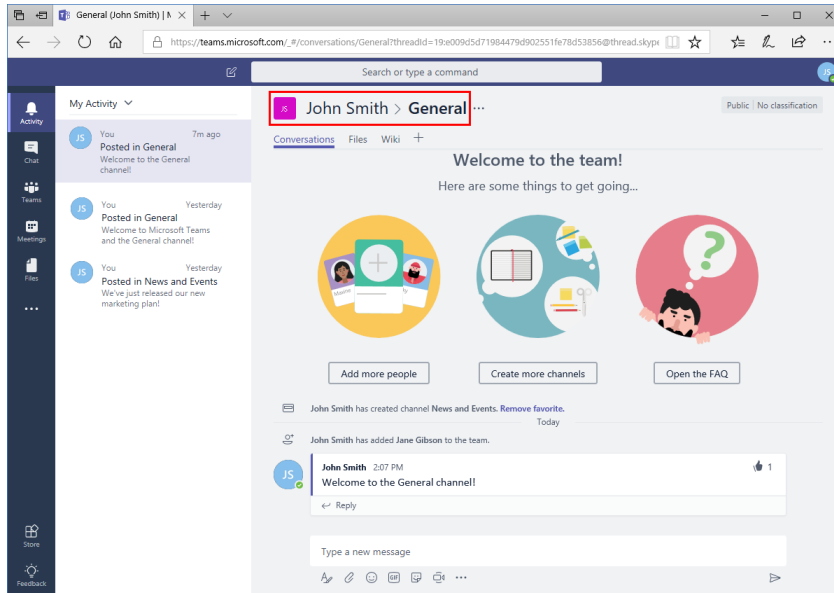
4. Click the Feed menu and click "My Activity:"



5. You will now see your activity from the last lesson (and previous activities as well):

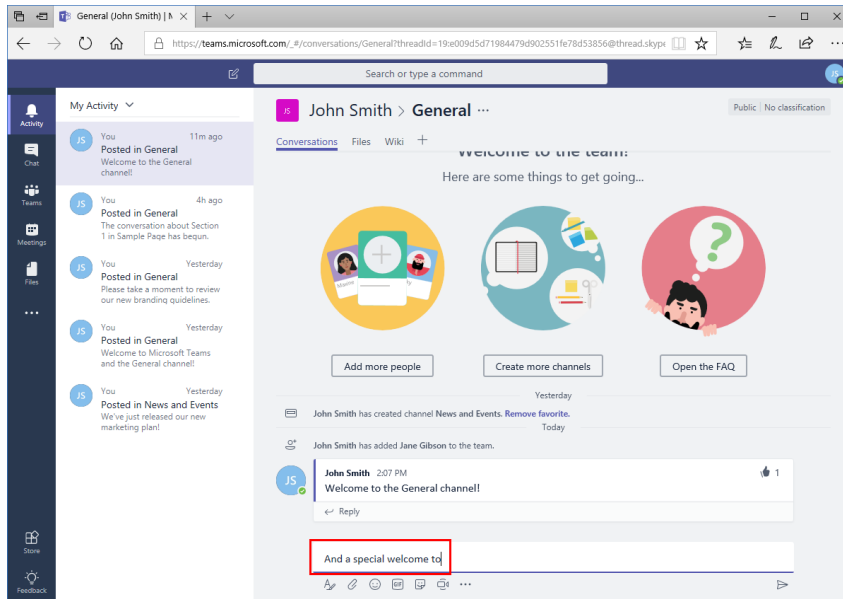


6. Ensure that the top activity is selected, which should display the Conversations tab of your team's General channel:

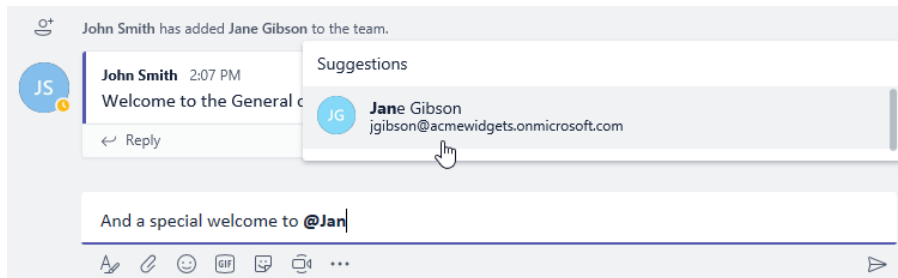


(If this channel is not displayed, navigate to it by clicking the Teams icon on the sidebar and selecting it.)

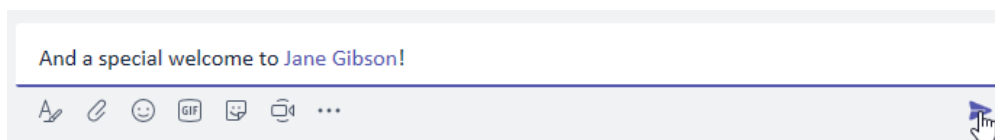
- 7. Let's create a new message. In the compose box, type, "And a special welcome to":



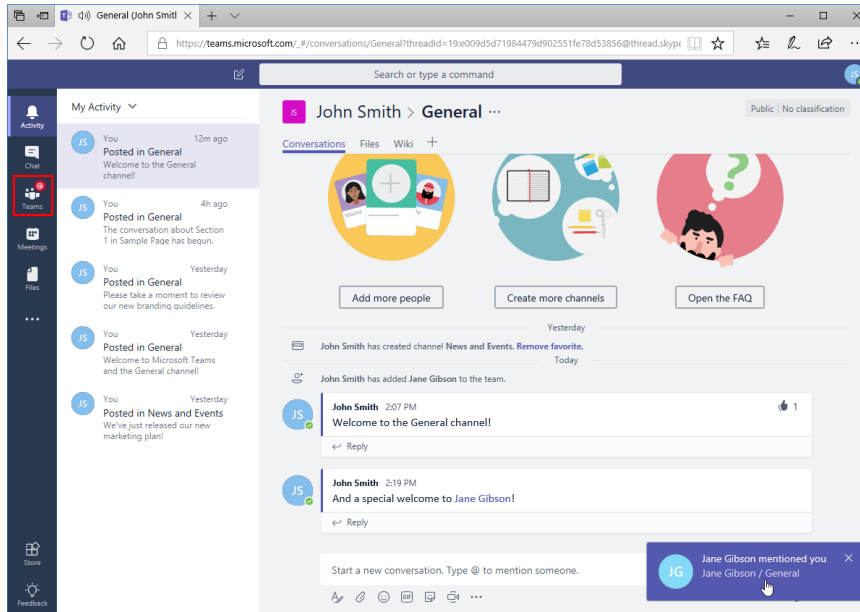
- 8. Add a space and type the at symbol (@). Then, start typing your partner's name. Click the correct result when it appears:



- 9. Add an exclamation mark and send the message:

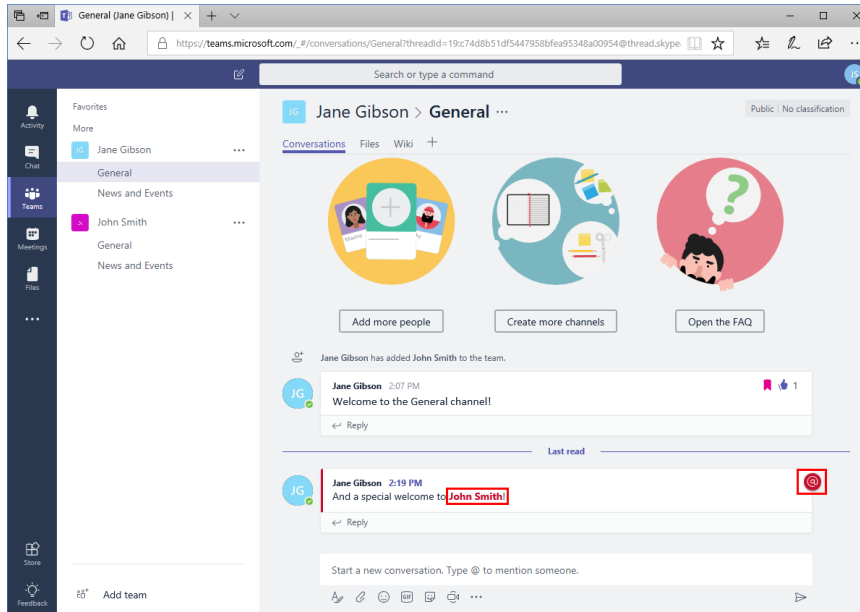


10. Wait a moment for your partner to send their message. When you receive a notification, click it to jump to that message:

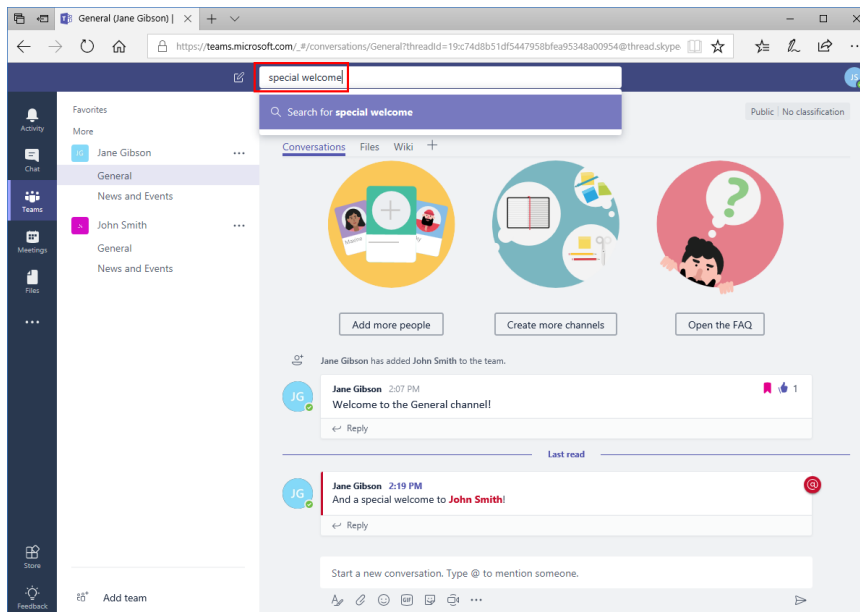


(Notice the special @ icon on the Teams badge.)

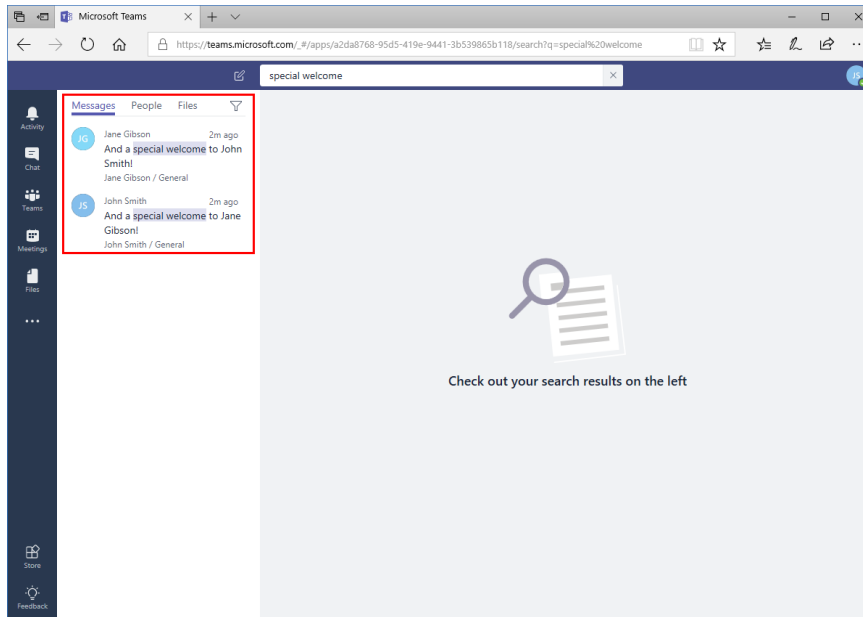
11. The channel containing the message will be displayed. Notice the red text and icon, highlighting the mention:



12. Let's try searching for the new messages. Click inside the search field at the top of the window, type, "special welcome," and press "Enter:"



13. You should see the messages to and from your partner:



14. Leave Teams open for the next activity.

TOPIC C: Managing Files in a Channel

In the last lesson, we learned how to upload a file in a post. In this topic, we will learn how to use the Files tab in a channel to view and manage those files from a central location.

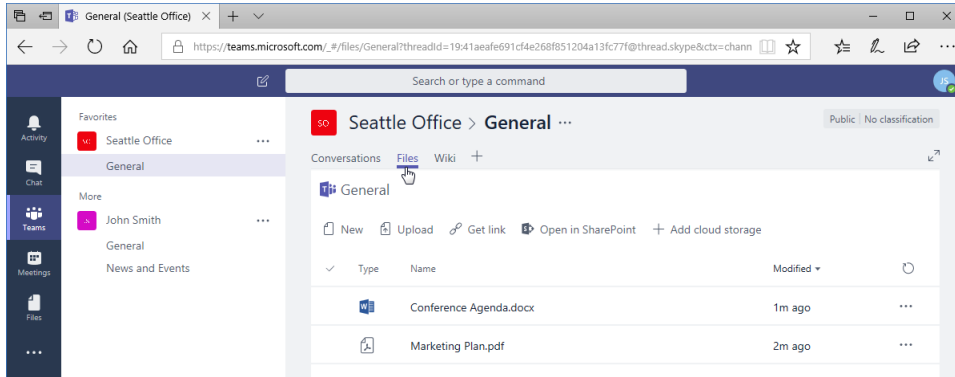
Topic Objectives

In this section, you will learn how to:

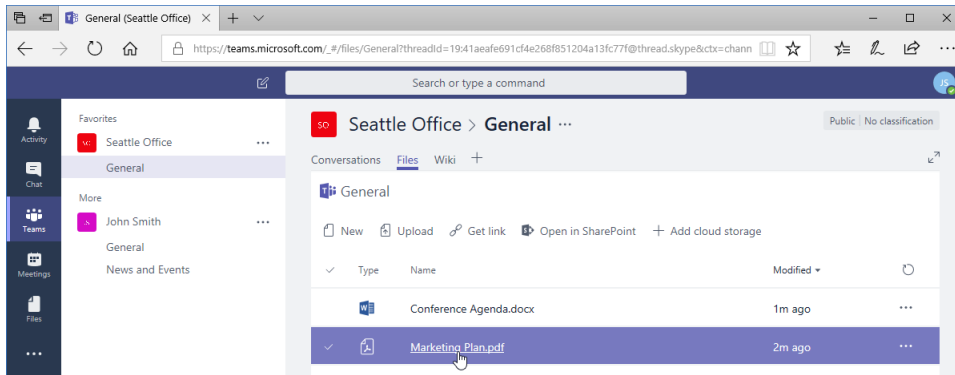
- Use the Files tab
- View, create, upload, manage, and move posted files
- Add additional file services

Viewing Posted Files

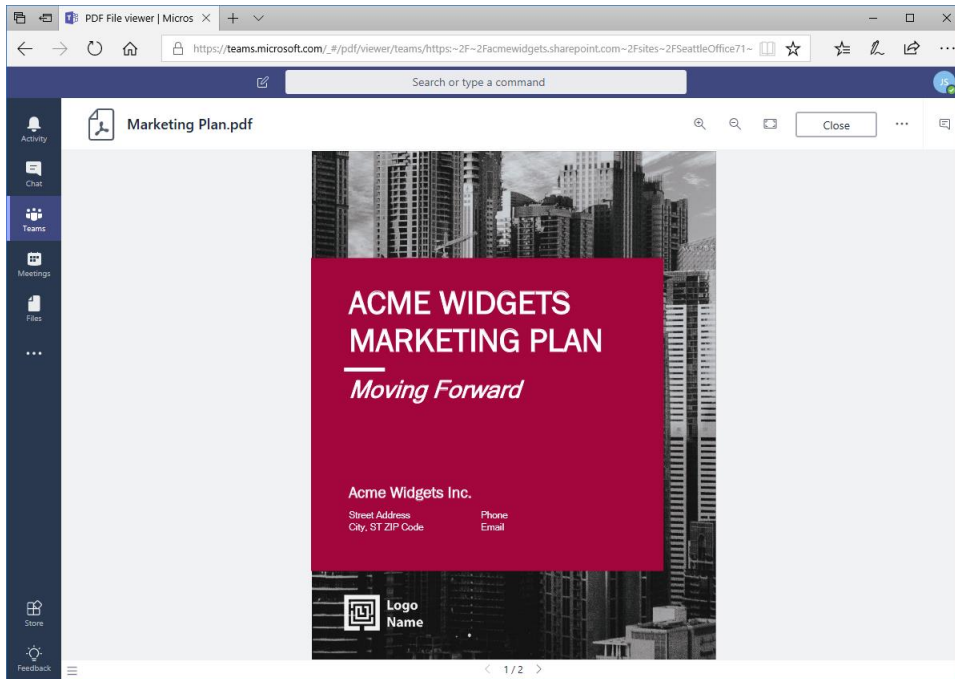
To view a list of all files uploaded to a channel, navigate to it and click the Files tab:



To view any file, click its name (just as you would from the post):



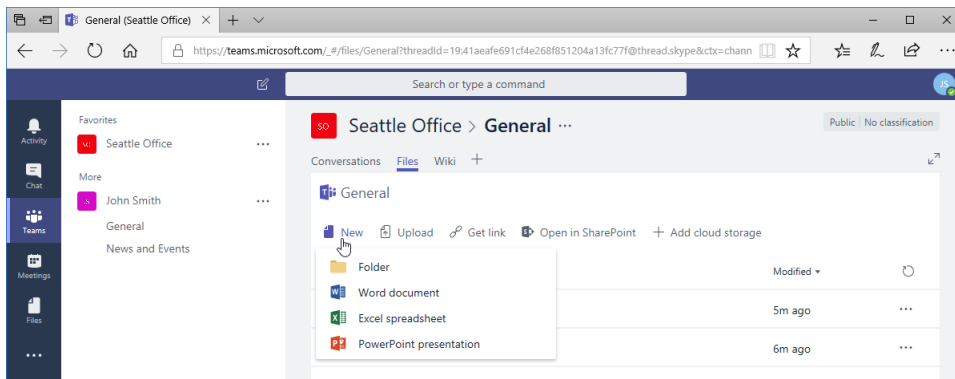
The file will then be displayed within Teams:



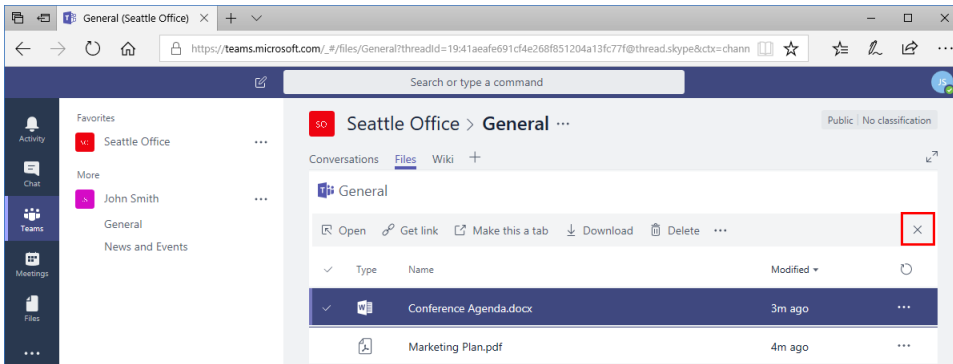
Click Close to return to the Files tab.

Creating a New File

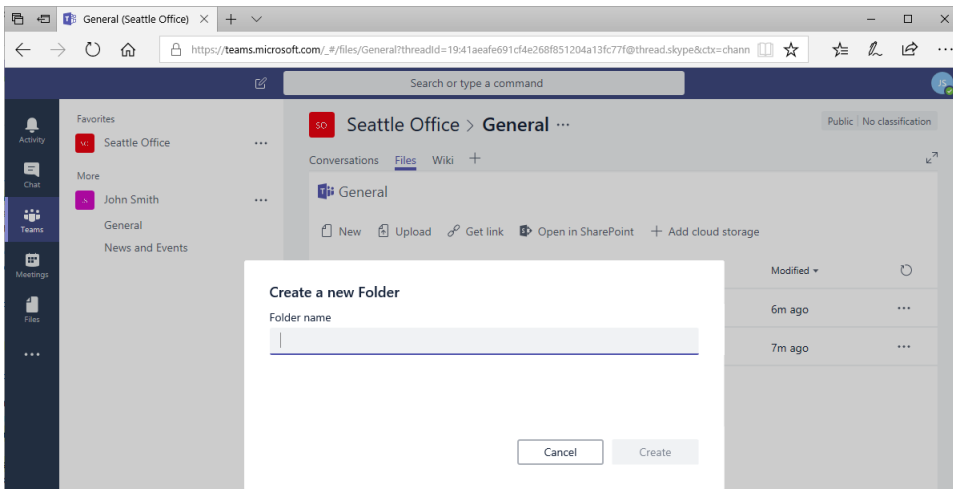
To create a new file, click the New icon on the toolbar and choose what you want to create:



If a file is currently selected, you will need to first close the contextual toolbar.



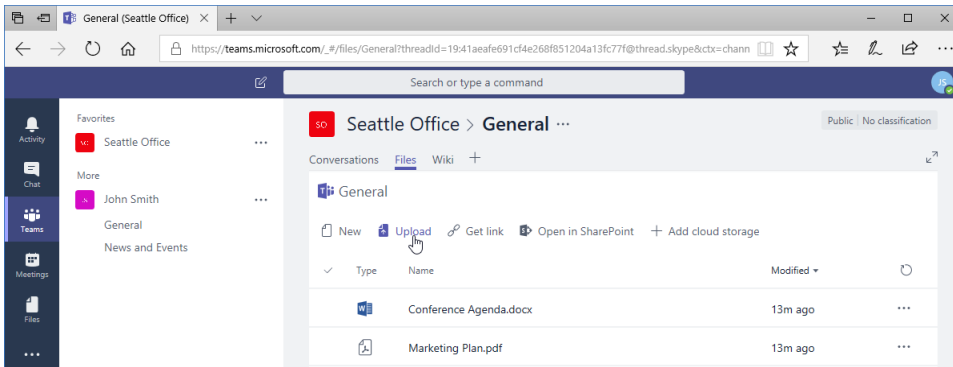
If you choose to create an Office document, the related application will open in another tab. If you choose to create a folder, you will be prompted to name it to continue:



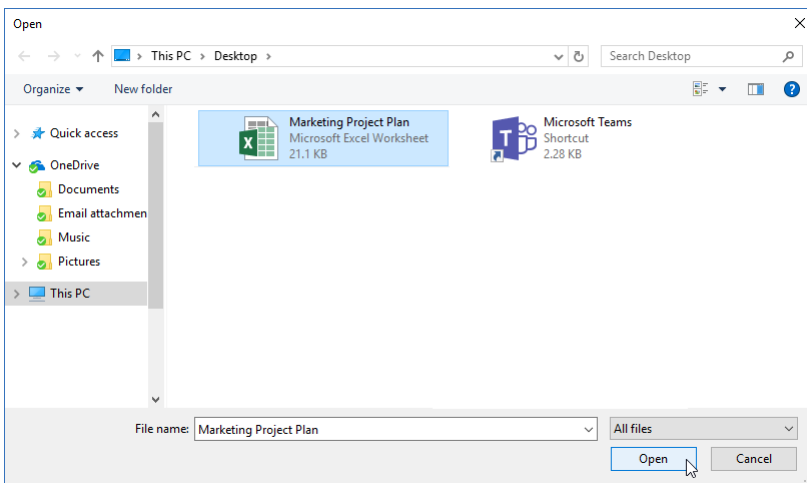
This folder can now be used to organize files just as you would on your desktop. (See the [Moving Files](#) topic for more information.)

Uploading a File

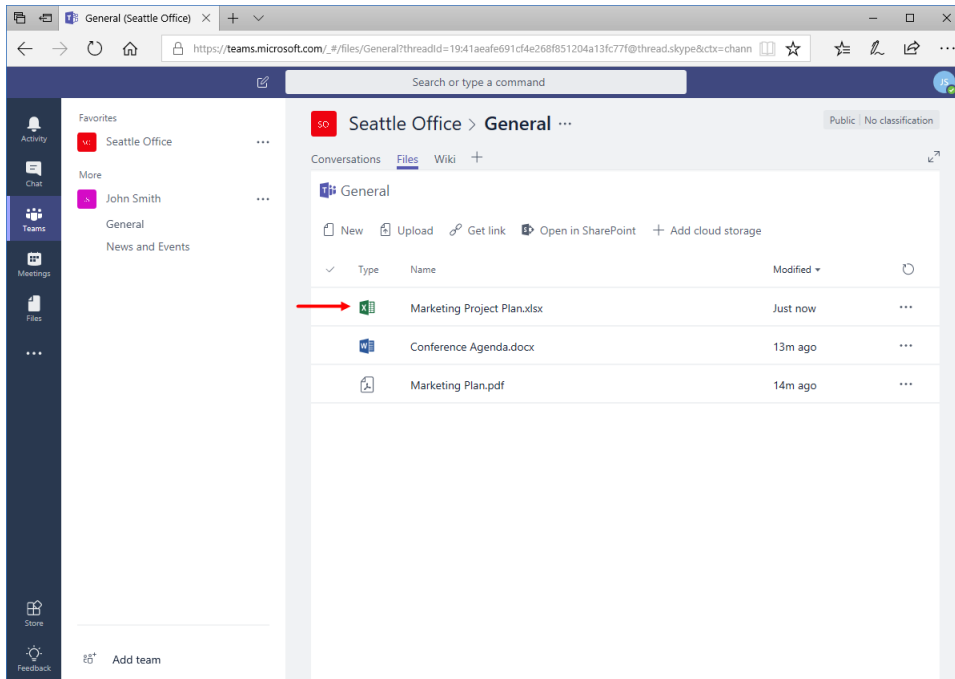
You can also add new files from your computer using the Upload command:



When you click this icon, the Open dialog will appear. Navigate to your file, select it, and click "Open:"

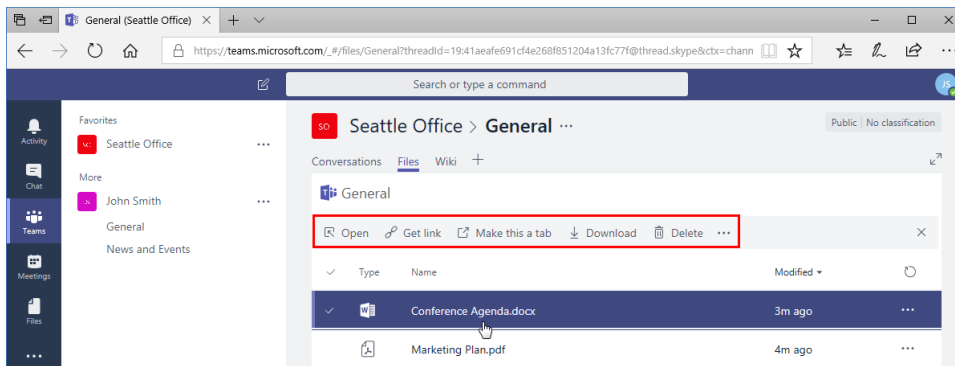


Then, it will be added to Teams:

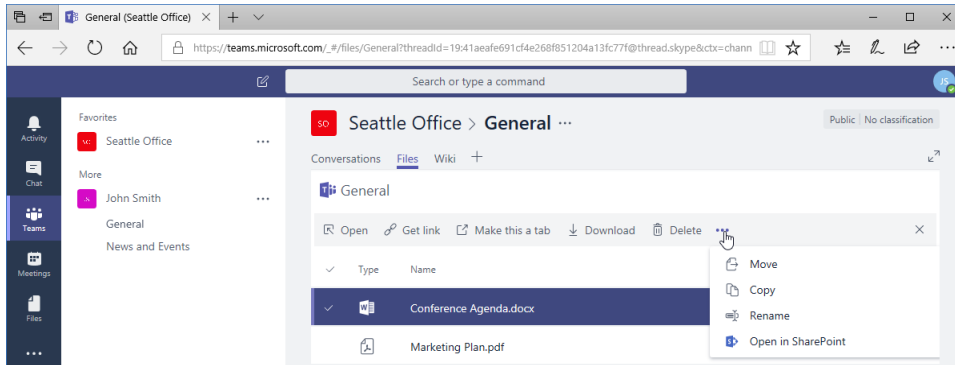


Managing Files

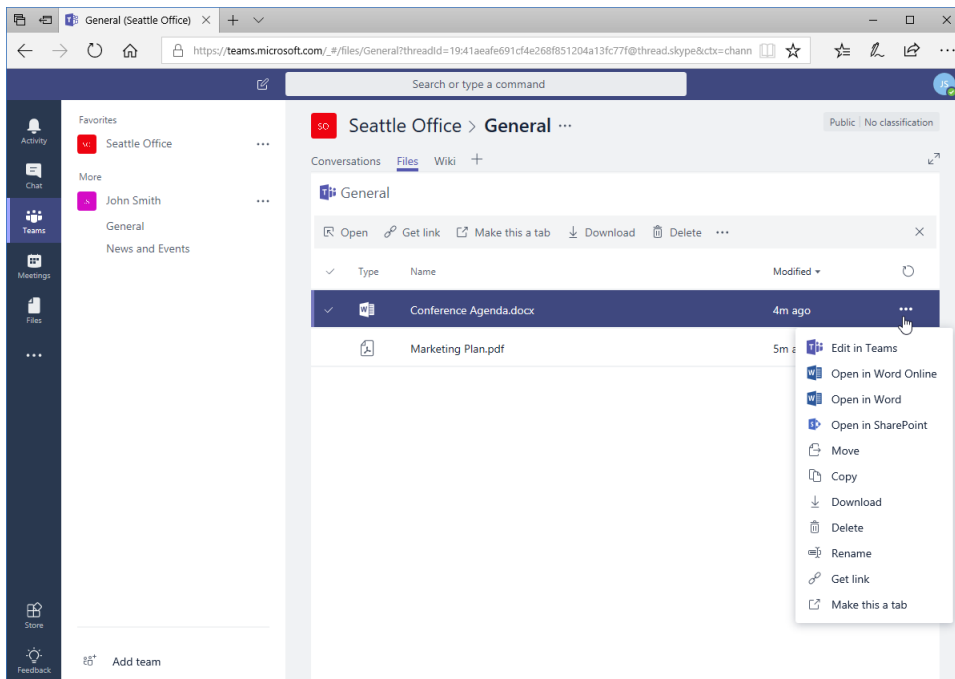
To modify a file, click on it to select it:



You will then see commands to open, download, and delete the file (among other things). The ellipses will show a menu with commands to move, copy, and rename the file, or open it in SharePoint:



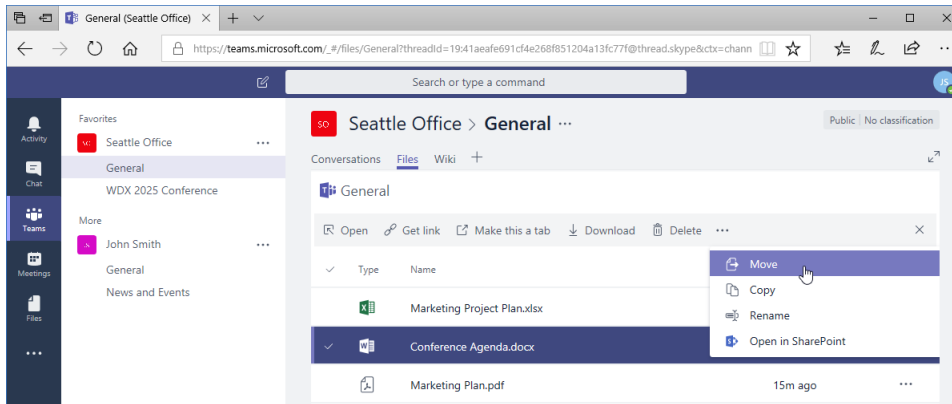
You can also click the ellipses next to the file's name to see even more options:



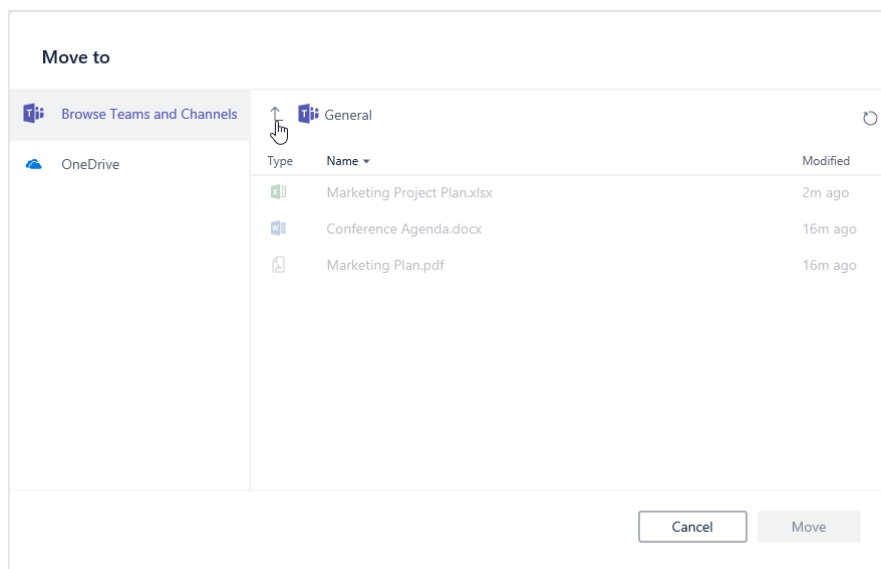
Note that generally, you will only be able to edit Microsoft Office files. However, using the online Office applications will allow you to leverage features like collaboration and co-authoring for your Teams files.

Moving Files

To move a file, select it and click Move on either of the More Options menus (accessible from the ellipses):

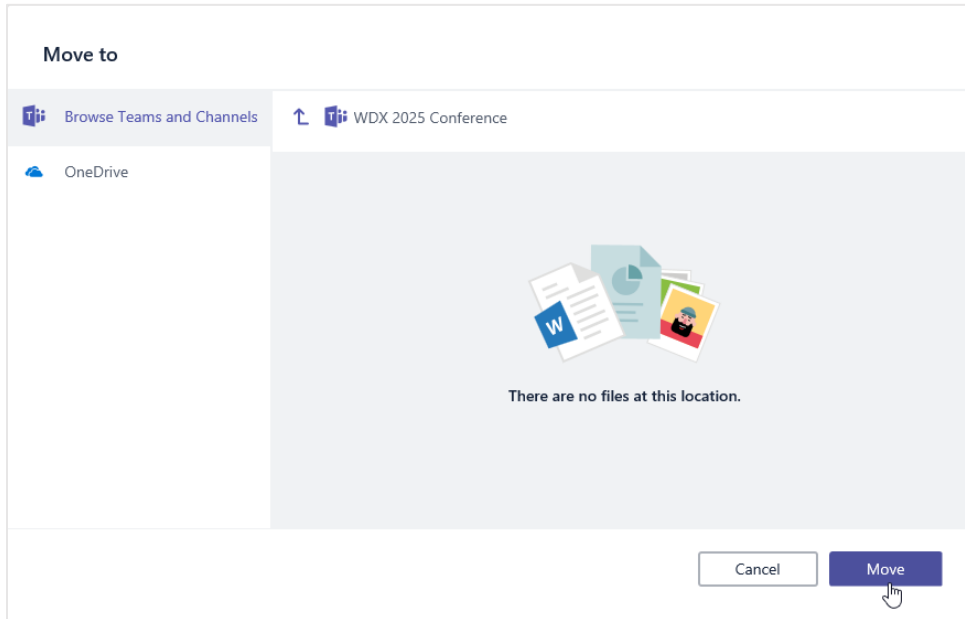


The “Move to” dialog will open:



(Note that by default you are browsing your teams and channels, but you can also view your OneDrive and any other connected sources.) Click the up arrow to navigate up in your Teams structure, and then select the team and channel you want to move the file to.

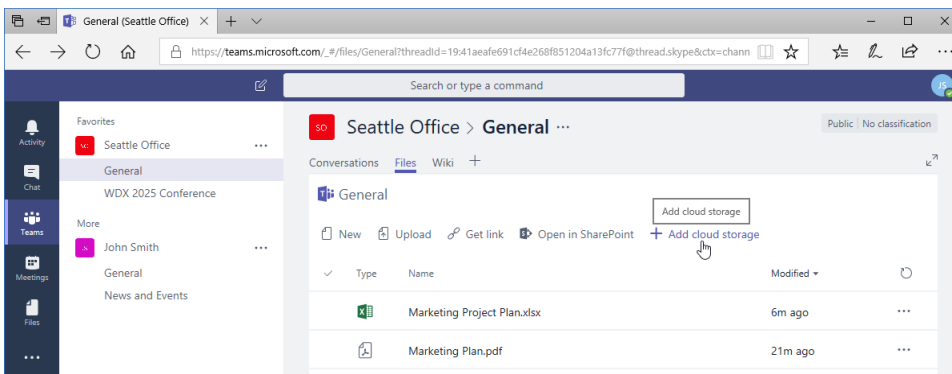
Here, we have chosen a new channel that does not yet have any files:



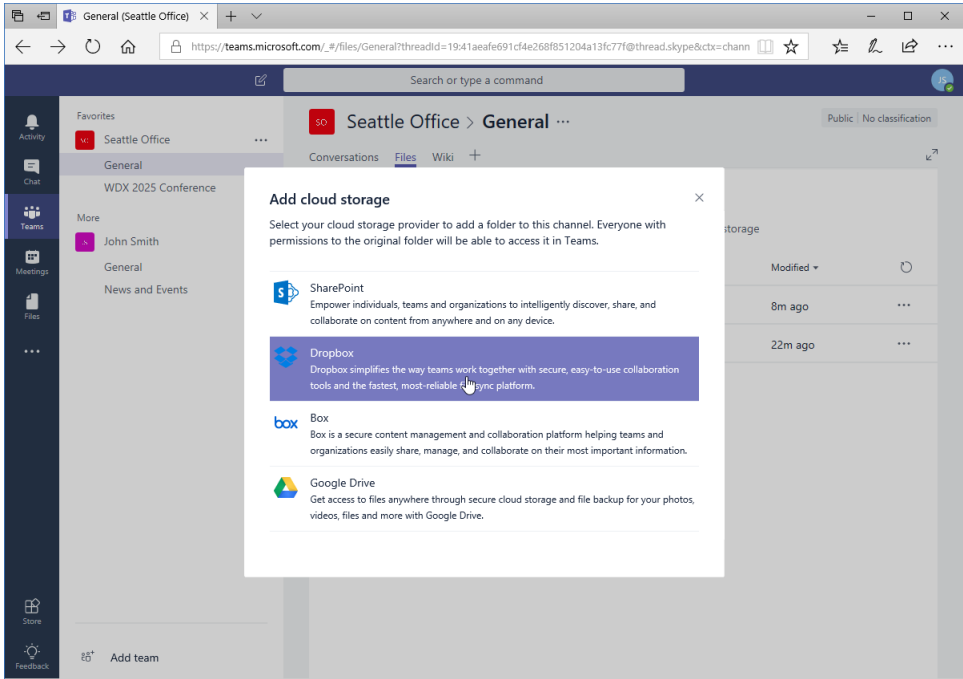
When you click “Move,” the operation will be completed, and you will be brought back to the Files tab in the original channel you were working with.

Adding Cloud Storage

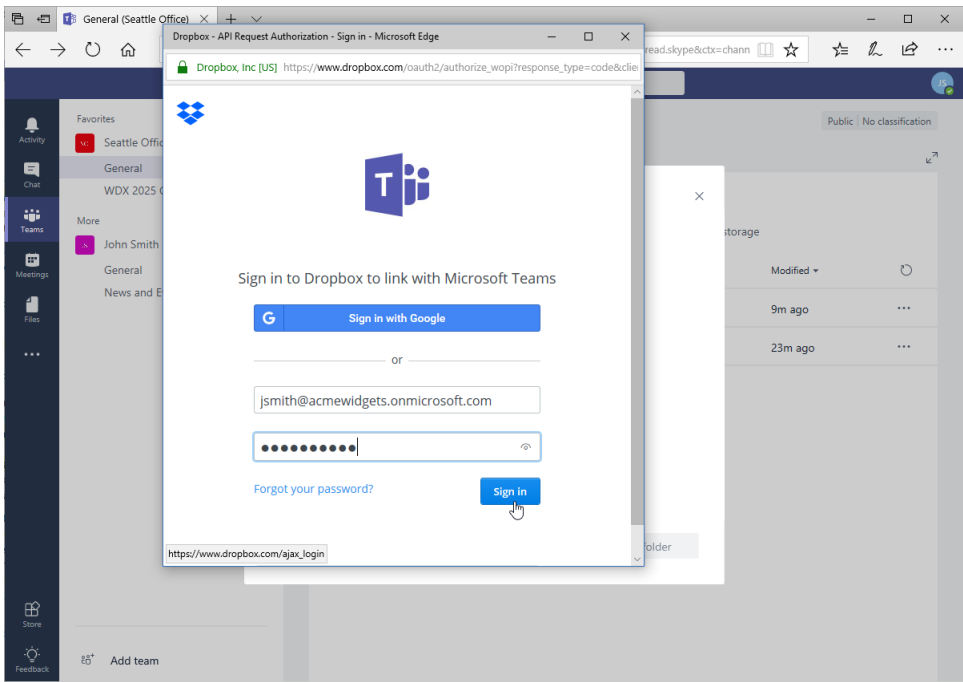
You can also add other services to Microsoft Teams, such as Dropbox and Google Drive. To start, click the Files tab and click “Add cloud storage:”



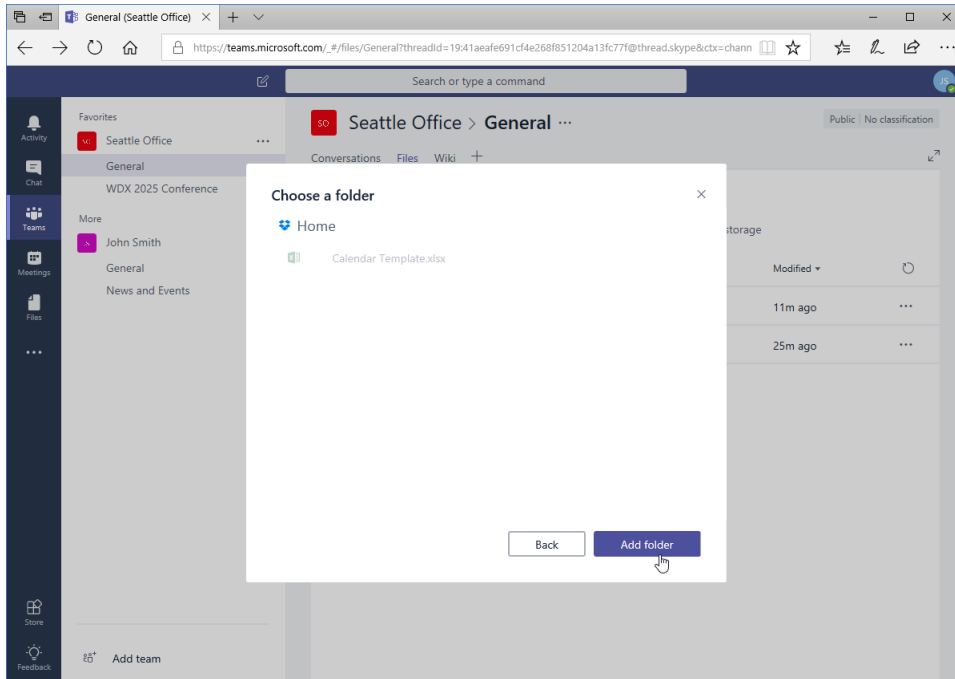
Now, click the service you want to add:



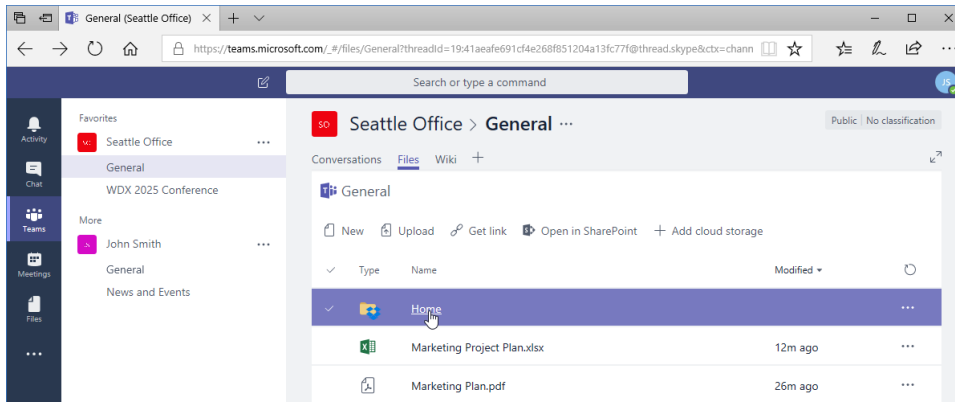
Sign in when prompted:



Follow the instructions in any other prompts. Then, select the target folder (here, we have selected the default “Home”) and click “Add folder:”



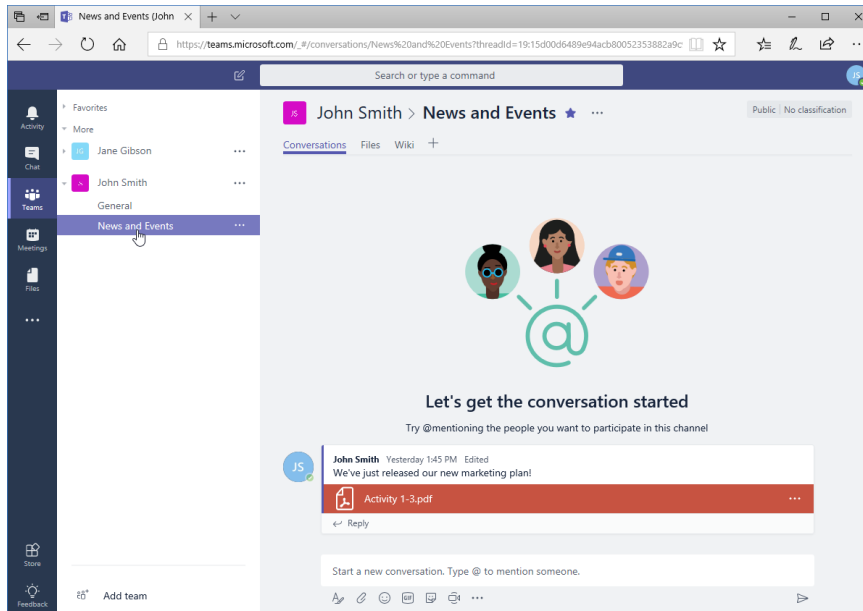
You can now access this service directly from Teams:



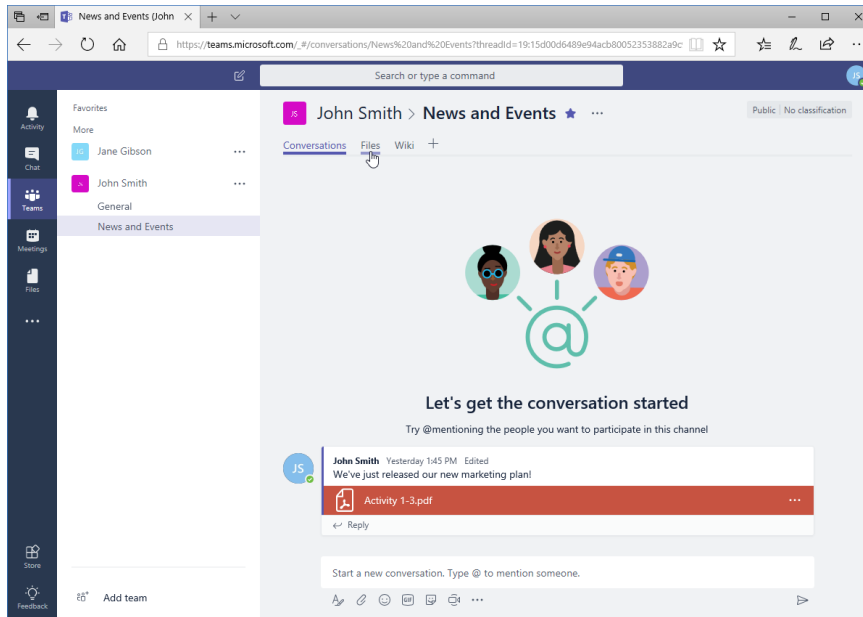
Activity 2-3: Managing Files in a Channel

In this activity, you will upload a file to Microsoft Teams and create a new file.

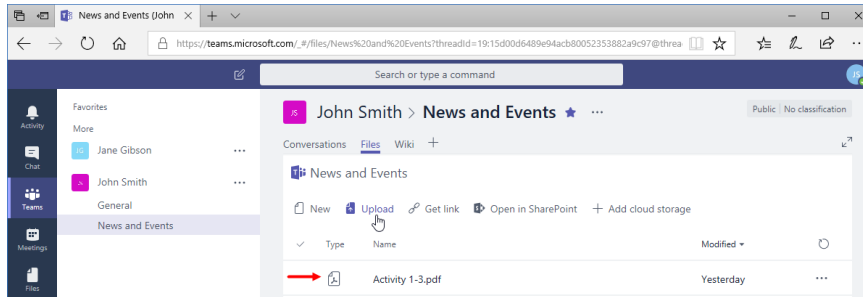
1. Ensure you have completed all Lesson 1 activities and that Microsoft Teams is open.
2. Navigate to your team's News and Events channel. Remember, to do this, click the Teams icon in the sidebar, click your team name, and click "News and Events:"



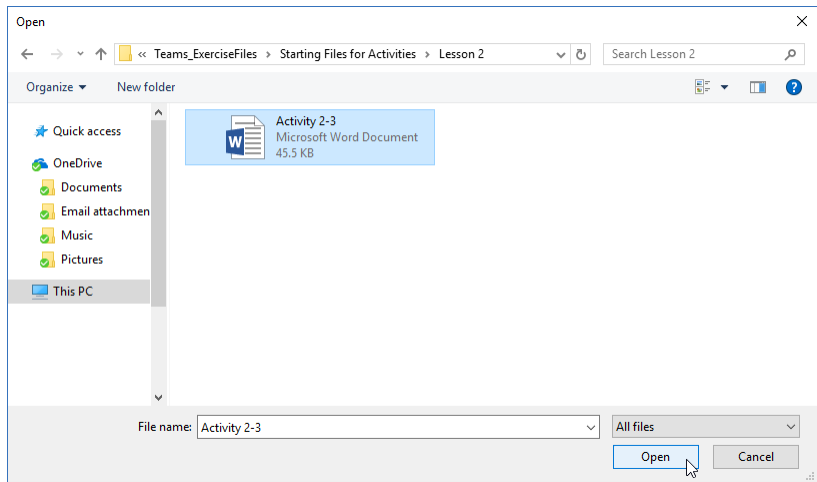
3. Click the Files tab:



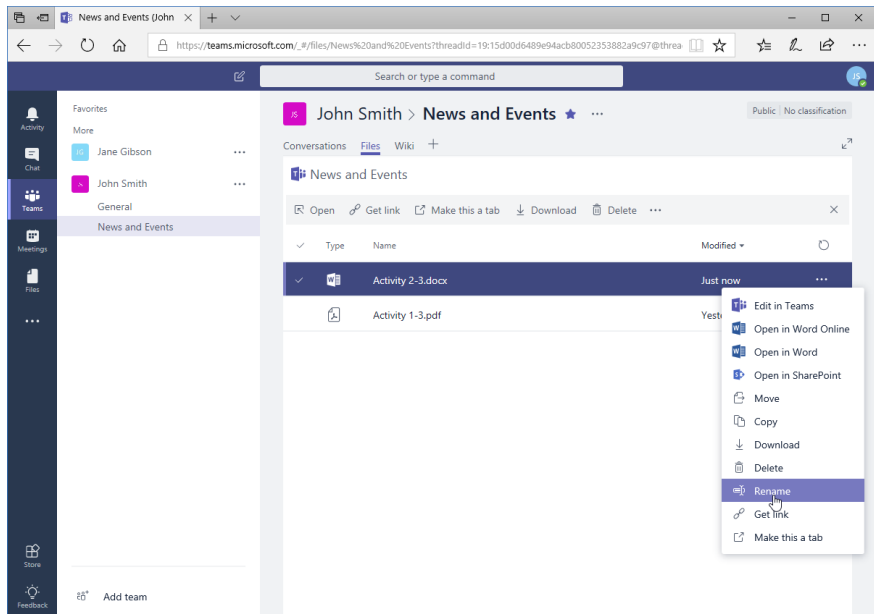
4. You should have one file here from a previous activity. Click "Upload" to add a new file:



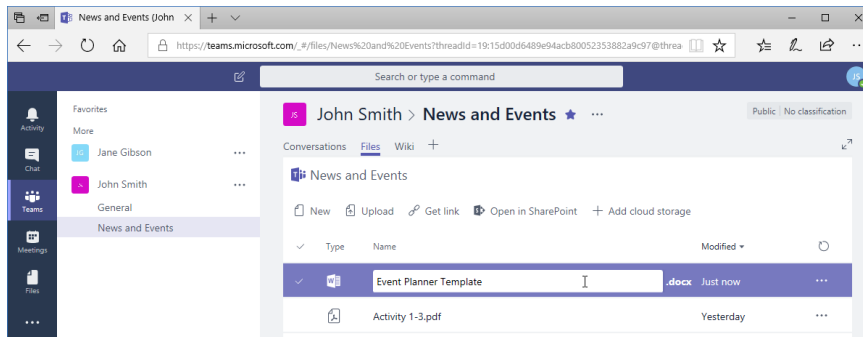
5. The Open dialog will appear. Navigate to the Lesson 2 folder of your Exercise Files. Select the Activity 2-3 file and click "Open:"



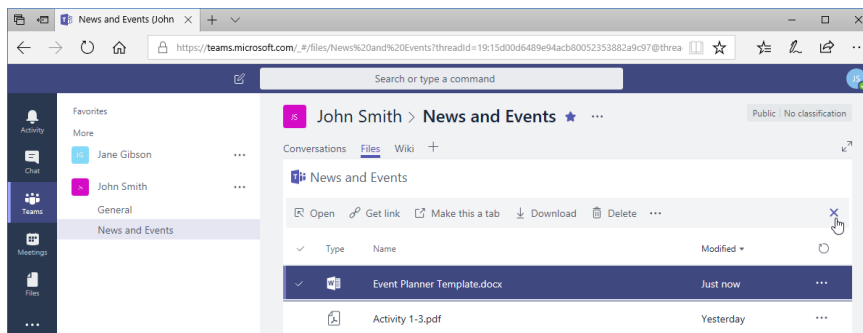
6. Let's rename this file. Click the ellipses next to it and click "Rename:"



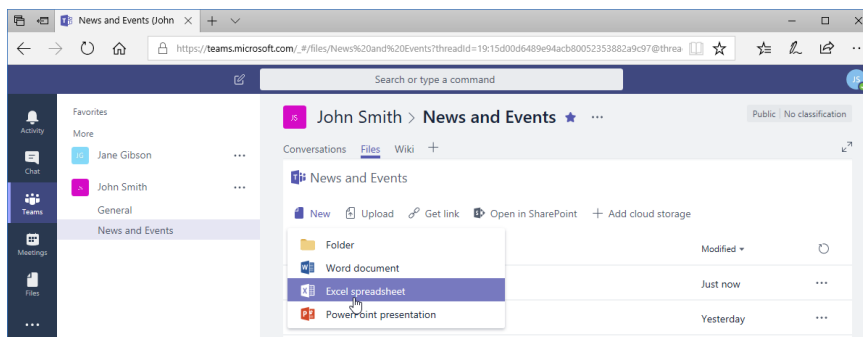
7. The file name will change to a text field. Remove the existing name and type, “Event Planner Template.” Press “Enter” to apply the change:



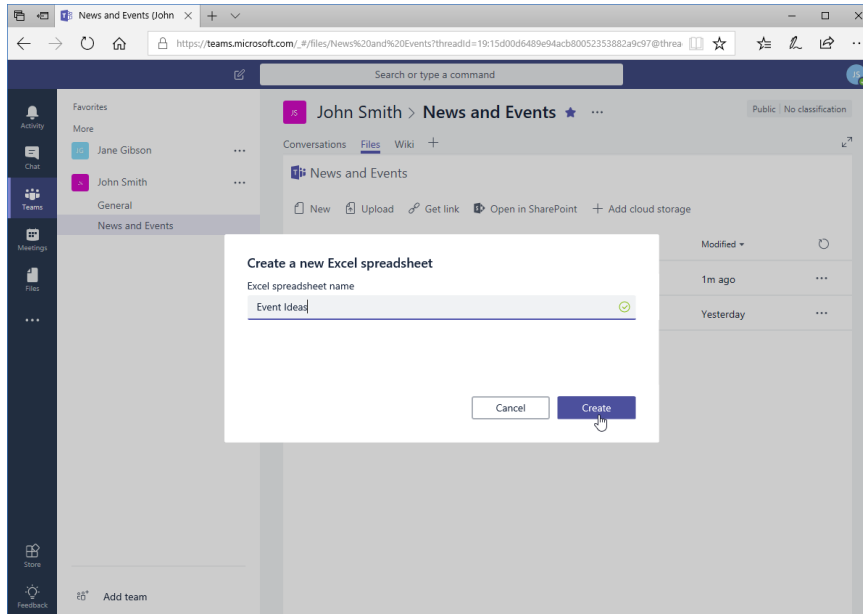
8. Now, click the “X” to close the contextual file toolbar:



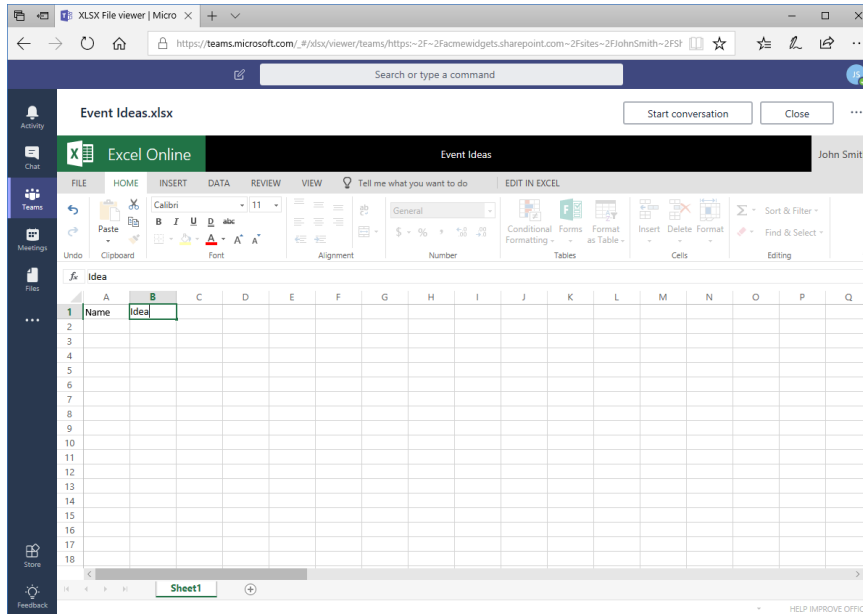
9. We want to add a new file where team members can put event ideas. Click the New button and click “Excel spreadsheet:”



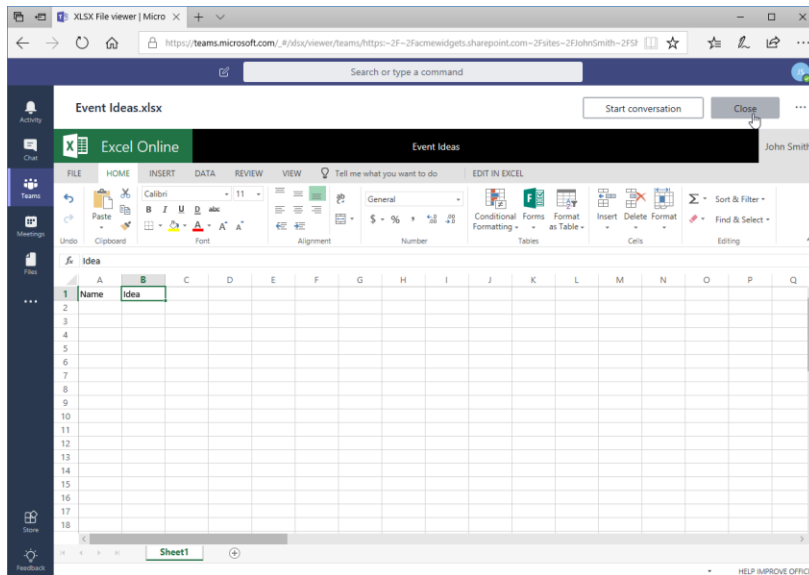
10. The “Create a new Excel spreadsheet” dialog box will open. Type, “Event Ideas” and click “Create:”



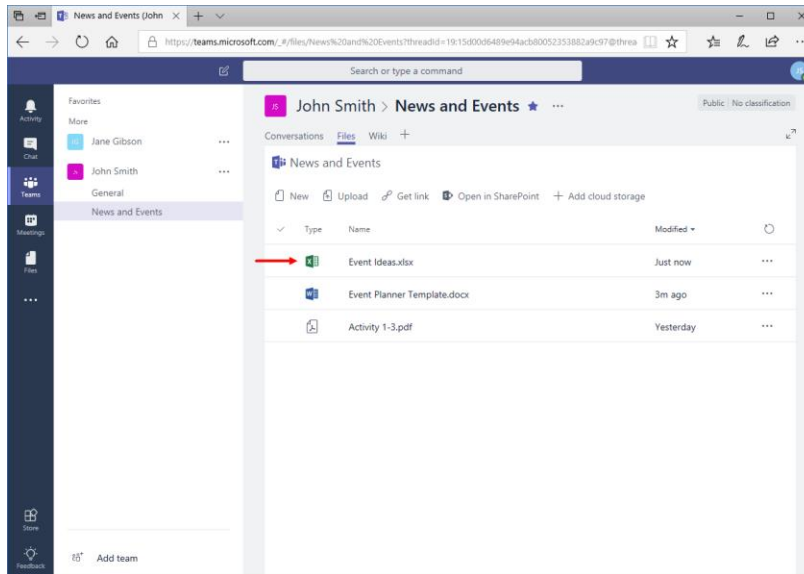
11. The Excel file will be created and will be displayed. Enter “Name” in cell A1 and “Idea” in cell B1:



12. Close the file:



13. It will now be available in the Files tab:



14. Leave Teams open for the next activity.

TOPIC D: Using the Wiki

So far, we have worked with the Conversations and Files tabs within a channel. The final tab is Wiki. This gives your team a place to store detailed information that is accessible to all team members.

Topic Objectives

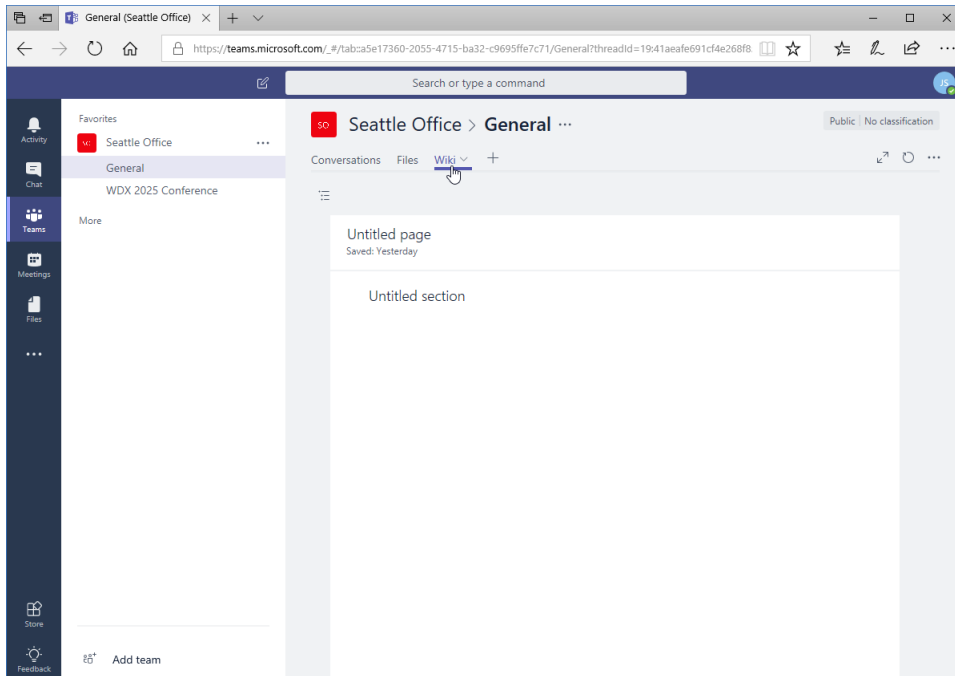
In this section, you will learn how to:

- View the wiki

- Create wiki content
- Create pages and sections
- Navigate through the wiki
- Change section and page options

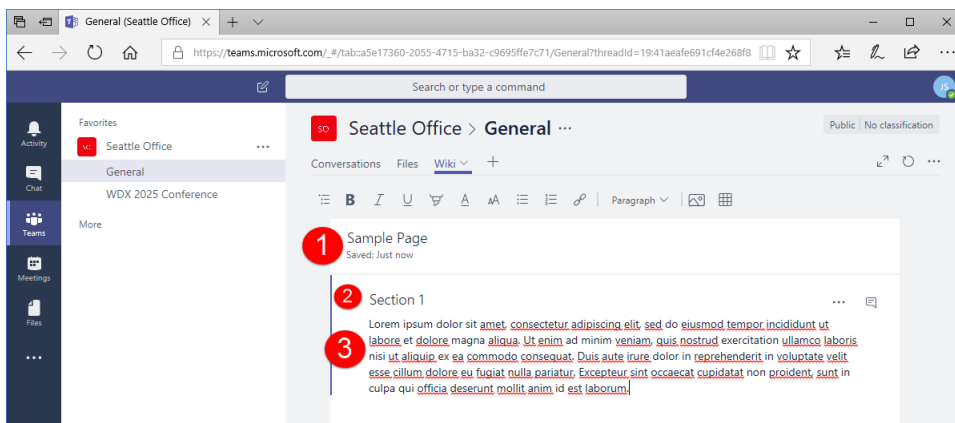
Viewing the Wiki

To view the wiki, open the channel and click the Wiki tab:



Creating Wiki Content

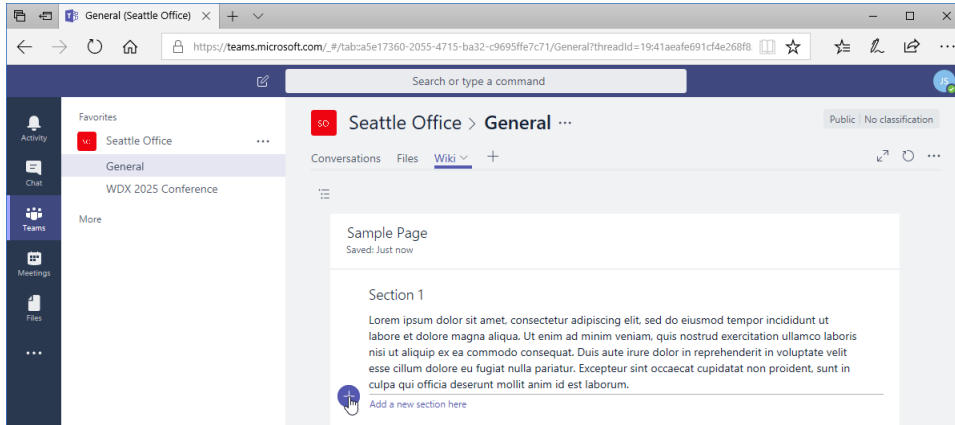
To create wiki content, simply click and type where indicated:



You will name the **page (1)** and the **section (2)**, and then enter your **text (3)**. Your content will be saved automatically, but you can edit any item (including the titles) at any time.

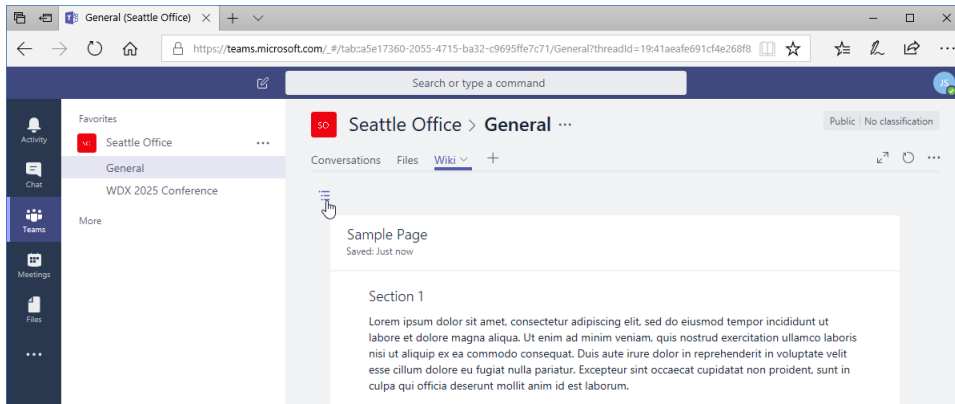
Creating Sections and Pages

To add a new section, move your mouse over the main content area and click the “Add a new section here” icon:

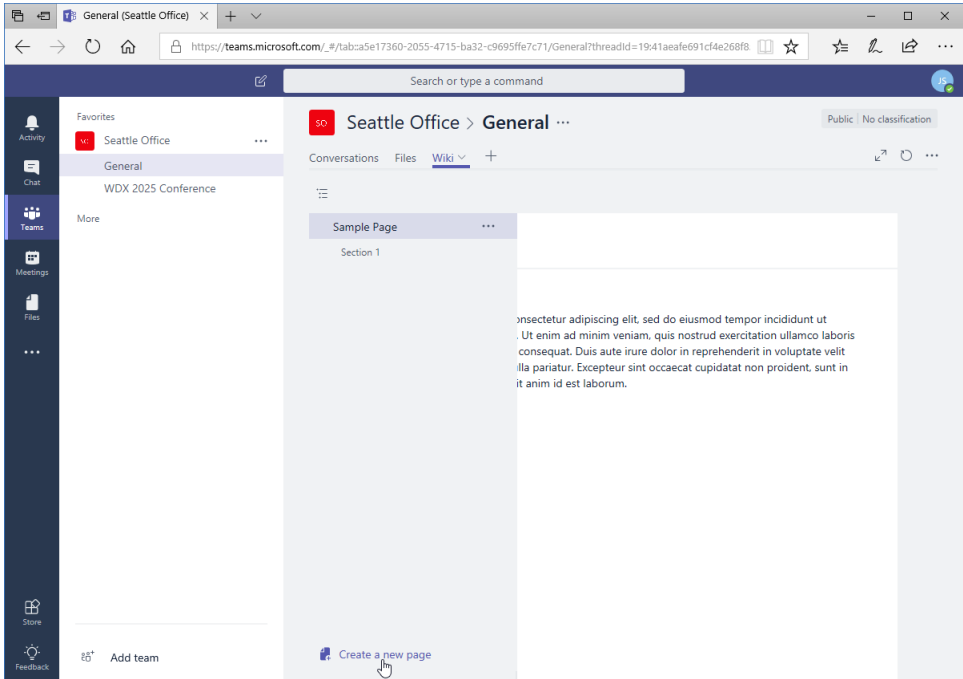


The section will then be added, ready for your content.

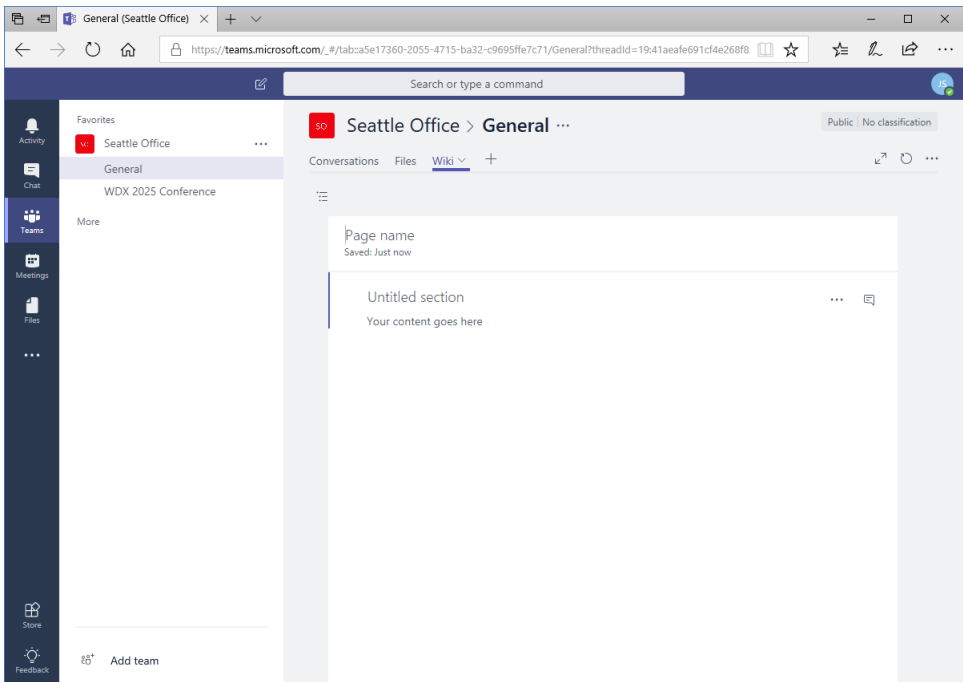
To add a new page, expand the Wiki Lists menu:



Then, click “Create a new page:”

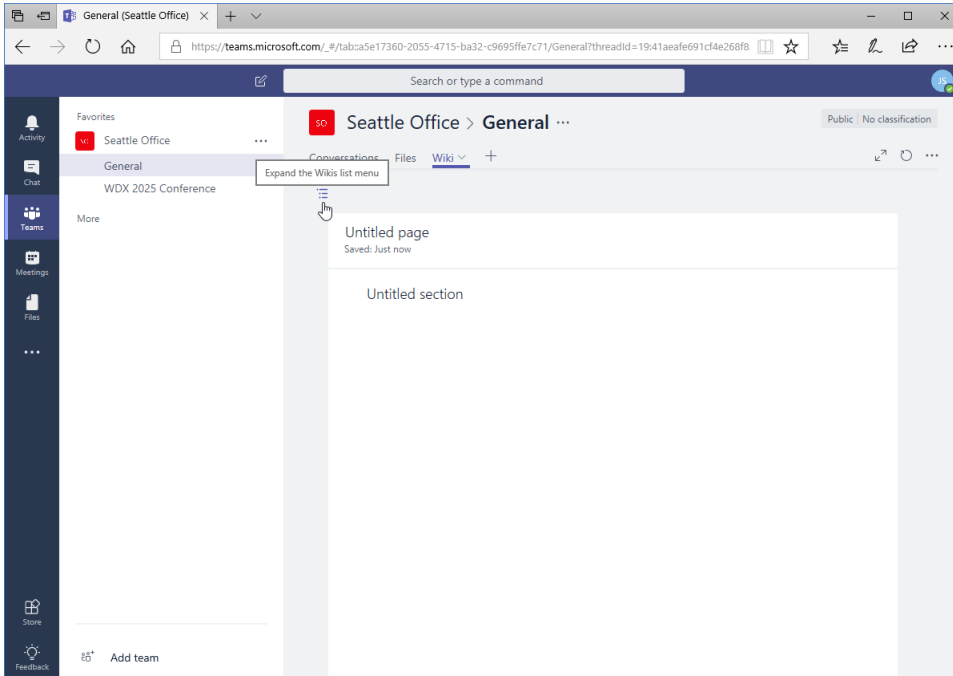


The new page will be added, ready for titles and content:

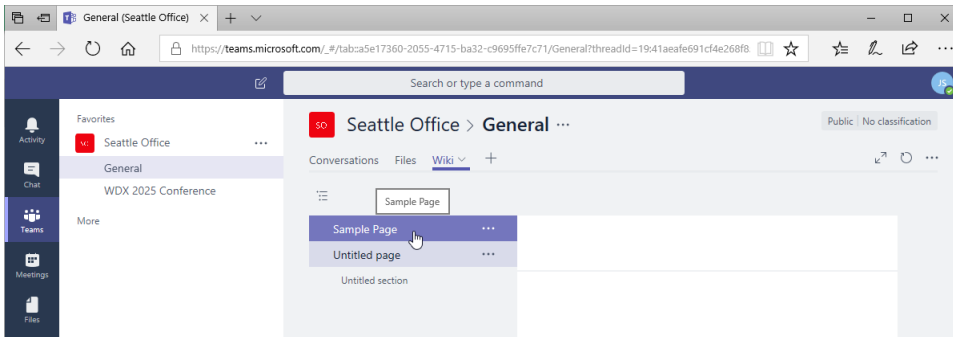


Navigating Through the Wiki

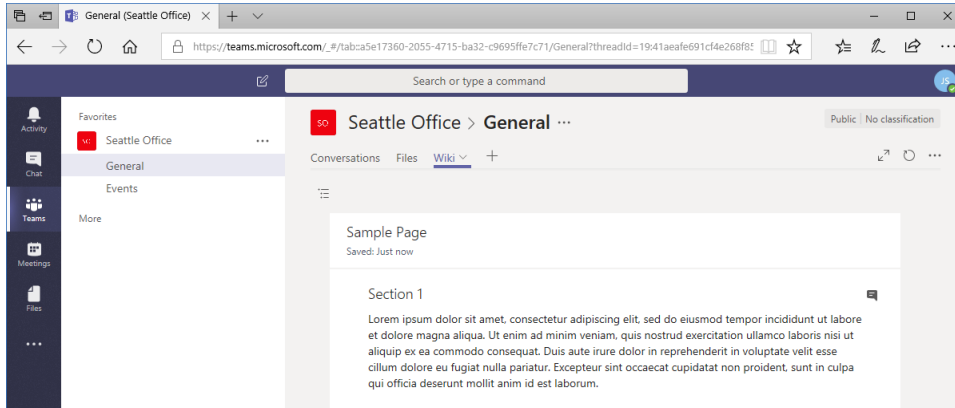
To navigate through the wiki, expand the Wiki Lists menu:



Now, click the page you want to view or edit:



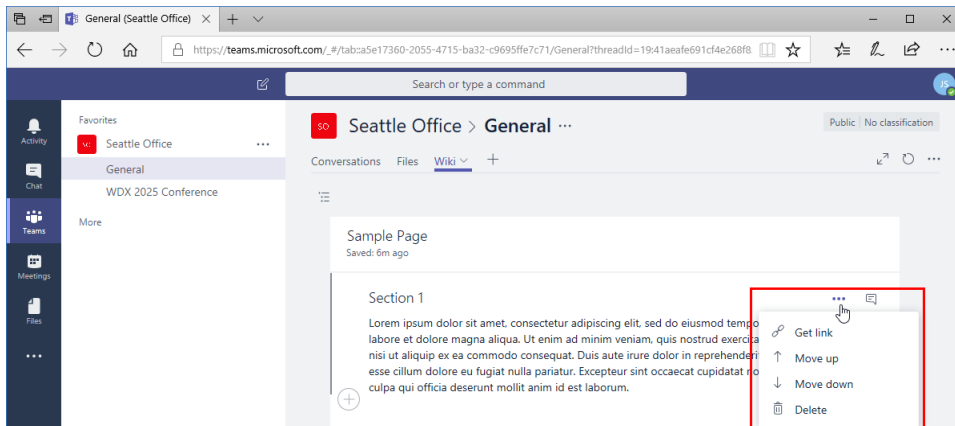
It will then be displayed:



(You may need to click the Wiki Lists menu button again to close it.)

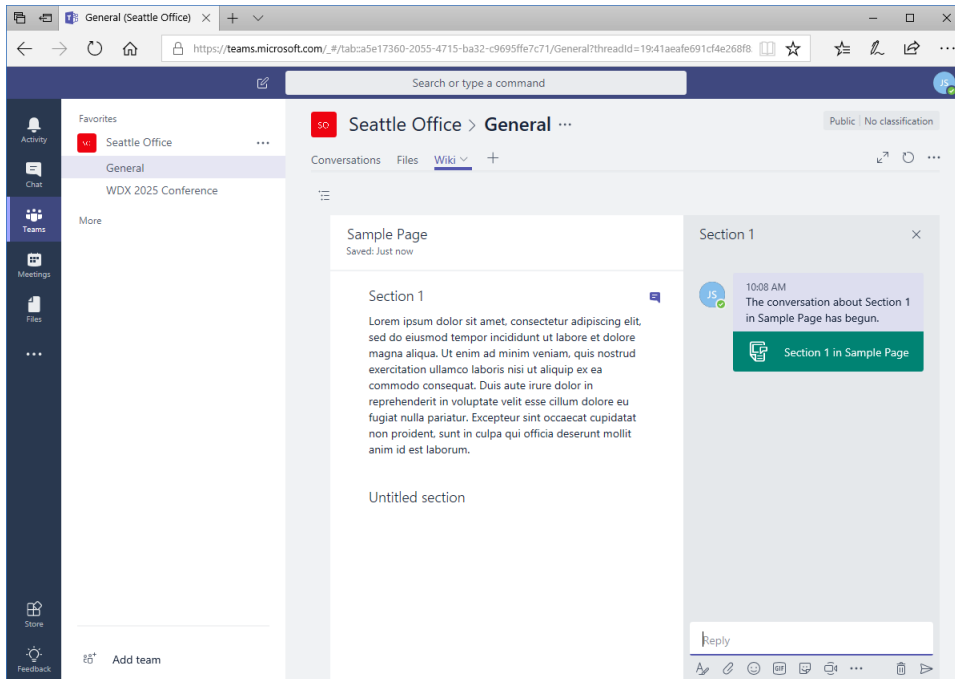
Accessing Section Options

If you move your mouse over a section when viewing wiki content, you will notice two icons in the top-right corner:



The ellipses opens a menu with the options shown above: you can get a link to the section, move it up or down in the page, or delete it entirely.

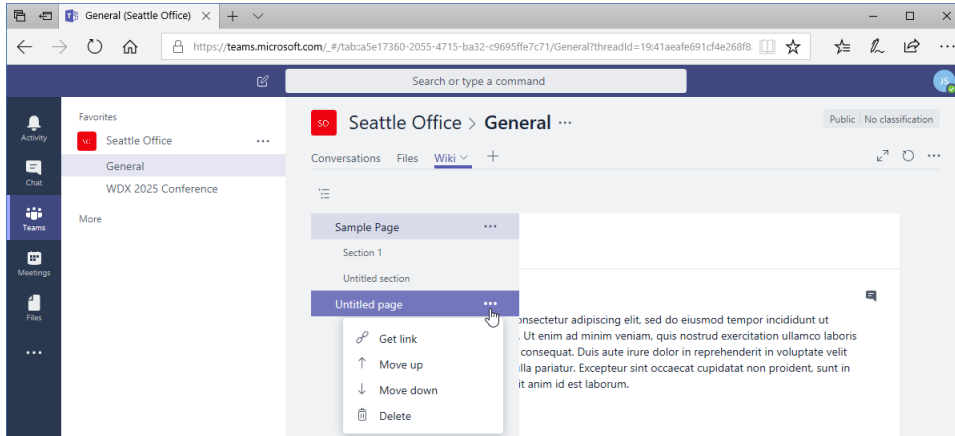
The speech bubble icon opens the Conversation pane:



Here, you can view the conversation, which will be saved back to the main channel and linked to this wiki. (Notice that the compose box is identical to the one in the main Conversations tab.) When you are finished, click the “X” to close the task pane.

Accessing Page Options

Similar options are available for pages and sections in the Wiki Lists menu:

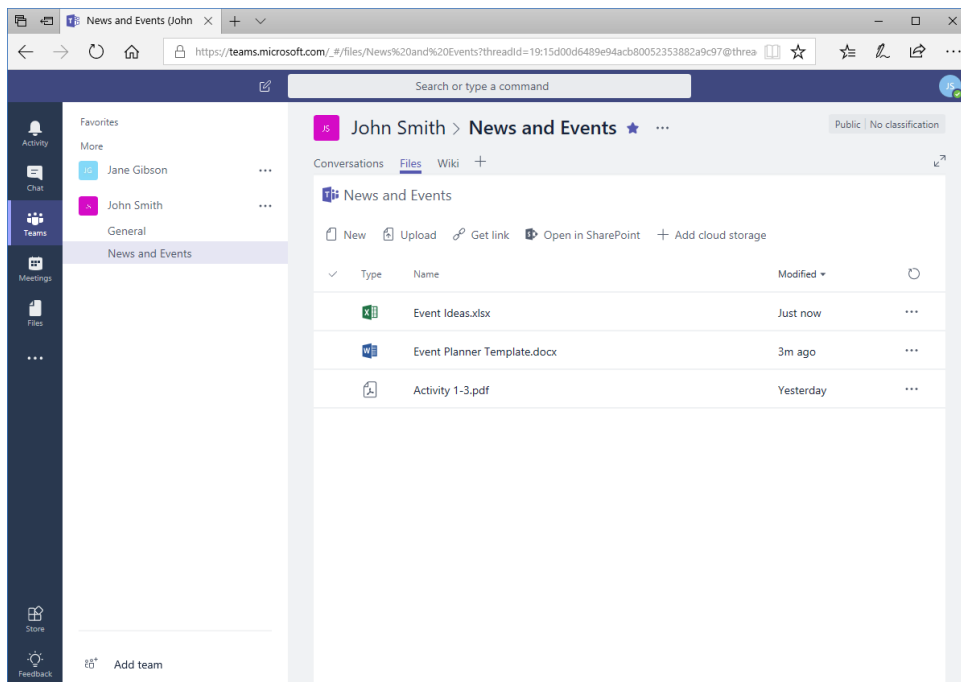


The Conversation icon is not available, but you do have options to get a link to the page or section (depending on which item is selected), move it up or down in the hierarchy, and delete the page or section entirely.

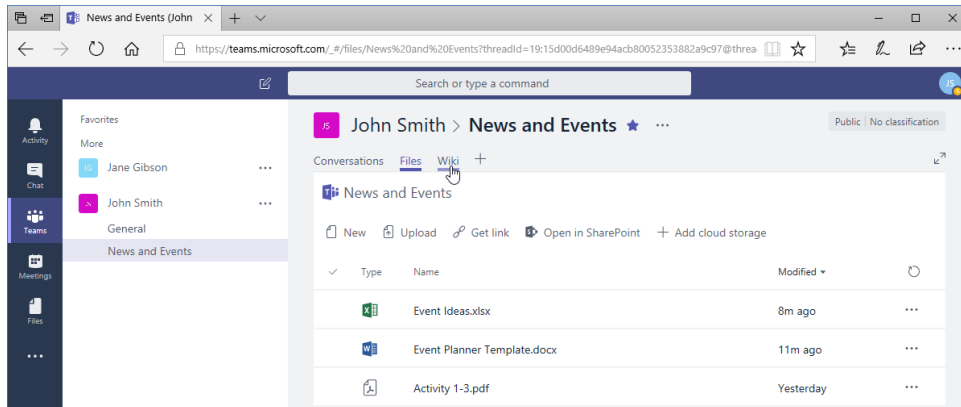
Activity 2-4: Using the Wiki

In this activity, you will set up a wiki for a channel.

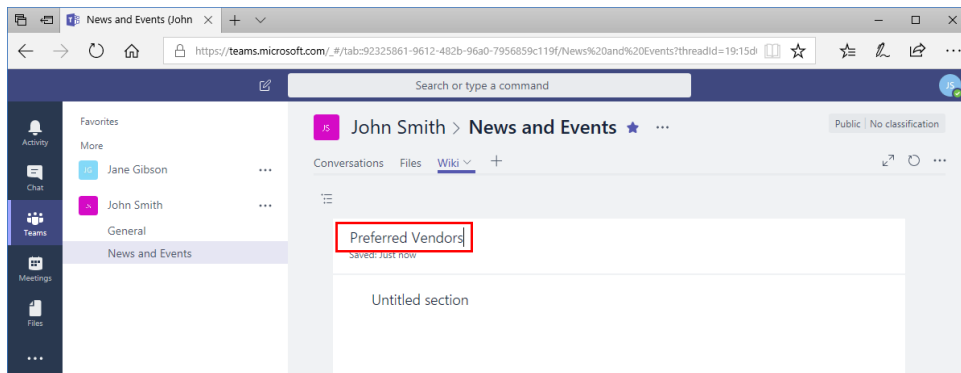
1. Ensure you have completed all Lesson 1 activities and that Microsoft Teams is open.
2. The Files tab of your team's News and Events channel should be displayed. If not, navigate to it now:



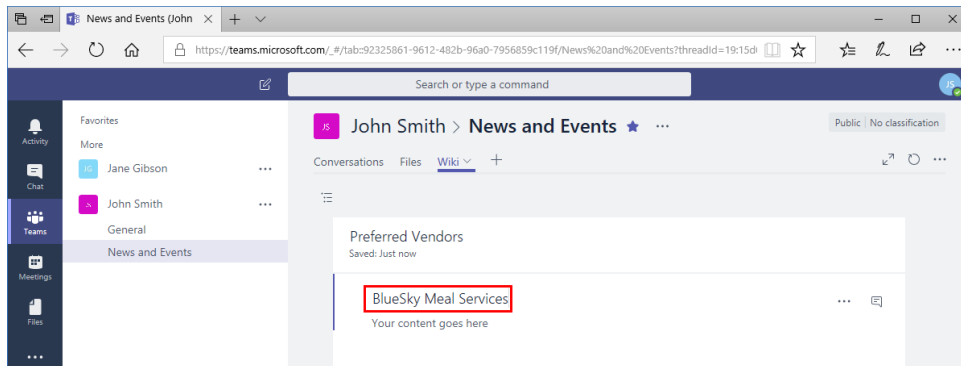
3. Click the Wiki tab:



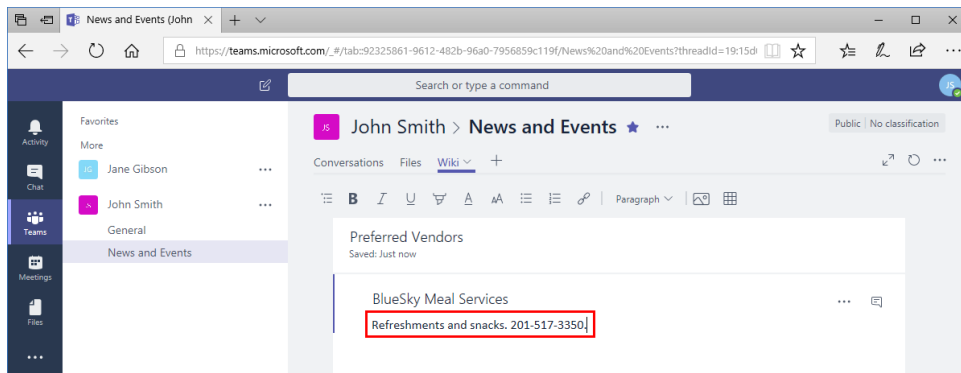
4. You will see a new page and section. Name the page “Preferred Vendors.”



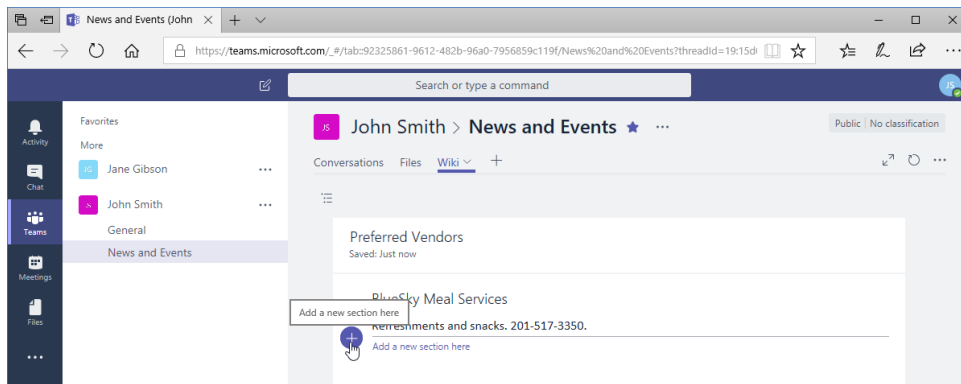
5. Name the first page “BlueSky Meal Services.”



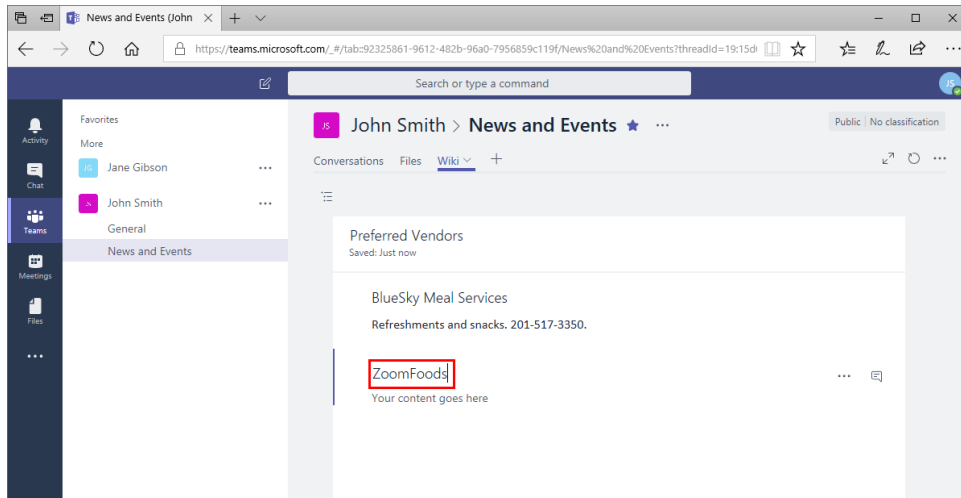
6. Click in the content area and type, “Refreshments and snacks. 201-517-3350.”



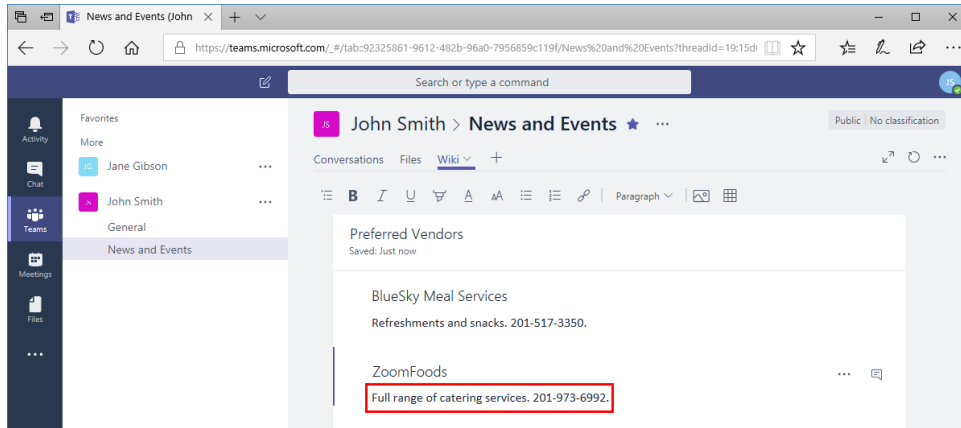
7. Move your mouse over the content area. Click the “Add a new section here” icon:



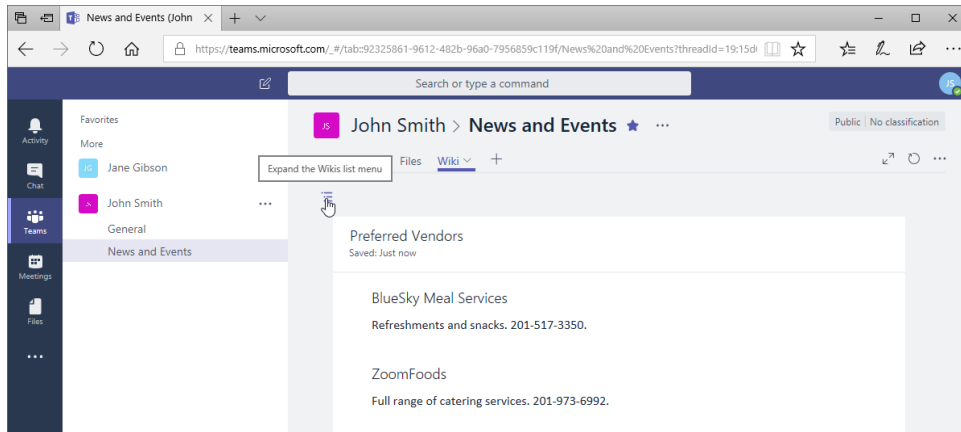
8. Name the new section “ZoomFoods.”



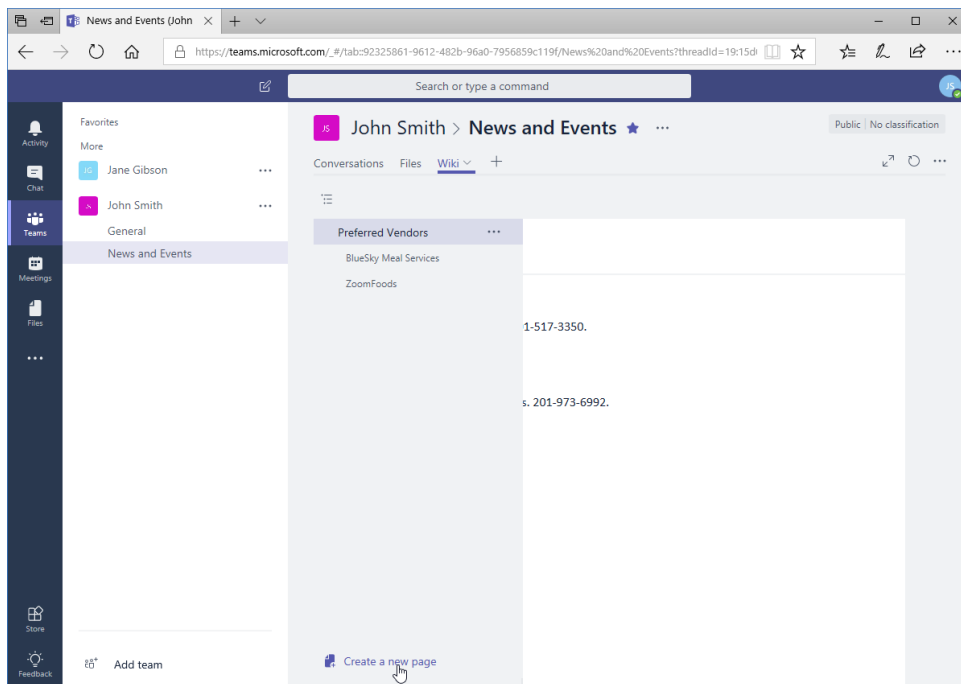
9. Click in the content area and type, “Full range of catering services. 201-973-6992.”



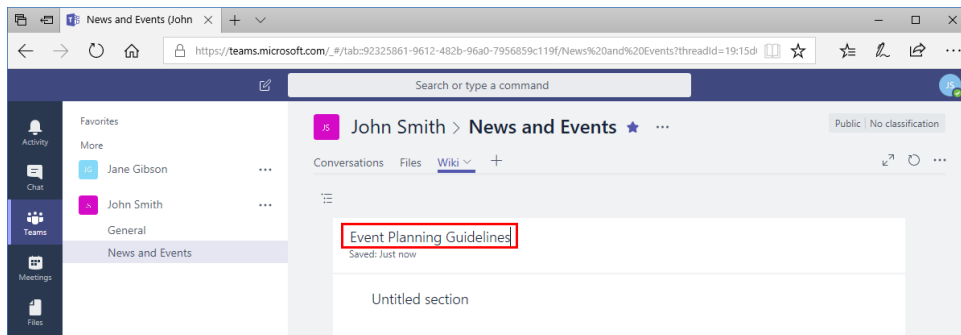
10. Now, click the Wikis List menu icon:



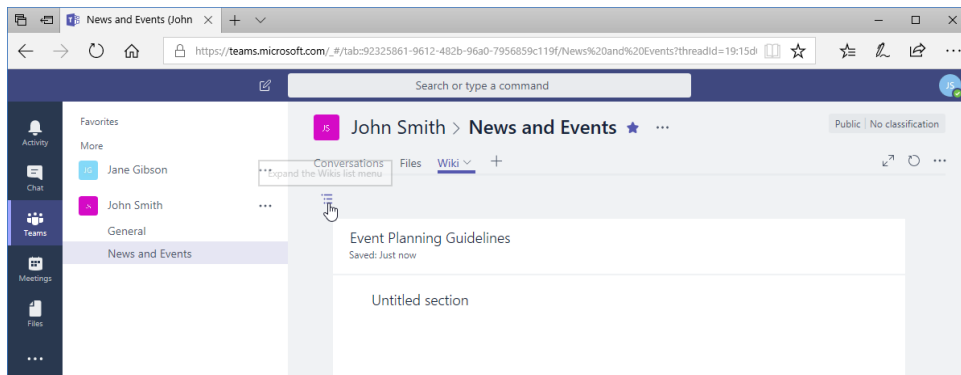
11. Click "Create a new page:"



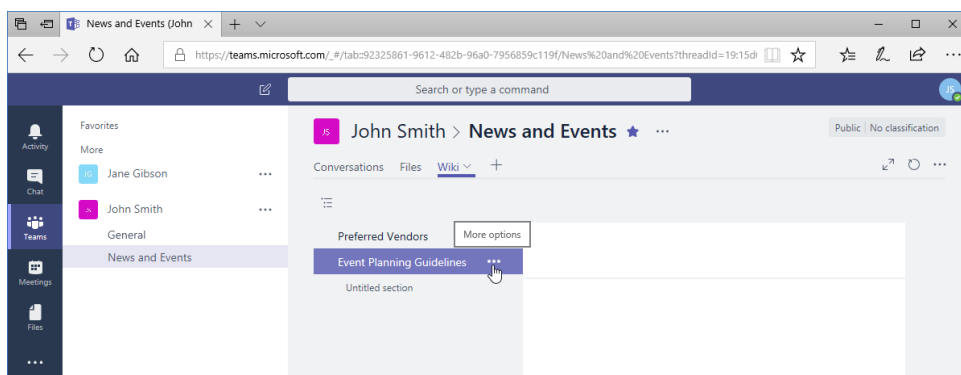
12. Name the new page “Event Planning Guidelines.”



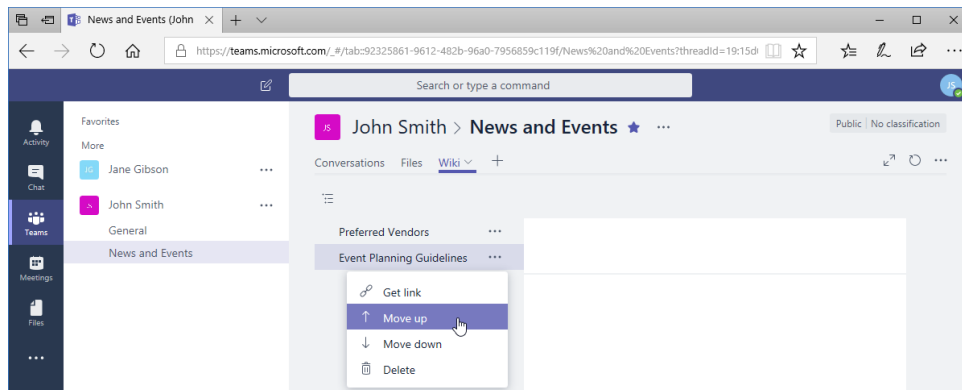
13. Let's leave this page empty for now. Click the Wikis List menu icon again:



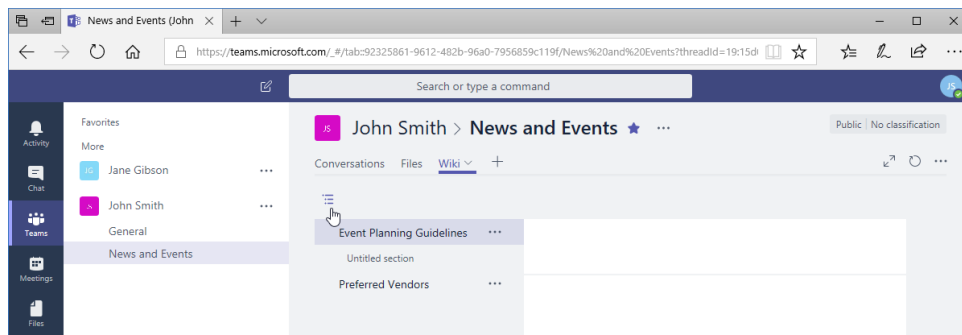
14. These guidelines should be at the top of the wiki. Click the ellipses next to the page's name:



15. Click “Move up:”



16. The menu will close and the Event Planning Guidelines page will be displayed. Click the Wiki Lists menu again to view the new hierarchy:



17. Close your browser to complete this activity.

Summary

In this lesson, you learned how to communicate within channels using messages. You also learned how to manage messages and files. We wrapped up the lesson with an introduction to the wiki – a great place to store and discuss channel-related information.

Review Questions

1. **How do you mark a message as read or unread?**
2. **How do you add other services to Microsoft Teams from a channel?**
3. **What is the difference between a mention and an announcement?**
4. **How do you “like” a message?**
5. **What is the structure of the wiki in Teams?**

LESSON 3: USING OTHER COMMUNICATION TOOLS

Lesson Objectives

In this lesson you will learn how to:

- Use chat
- Manage meetings and files

TOPIC A: Using Chat (Part 1)

So far, we have learned about group communication using channels. However, Microsoft Teams also gives you the ability to communicate privately with other users via chat. Content from chats will be visible in search results to the people involved, but not to the rest of your team.

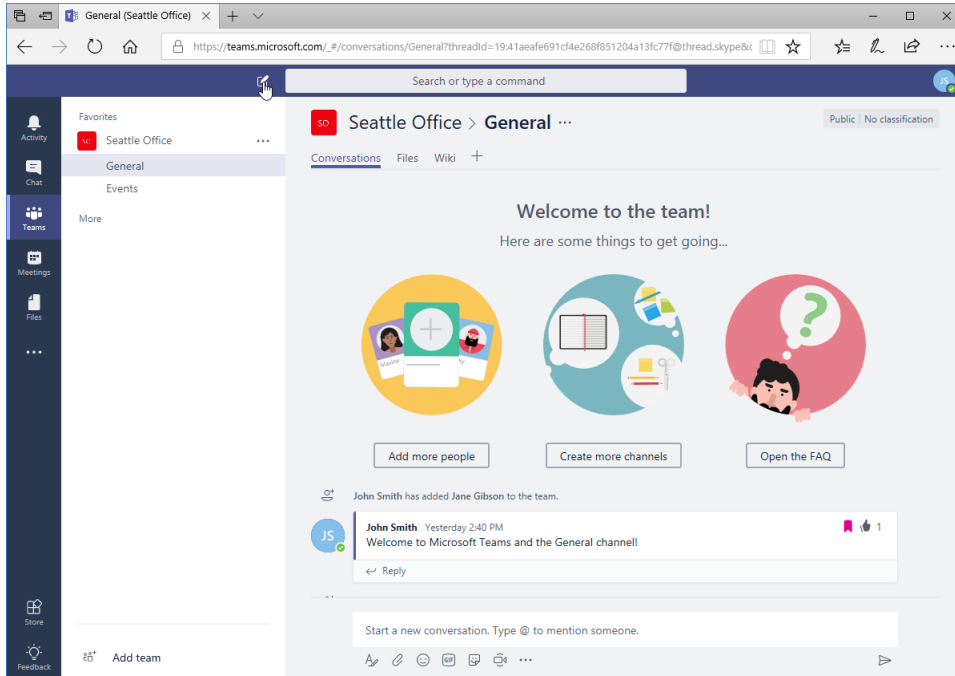
Topic Objectives

In this section, you will learn how to:

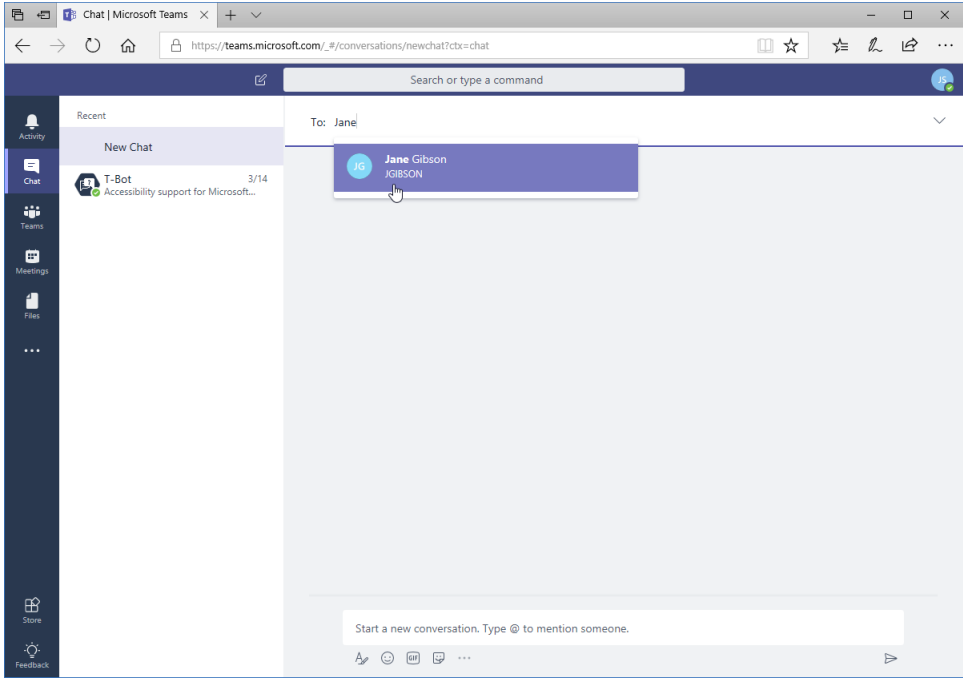
- Start a chat
- Reply to and continue a chat
- Add other users to a chat
- Use chat message features

Starting a Chat

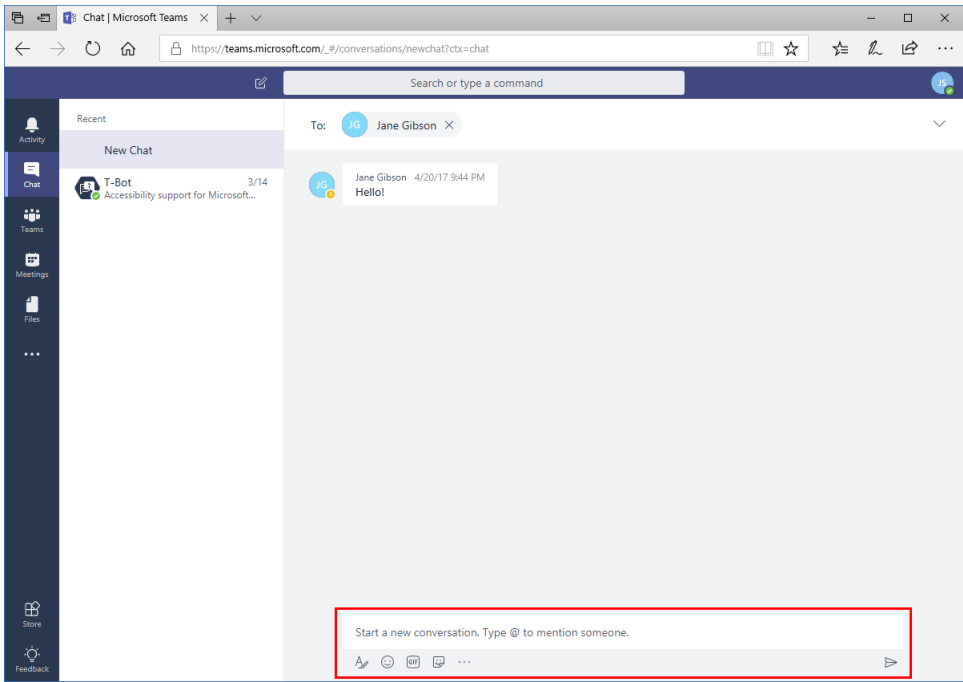
To start a chat, click the New Chat icon (next to the search bar) from anywhere in Teams:



The Chat icon from the sidebar will be selected. First, enter a name or group in the To field. Just as before, you will see a menu with suggestions to complete this field. Click the correct suggestion:



Any message history will now appear in the main window. You can type your message in the compose box at the bottom of the window:



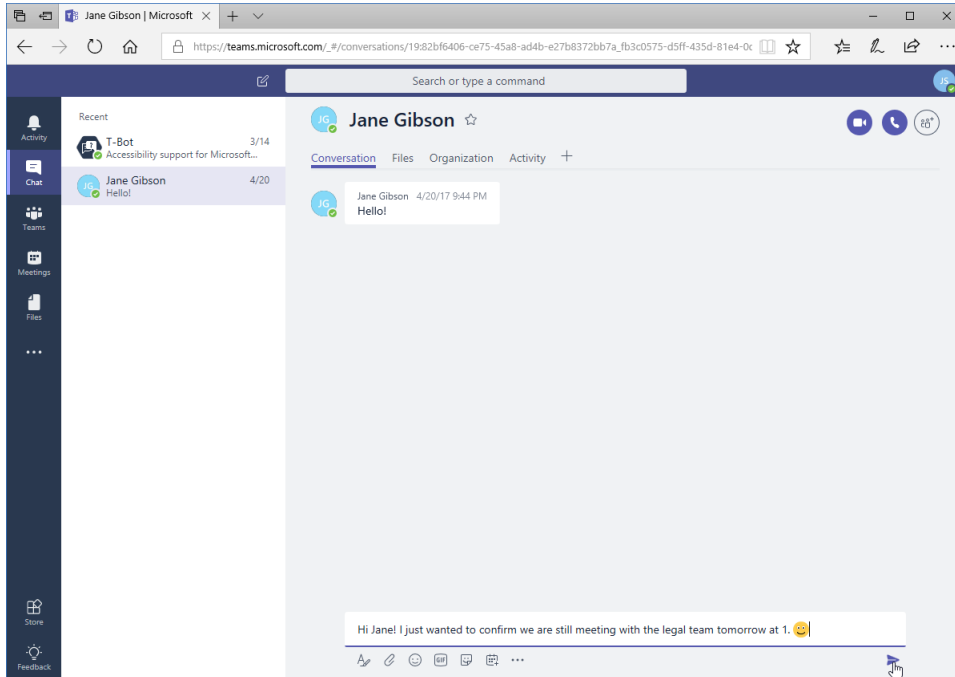
Notice that we have many of the same features as when creating messages in a channel, including an expanded compose box and the ability to add emojis, GIFs, and stickers.

Also, notice the icon in the corner of the user's profile icon. In this case, it is yellow, meaning Jane is away:



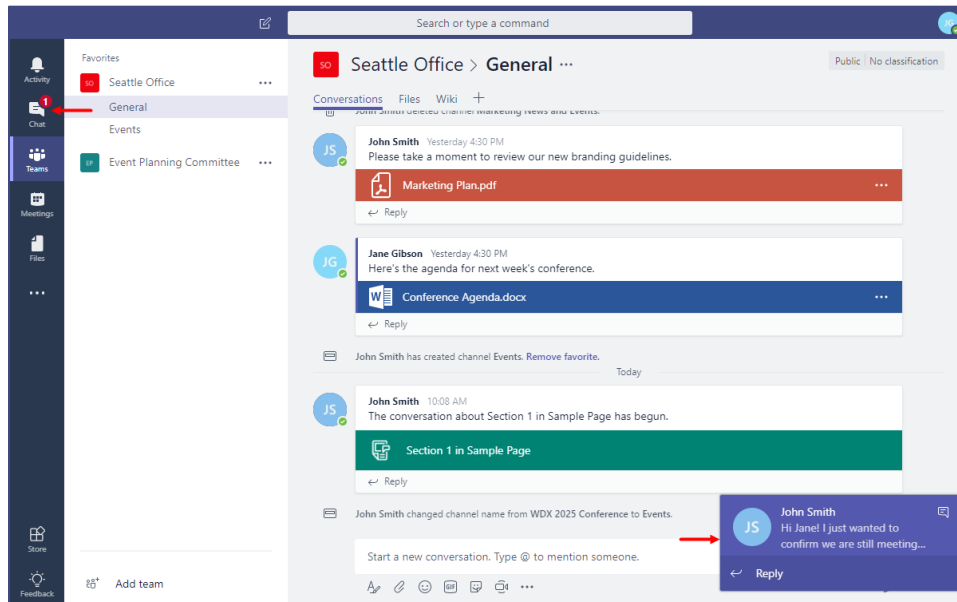
This is particularly useful if you need an urgent response from someone, since you can identify if they are available or not.

Once your message is complete, press “Enter” or click the arrow to send it:

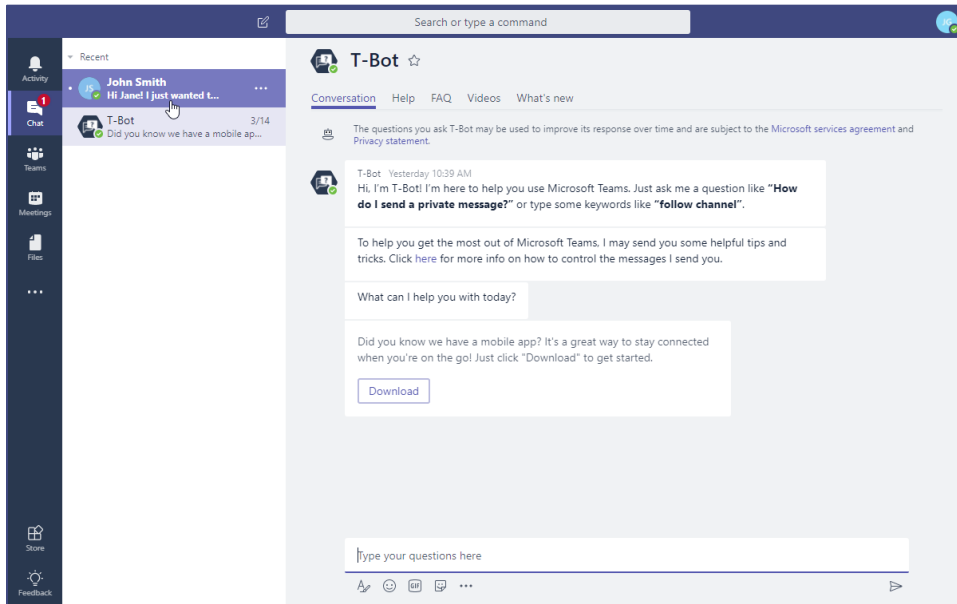


Replying to a Chat Message

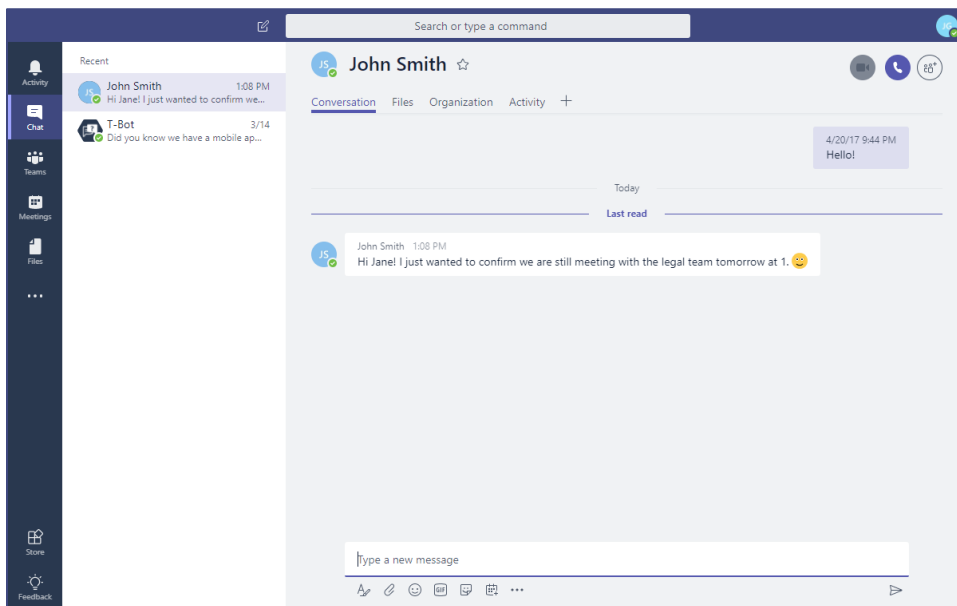
When you receive a chat message, you will see a pop-up notification and a badge next to the Chat icon on the sidebar:



Click the notification to go right to the message. If the message disappears before you can click on it, open Chat and click the bolded item (which indicates it is new):

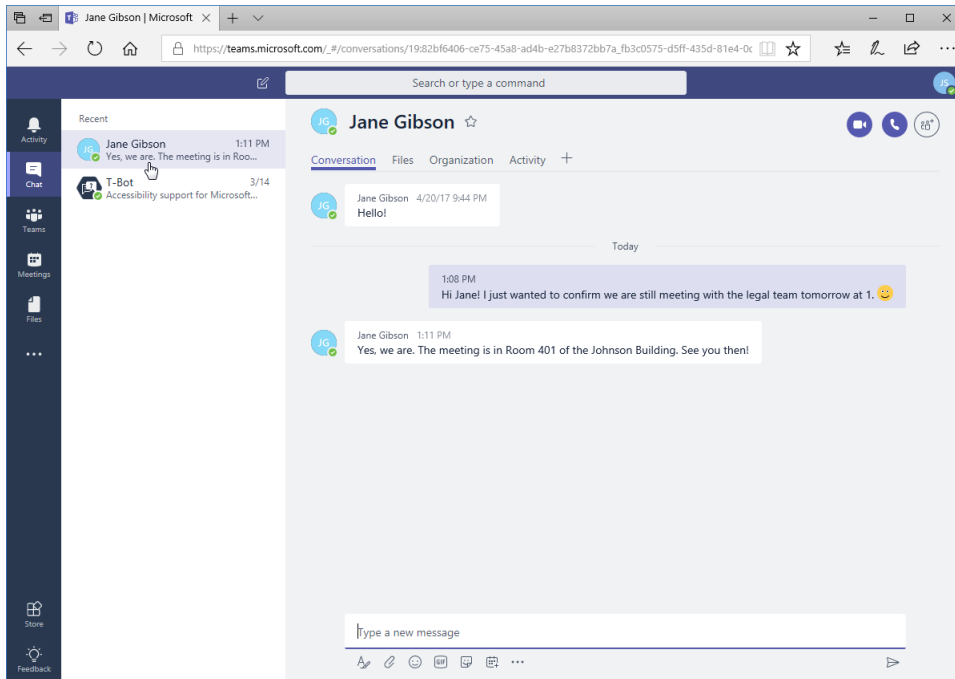


You can now view the message and reply using the compose box:



Continuing a Chat

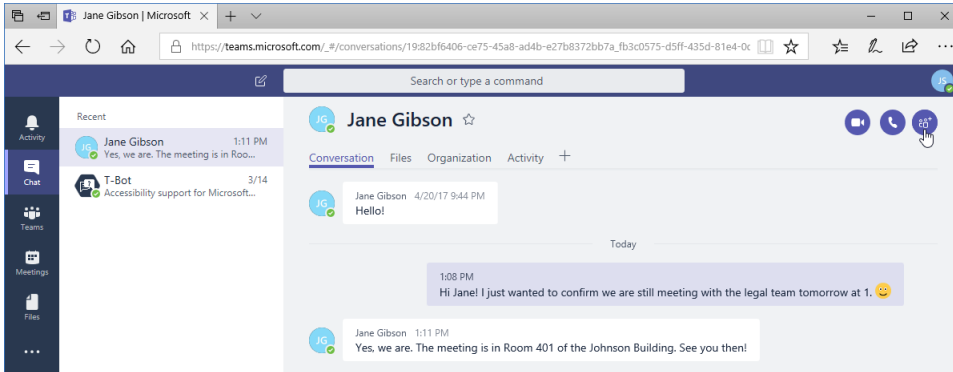
If you want to continue a chat with someone, click the Chat icon from the sidebar and click the user's name:



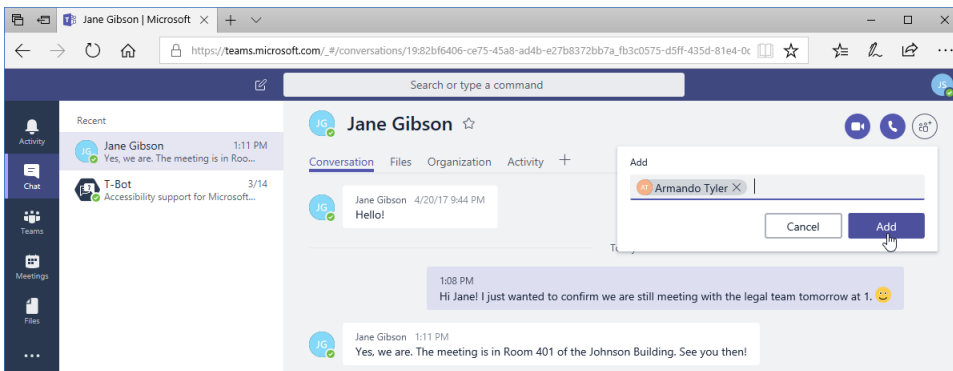
You will then see your chat history and can create a new message.

Adding Other Users to the Chat

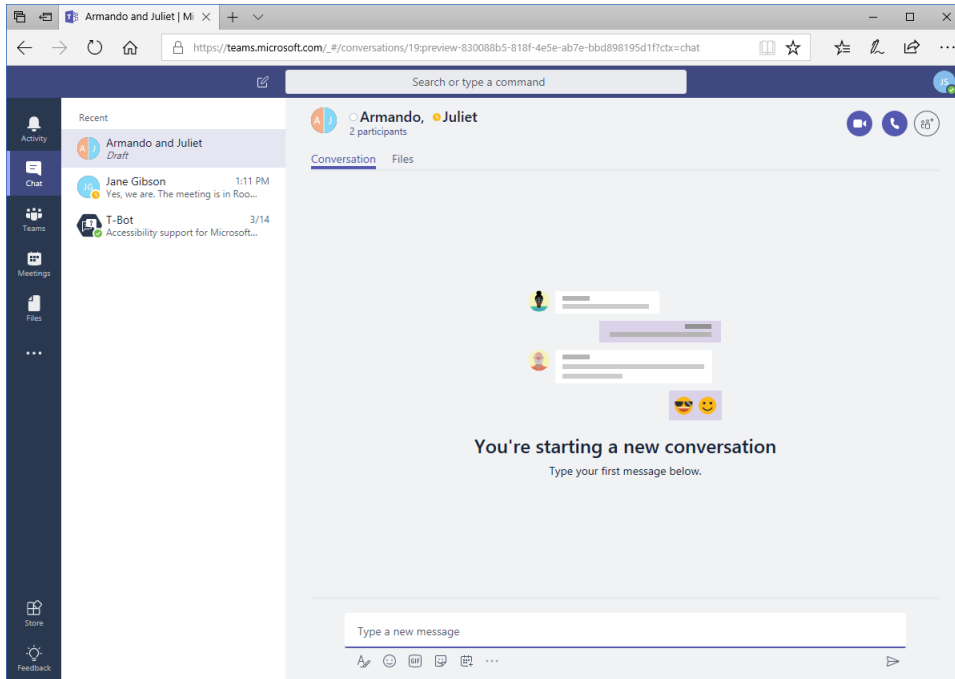
To add other users to the chat, click the “Add people” icon in the top right corner of the chat window:



Now, enter the user’s name and click “Add:”



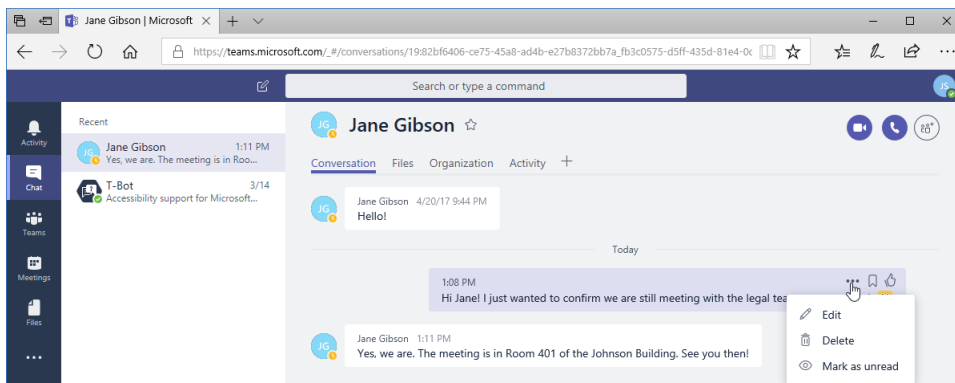
A new message window will be created. (This way, the new user will not have access to your chat history.)



You can now create and send your message as usual.

Using Chat Message Features

You can work with chat messages in the same way as channel messages. You can like a message, save it, or click the ellipses for more options:



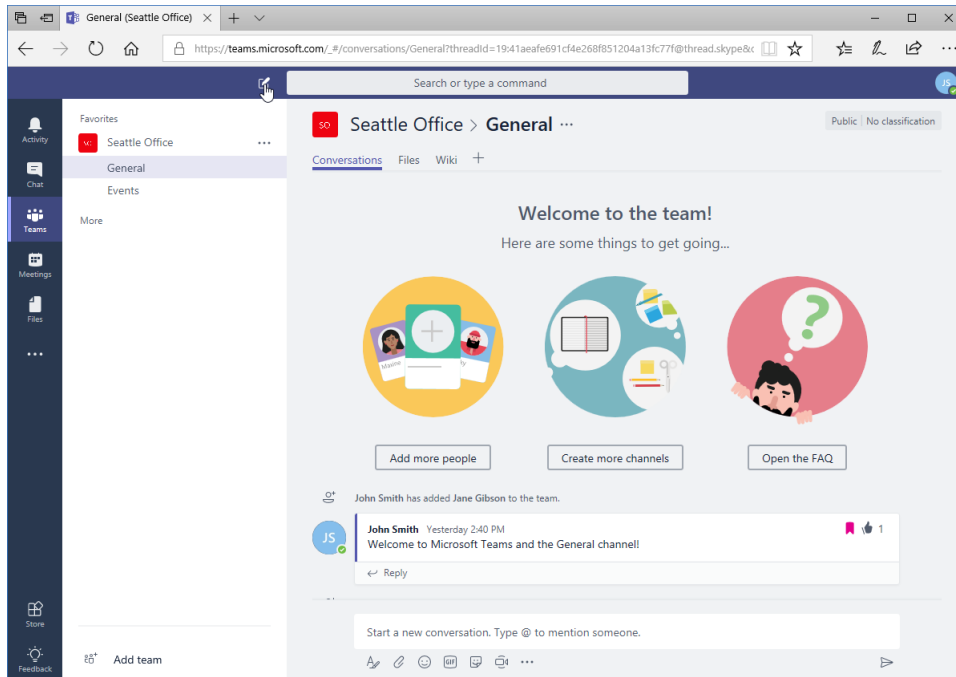
(Note that you can only delete or edit messages you have created.)

Activity 3-1: Using Chat (Part 1)

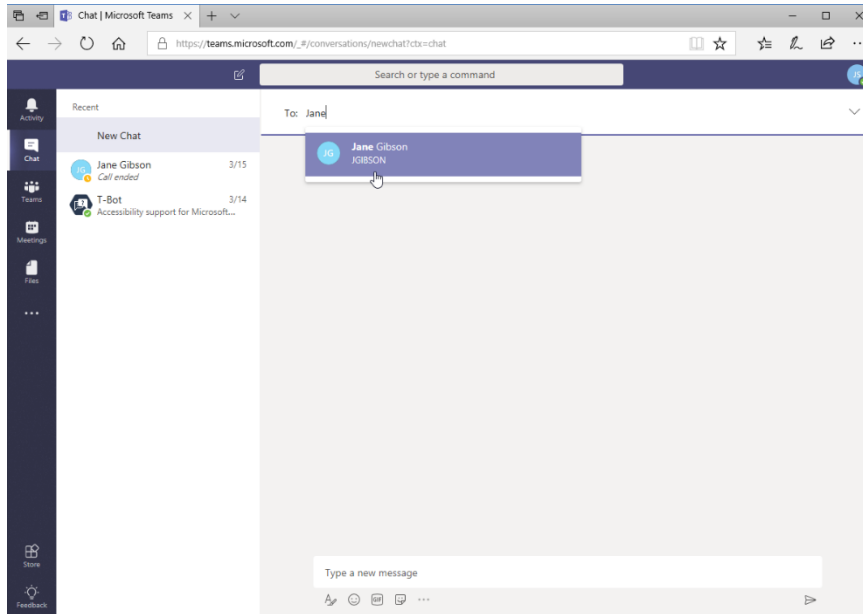
In this activity, you will start a new chat and send a message.

1. Ensure you have completed all previous activities and that Microsoft Teams is open. Choose a partner from your class, or ask a friend to help you out. Ensure you are members of each other's teams.

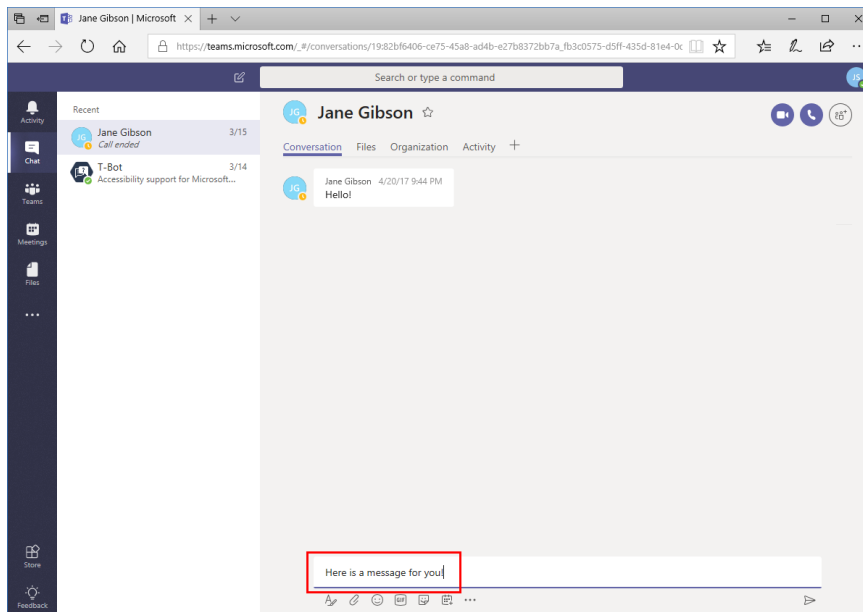
2. Click the New Chat icon at the top of the Teams window:



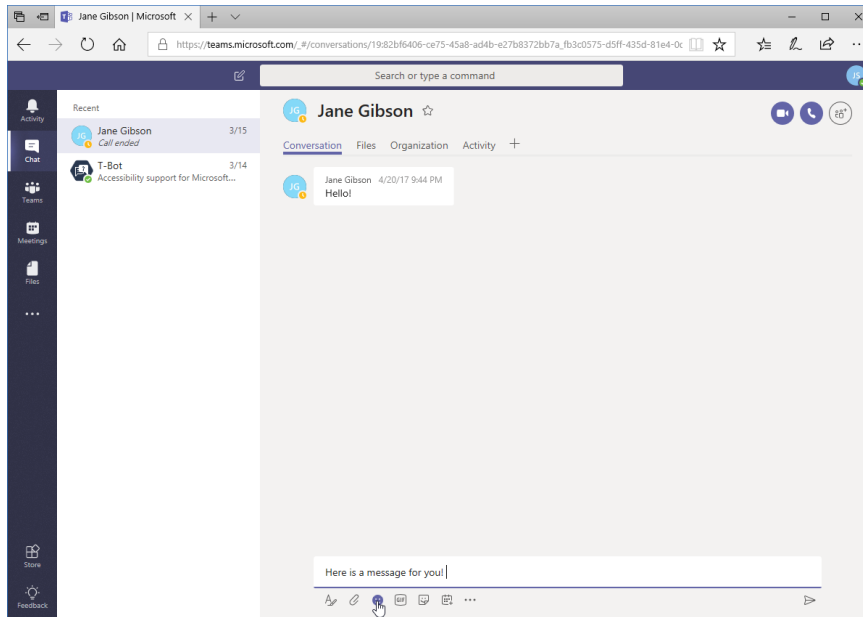
3. The chat window will open. Start typing your partner's name in the field at the top of the window. Click their name when it appears:



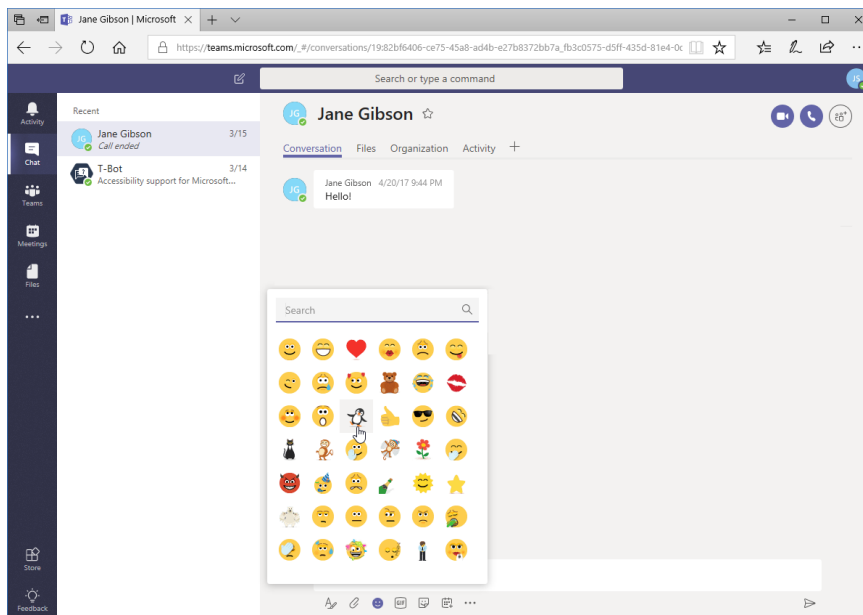
4. In the compose box, type, "Here is a message for you!":



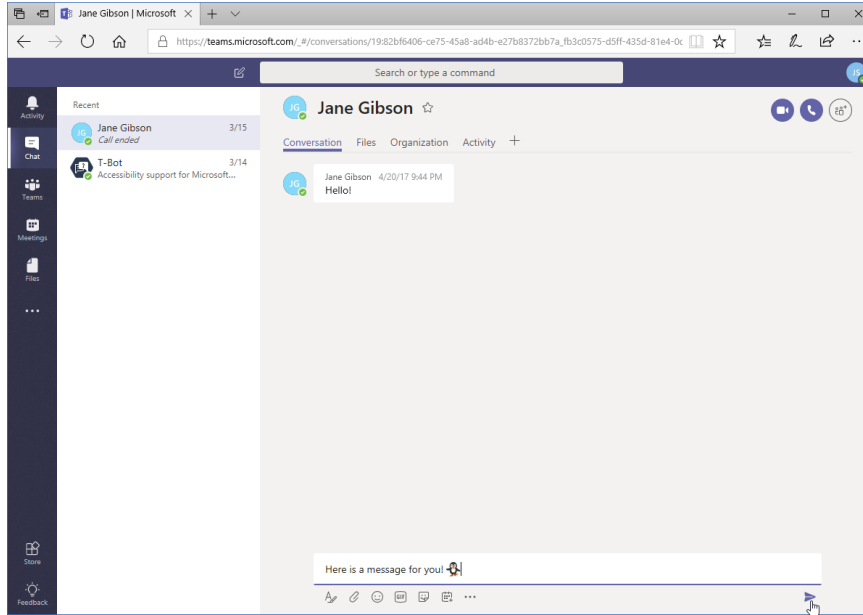
5. Add a space and click the emoji button:



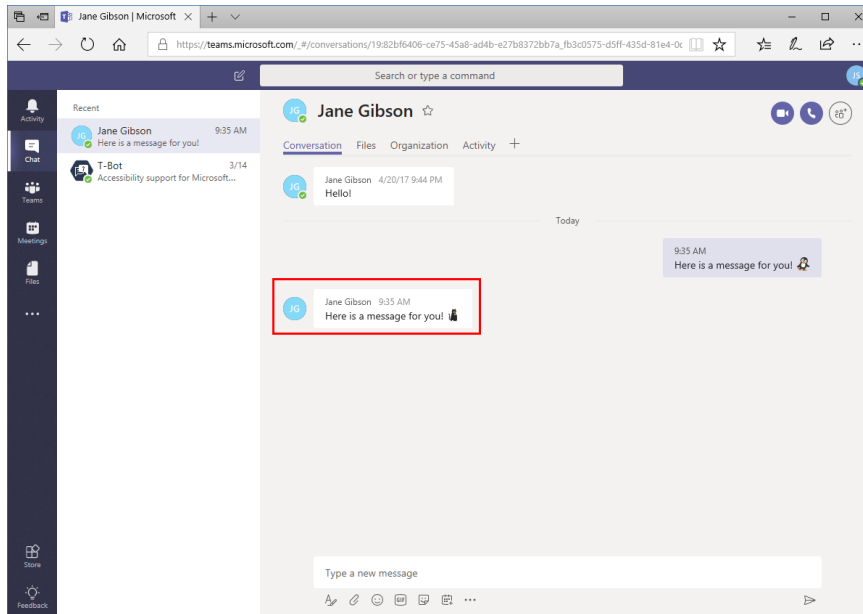
6. Click any emoji you like to add it to your message:



7. Press “Enter” or click the arrow to send your message:

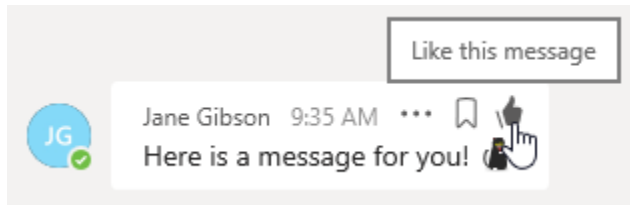


8. You should receive a message back from your partner:

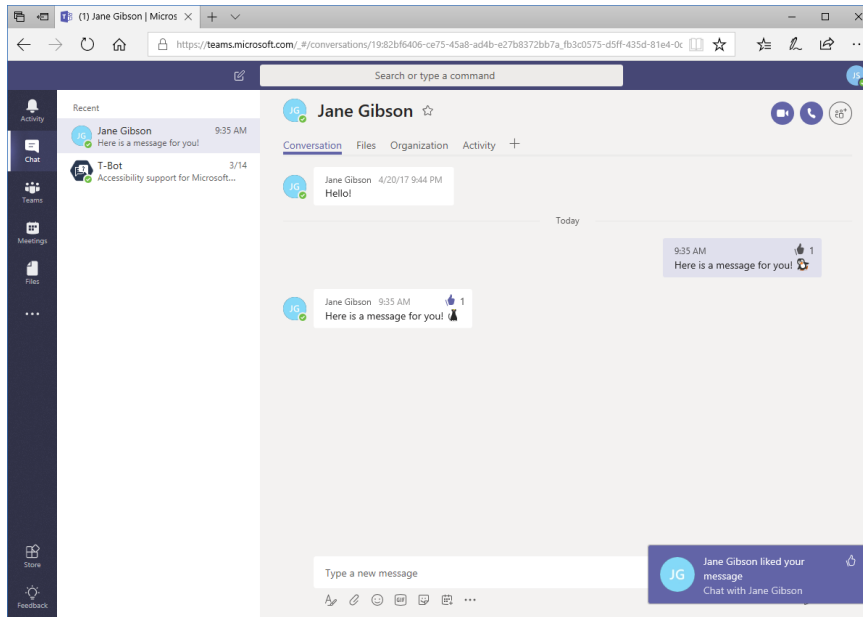


(You may not get a notification since you are already in the chat window.)

9. Move your mouse over the message and click the thumbs-up icon to like it:



10. You should see your partner like your message, too:



11. Leave Teams open for the next activity.

TOPIC B: Using Chat (Part 2)

In the last topic, we learned how to use basic chat features. In this topic, we'll explore a few additional features that can help you get even more out of the Chat feature in teams.

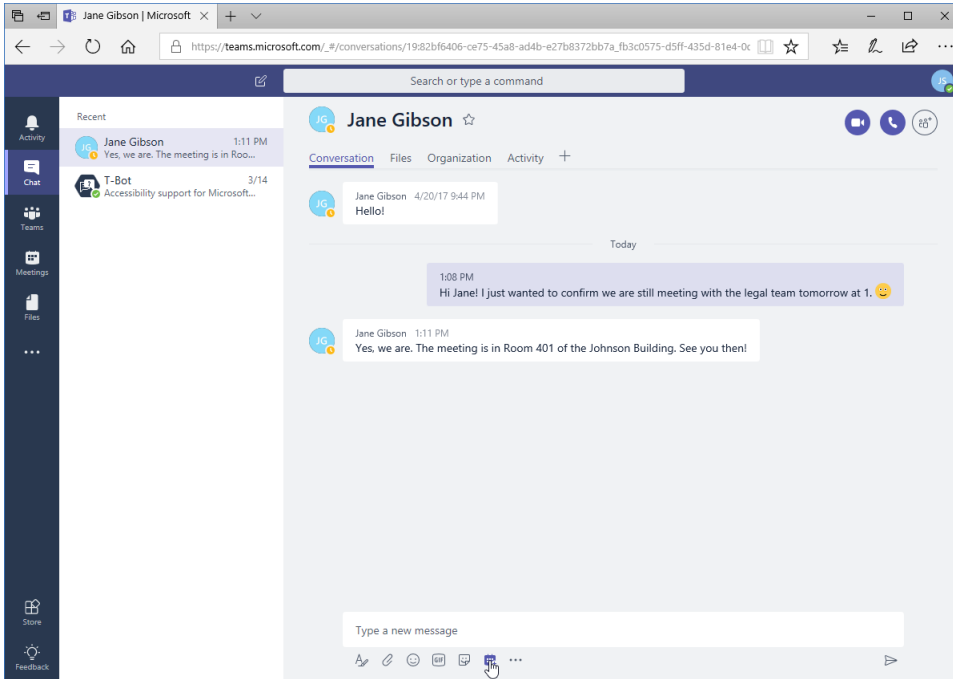
Topic Objectives

In this section, you will learn how to:

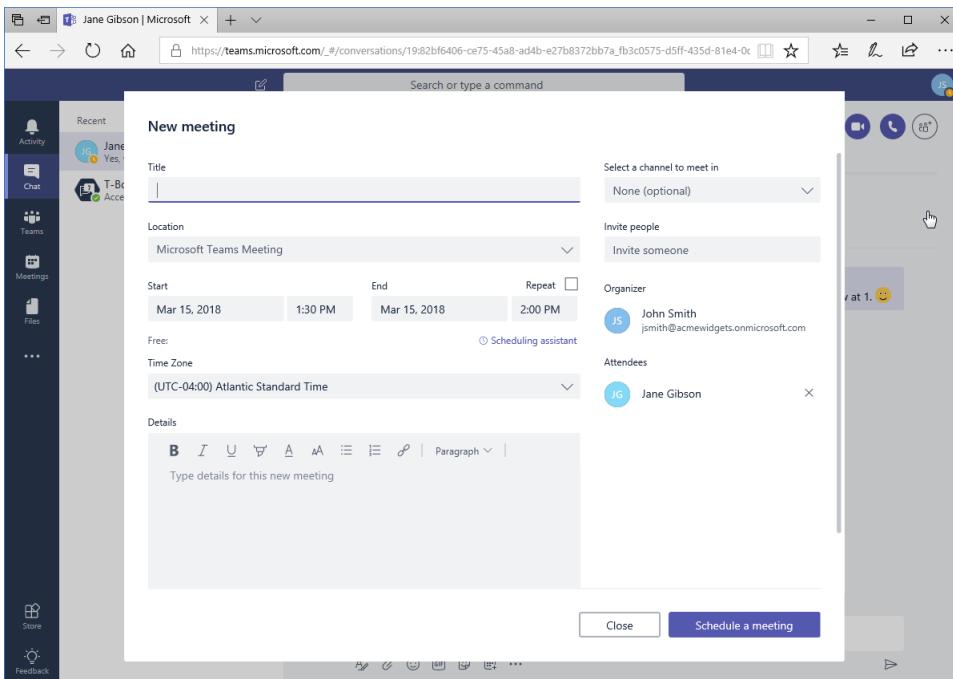
- Schedule a meeting from a chat message
- Start video and audio calls
- Use the tabs in the Chat window
- Manage chats

Scheduling a Meeting from a Chat Message

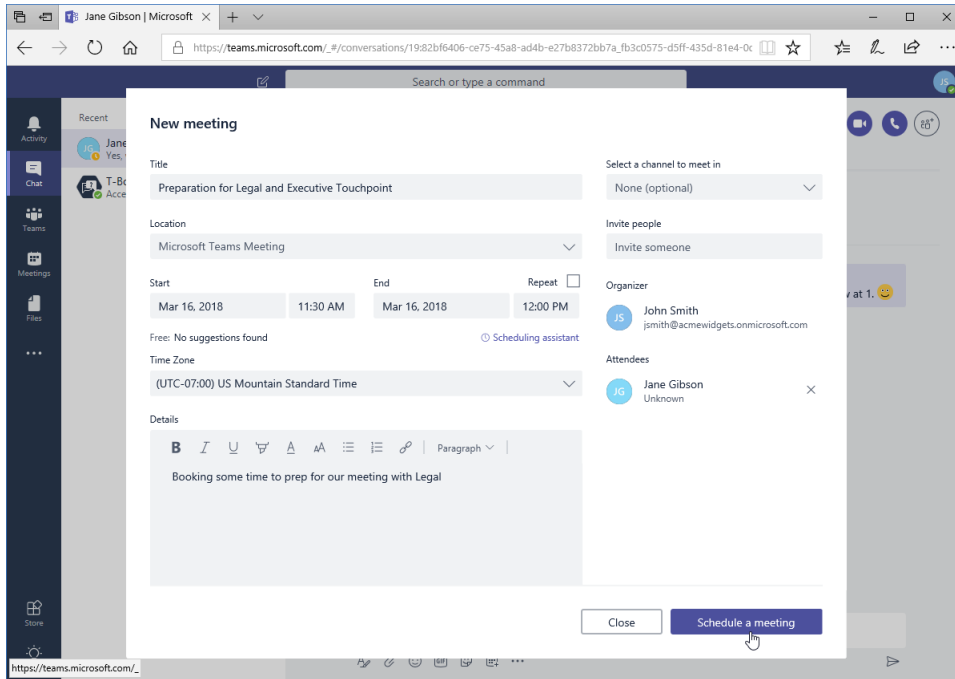
To schedule a meeting from within a chat message, click the “Schedule meeting” icon in the compose box:



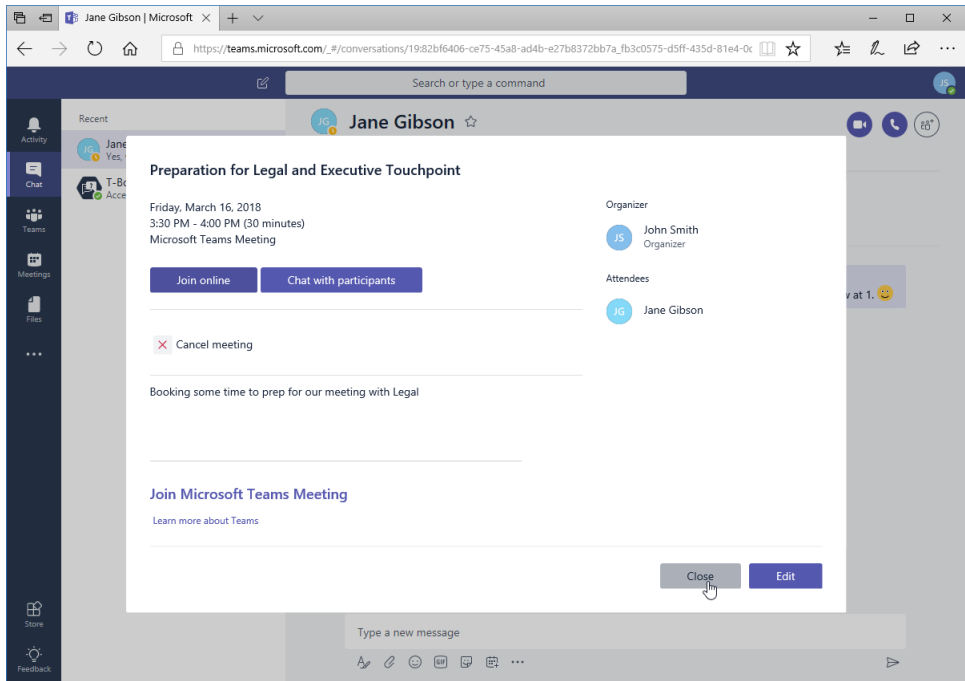
The “New meeting” window will open:



We will take a closer look at this window in the next topic, but for now, know that all you have to do is enter the details and click “Schedule a meeting.”



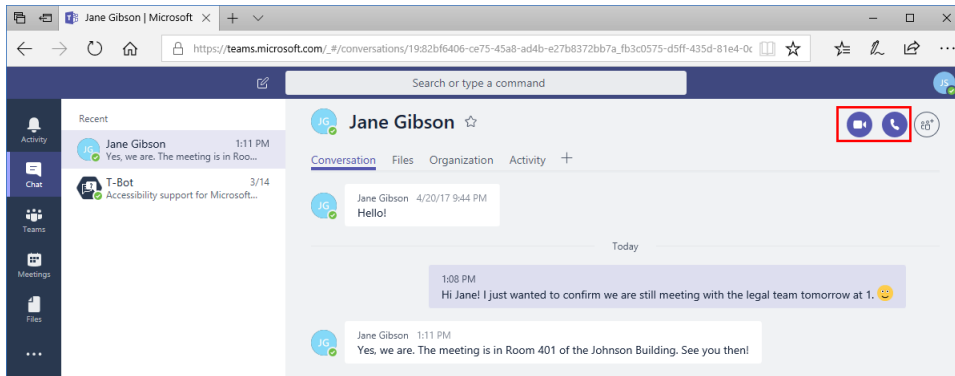
The meeting will now be created. Click “Close” in the confirmation dialog:



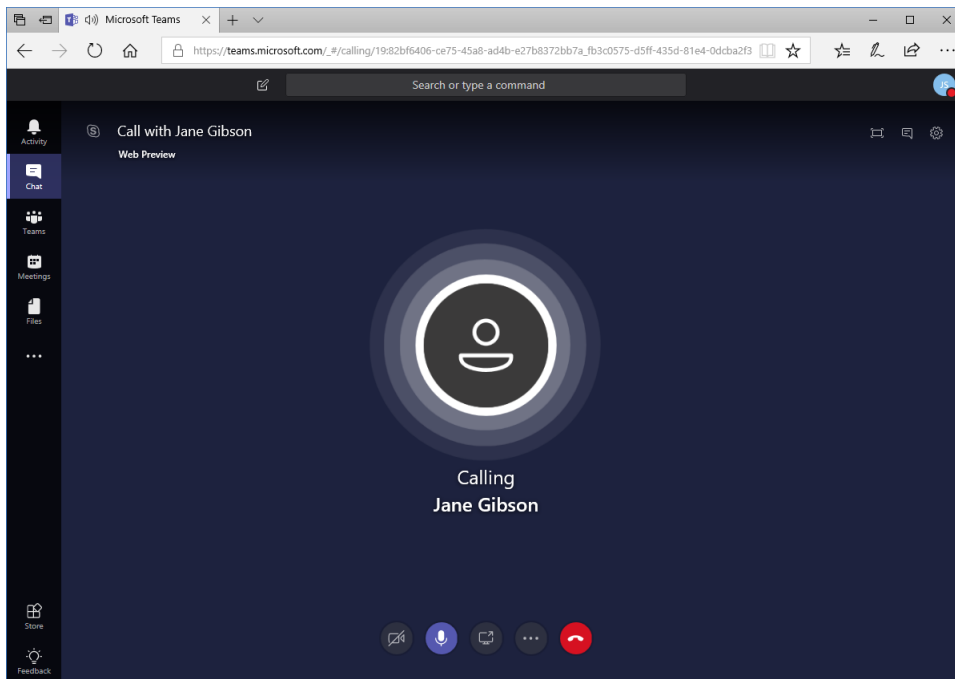
You will then be returned to the chat window. The meeting will not appear here, but will be shown in the Meetings tab on the sidebar.

Starting Audio or Video Calls

To call someone instead of messaging them, click either Call button at the top of the chat window:



(The left icon starts a video call, while the right icon starts an audio call. You will need a webcam for a video call, or a microphone/headset for an audio call.) The call will be placed:

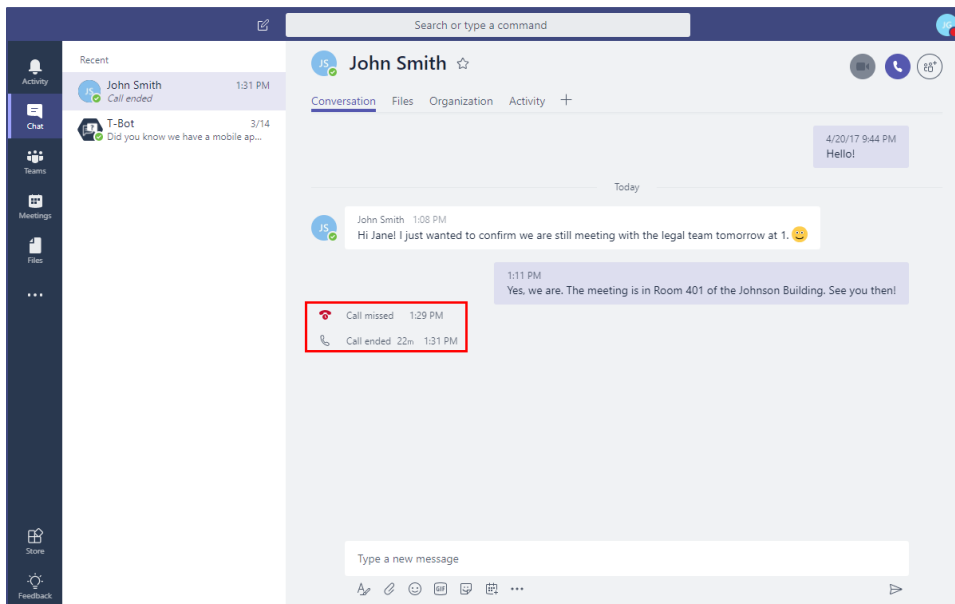


And the recipient will see a notification:



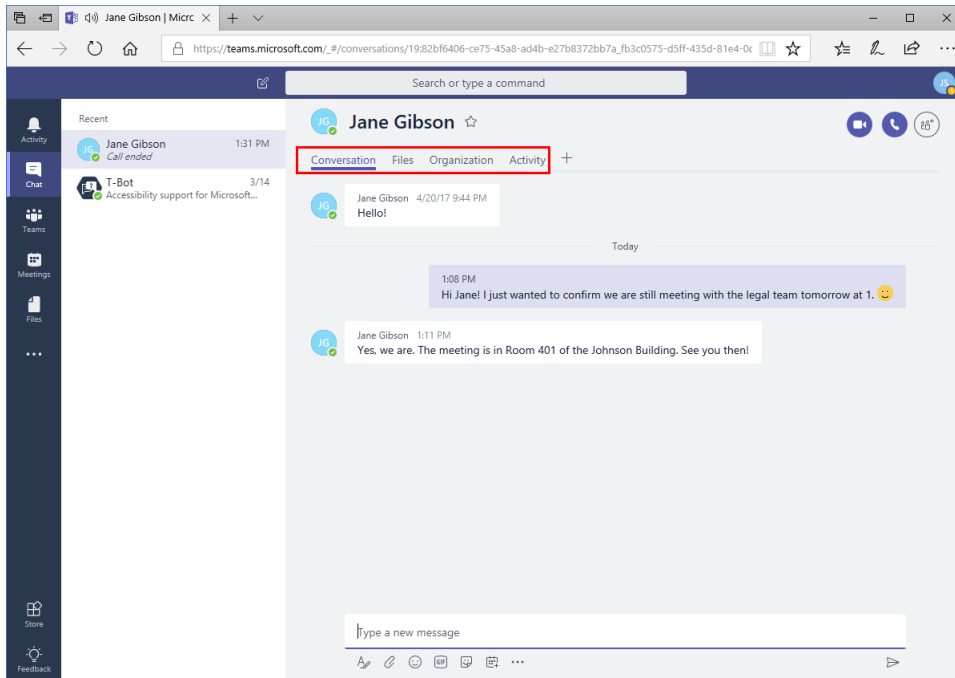
They can accept the call as video or audio. When the call is complete, either user can click the red icon to hang up.

Call history will be shown in the message window:



Overview of Chat Tabs

Just as in channels, you will use the Conversation tab to send and view chat messages:



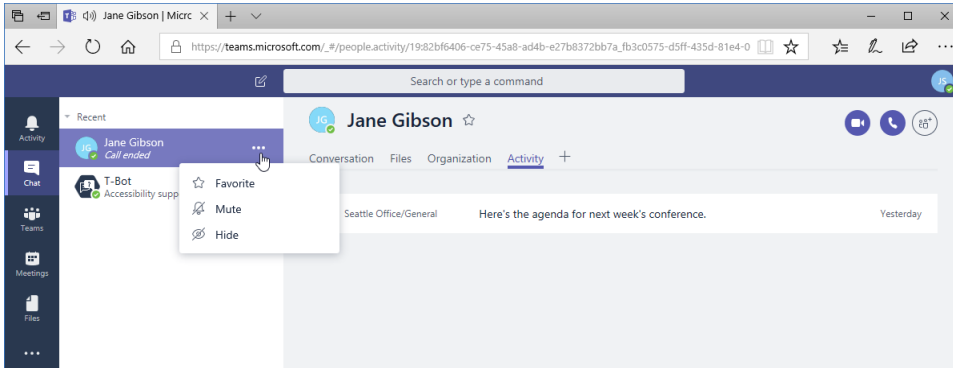
However, there are three other tabs, which work in a similar way as those in channels.

- **Files:** View and manage all files in this chat.
- **Organization:** View this user's position in the organization.
- **Activity:** View all activity by this user.

Also note the plus sign, which allows you to add custom tabs to the chat window.

Managing Chats

To manage your chat history, move your mouse over the appropriate entry in the contextual task pane (while the Chat icon is selected from the sidebar) and click the ellipses:

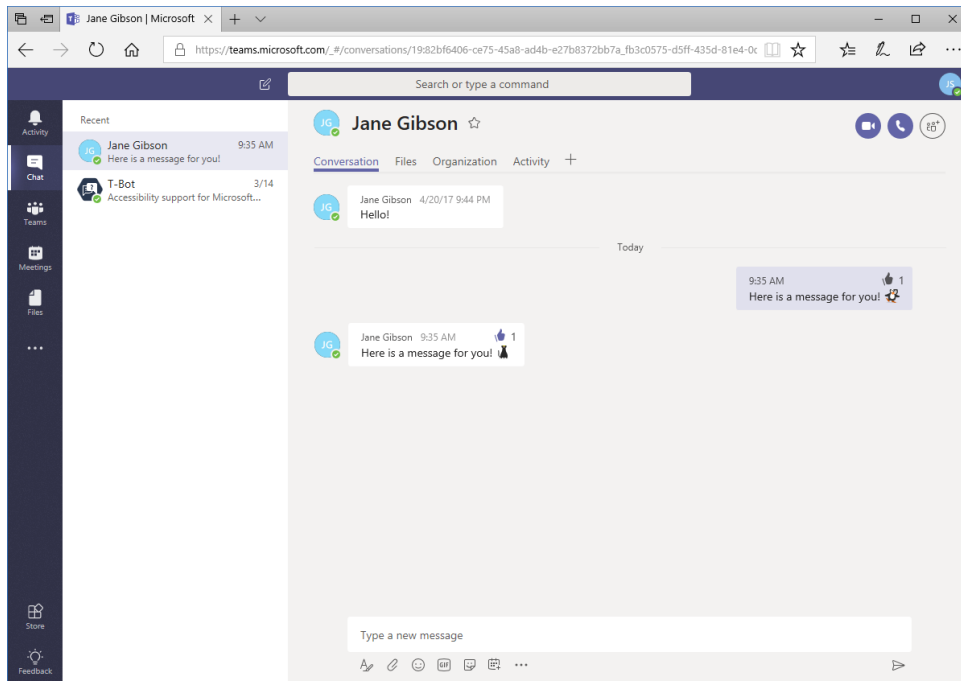


You will see options to mark this chat as a favorite (moving it to a Favorites category), mute this person (which will hide notifications when they send you a message), or hide this chat entry entirely.

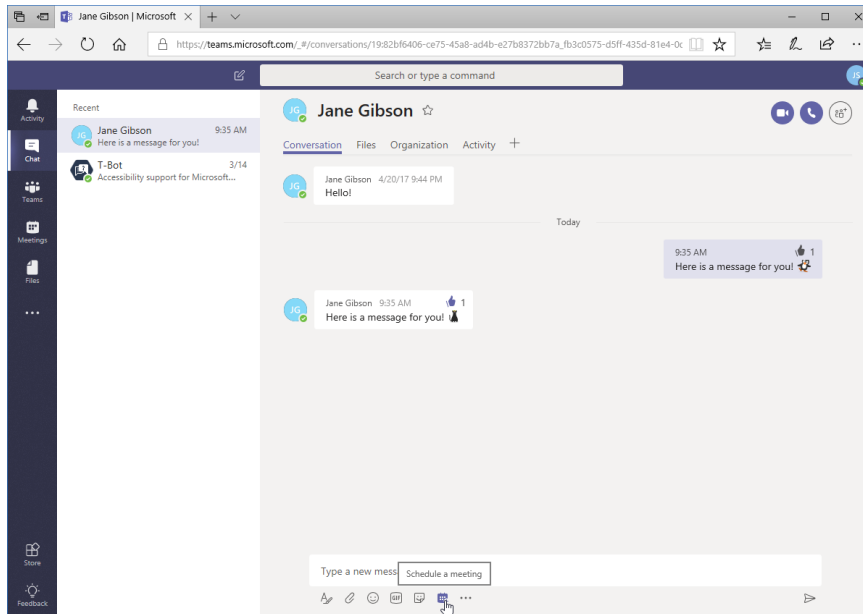
Activity 3-2: Using Chat (Part 2)

In this activity, you will explore additional chat features.

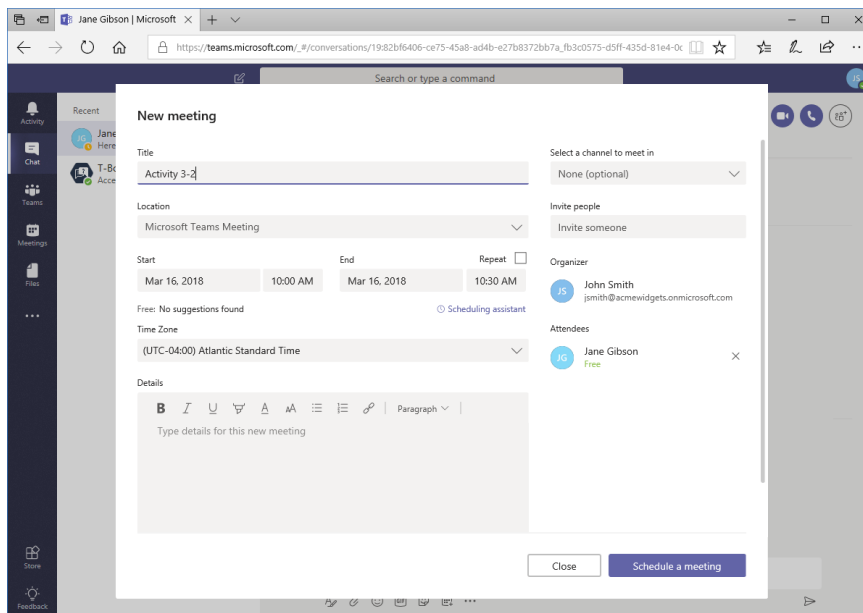
1. Ensure you have completed Activity 3-1. You should have a chat window open with your partner from that activity:



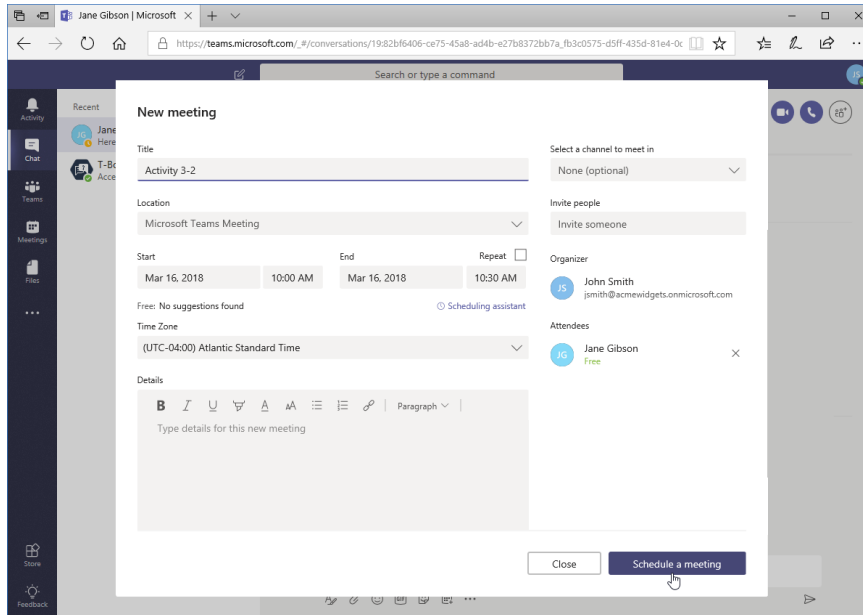
2. Click the “Schedule a meeting” icon below the compose box:



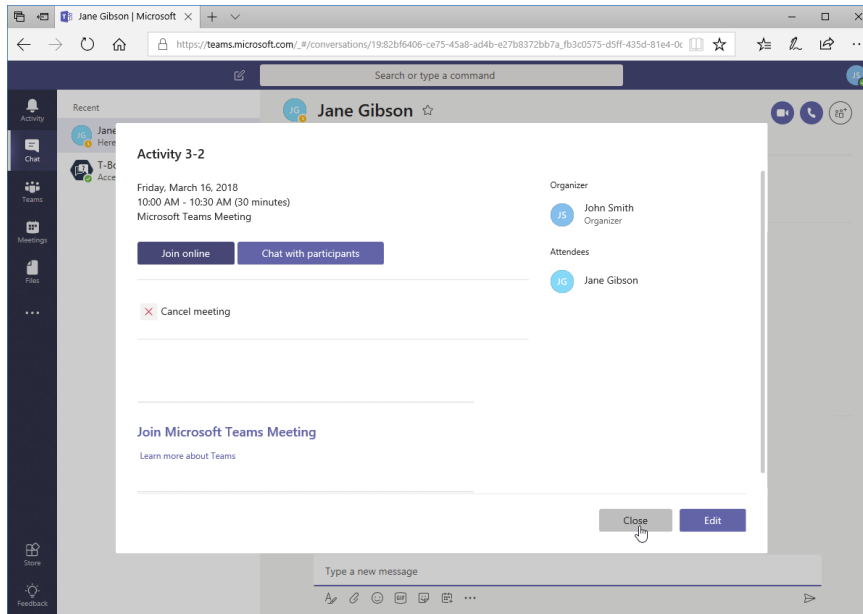
3. The “New meeting” dialog will open. Enter “Activity 3-2” in the Title field:



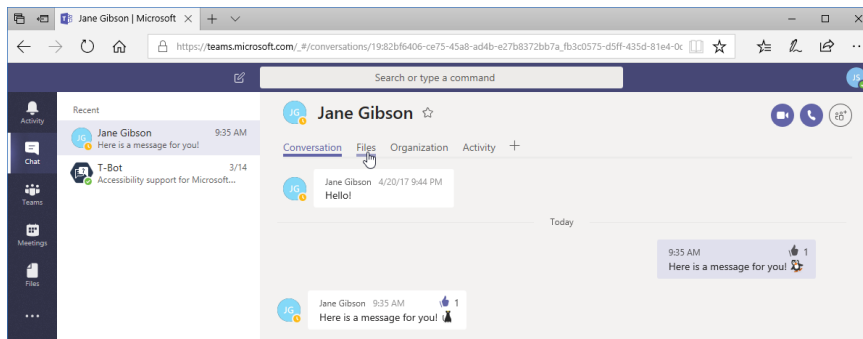
4. By default, the meeting will be scheduled in the next free slot, using Microsoft Teams as the location. For the purposes of this activity, these settings are fine. Click “Schedule a meeting” to complete the process:



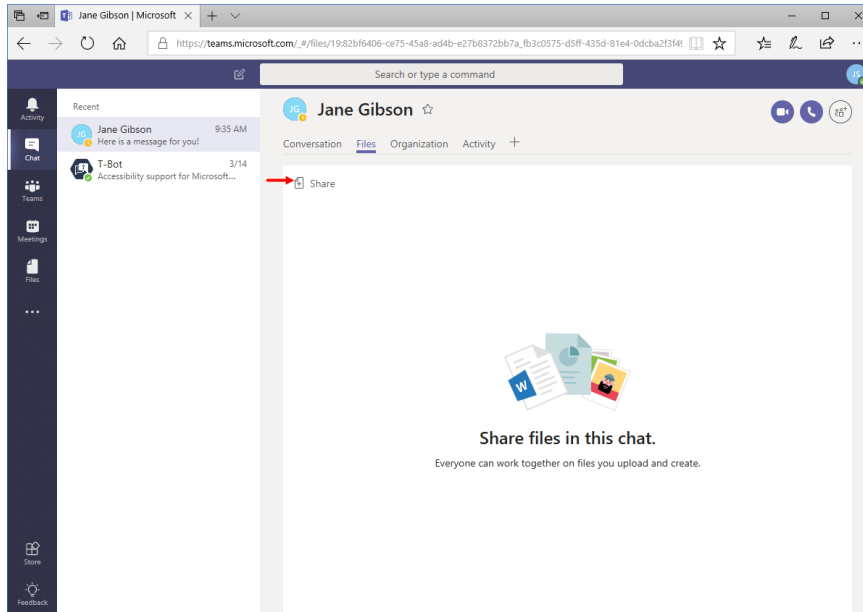
5. Close the confirmation dialog:



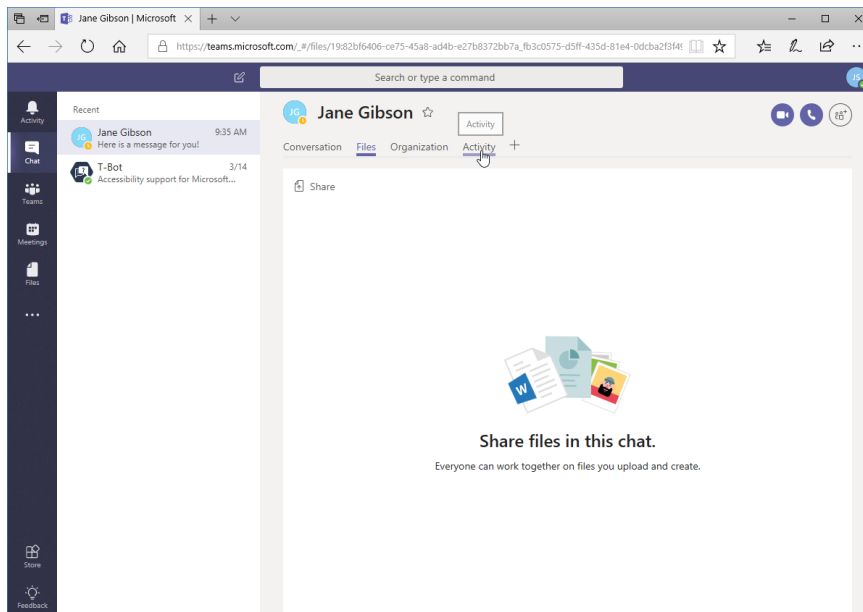
6. Now, let's see if we have any files in this chat. Click the Files tab:



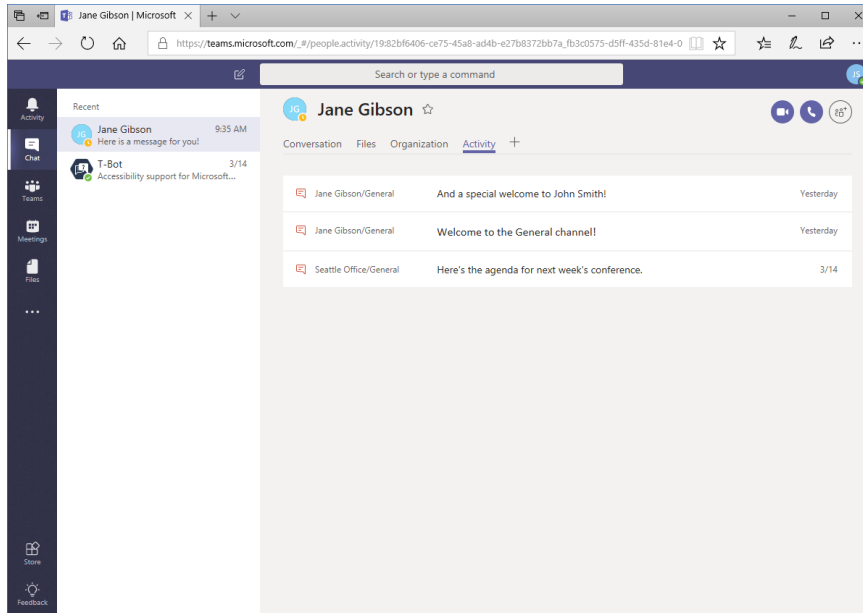
7. You can see that we do not have any files in this chat, but we do have a Share button that would allow us to add one:



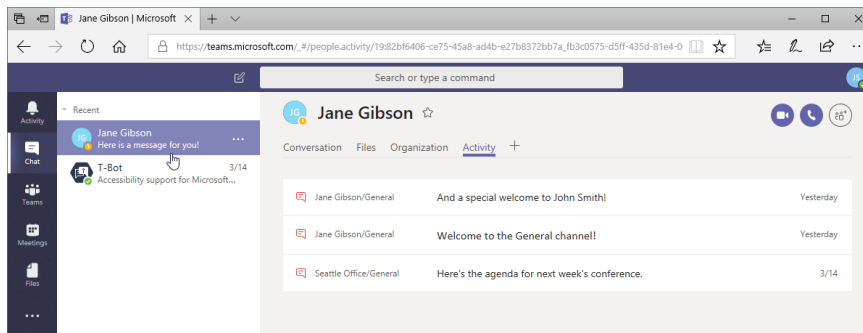
8. Next, click the Activity tab:



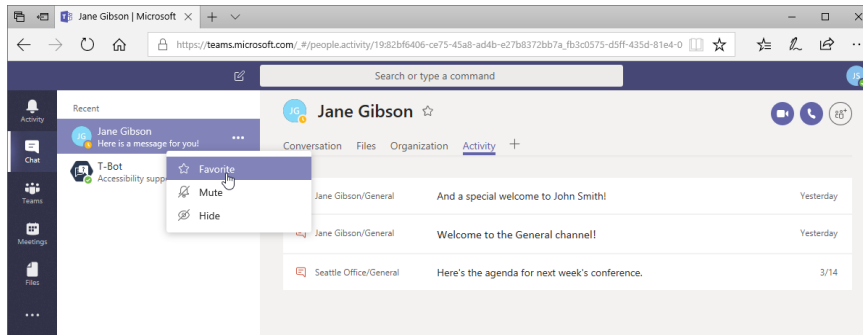
9. You should see some of the items that your partner has completed in this course:



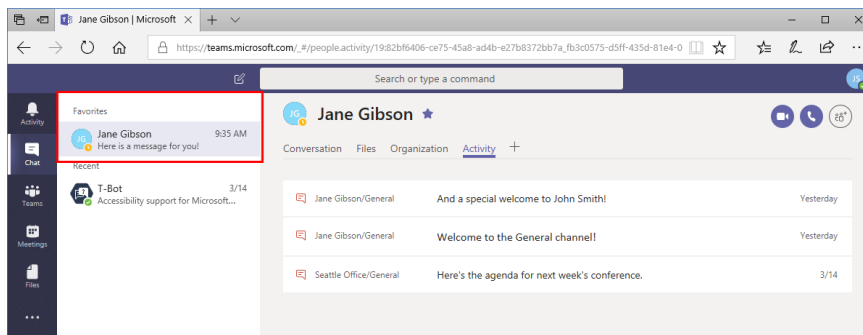
10. Let's mark this chat as a favorite. Move your mouse over your partner's name in the task pane:



11. Click the ellipses and click “Favorite:”



12. The Favorites category will now be added (if necessary) and this chat will be added to it:



13. Leave Teams open for the next activity.

TOPIC C: Managing Meetings

In our last topic, we took a quick look at creating a meeting from a chat message. In this topic, we will take a closer look at the Meetings tab, and learn how to view, schedule, and create meetings. Note that any meetings scheduled in Teams will automatically be synchronized with Microsoft Outlook. You can also use Outlook to schedule Teams meetings.

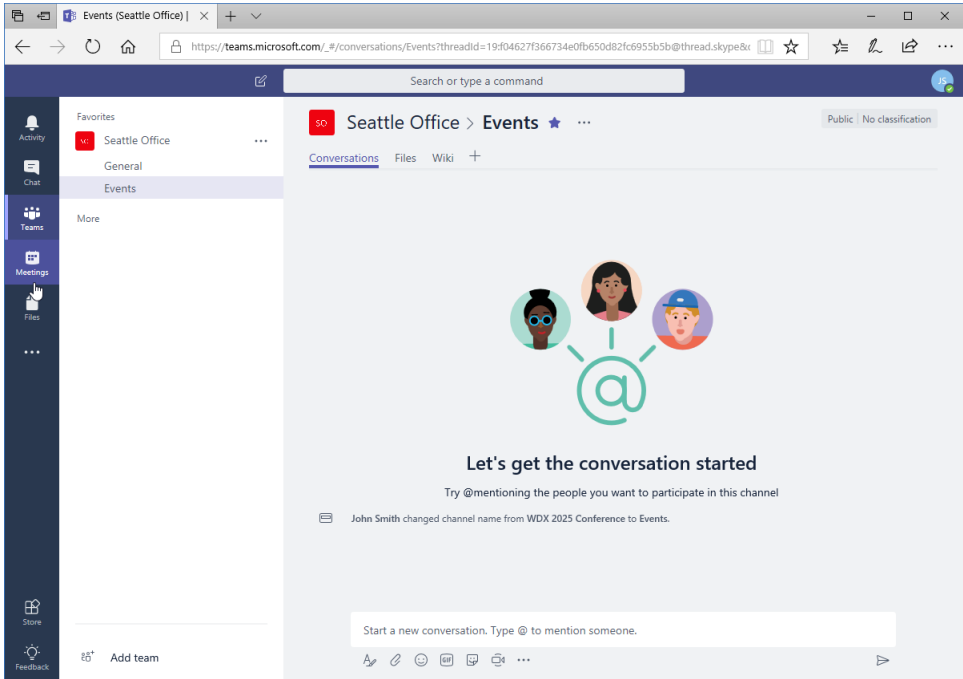
Topic Objectives

In this section, you will learn how to:

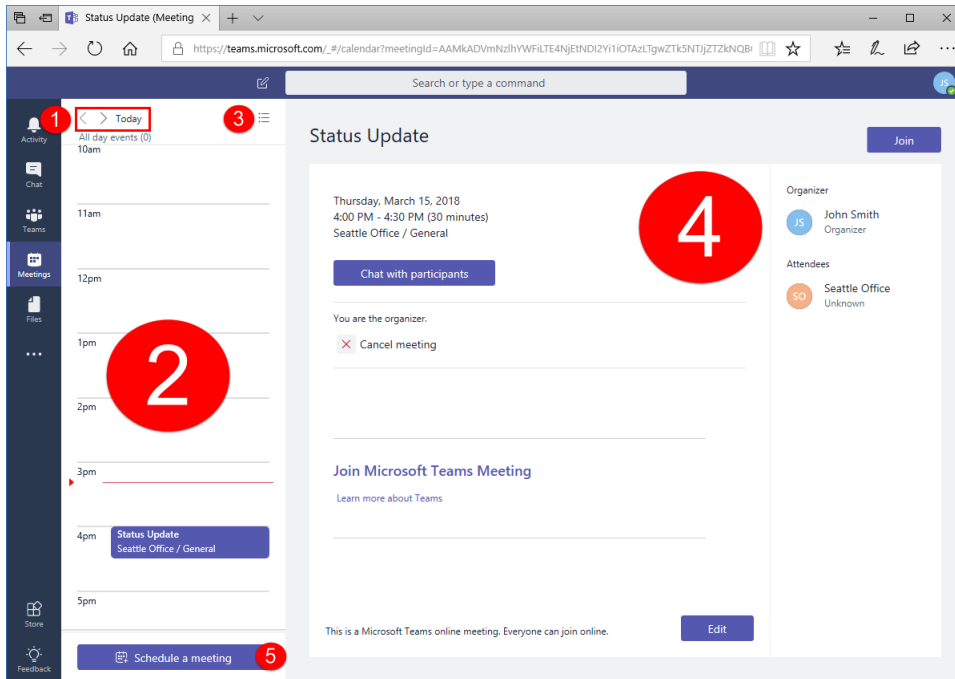
- Use the Meetings tab
- Use Agenda View
- Schedule, edit, join, and cancel meetings

Using the Meetings Tab

To start, click the Meetings icon in the sidebar:



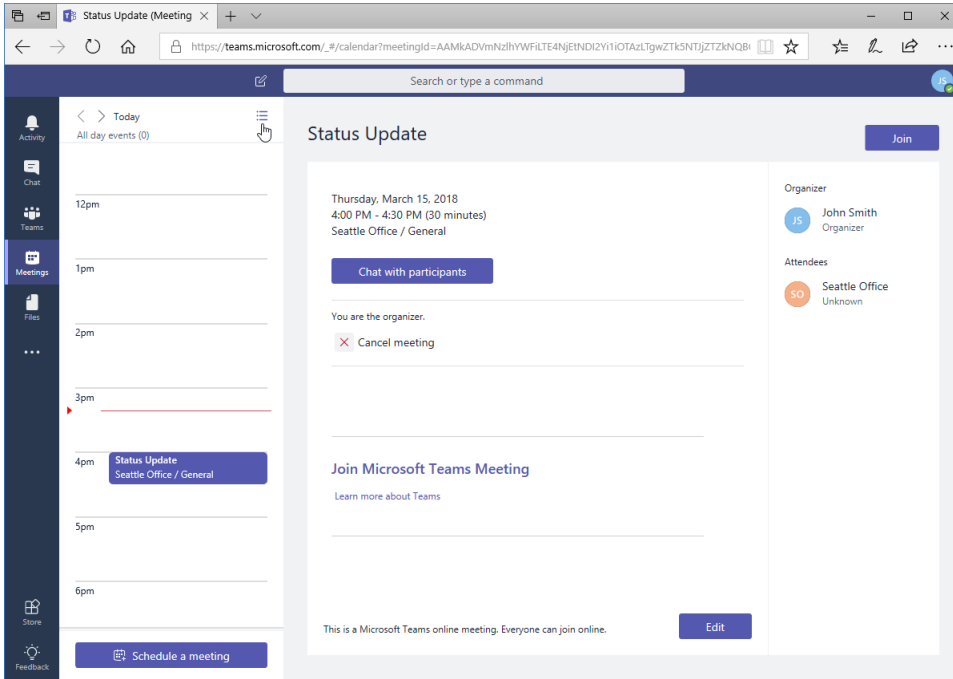
You will see the Meetings window:



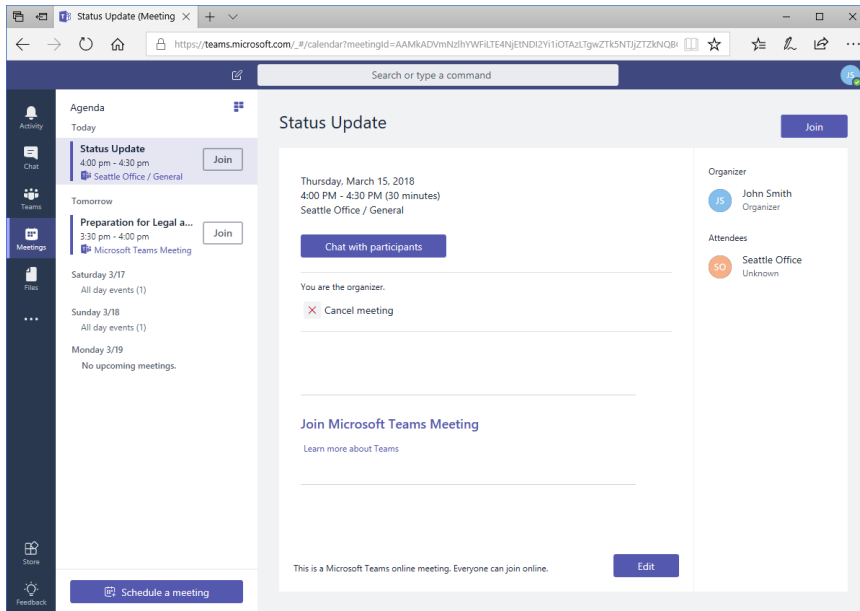
Just as with other views, a task pane on the left shows key elements. The **current date and navigation arrows (1)** are at the top of this pane. The **selected day's events (2)** are shown in the main part of the pane, sorted by time. (Note that the current time is marked with a red line on the current date.) You can change this view using the **view icon (3)** in the top right of the pane. The next event's details will be shown in the **main window on the right (4)**. (Click any item from the calendar to see that event's details instead.) At the bottom of the task pane on the left, you can also **schedule a meeting (5)**.

Using Agenda View

Let's take a look at Agenda View, which can be accessed using the icon in the top right of the Meetings task pane:



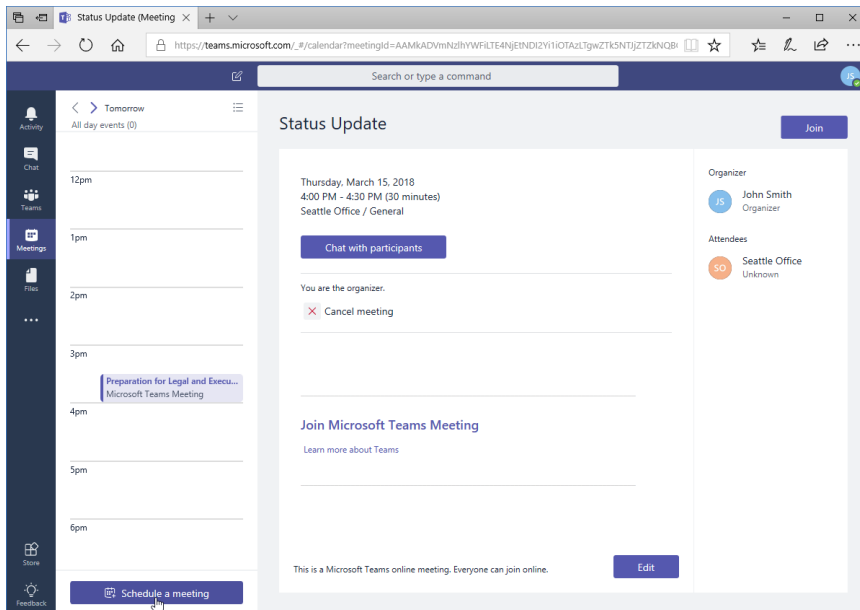
This view focuses on upcoming meetings:



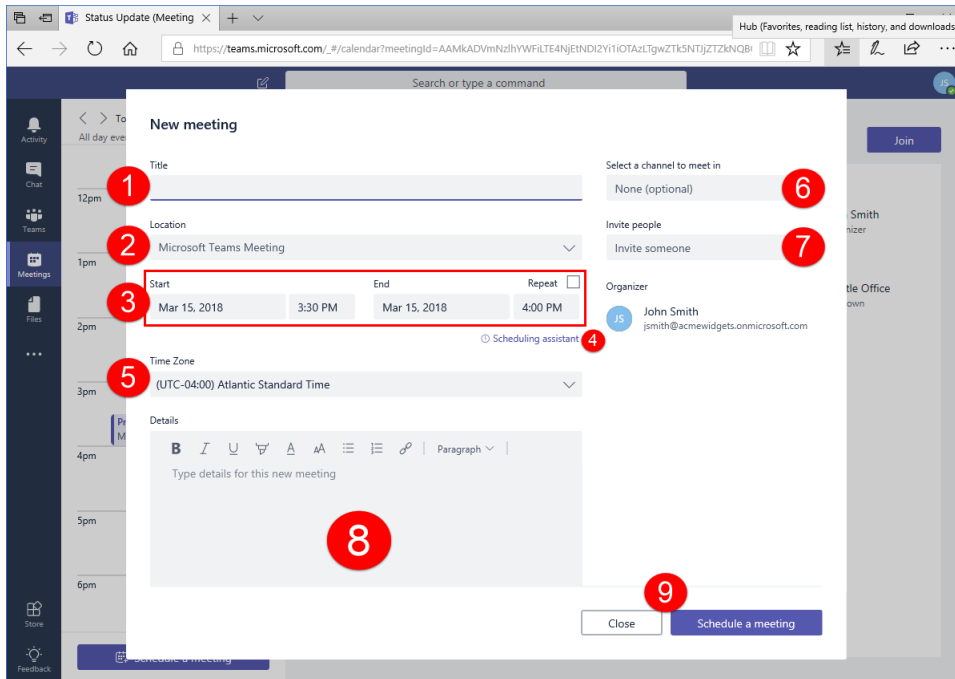
Click the Day View icon in the top right to toggle back to the default view.

Scheduling a Meeting

To schedule a new meeting from the Meetings tab, click the “Schedule a meeting” button in the task pane:



The “New meeting” dialog will open:

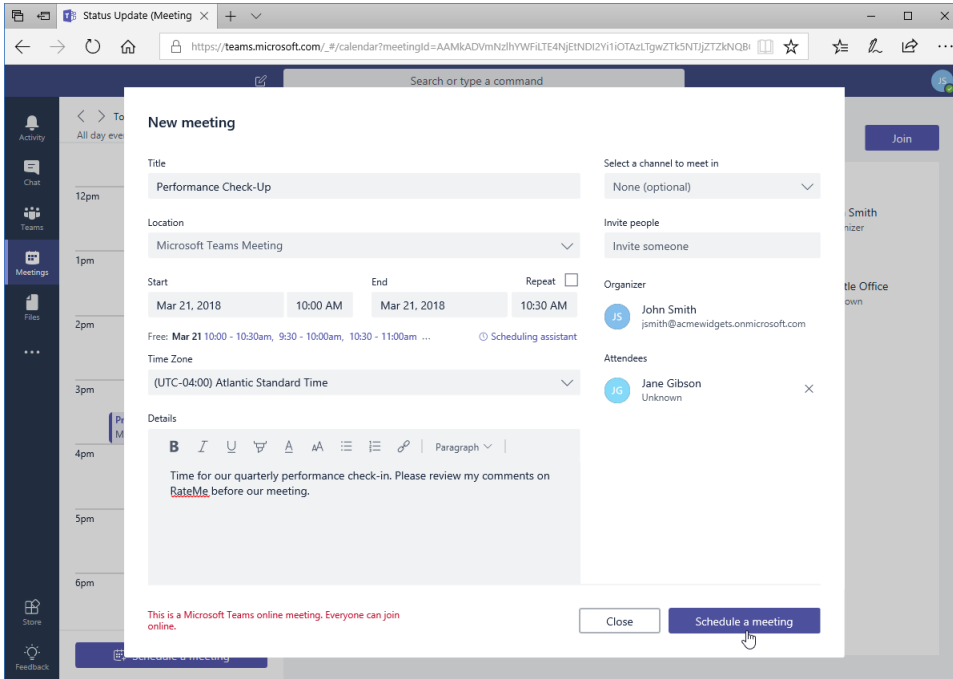


Let’s explore its options.

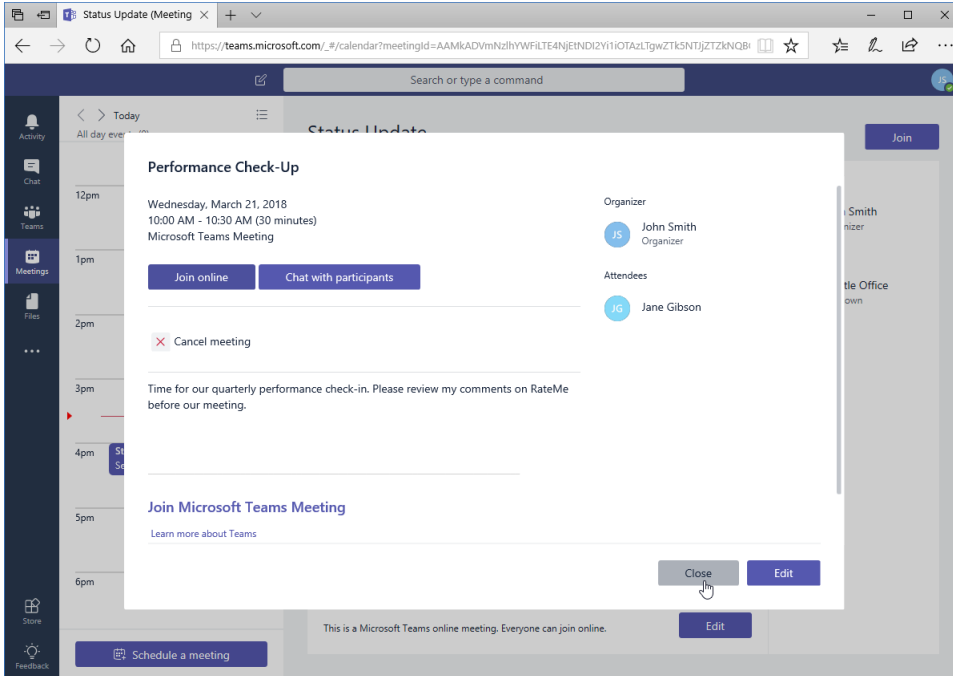
1. Enter the **title** of the meeting.
2. Choose a **location**. By default, this will be an online Teams meeting, but you can also choose another location that has been configured by your organization in Active Directory.
3. Set the **start and end time and date**. An option to **repeat** this meeting is also included.
4. Click the “**Scheduling assistant**” link for help in choosing a time when all attendees are free. (This is similar to the Microsoft Outlook feature of the same name.)
5. Choose the **time zone** for the meeting.
6. Choose a **channel** for the meeting. This is optional but allows any member to join the meeting, and posts meeting details in the channel.
7. Specify **meeting attendees** by typing their name. (You can also add groups.) Current attendees and the organizer will be listed below this field.

8. Enter the **details** of the meeting. Note the formatting options, which are quite similar to the options when creating a channel or chat message.
9. Click **Close** to save a draft of this meeting, or click “**Schedule a meeting**” to complete the process.

Here is a sample dialog:



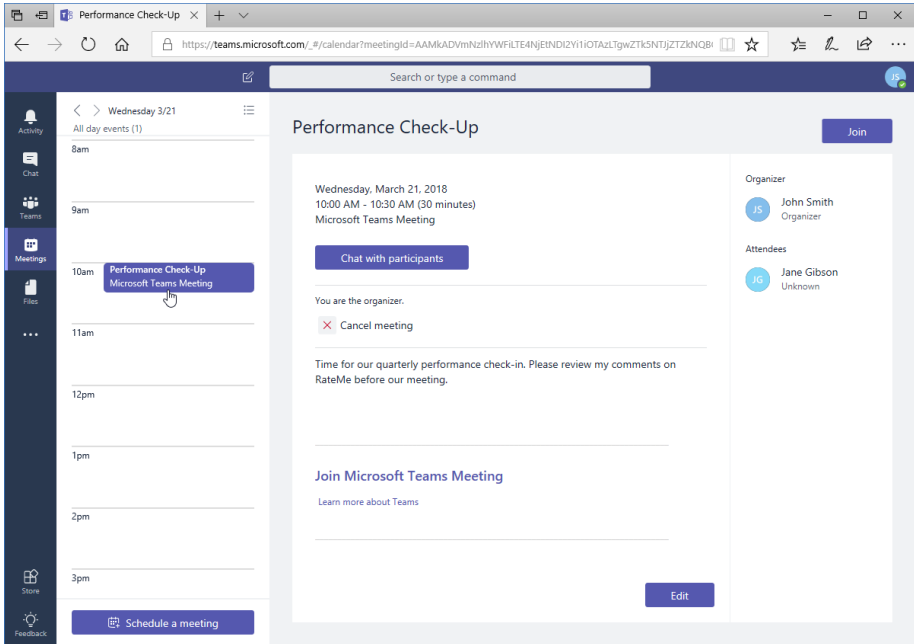
Once you click “Schedule a meeting,” you will be prompted to confirm the details. (Note that there are also options to edit, cancel, or join it, and to create a chat with meeting participants.) Click “Close” to continue:



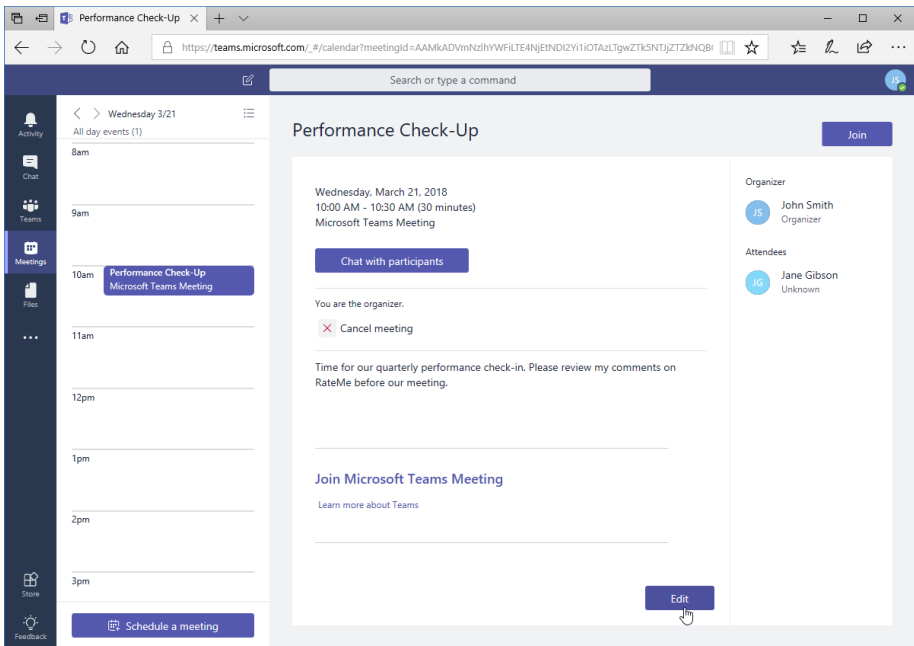
The meeting will be added to the calendar of everyone attending it.

Editing a Meeting

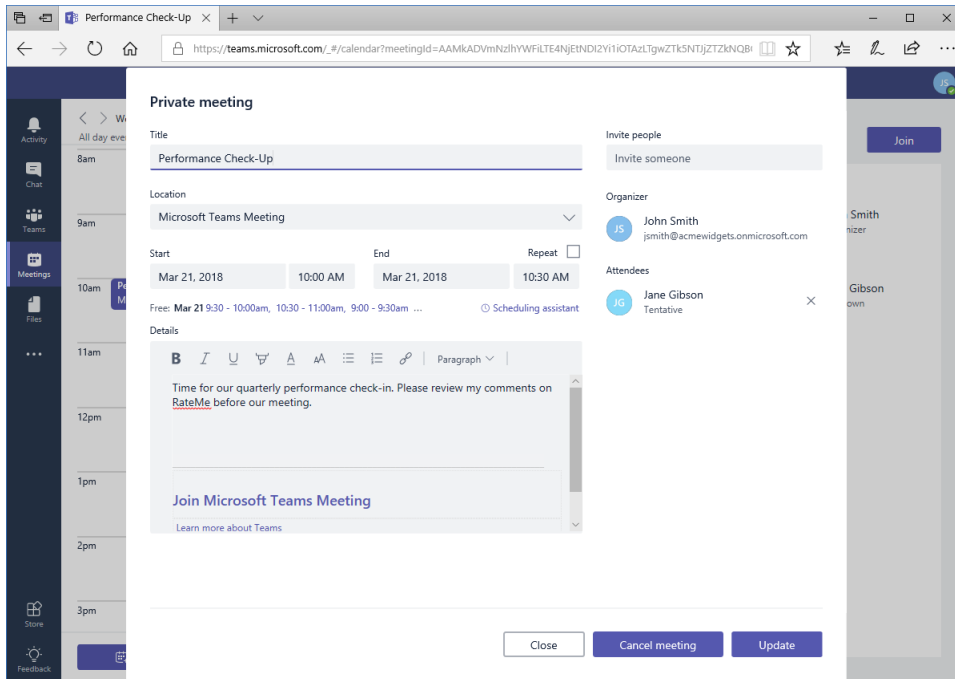
To edit a meeting, locate it in the calendar and click on it. This will display its details in the window on the right:



Now, click "Edit" in the window on the right:



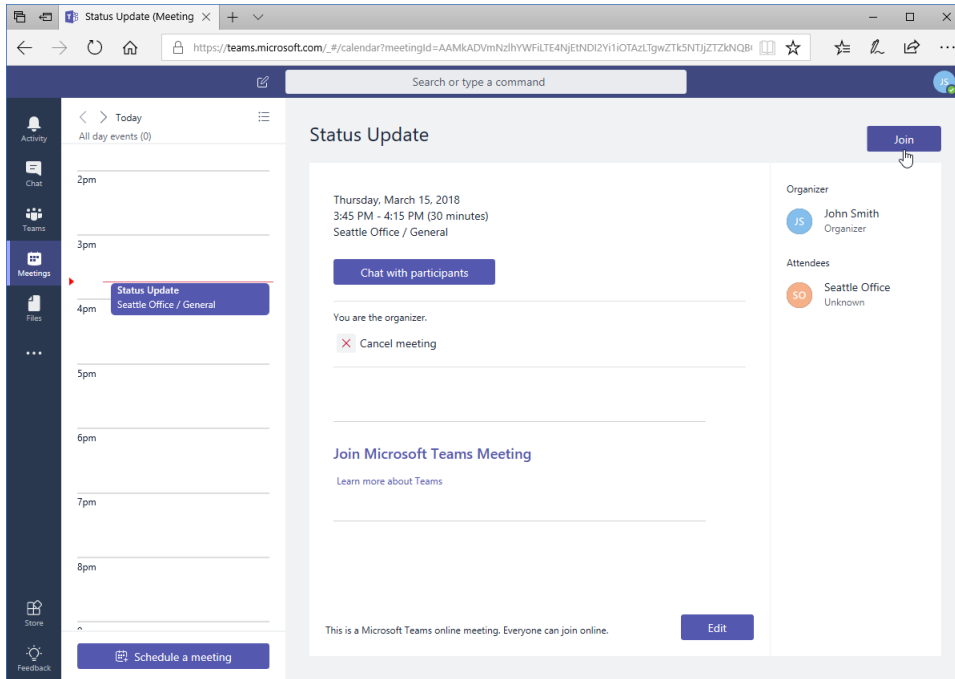
The meeting dialog box will open:



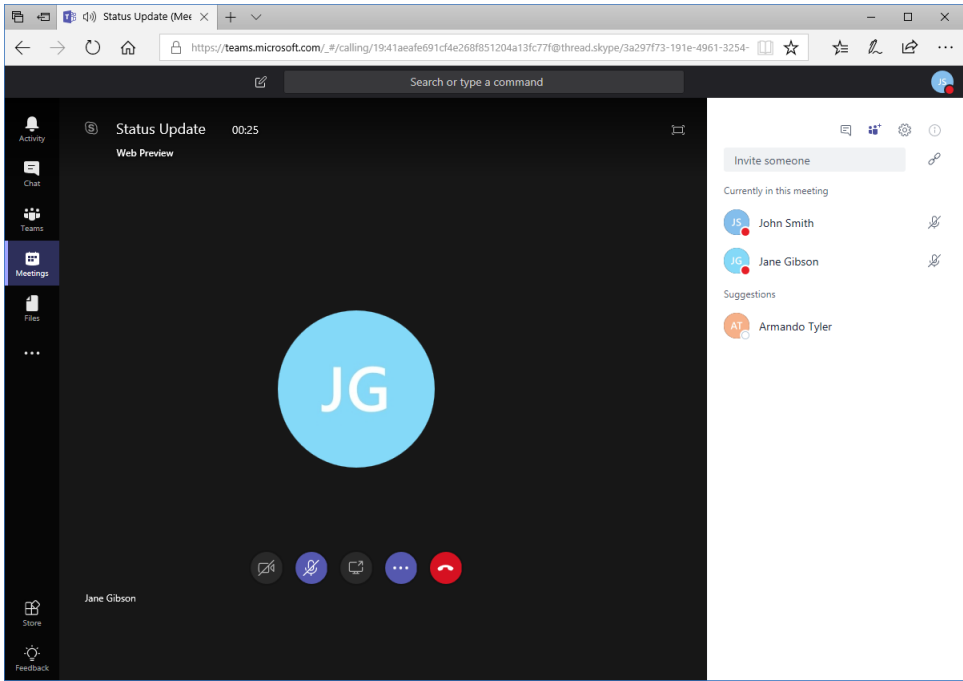
As you can see, it is almost the same as the original “New meeting” dialog. Simply make your changes and click Update. Or, click “Close” to cancel the process.

Joining a Meeting

When it is time to join the meeting, it should be automatically displayed in the left side of the Meetings window. Ensure your webcam or microphone is connected and configured, and click Join:

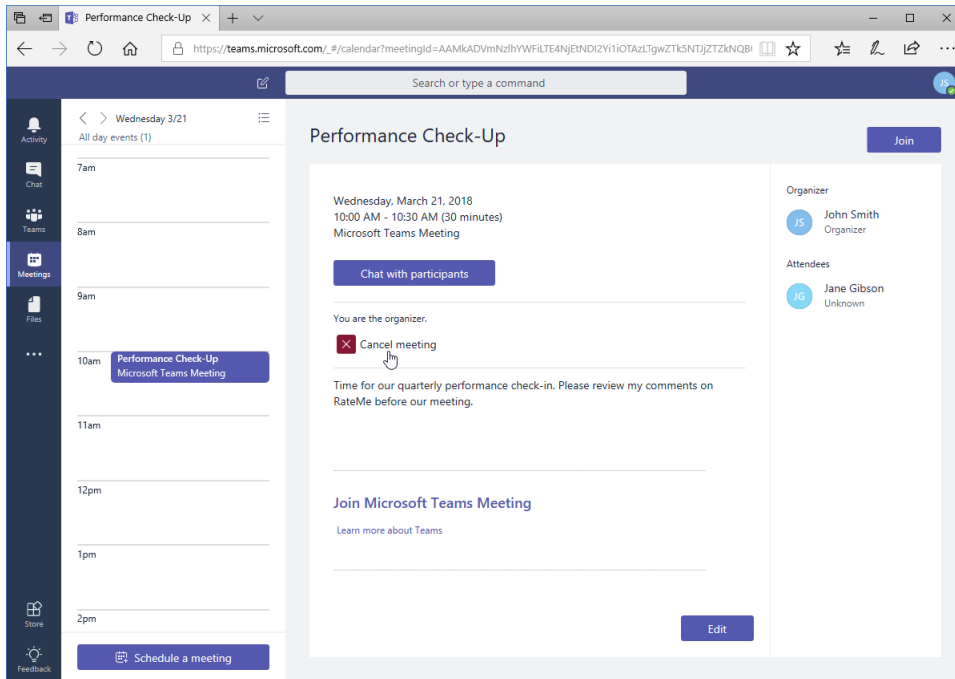


You will then be placed in the meeting. When the meeting is finished, click the red icon to hang up and leave:

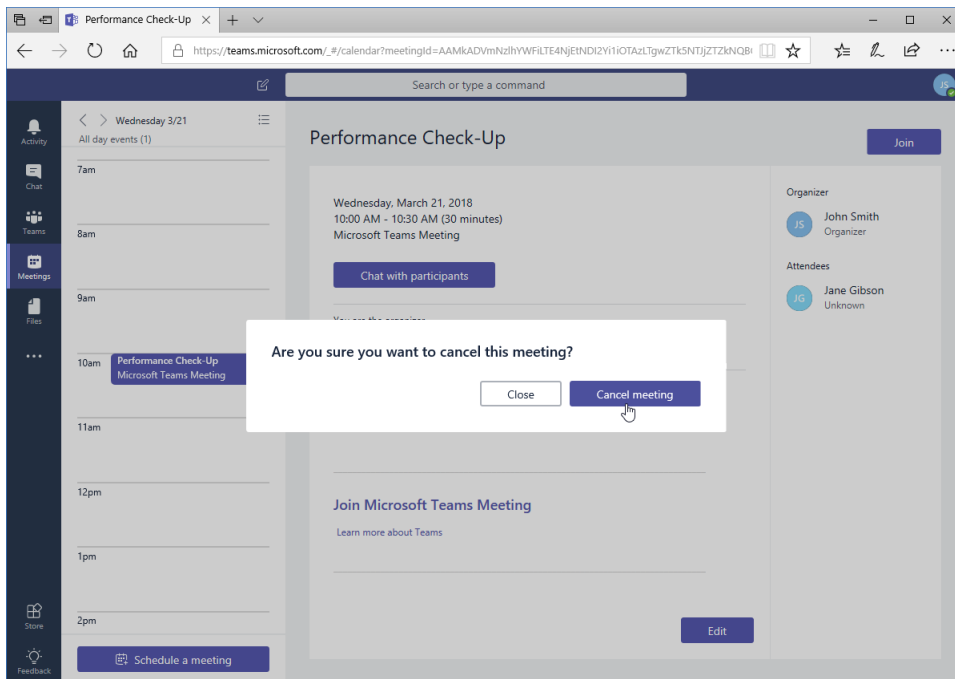


Canceling a Meeting

To cancel a meeting, locate it in the calendar and click it to display its details. Then, click “Cancel meeting:”



Click “Cancel meeting” to confirm the process:

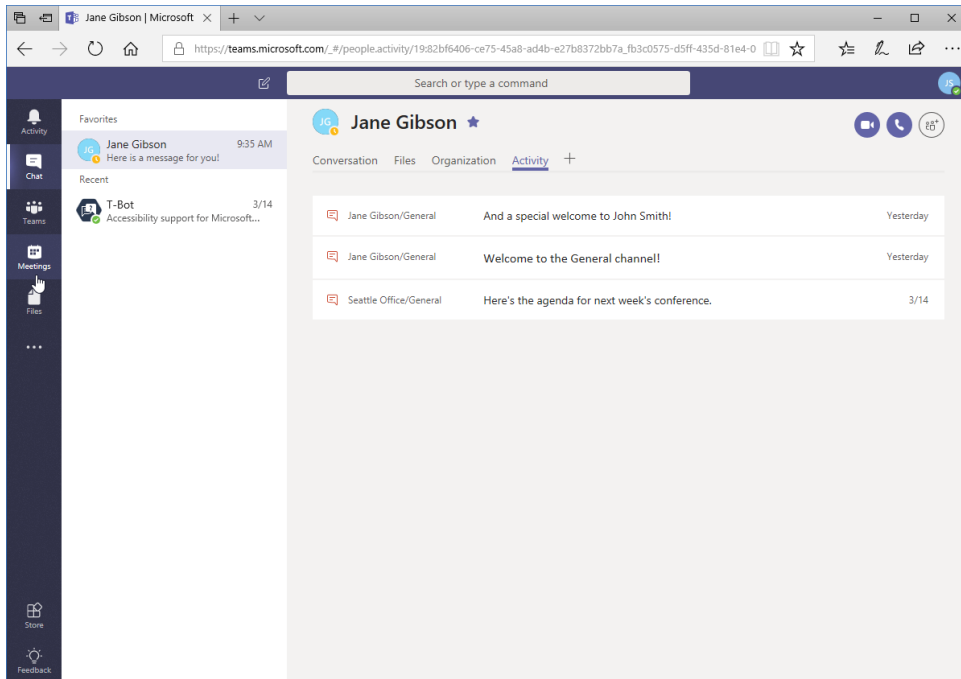


Activity 3-3: Managing Meetings

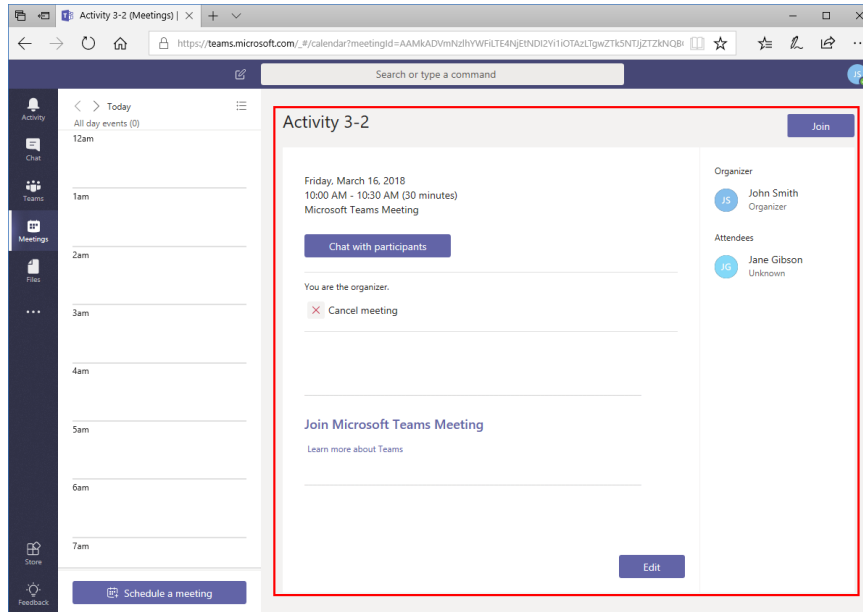
In this activity, you will create and edit a meeting.

1. Ensure you have completed all previous activities and that Microsoft Teams is open. Choose a partner from your class, or ask a friend to help you out. Ensure you are members of each other's teams.

2. Click the Meetings icon in the sidebar:

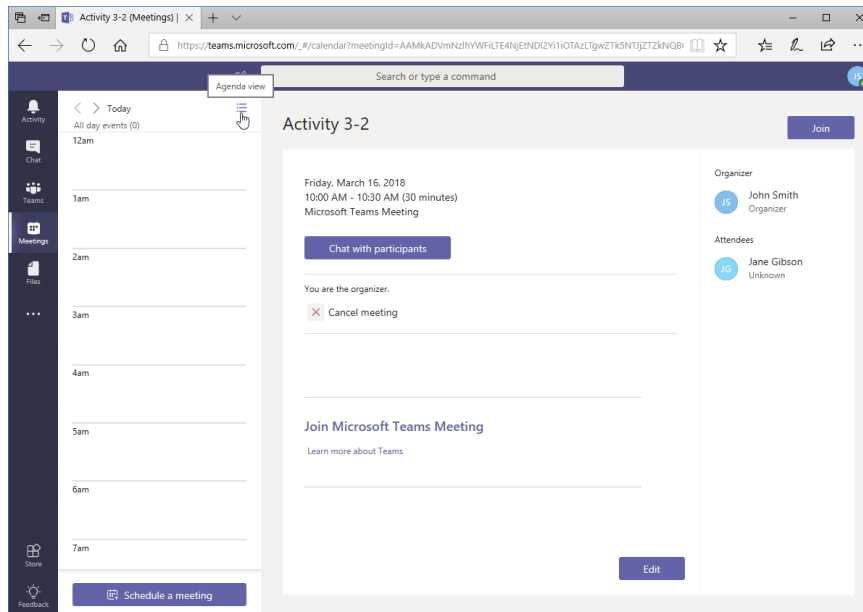


3. Your next meeting will be displayed in the right side of the window. Review its details:

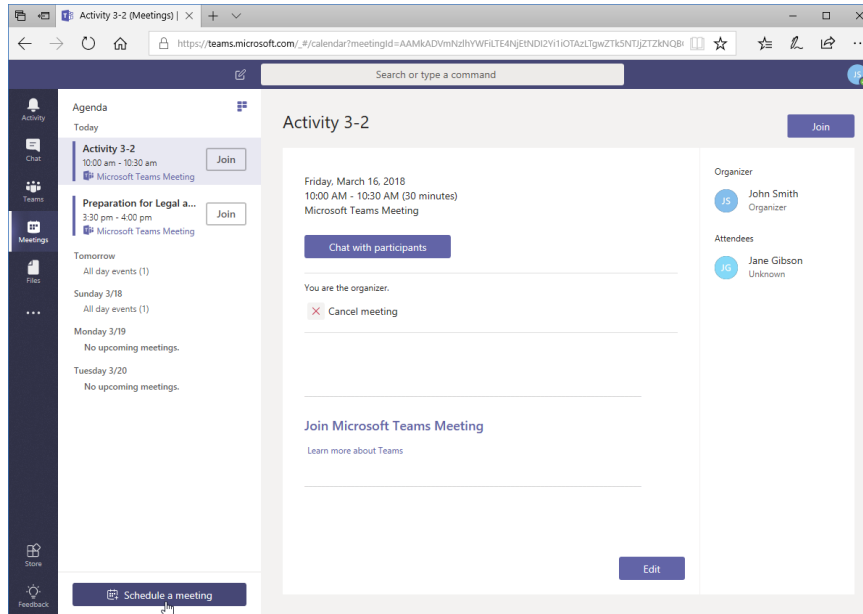


(If nothing is displayed in this window, skip to the next step.)

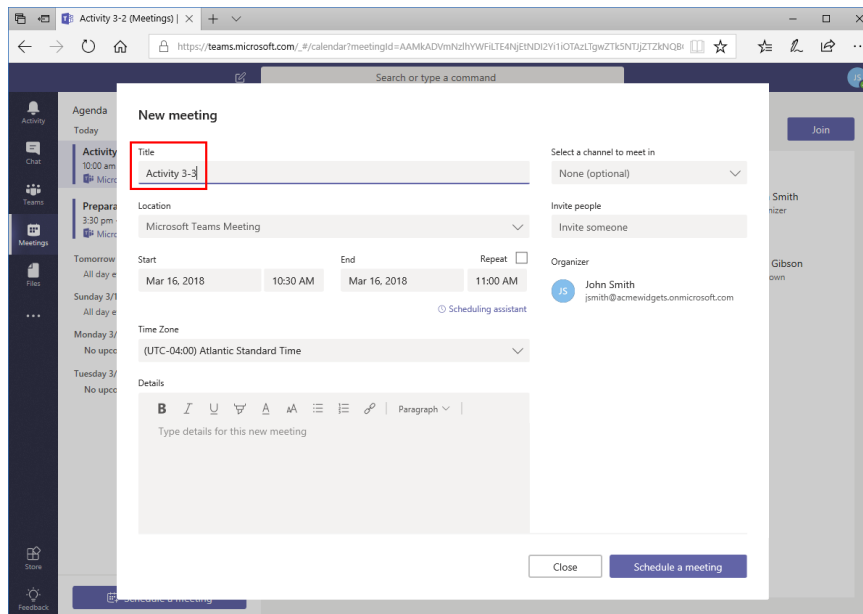
4. Click the icon in the top right corner of the task pane to switch to Agenda View:



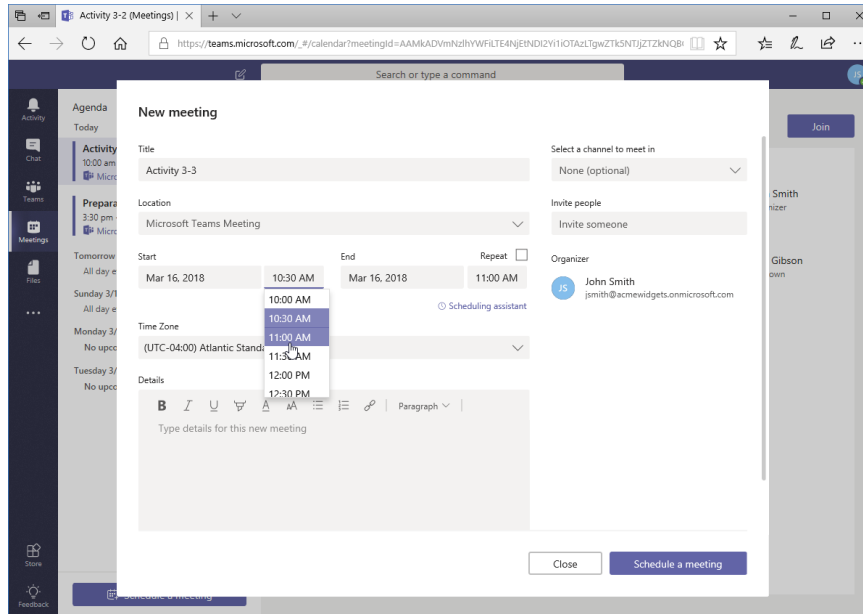
5. Review your upcoming meetings. Then, click “Schedule a meeting” at the bottom of the task pane:



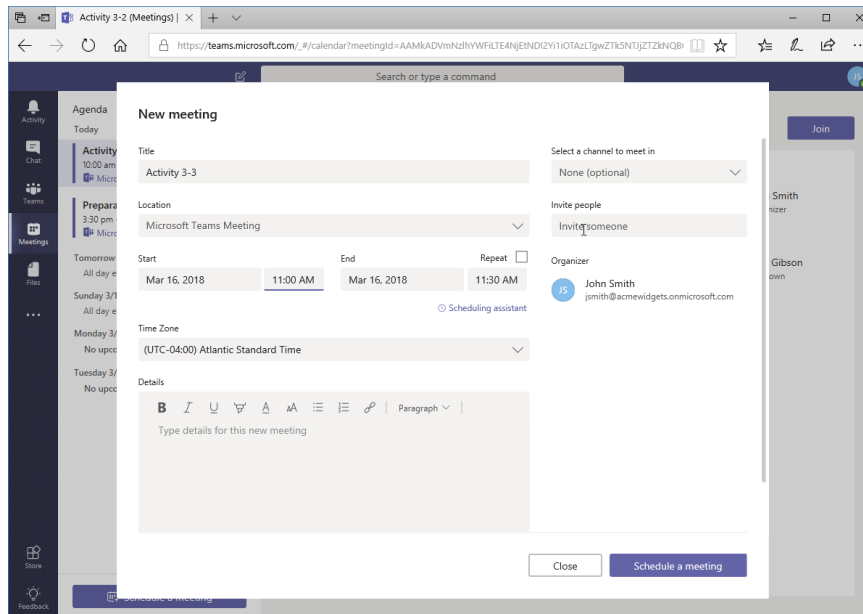
6. The “New meeting” window will open. Type, “Activity 3-3” in the Title field:



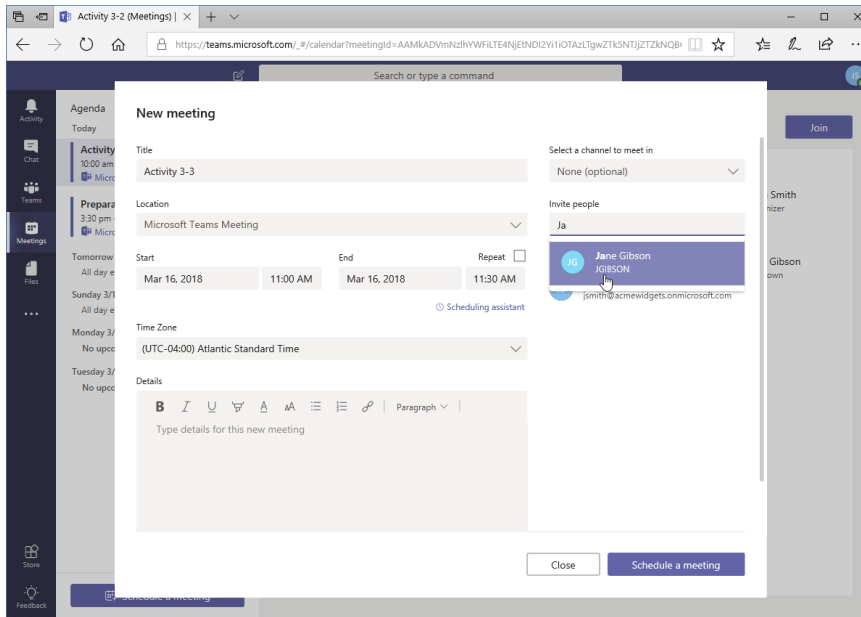
7. Leave the Location as “Microsoft Teams Meeting.” Set the meeting to start one hour from now:



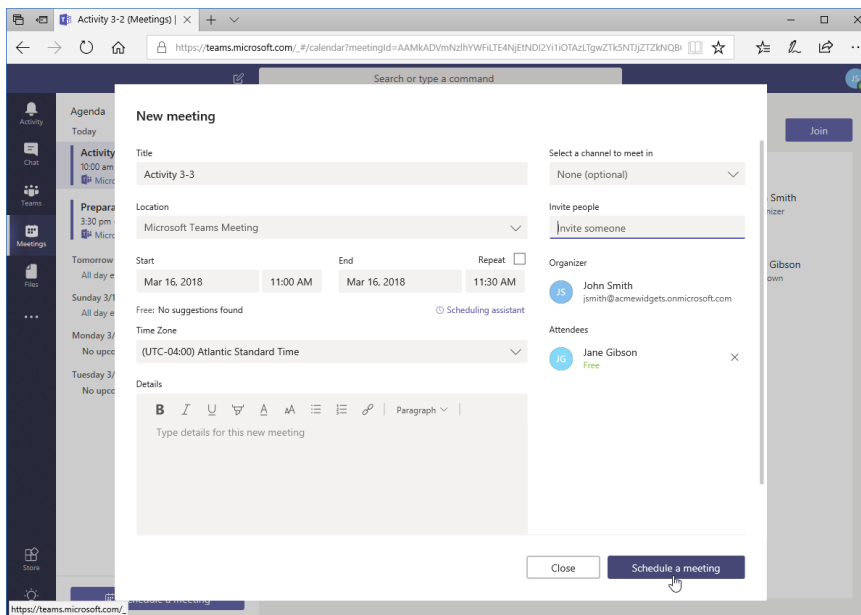
8. Leave the duration as half an hour (the default setting.) Click in the “Invite people” field:



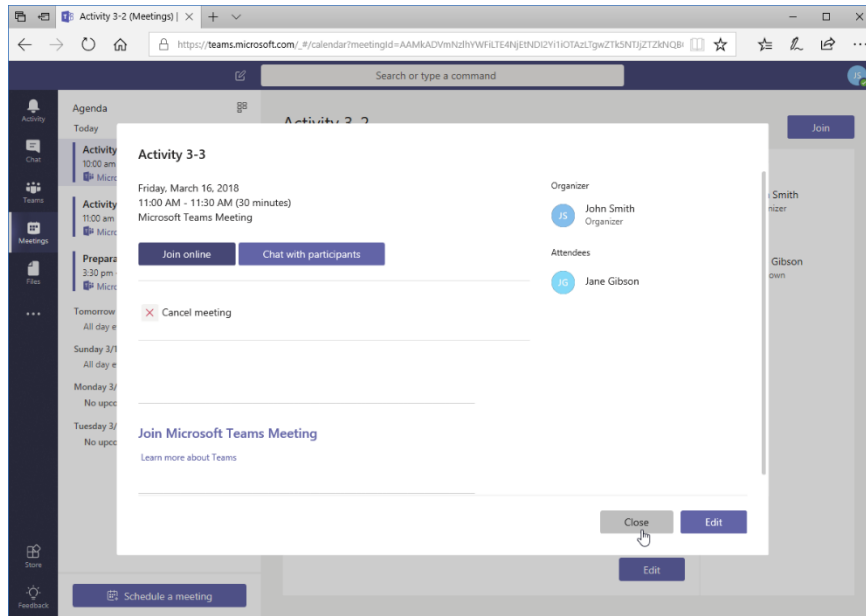
9. Start typing your partner's name. Click on it when it appears:



10. Click "Schedule a meeting" to save your changes:



11. In the confirmation dialog box that appears, review the meeting details. Click “Close” to return to Teams:



12. Leave Teams open for the next activity.

TOPIC D: Managing Files in Teams

Earlier, we learned how to manage files from channels. However, Teams also offers some options for managing all of your files, as well as files stored on OneDrive and other connected services.

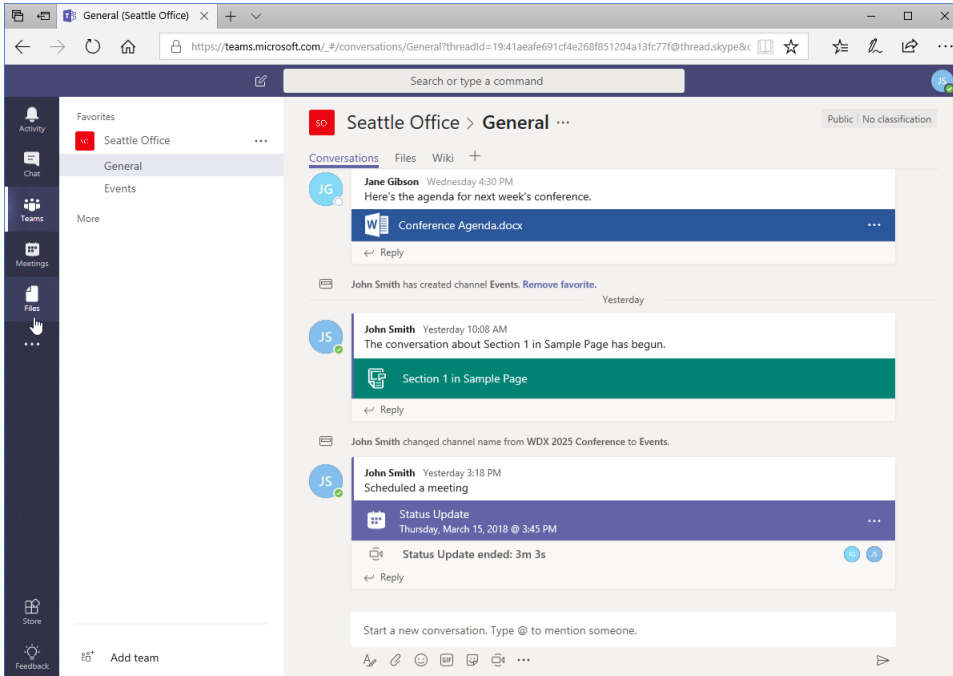
Topic Objectives

In this section, you will learn how to:

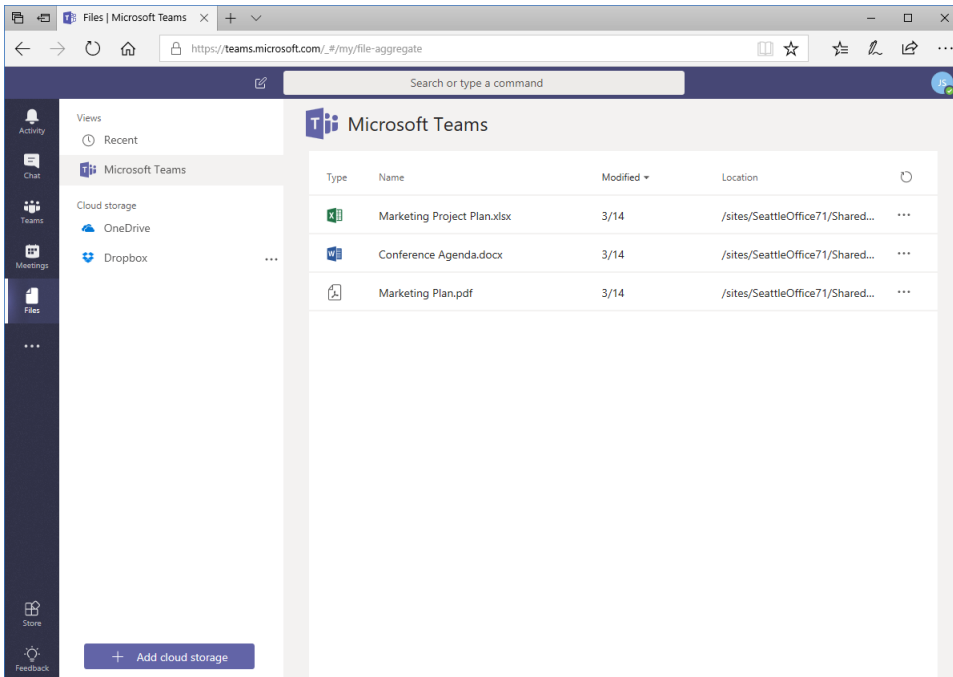
- Use the Files tab in Teams
- View and manage files from different sources
- Add and manage cloud storage

Using the Files Tab in Teams

Click the Files icon in the sidebar to begin:



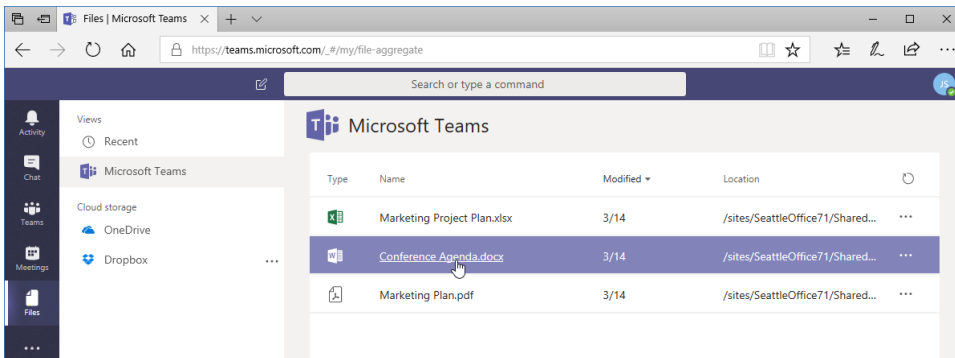
The Files window will open:



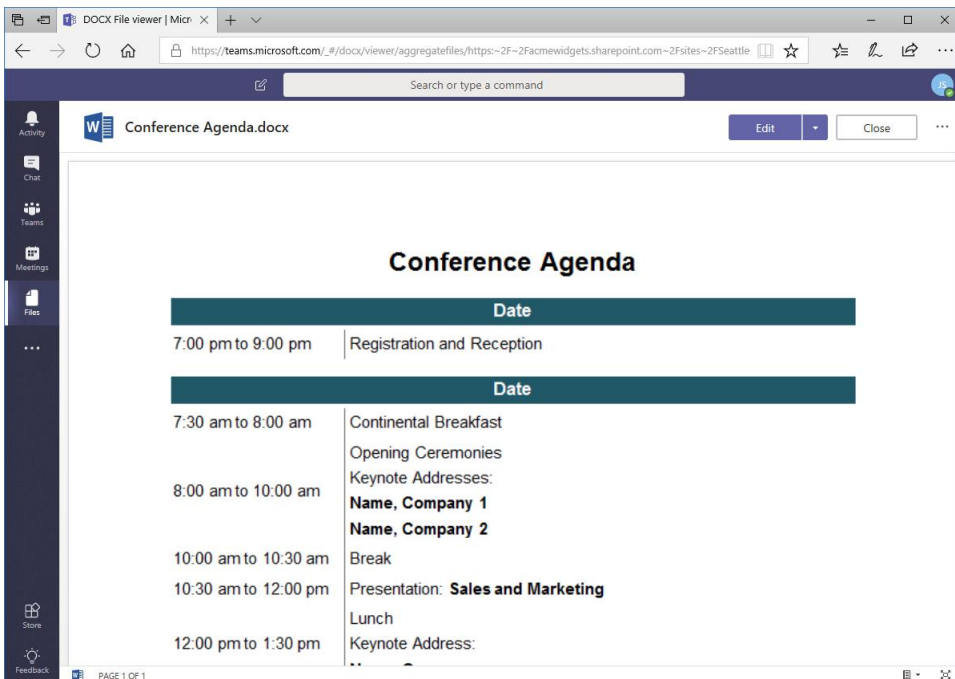
On the left, you can choose what source you want to view files from. (Notice that here, a Dropbox account is listed since it was previously added via a channel.) The files in the selected source will be displayed in the main part of the window on the right.

Viewing Files

Click any file to view it:



It will then open in Teams:

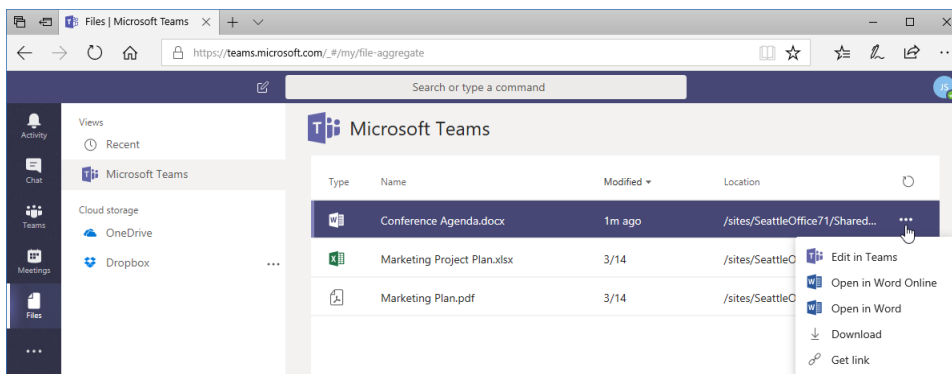


Let's take a moment to explore the commands in the top-right corner of the window. These will vary depending on the file type, but for Microsoft Office documents you should have the following options:

- **Edit:** Click this icon to edit the document in Word Online. Or, click the drop-down arrow to download the document or open it in SharePoint.
- **Close:** Return to Teams.
- **Ellipses (More Options):** Download the document or open it in SharePoint.

Managing Files

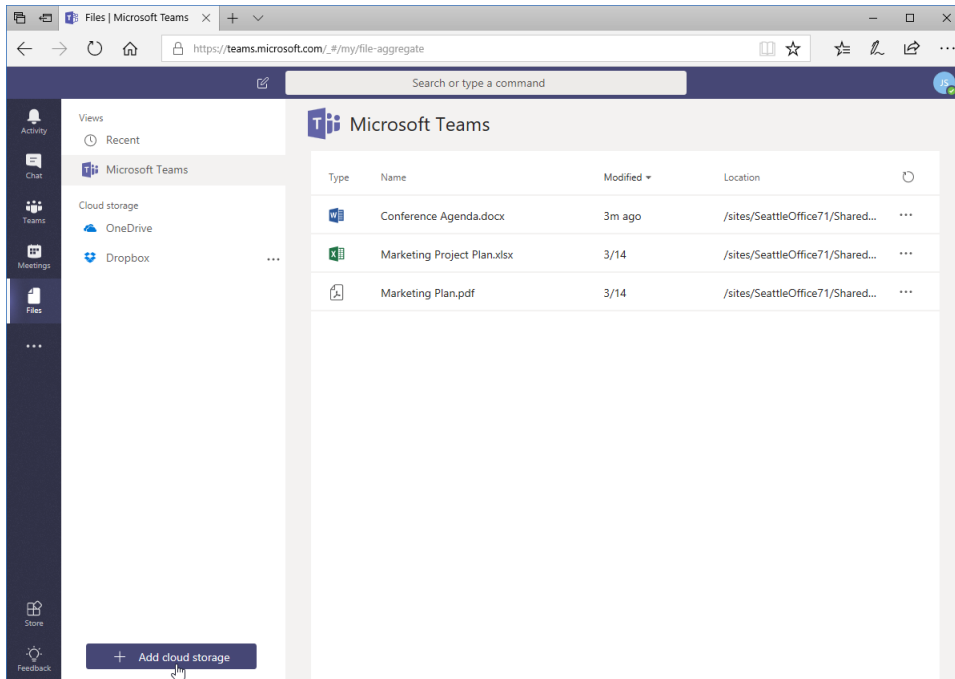
Click the ellipses next to a file's name to see options for managing it:



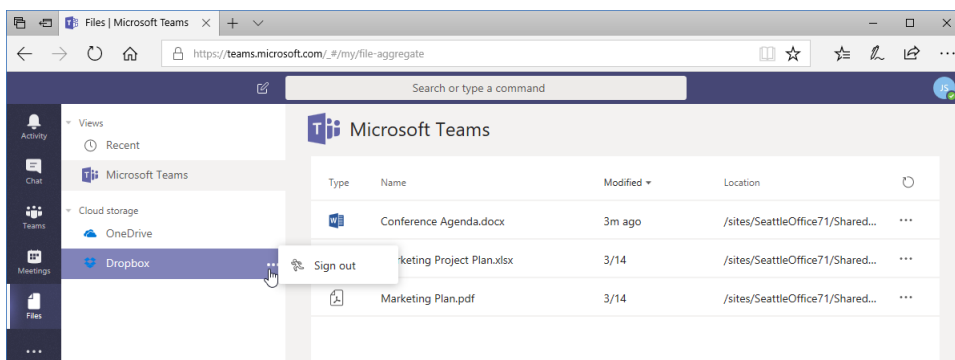
These options may differ slightly depending on the file type. However, the menu will be available no matter where the file is stored (Teams, OneDrive, cloud service, etc.).

Adding and Managing Cloud Storage

In Lesson 2-C, we learned how to add cloud storage when working with the Files tab in a channel. The same command is available in the Files window:



To sign out of a connected service, move your mouse over the account name, click the ellipses, and click “Sign out:”

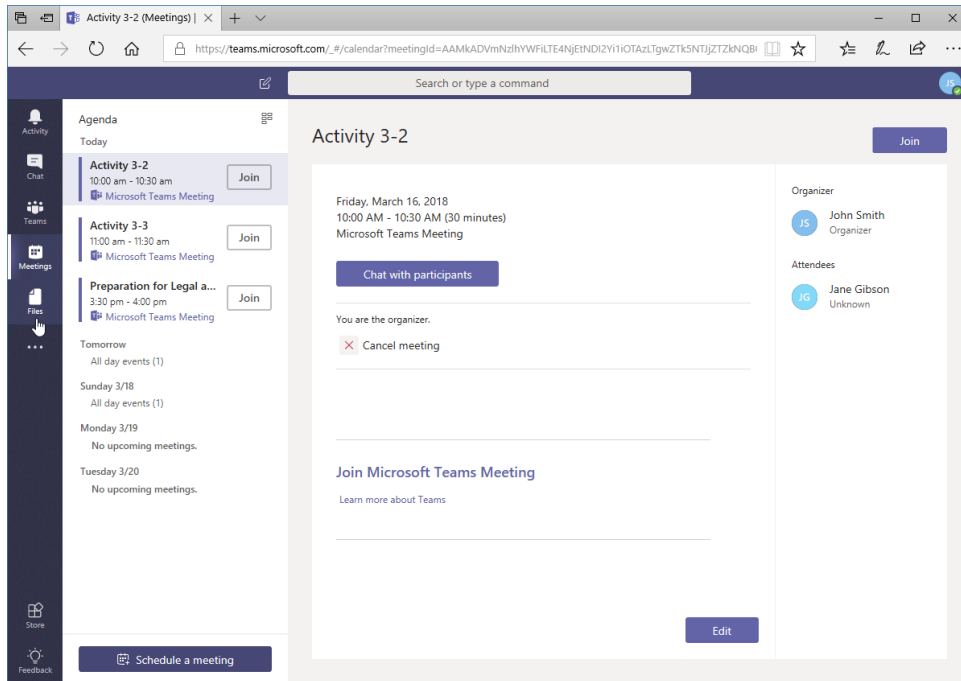


It will now be removed from the list, and will need to be reconnected to be used again.

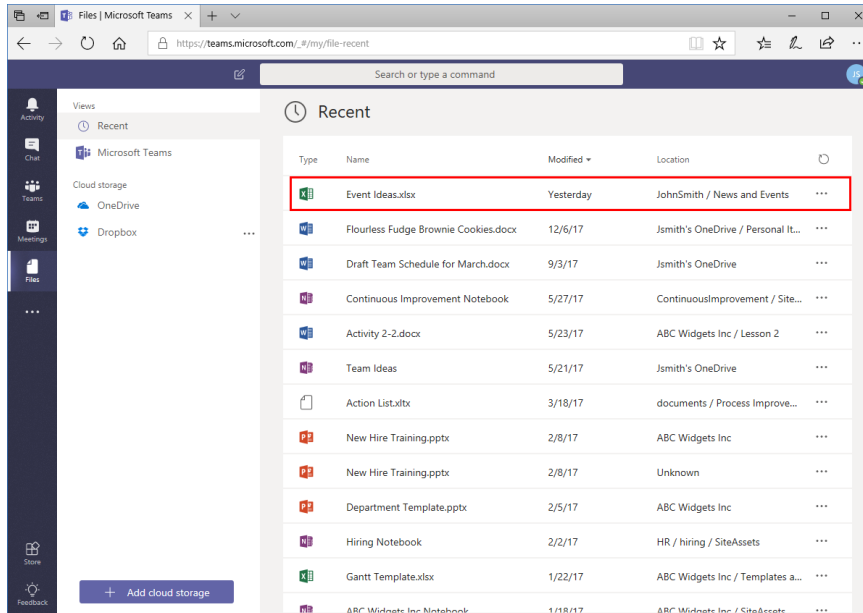
Activity 3-4: Managing Files in Teams

In this activity, you will review the Files tab in Teams.

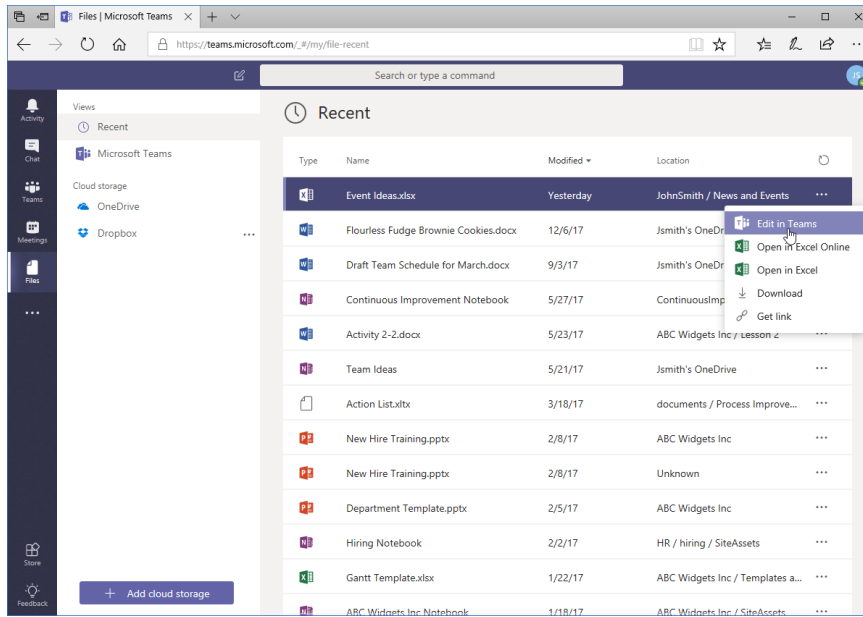
1. Ensure you have completed all previous activities and that Microsoft Teams is open.
2. Click the Files tab in the sidebar:



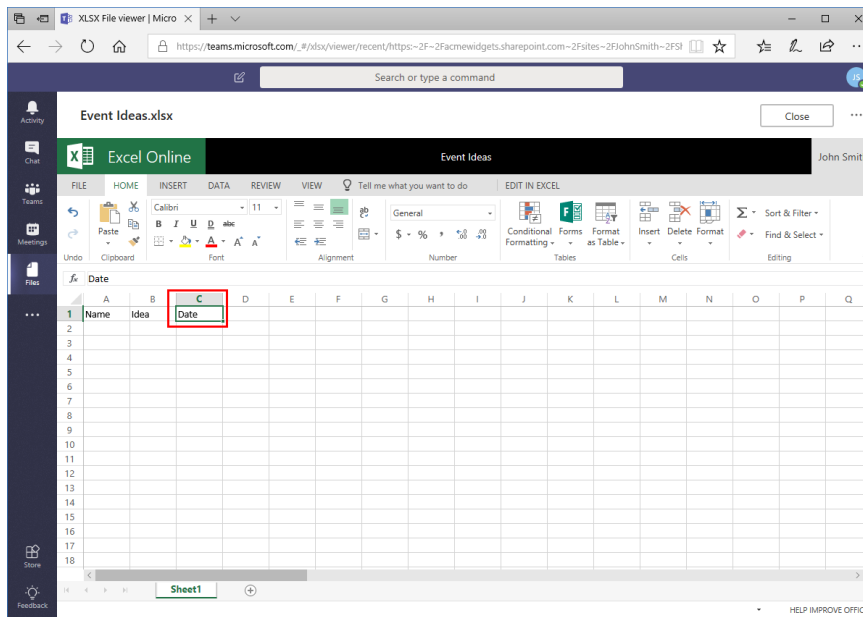
3. The Recent category should be selected from the task pane on the left. (If not, select it now.) You should see the Event Ideas file we created in Activity 2-3. Notice the location of the file – your team and channel:



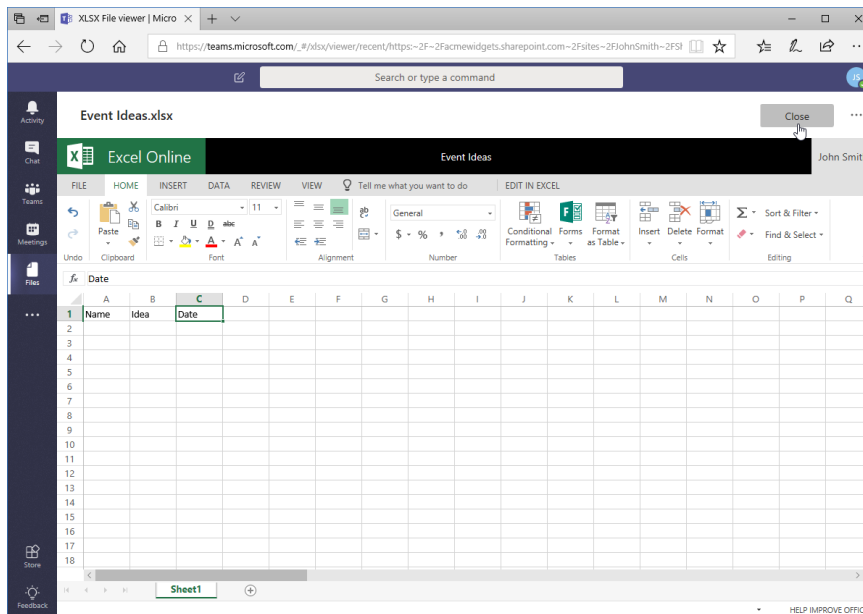
4. Click the ellipses next to this file and click “Edit in Teams:”



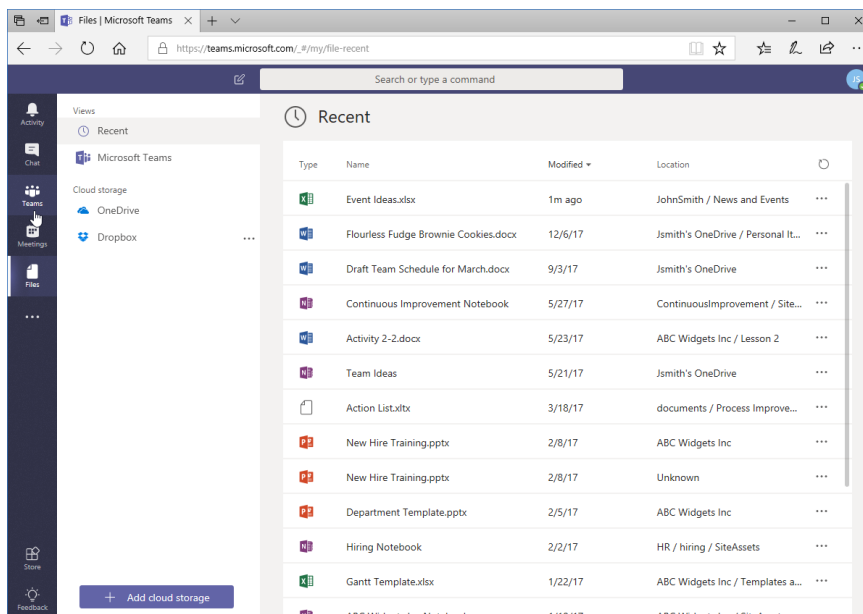
5. Excel Online will open within Teams. Click in cell C1 and type, “Date:”



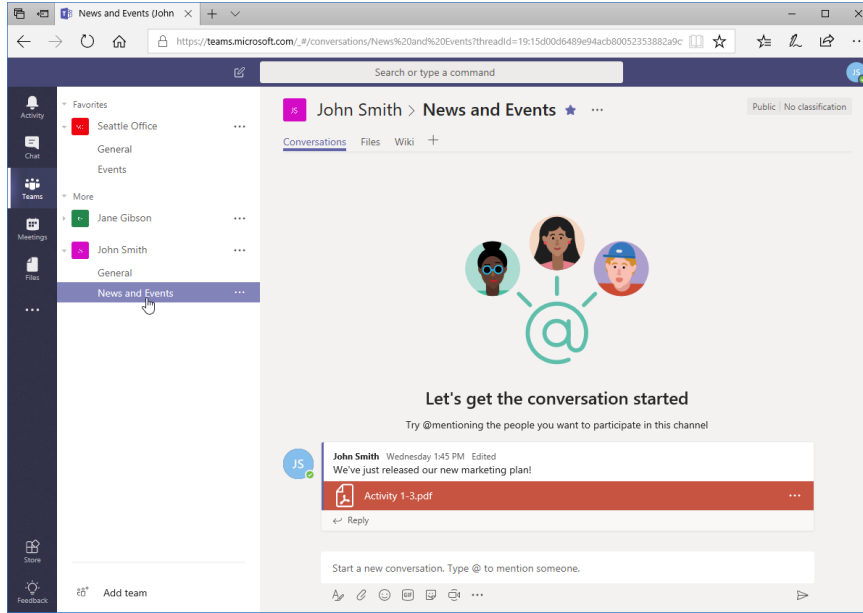
6. Close the Excel window to return to Teams:



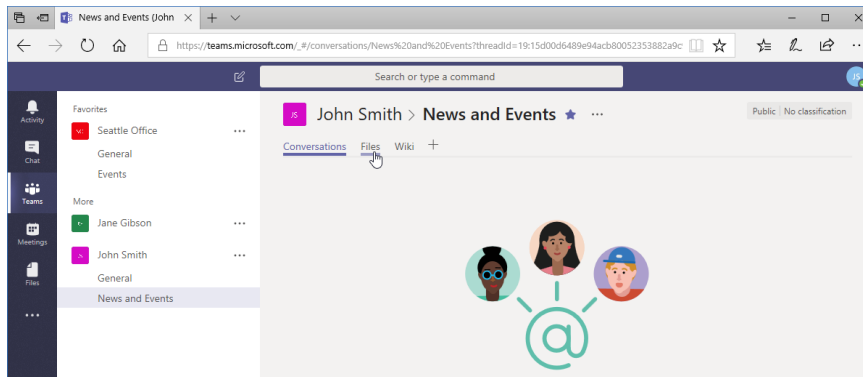
7. Now, let's see if the file updated in your channel. Click the Teams icon in the sidebar:



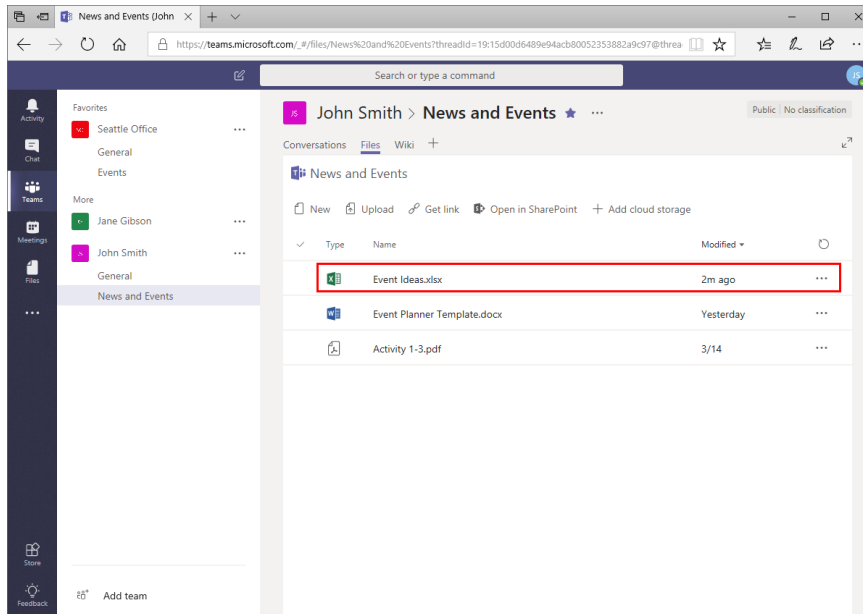
8. Navigate to your News and Events channel:



9. Click the Files tab:



10. Check the modified time on the Event Ideas file:



11. This confirms that our changes have been applied, and this activity is now complete.

Summary

In this lesson, you learned about some of the communication tools in Teams outside of channels. You should now be comfortable using chat, managing meetings, and managing files.

Review Questions

1. **What is required to start a video call?**
2. **What file sources are displayed in the Files tab of Teams?**
3. **What is the easiest way to start a new chat?**
4. **How do you cancel a meeting?**
5. **True or False: Chats are restricted to only two people.**

LESSON 4: CUSTOMIZING CHANNELS

Lesson Objectives

In this lesson you will learn how to:

- Customize channels
- Add tabs and connectors to a channel

TOPIC A: Customizing Channels

Once you start creating channels, you may want to customize them to make them more relevant to you. In this topic, we will learn about some of these features.

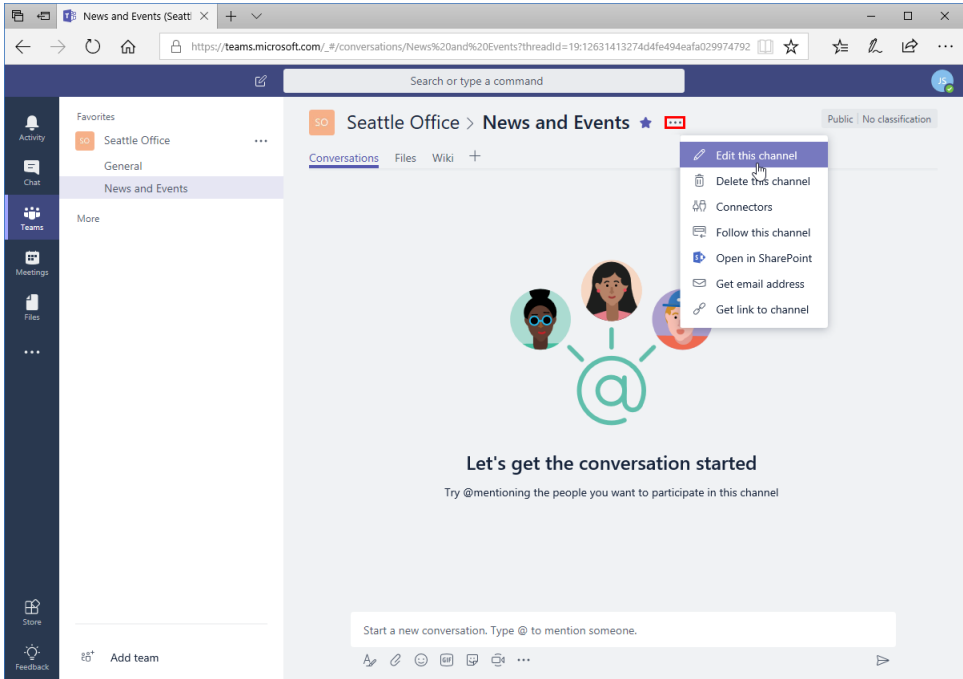
Topic Objectives

In this section, you will learn how to:

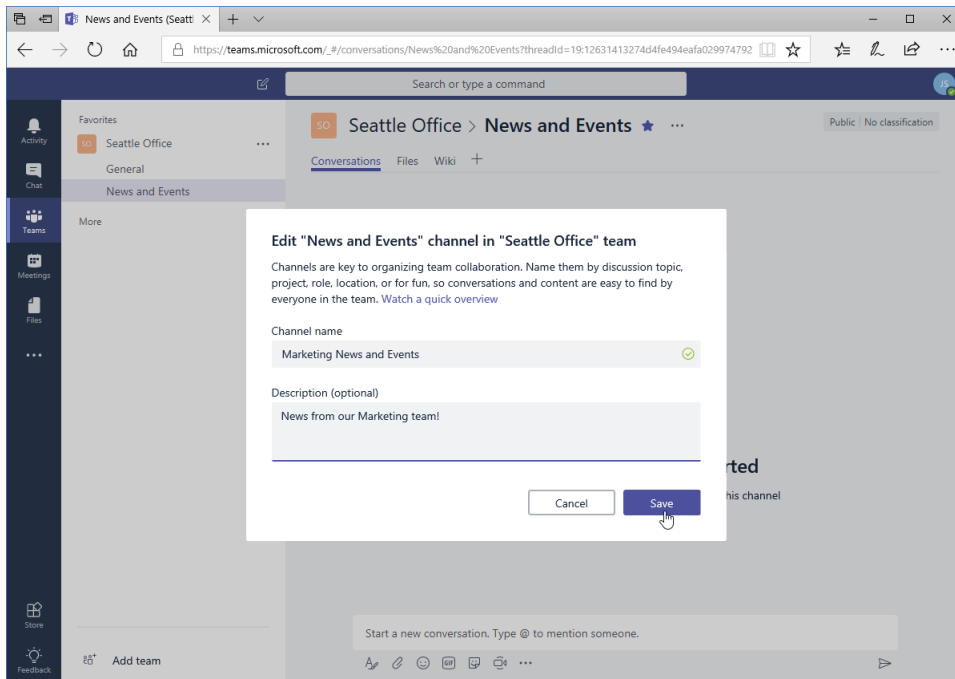
- Rename a channel
- Access the channel's email address and SharePoint link
- Delete a channel

Renaming a Channel

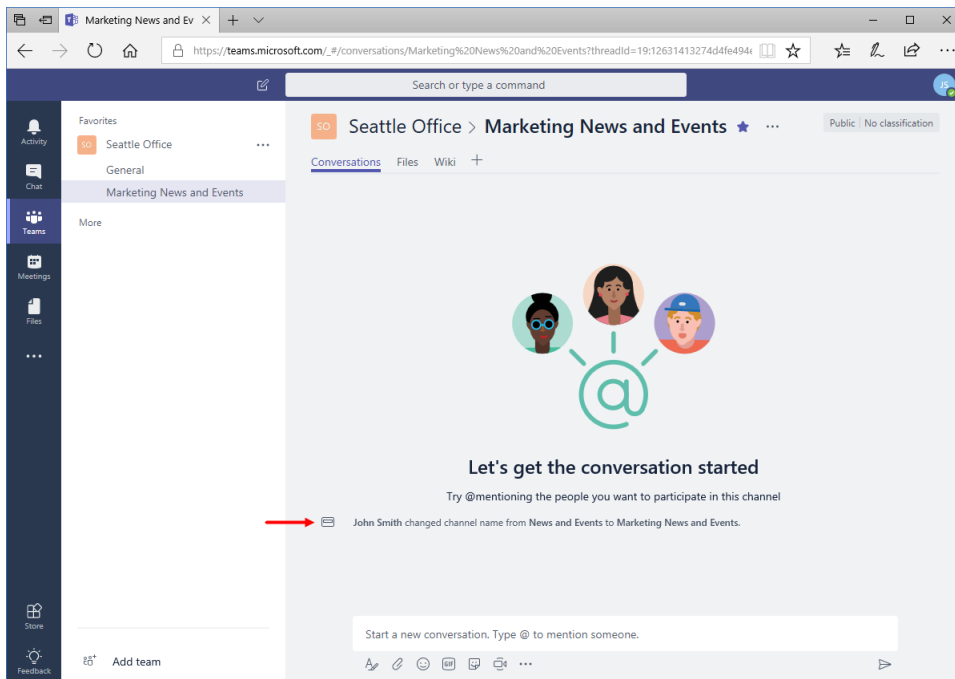
To rename a channel, open the channel page, click the ellipses next to its name, and click “Edit this channel:”



The Edit dialog will open. Here, you can change the channel name and/or description. Once you are finished, click “Save:”

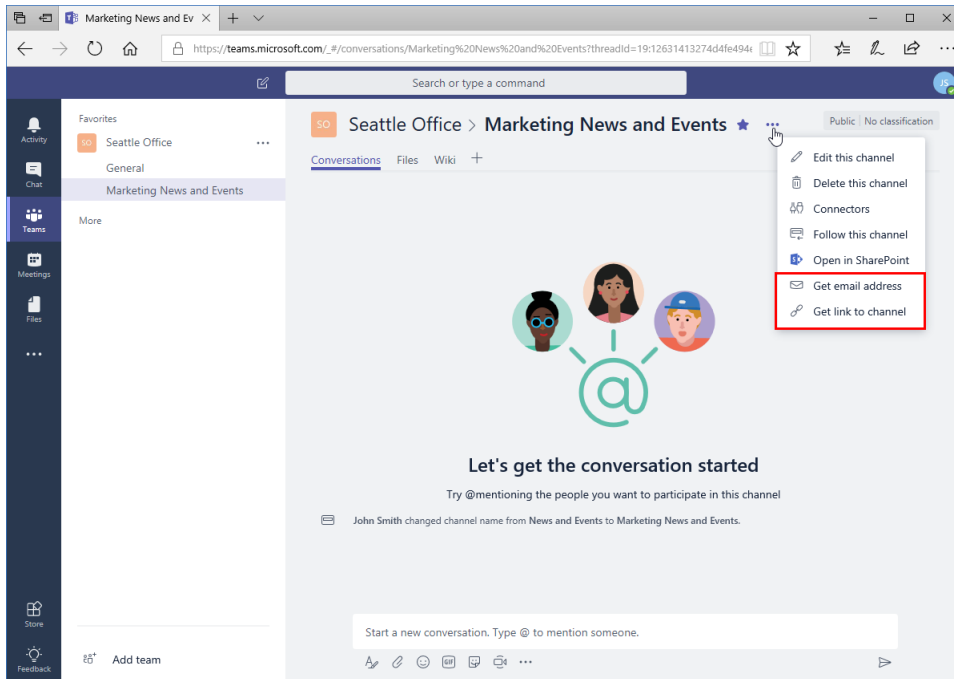


The change will be applied and noted in the channel:



Accessing the Channel Email Address and Link

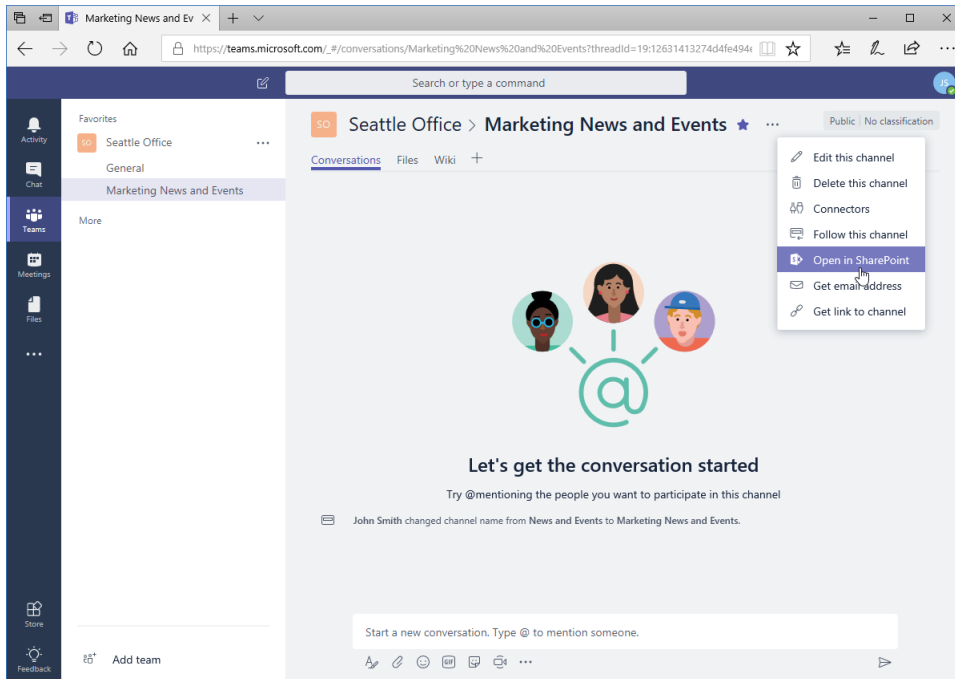
You will also see links in the More Options menu (accessible by clicking the ellipses) to get an email address and link to the channel:



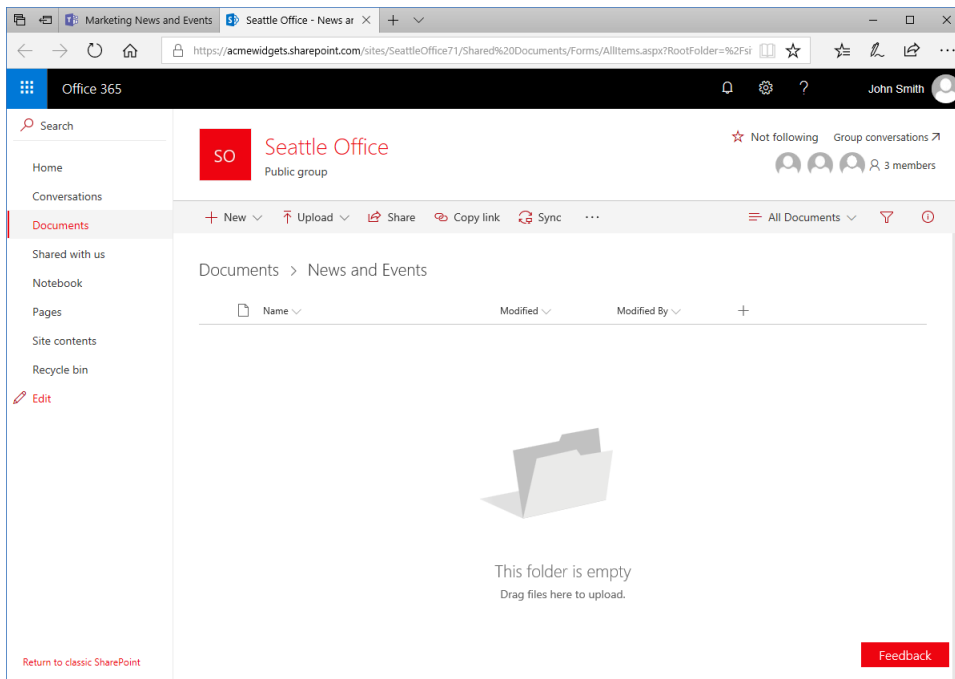
The link to the channel provides users with direct access to it, while the email address will allow users to post to the channel by sending a message to that address.

Accessing the Team's SharePoint Page

When you create a team, an Office 365 group and SharePoint site are automatically created. You can access this site from the More Options menu:

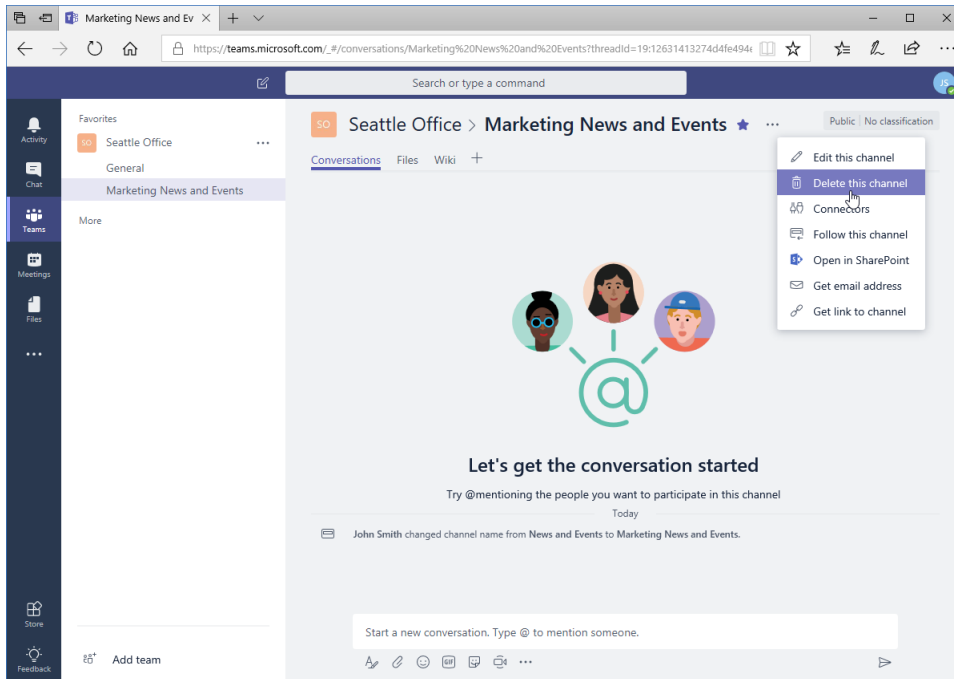


This will open the SharePoint group site in a new tab or window:

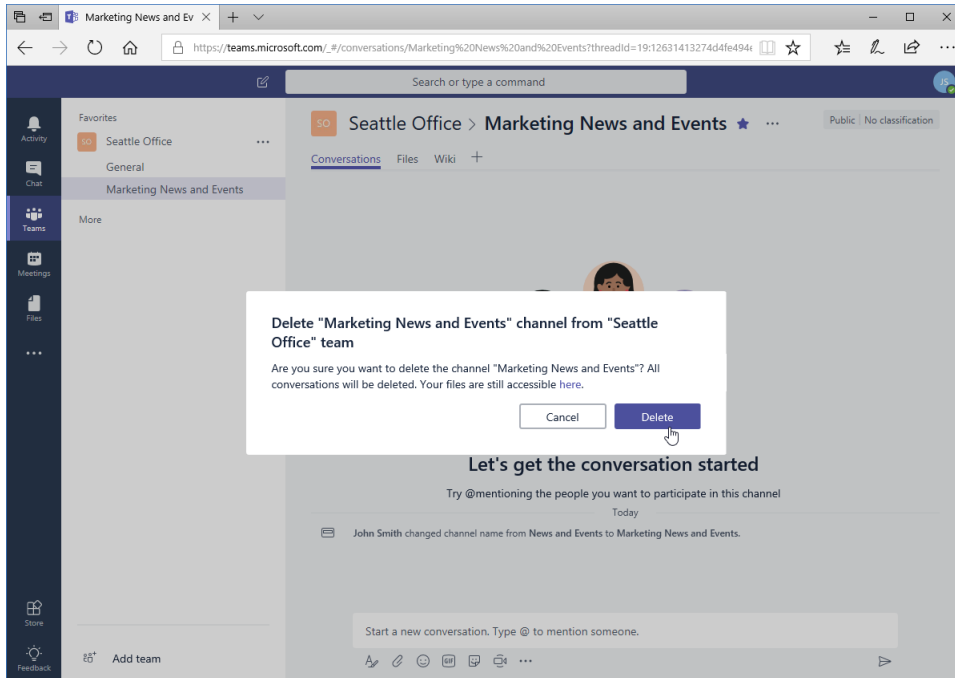


Deleting a Channel

The final option we will explore is deleting a channel. You can access this command from the ellipses menu:



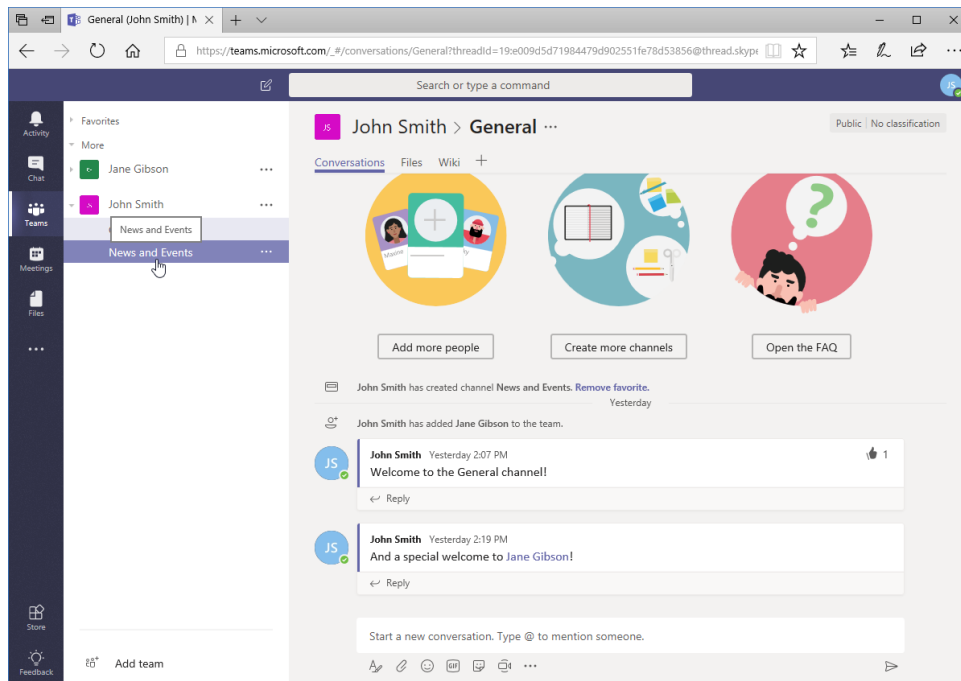
When you click this command, you will be notified that all conversations will be deleted, although files will still be accessible from the sidebar icon. Click “Delete” to complete the operation:



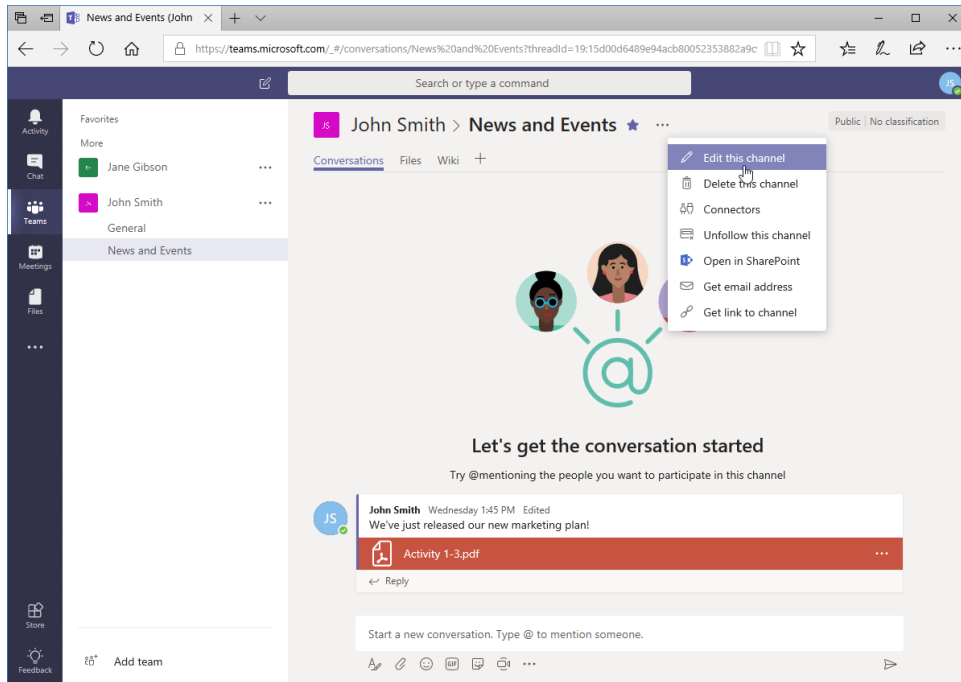
Activity 4-1: Customizing Channels

In this activity, you will customize the channel you created earlier in this course. Note that this activity uses Microsoft Edge. If you are using another browser, some steps may be different.

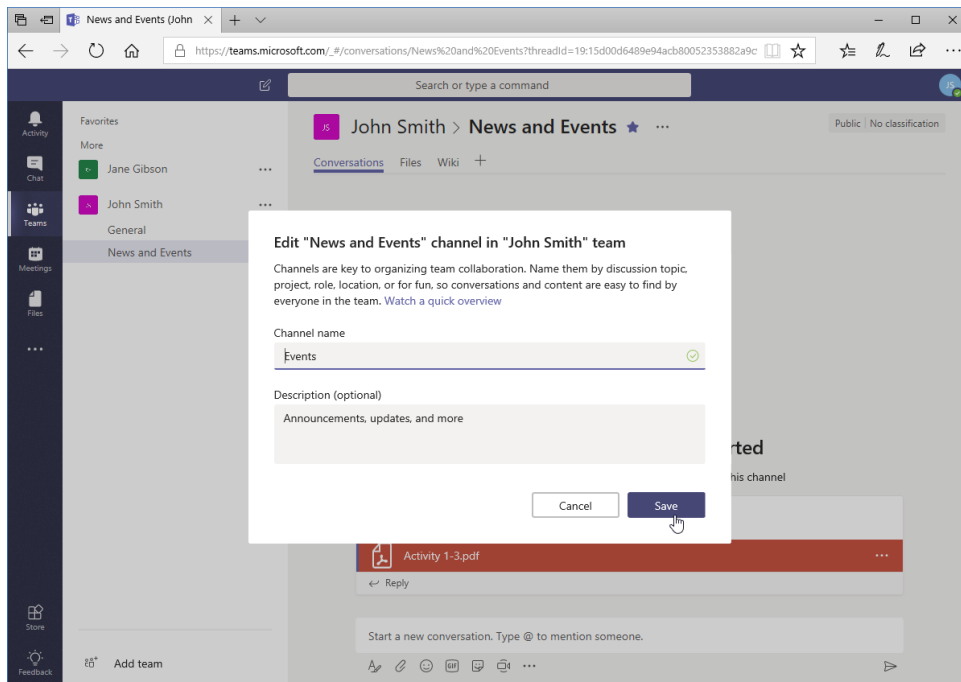
1. Ensure you have completed all previous activities and that Microsoft Teams is open.
2. Navigate to the News and Events channel in your team:



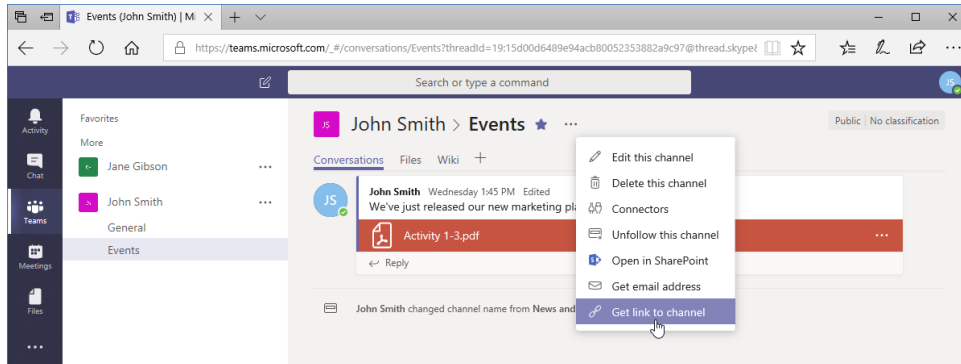
3. Click the ellipses next to the channel's name and click "Edit this channel:"



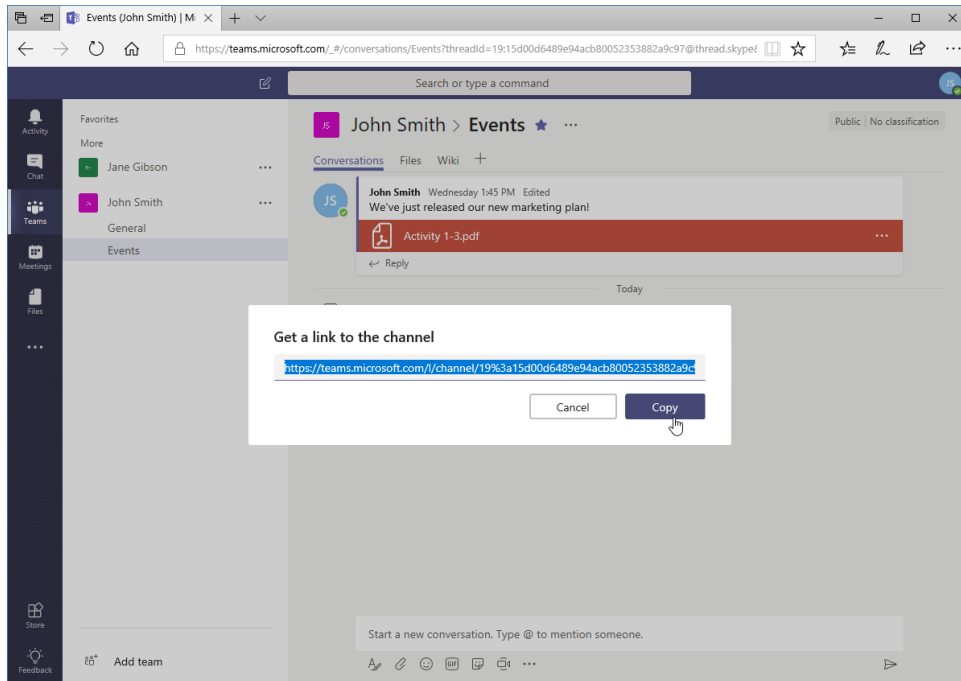
4. Change the channel's name to "Events" and click "Save:"



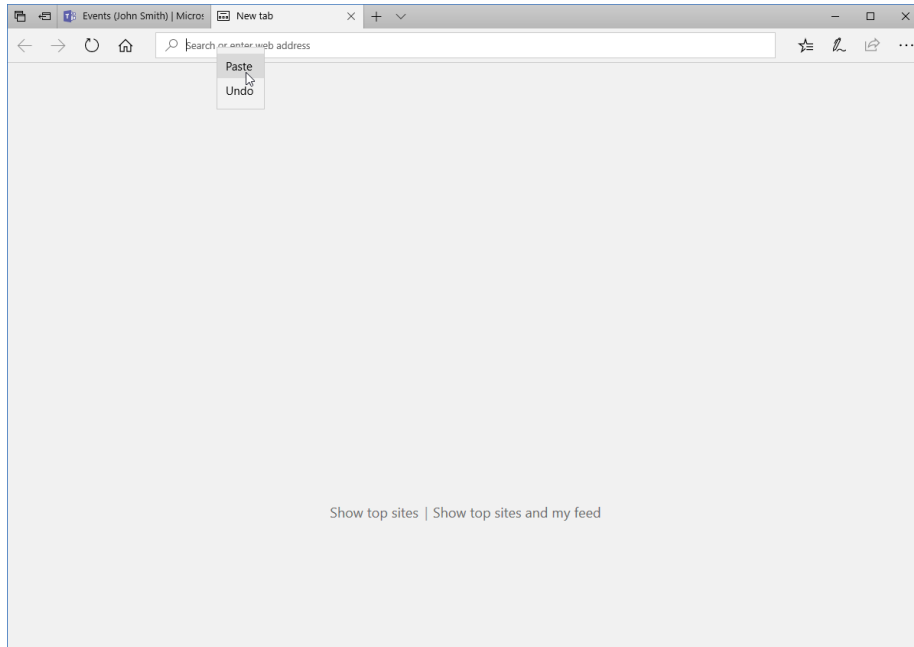
- Now, let's copy the quick link to the channel. Click the ellipses next to the channel name and click "Get link to channel:"



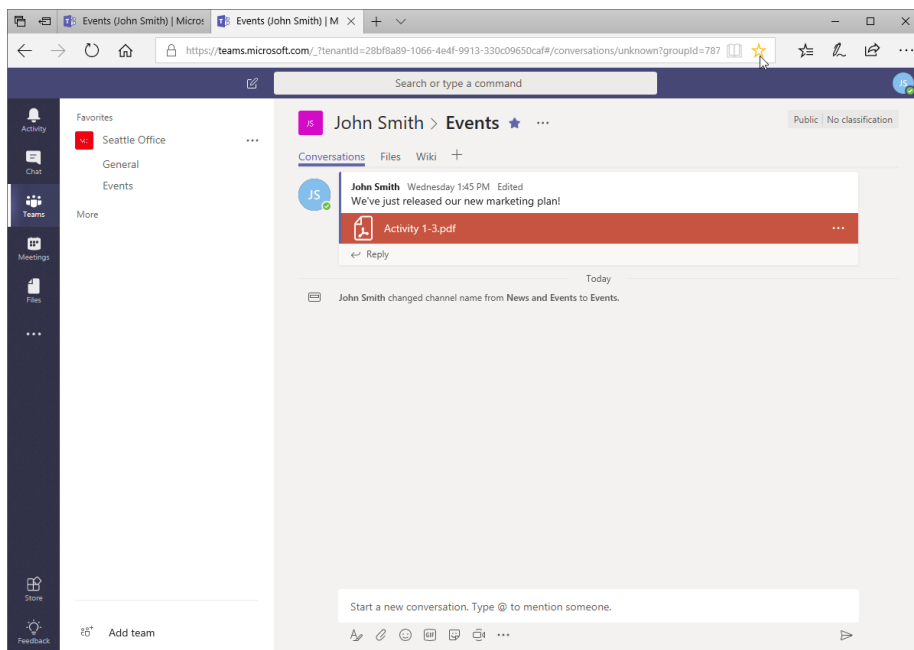
- Click the Copy button in the dialog that appears:



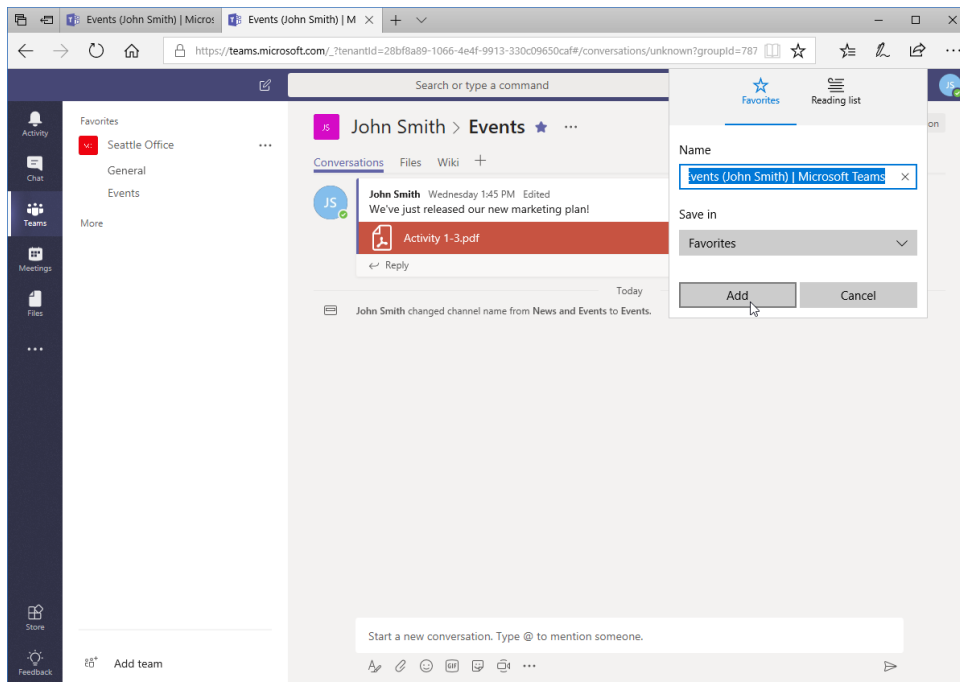
7. Create a new tab in your browser. Paste the link in the address bar and press “Enter:”



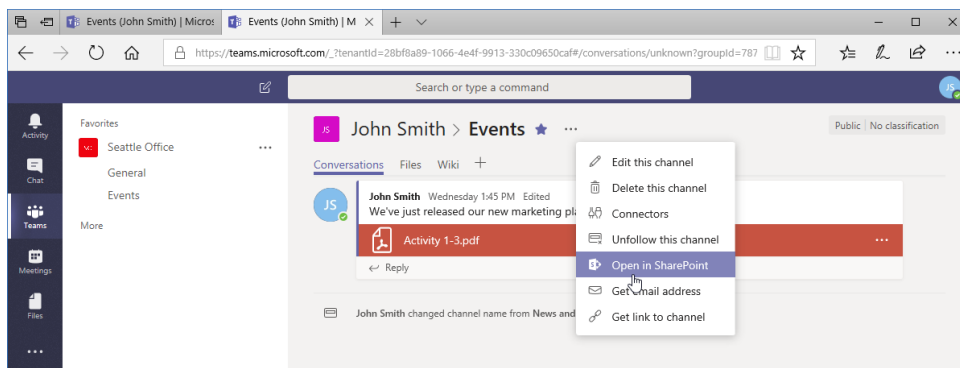
8. The page will now load. Click the star in the address bar to mark it as a favorite:



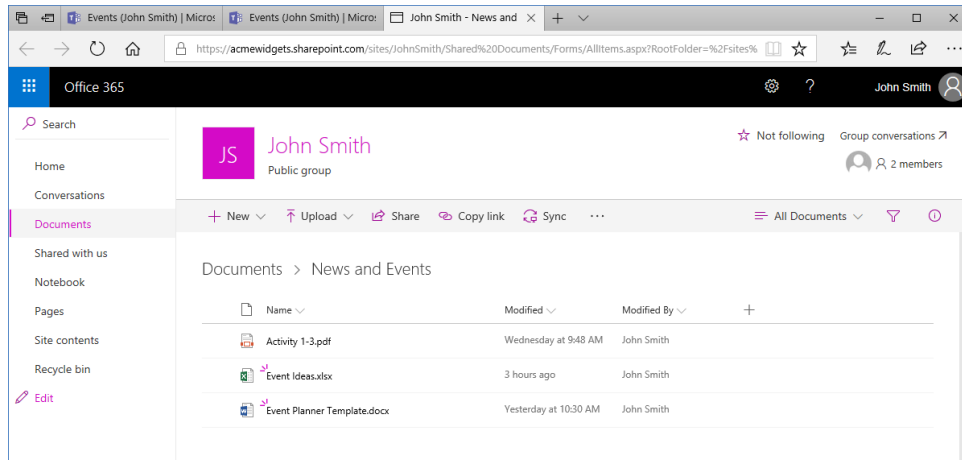
9. Click “Add” to complete the process:



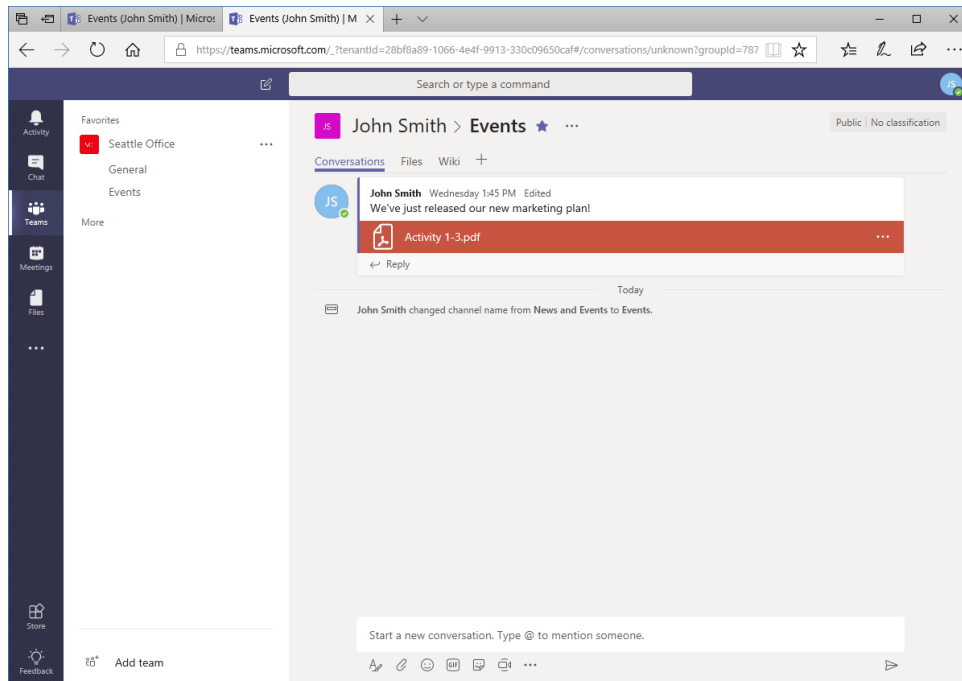
10. The channel will now be available as a favorite. Now, let’s check out this team’s SharePoint site. In either tab, click the ellipses next to the channel name and click “Open in SharePoint:”



11. Review the interface and the available files:



12. Then, close this browser tab and return to Teams to complete this activity:



TOPIC B: Adding Tabs to a Channel

Another way you can customize channels is by adding or removing tabs. By default, each channel has tabs for Conversations, Files, and Wiki, but these can be modified or removed as necessary.

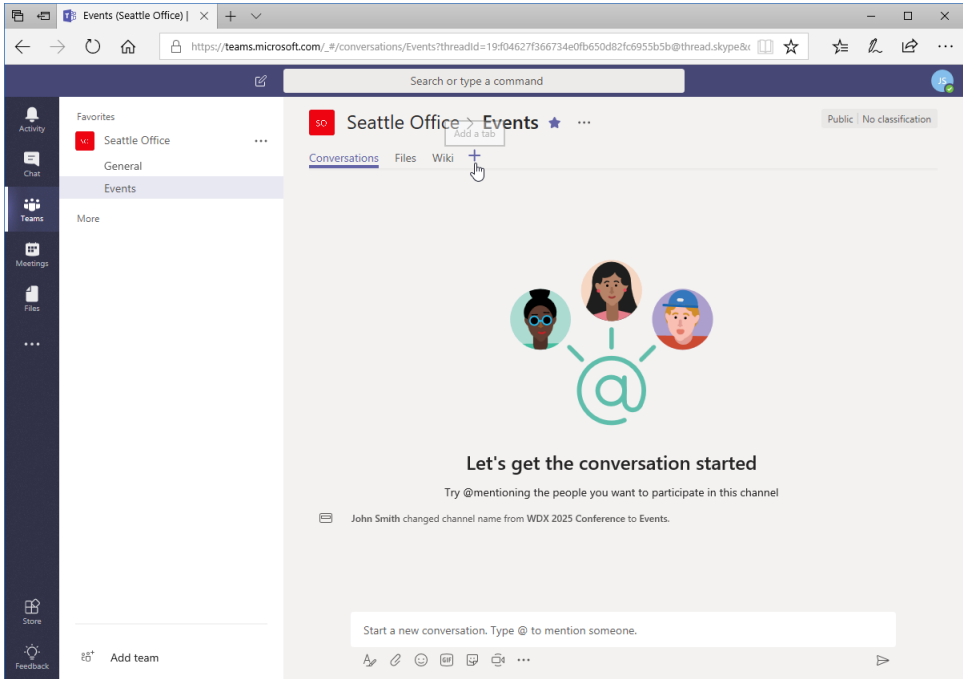
Topic Objectives

In this section, you will learn how to:

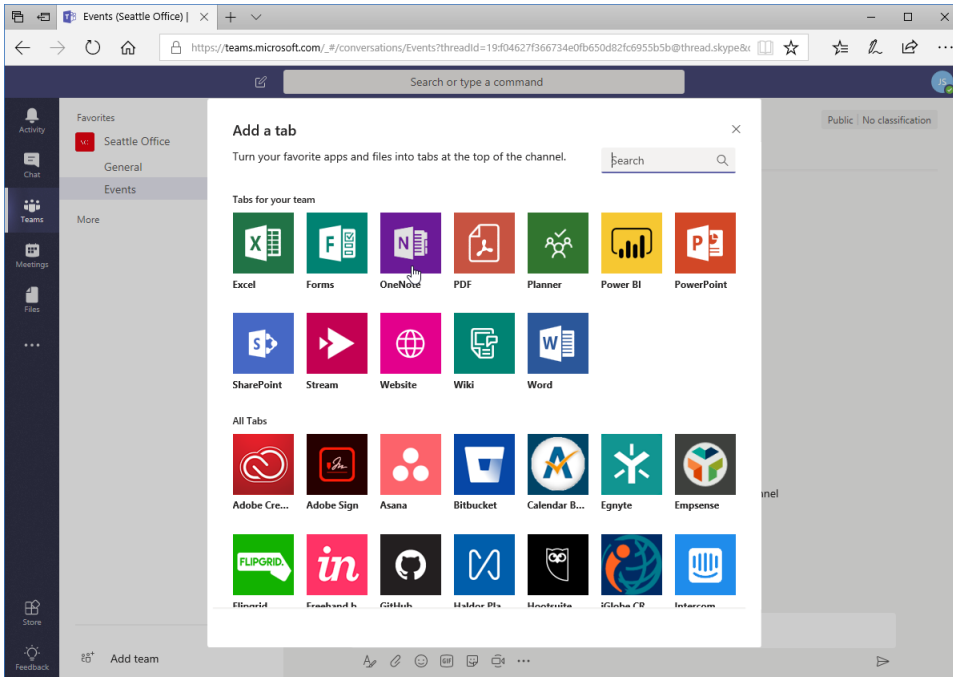
- Add, rename, and remove tabs
- Use tab conversations

Adding a Tab

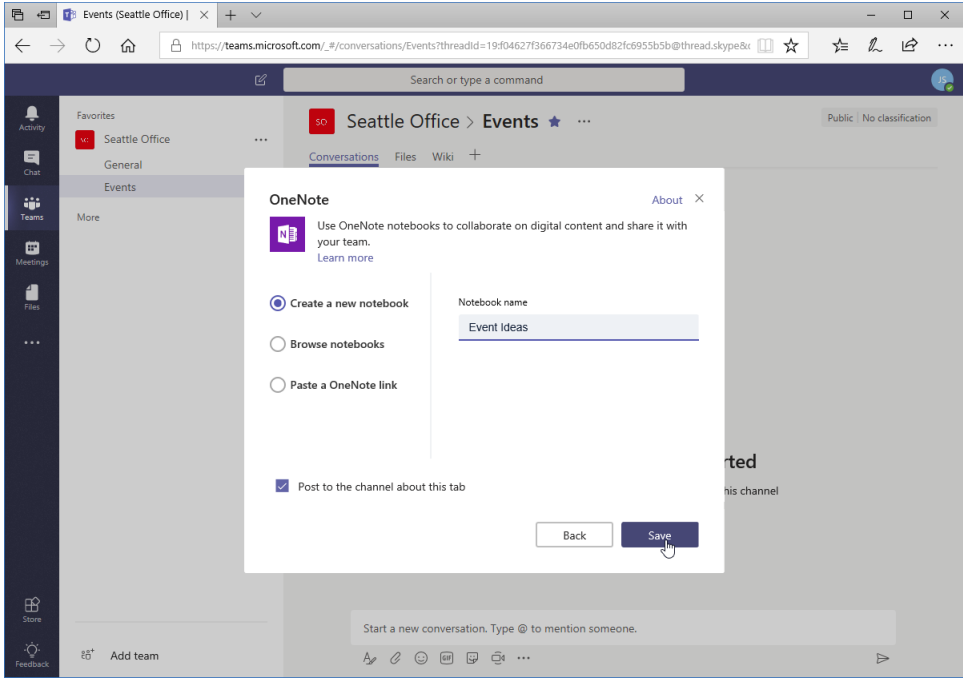
To add a new tab to a channel, click the plus sign at the end of the tab list:



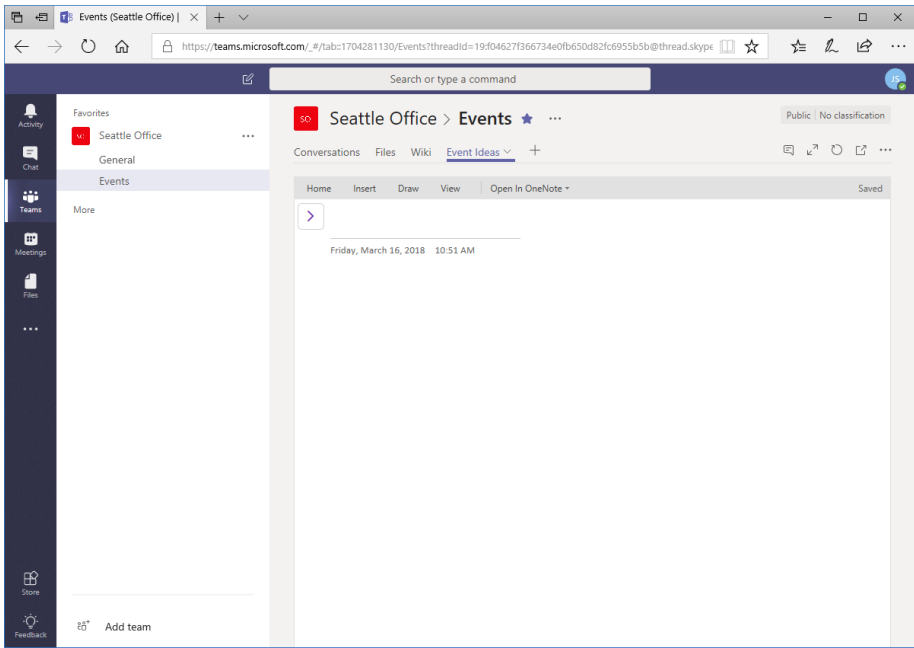
Now, choose the app you want to add. You can choose from Microsoft apps, websites, PDF documents, and third-party add-ins. Here, we are adding OneNote:



Once you choose what to add, you will be prompted to specify settings (or log in if it is a third-party app). Here, we are creating a new notebook just for this purpose. We will also post to the channel to let everyone know about the new feature:

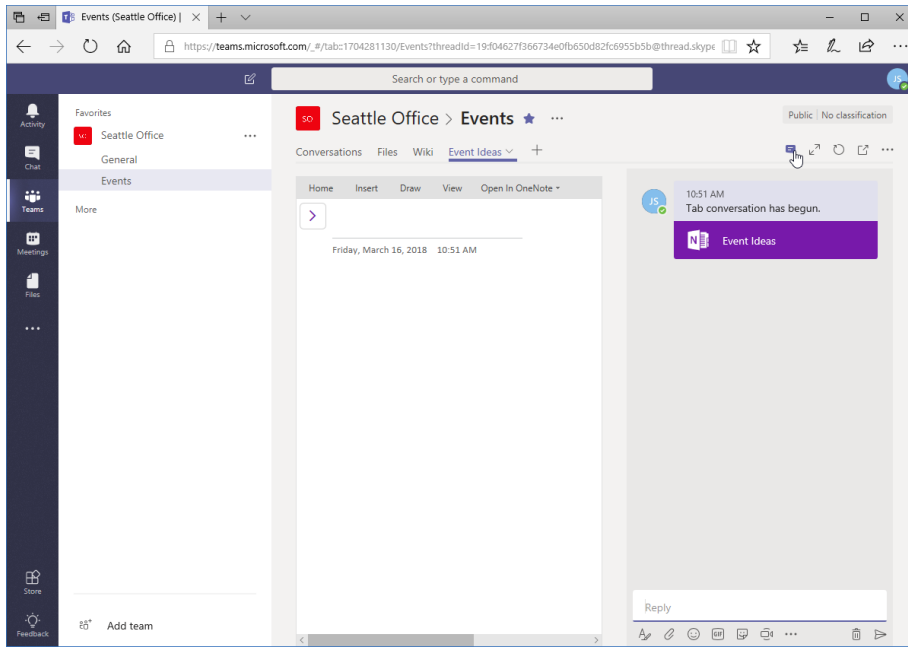


The tab will be ready to use. In this example, we have a mini OneNote interface, with a notebook ready to go:

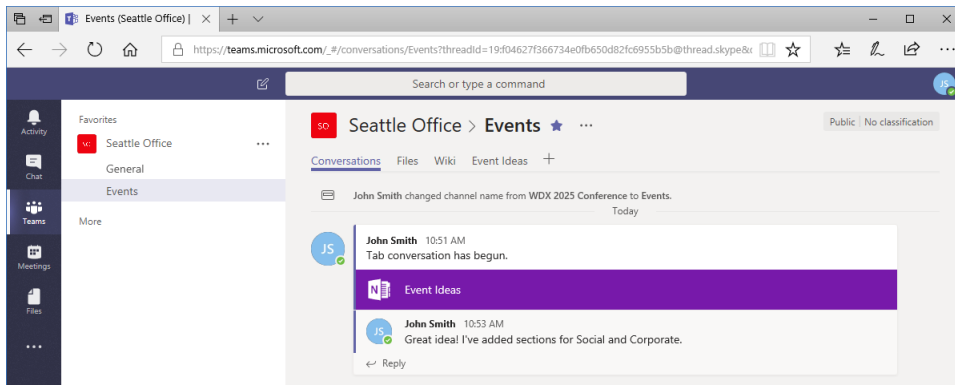


Using Tab Conversations

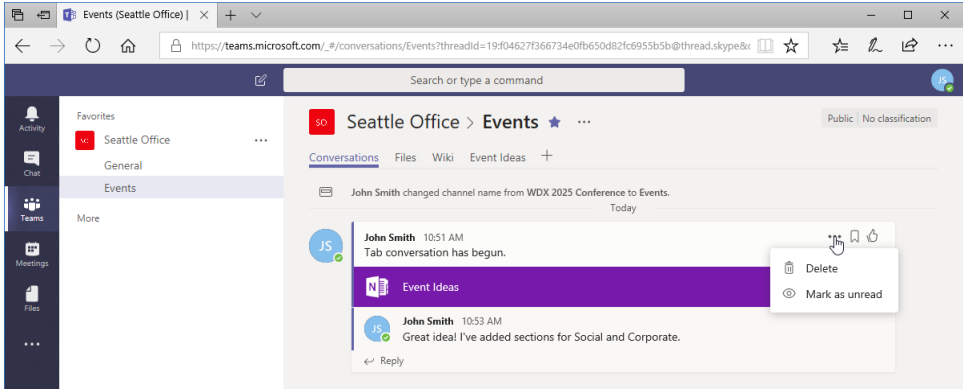
Custom tabs have a Conversation option, just like wiki pages:



This allows team members to talk about the tab's contents. This information will be stored in the channel, but linked back to the source:

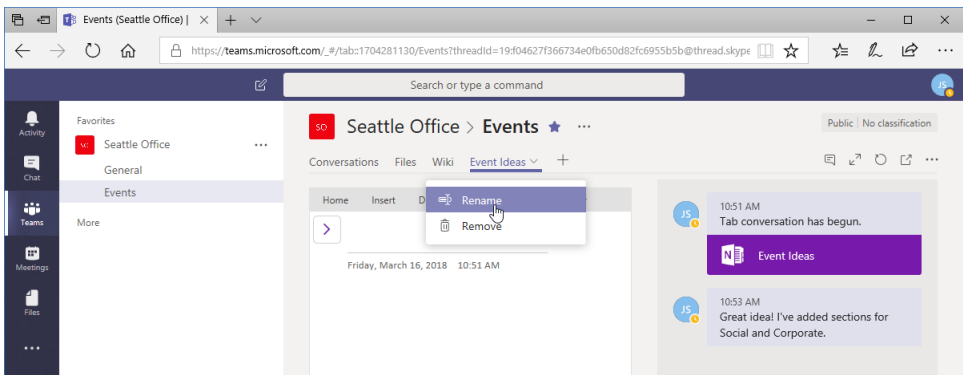


You can even manage these automated posts in the same way as regular channel messages:

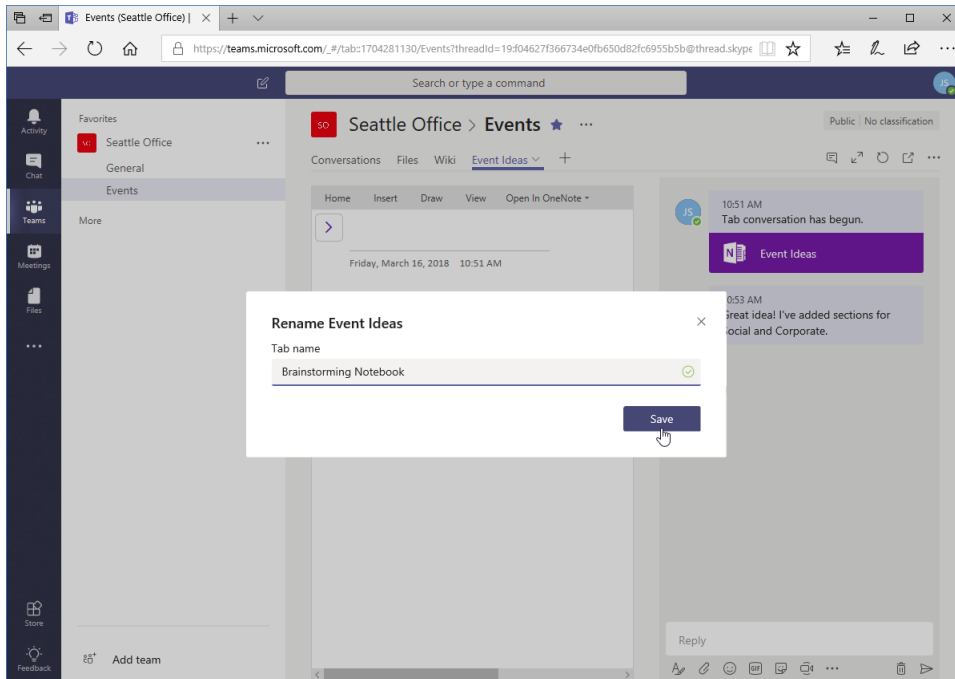


Renaming a Tab

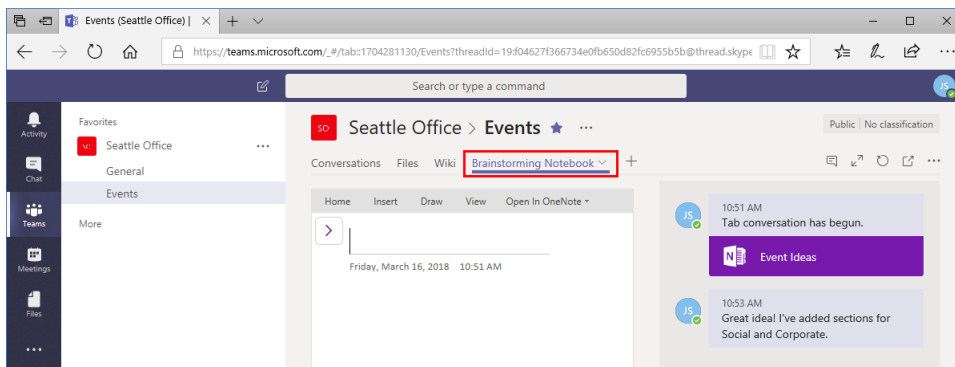
To rename a tab, click the drop-down arrow next to it and click “Rename:”



The Rename dialog will open. Type the new name and click “Save:”

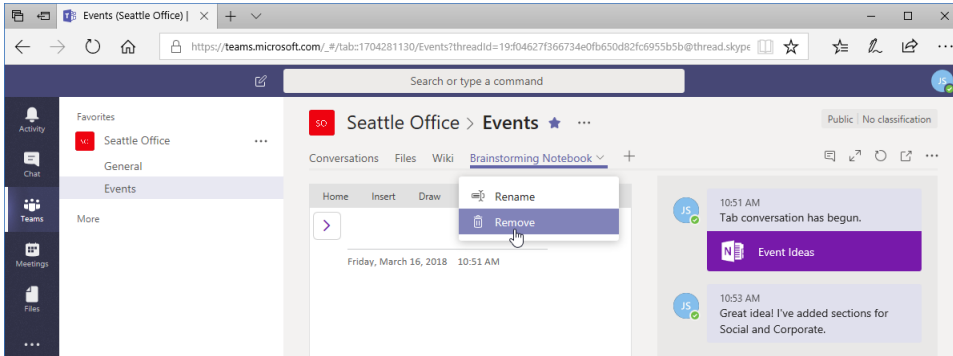


The change will now be applied:

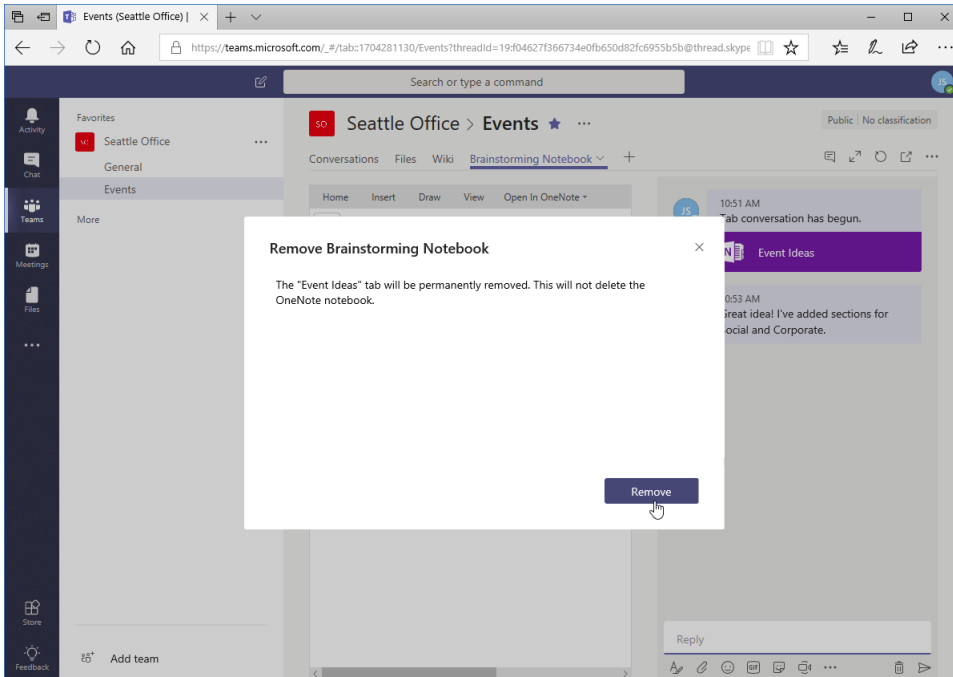


Removing a Tab

To remove a custom tab, click the drop-down arrow next to it and click “Remove:”



Click Remove to complete the operation:

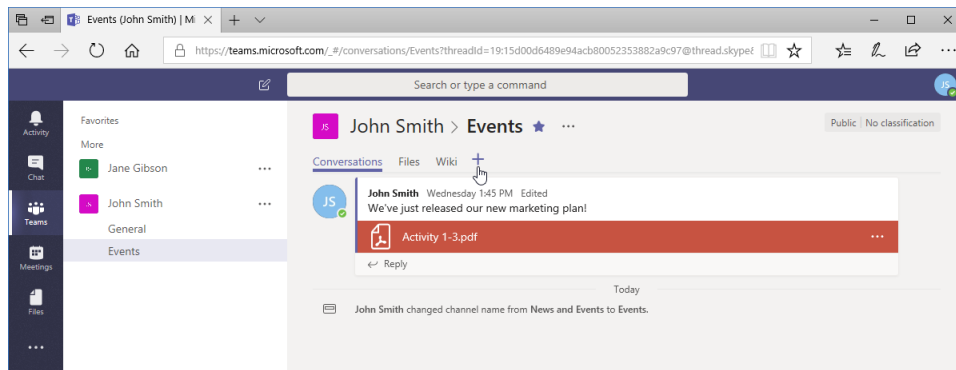


Note that you can rename and/or remove the Wiki tab, but not the Conversations or Files tabs.

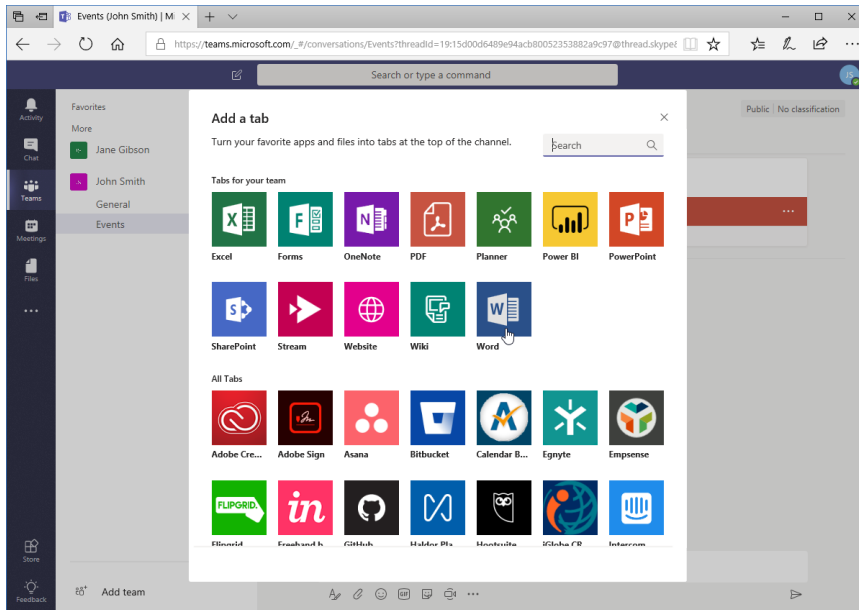
Activity 4-2: Adding Tabs to a Channel

In this activity, you will add a tab to your Events channel.

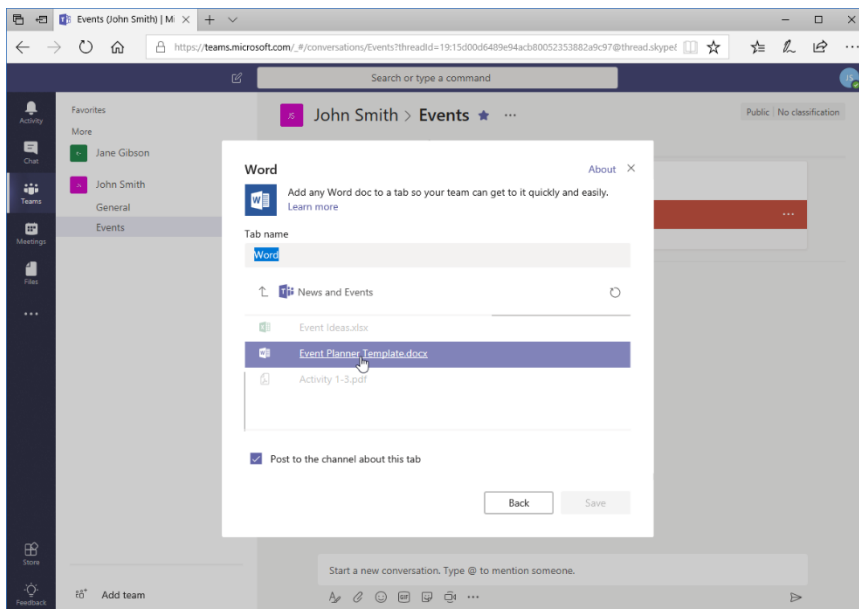
1. Ensure you have completed all previous activities and that Microsoft Teams is open.
2. In Activity 2-3, we added an event planning template to our channel. However, we would like to make it a little more accessible. Navigate to the Events channel in your team and click the plus sign at the end of the tab list:



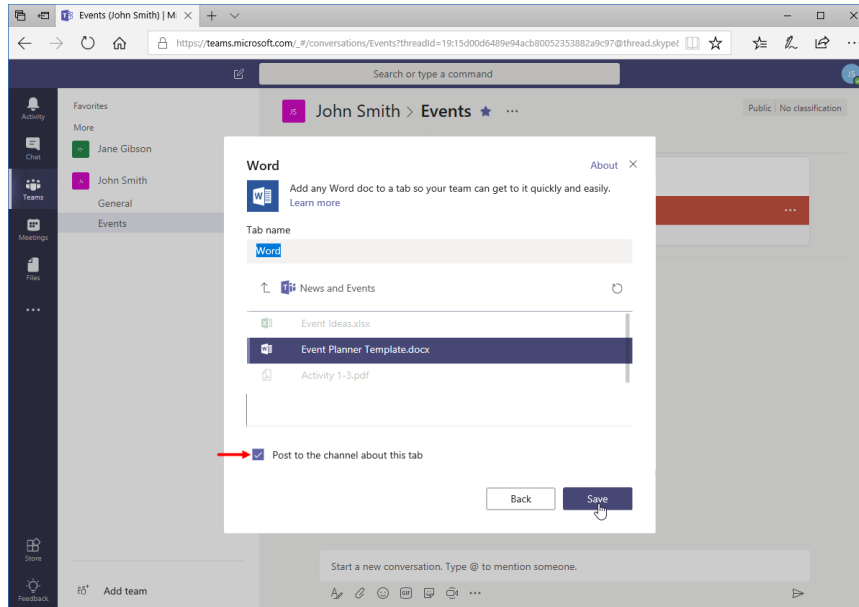
3. The file we uploaded was a Word document, so click that icon:



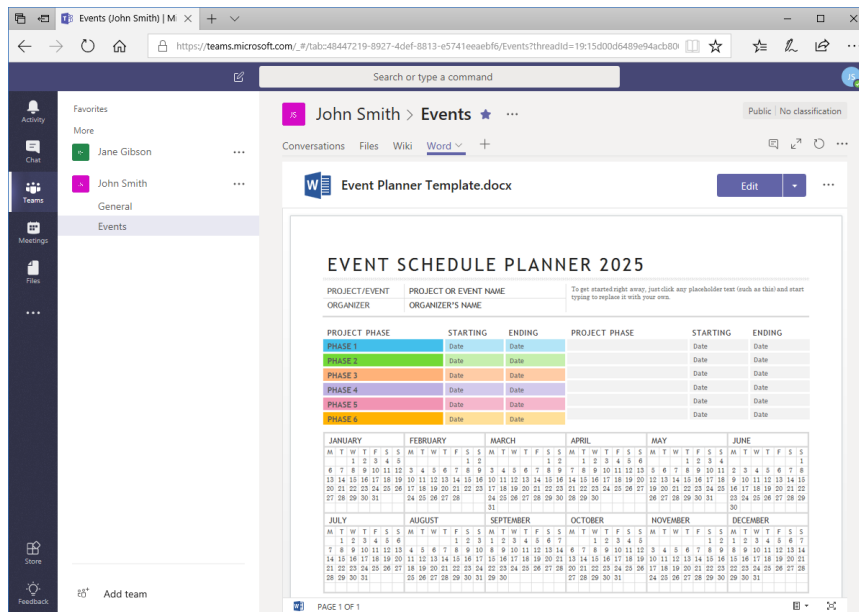
4. Click to select the Event Planner Template document:



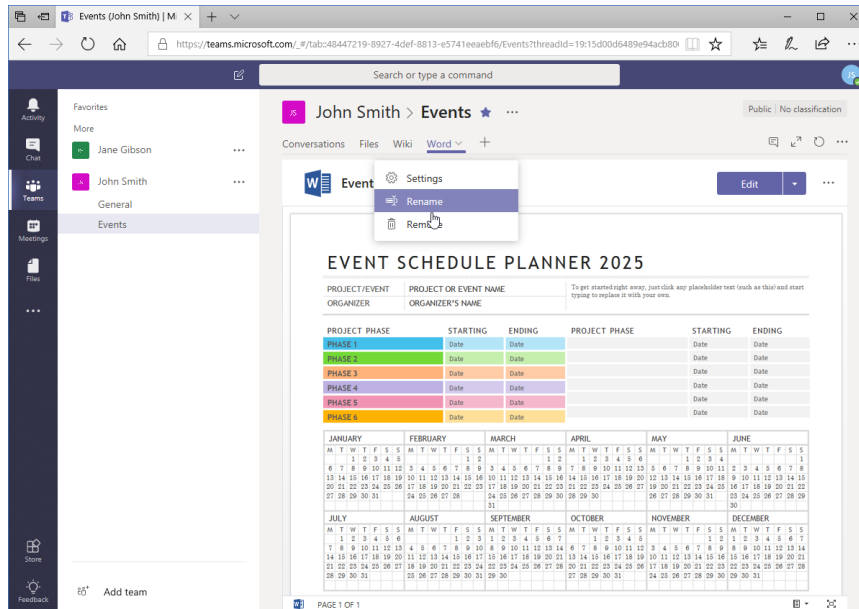
5. Ensure that the “Post to this channel about this tab” box is selected and click “Save.”



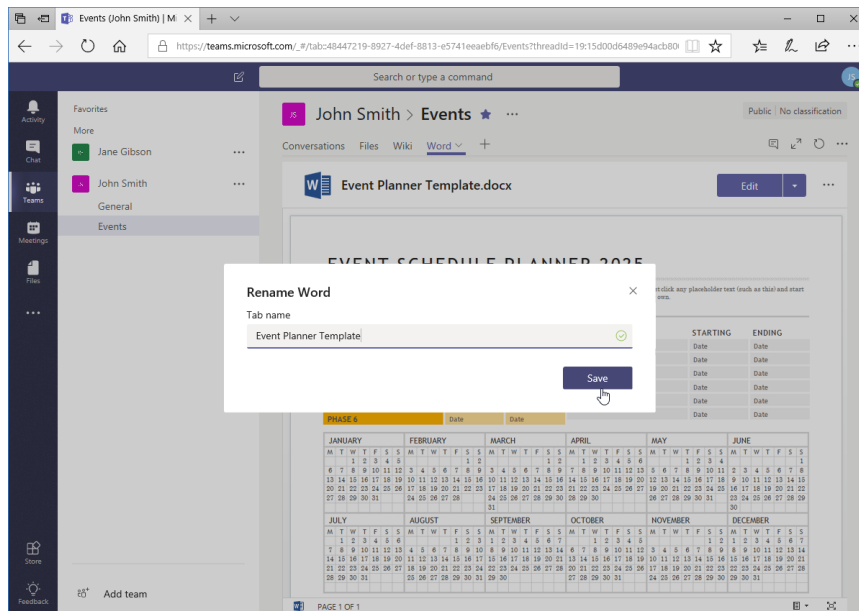
6. Review the new tab:



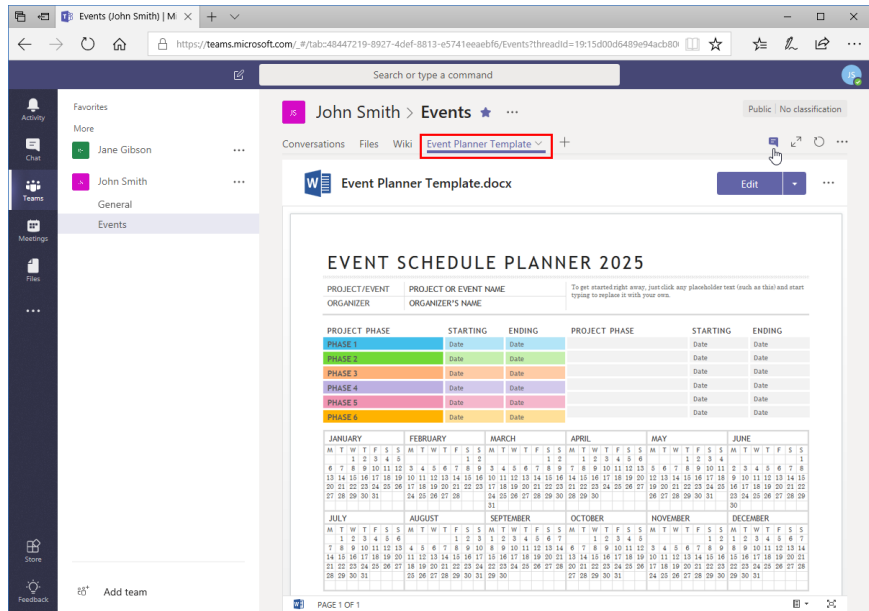
- Let's rename the tab. Click the drop-down arrow next to the current tab name (Word) and click "Rename:"



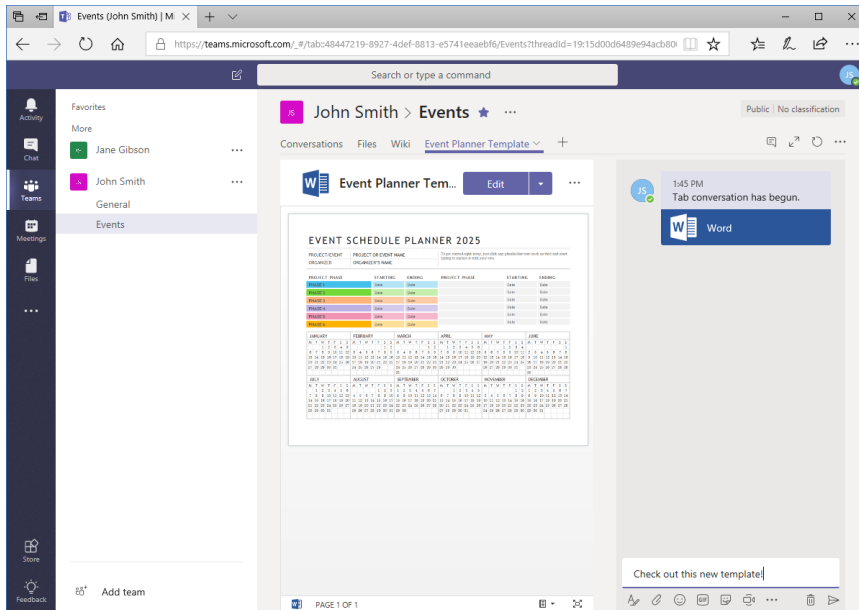
- In the dialog that appears, type, "Event Planner Template" and click "Save:"



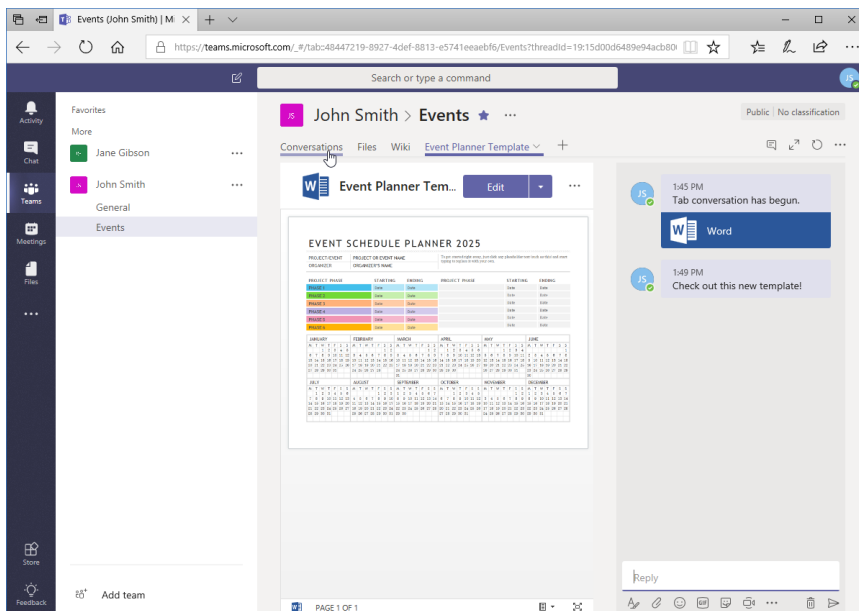
- The change will be applied. Now, click the speech bubble icon to start a conversation about this tab:



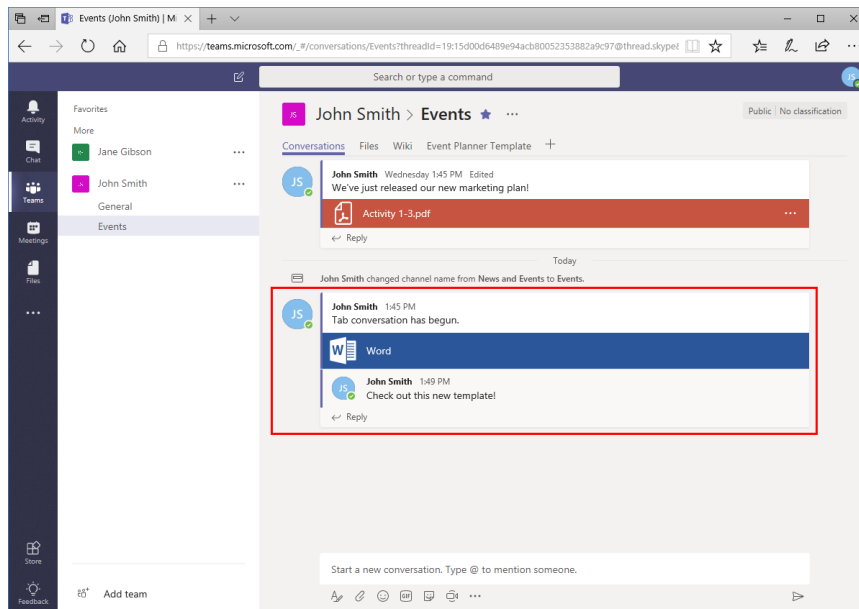
10. Type, "Check out this new template!" and press "Enter" to send your message:



11. Switch back to the Conversations tab:



12. Review the activity history:



13. This activity is now complete. Leave Teams open for the next activity.

TOPIC C: Adding Connectors to a Channel

One of the biggest advantages of Microsoft Teams is its ability to integrate existing services. One of these features is **connectors**, which display information from third-party sources right in a channel.

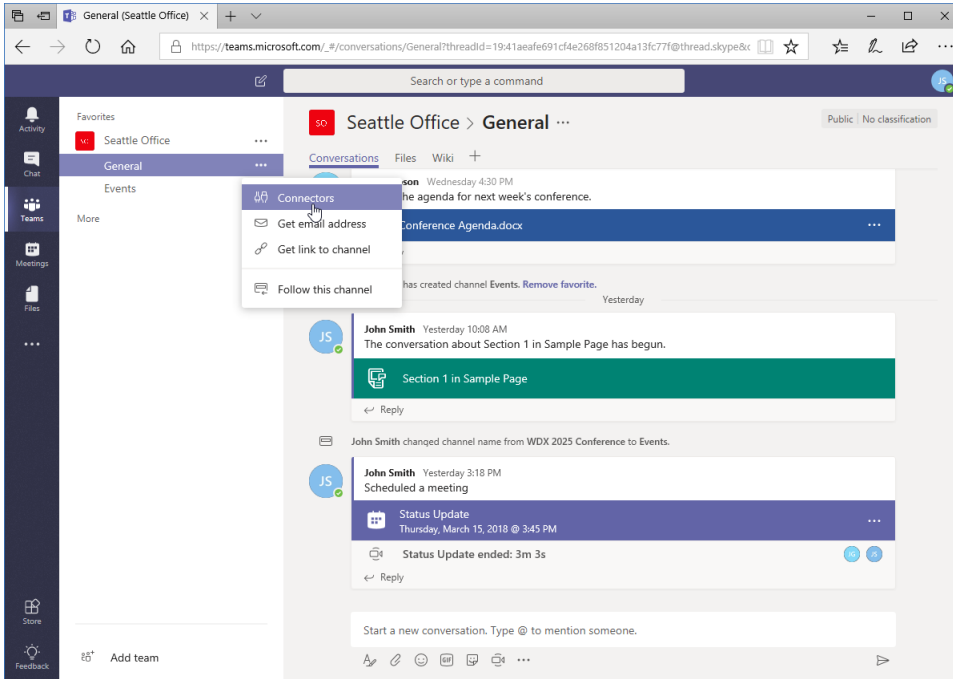
Topic Objectives

In this section, you will learn how to:

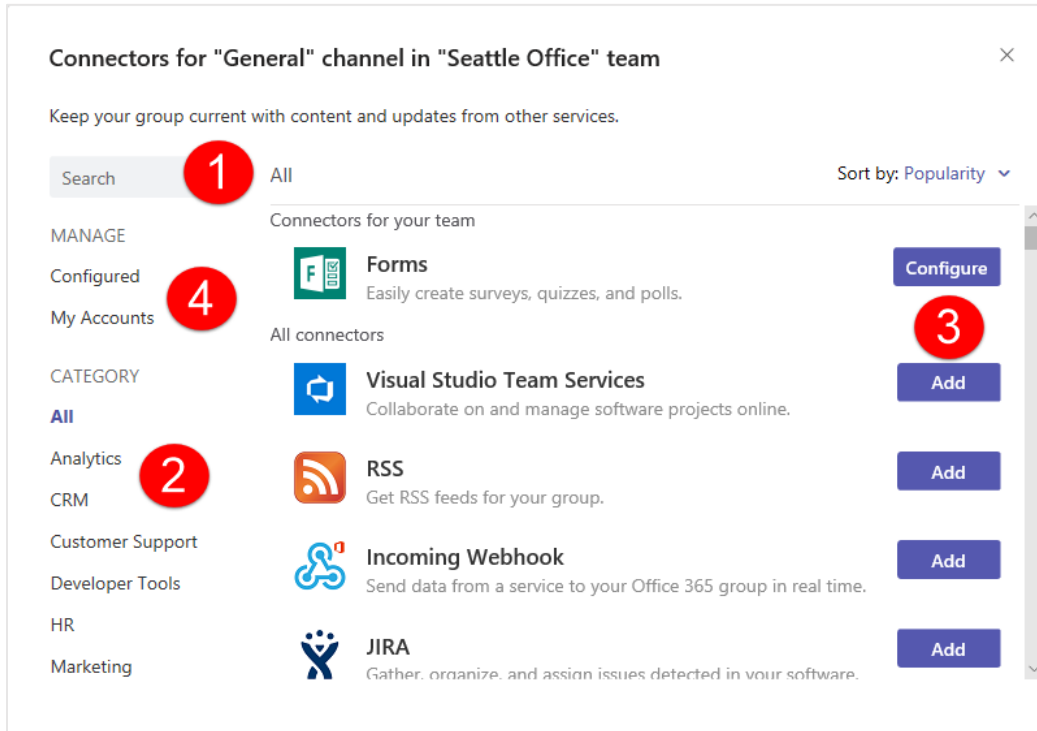
- Add, use, and remove connectors
- Customize connector accounts and settings

Adding a Connector

To add a connector to a channel, click the Teams icon from the sidebar. Then, move your mouse over the target channel, click the ellipses, and click “Connectors:”

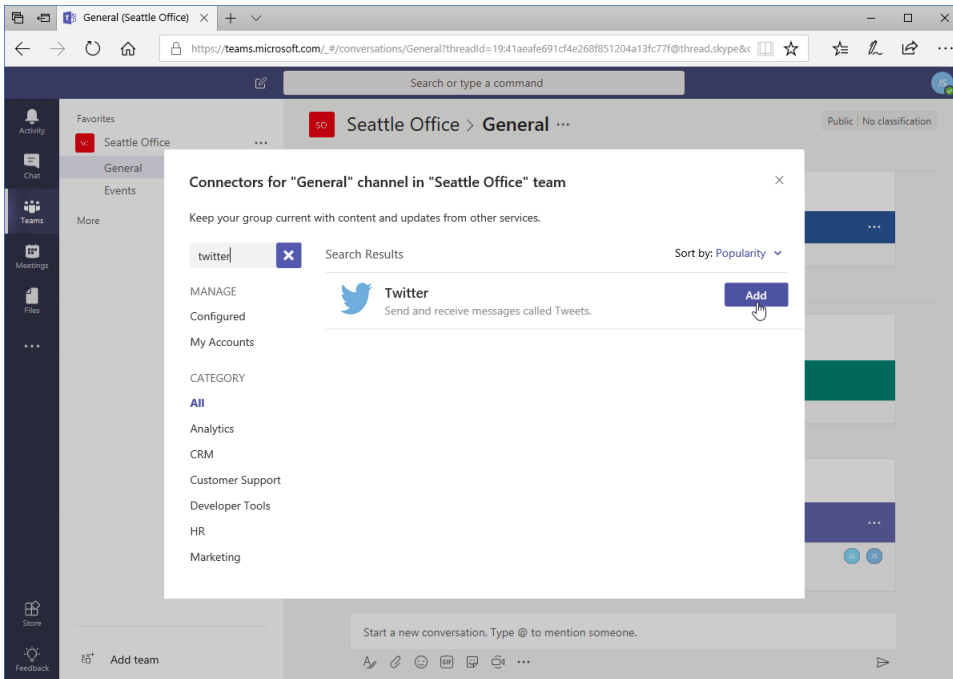


The Connectors dialog box will open:

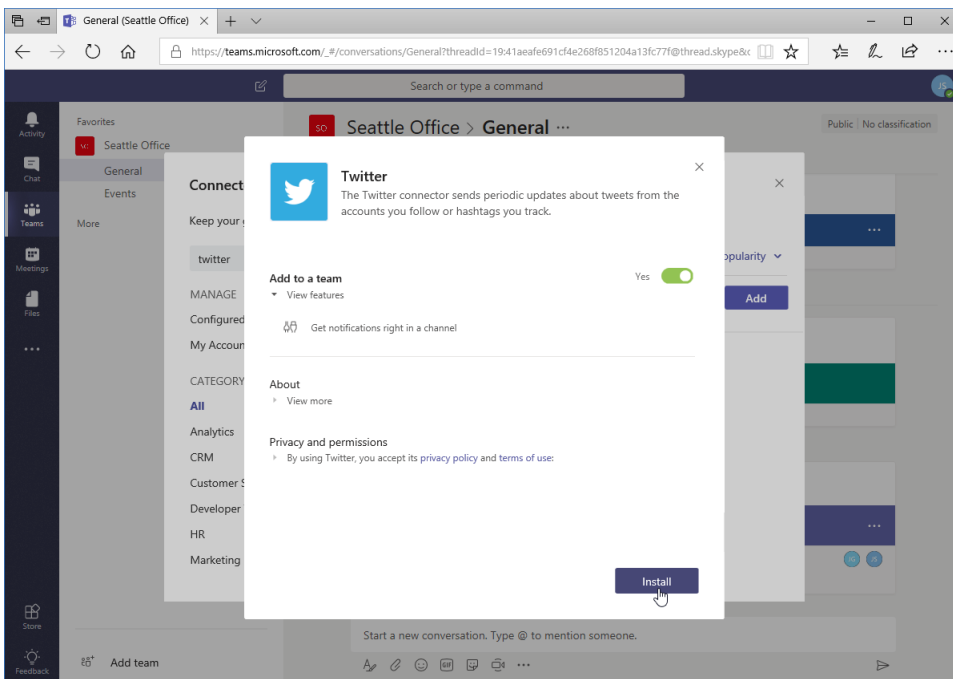


At the top of the window, you can **search (1)** for the connector you want to add. Or, use the **categories (2)** to browse available connectors. Once you have found the connector you want to use, click **Add (3)**. Note that you can also **manage existing connectors (4)** from this dialog box.

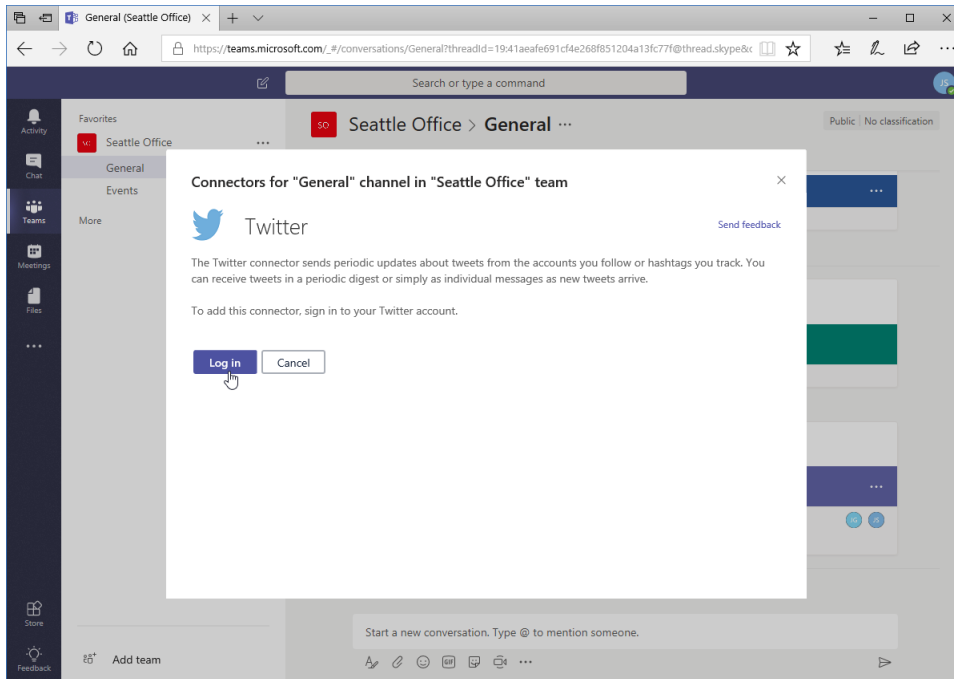
Here, we are about to add a Twitter connector:



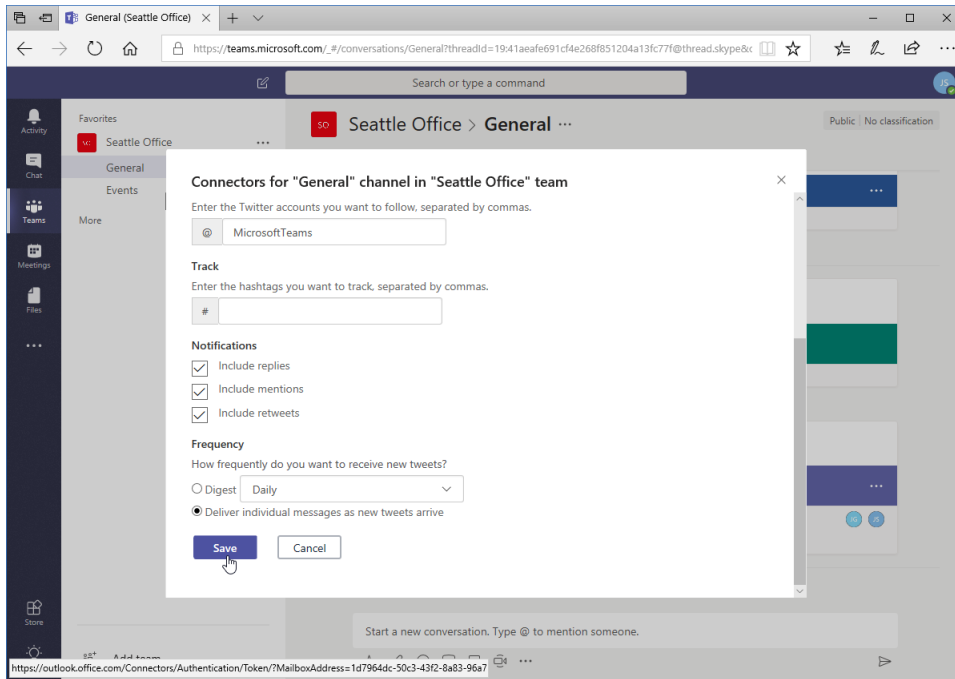
What happens next will depend on what service you have chosen. Here, we are confirming we want to add it to the team, which will send notifications to the channel. Click "Install" to complete the process:



Next, you will be prompted to log into Twitter:

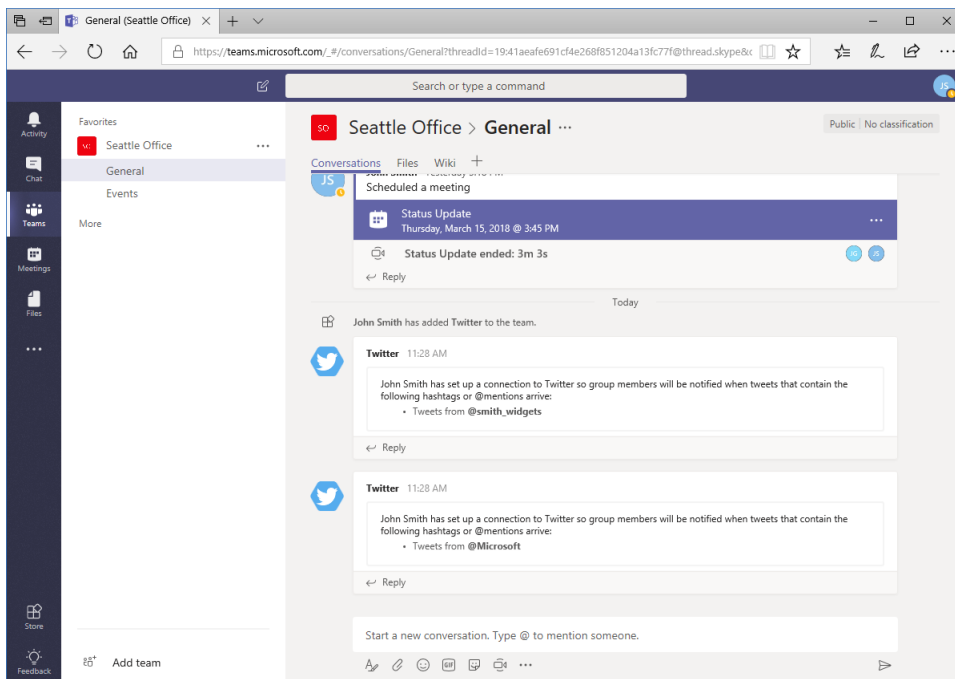


Once you have successfully logged in, you can choose what you want displayed in the channel. Here, you have entered the account you want to follow, customized the notification settings, and adjusted the frequency. You will now click “Save” to apply the changes:



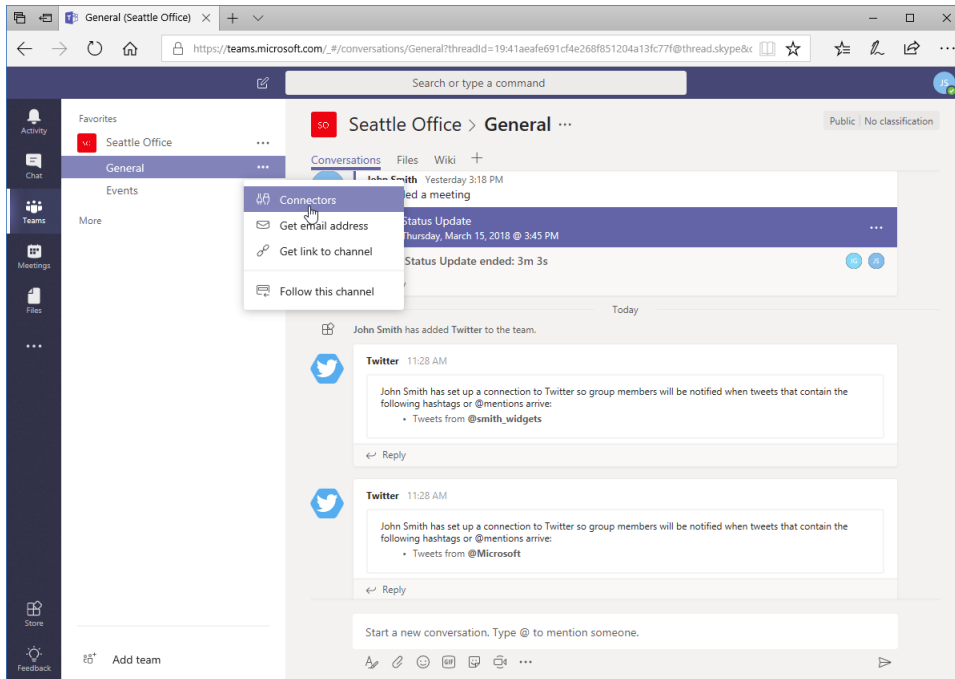
Once those changes have been saved, you will close the dialog box and return to Teams.

Now, the connector's data will be displayed in the channel according to your settings:

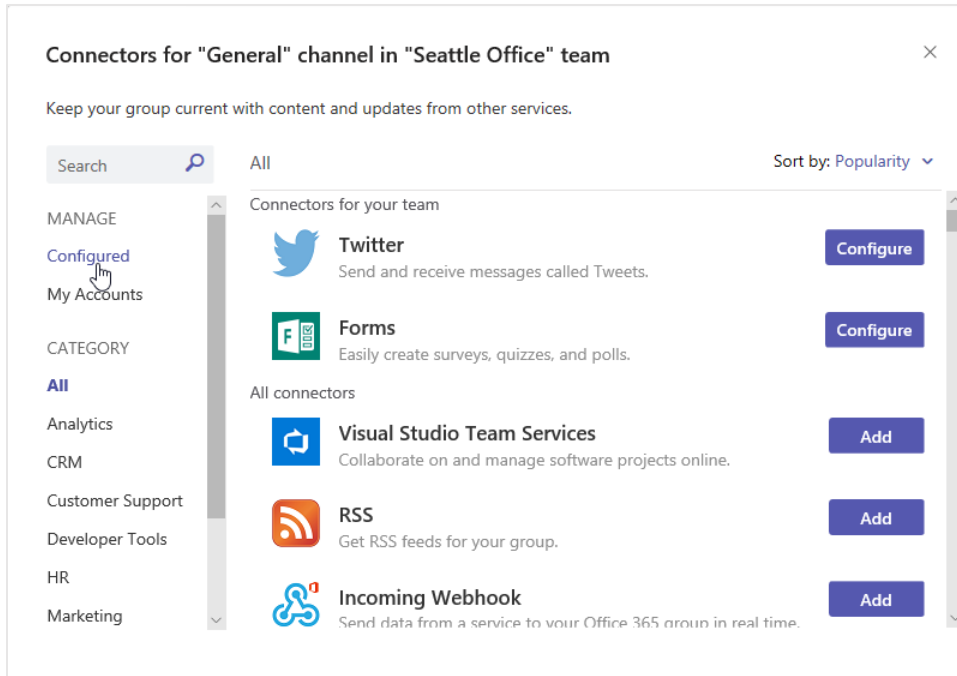


Changing Connector Settings

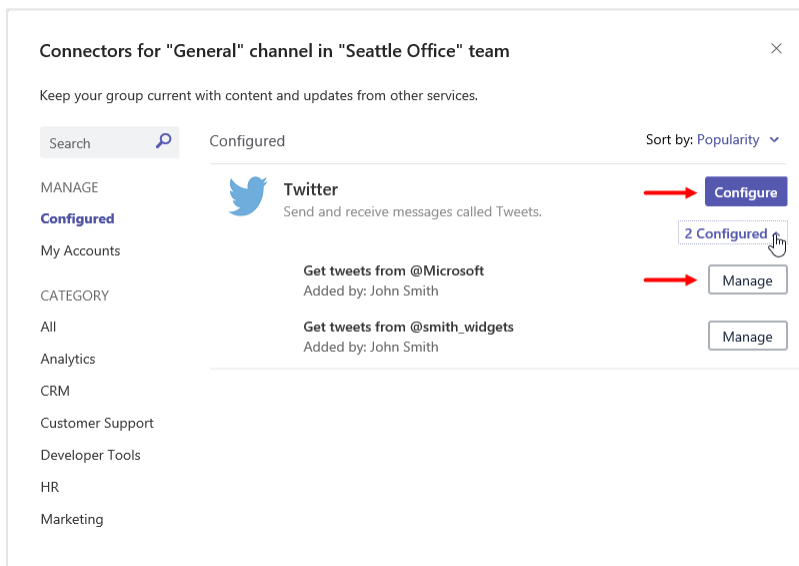
To change the settings for a connector after it has been configured, move your mouse over the target channel, click the ellipses, and click “Connectors:”



The Connectors dialog will open. Click the Configured category on the left:




Now, click Configure to manage the connector itself. Or, click the chevron to view its services and click "Manage" next to the one you want to modify:



The options in both cases are almost the same as when it was set up, but the settings will be pre-populated:

Connectors for "General" channel in "Seattle Office" team

 Twitter [Send feedback](#)

The Twitter connector sends periodic updates about tweets from the accounts you follow or hashtags you track. You can receive tweets in a periodic digest or simply as individual messages as new tweets arrive.

Choose the Twitter account you want to use to configure this connector, or add a new account.

[Add a new Twitter account](#)

Follow
Enter the Twitter accounts you want to follow, separated by commas.

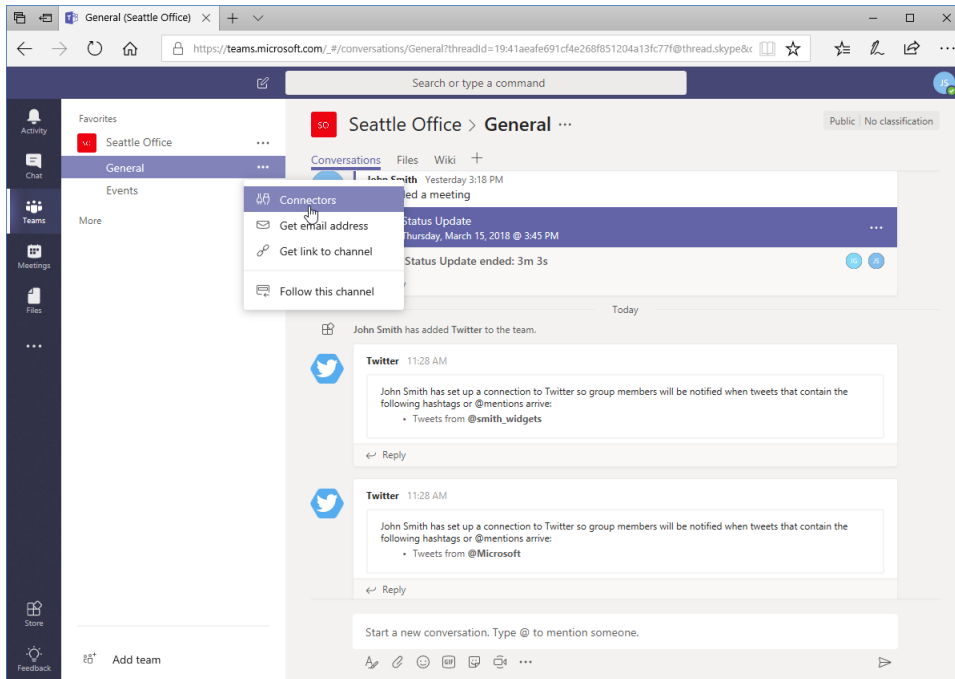
Track
Enter the hashtags you want to track, separated by commas.

Notifications
 Include replies

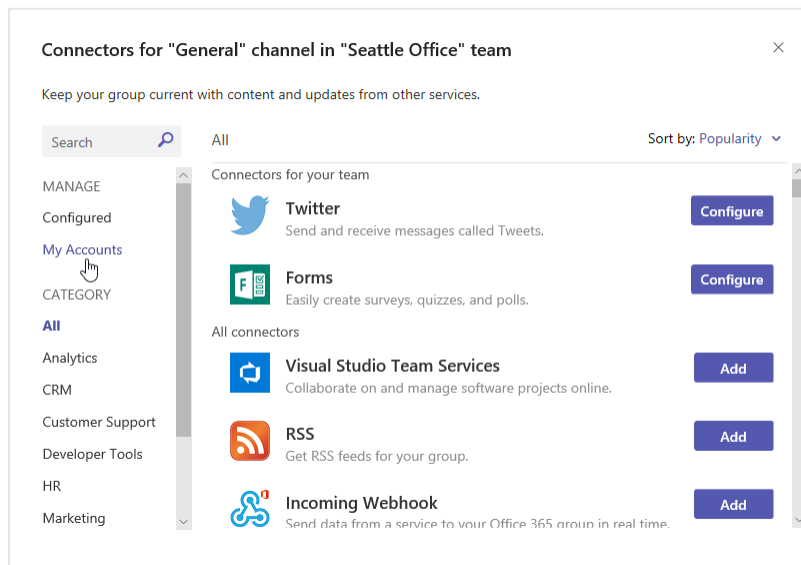
Simply make your changes, click "Save," and close the dialog.

Changing Connector Accounts

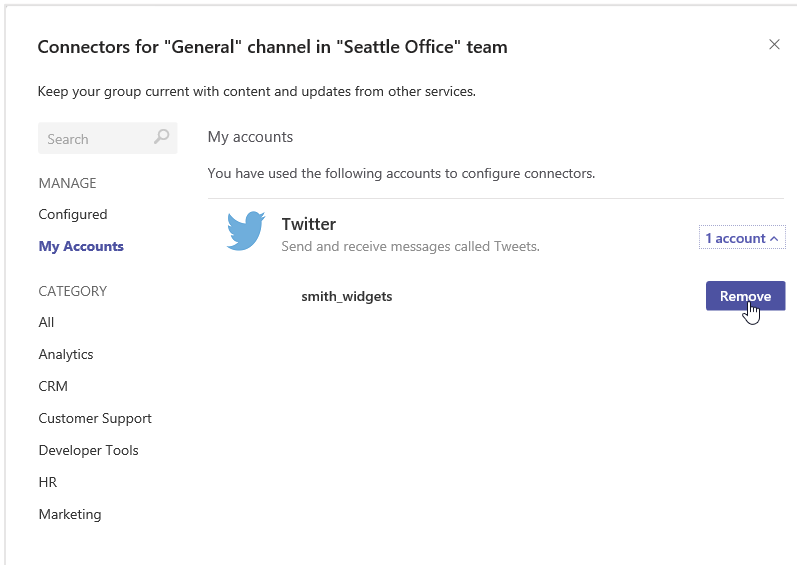
To change the login information for a connector, move your mouse over the target channel, click the ellipses, and click “Connectors:”



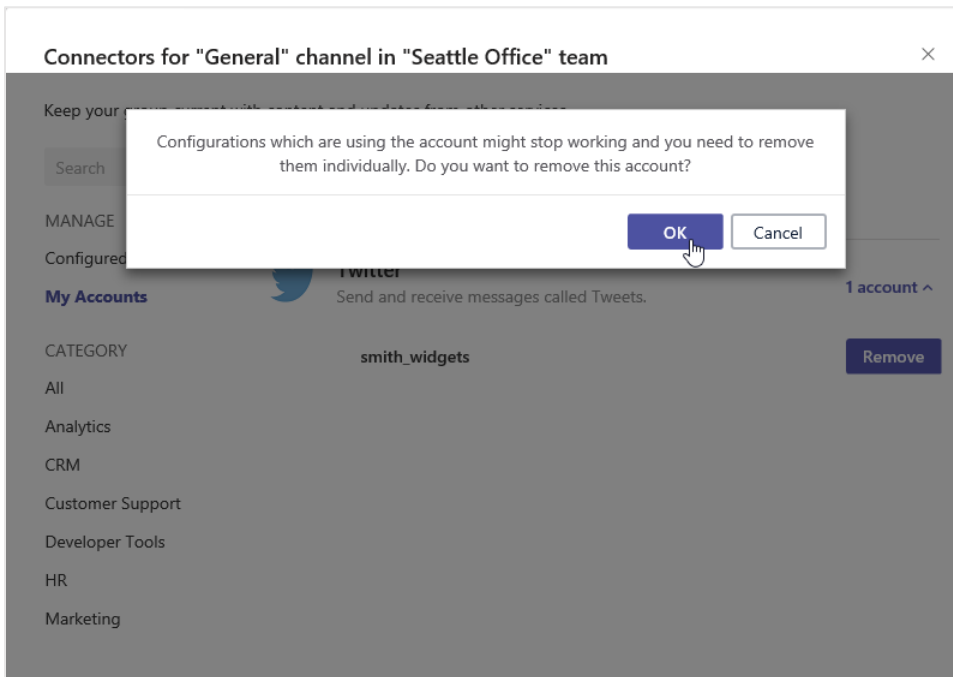
The Connectors dialog will open. Click the My Accounts category on the left:



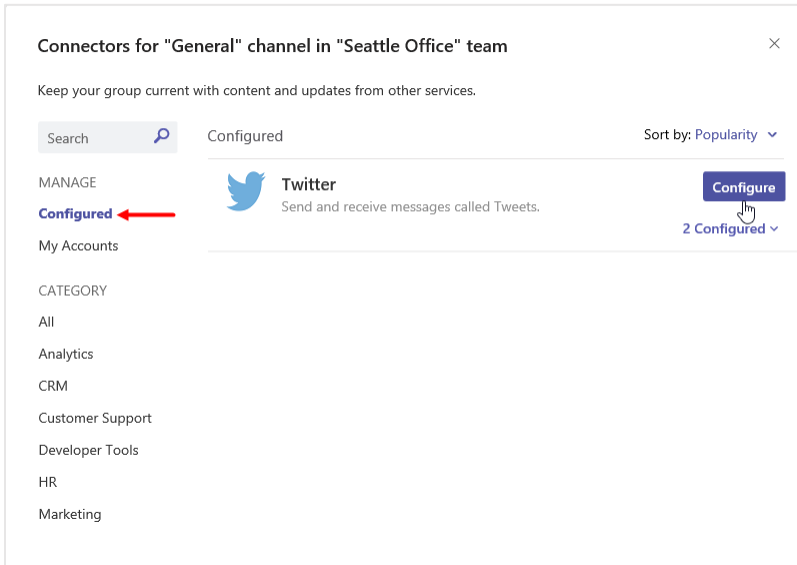
Find the connector you want to change the sign-in information for and click "Remove:"



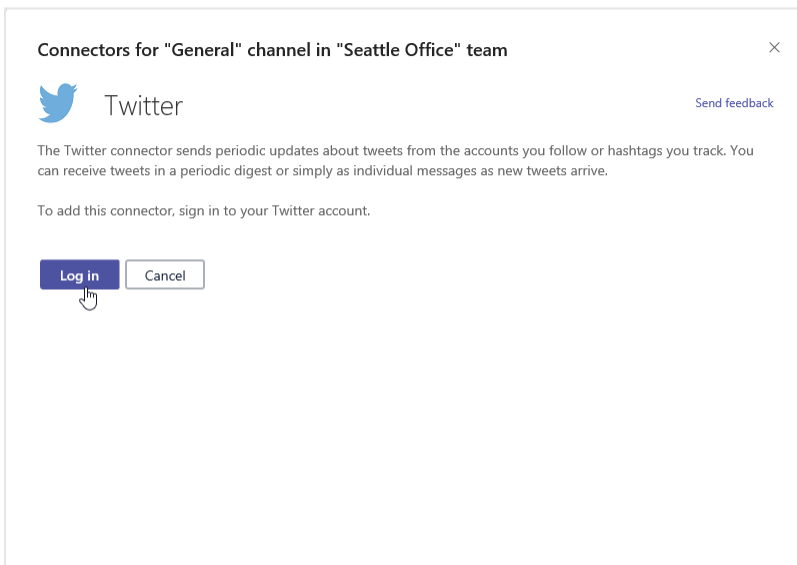
Click OK to confirm the operation:



Now, click the Configured category. Click “Configure” next to the appropriate connector:

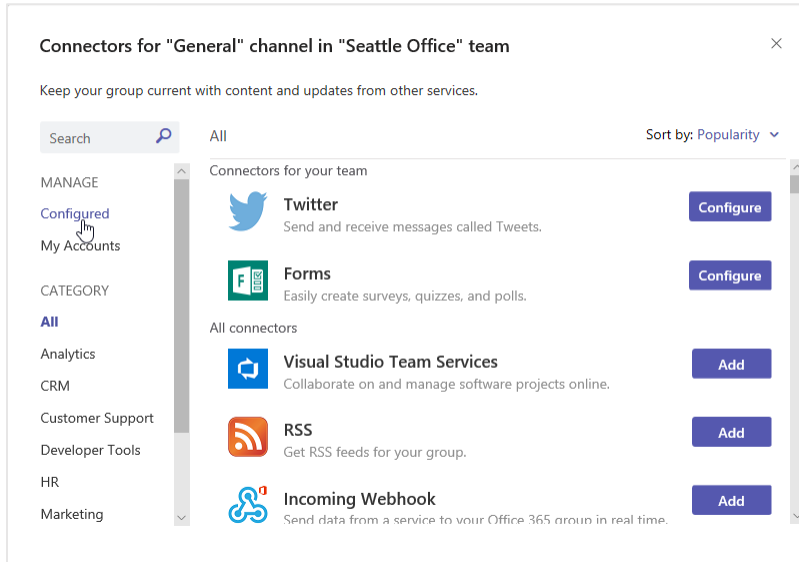


Follow the prompts to log in with a different account:



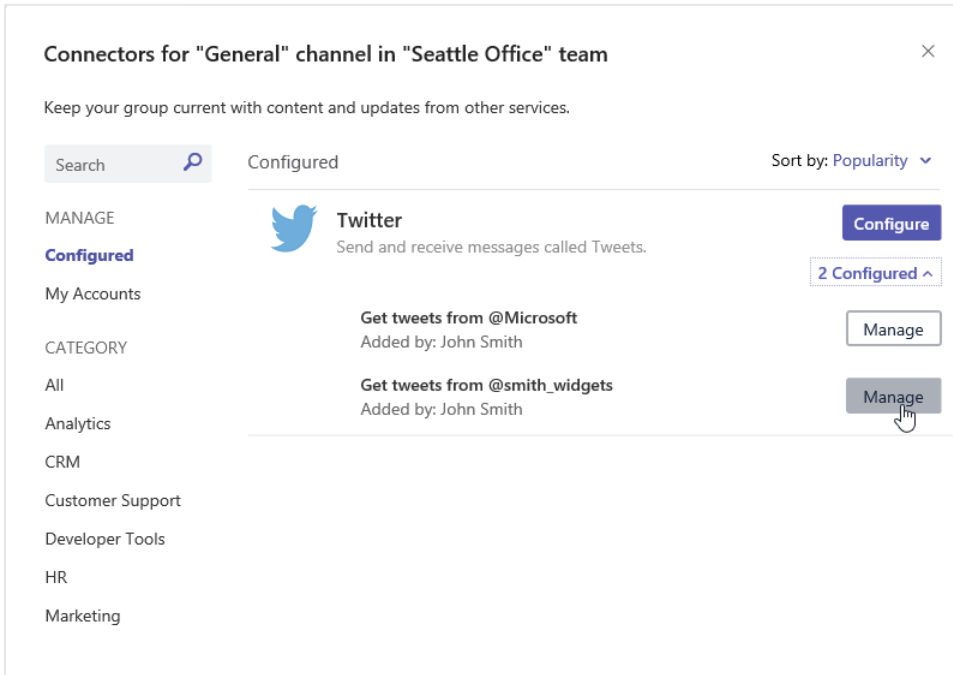
Removing a Connector

To remove a connector, open the Connectors dialog box and click the Configured category on the left:

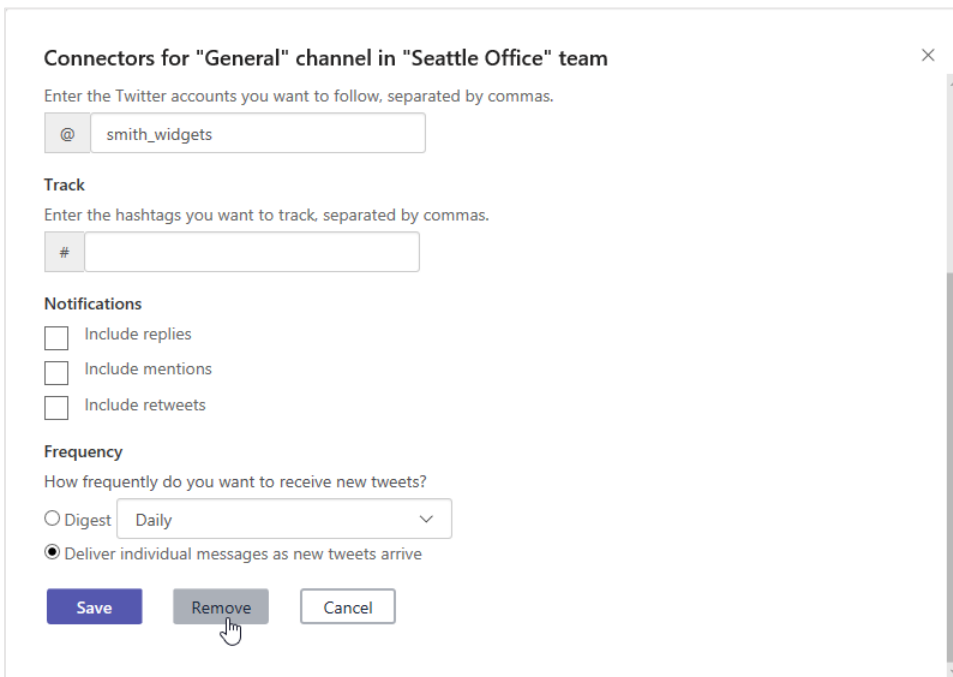


(Remember, you can open this dialog by moving your mouse over the target channel, clicking the ellipses, and clicking “Connectors.”)

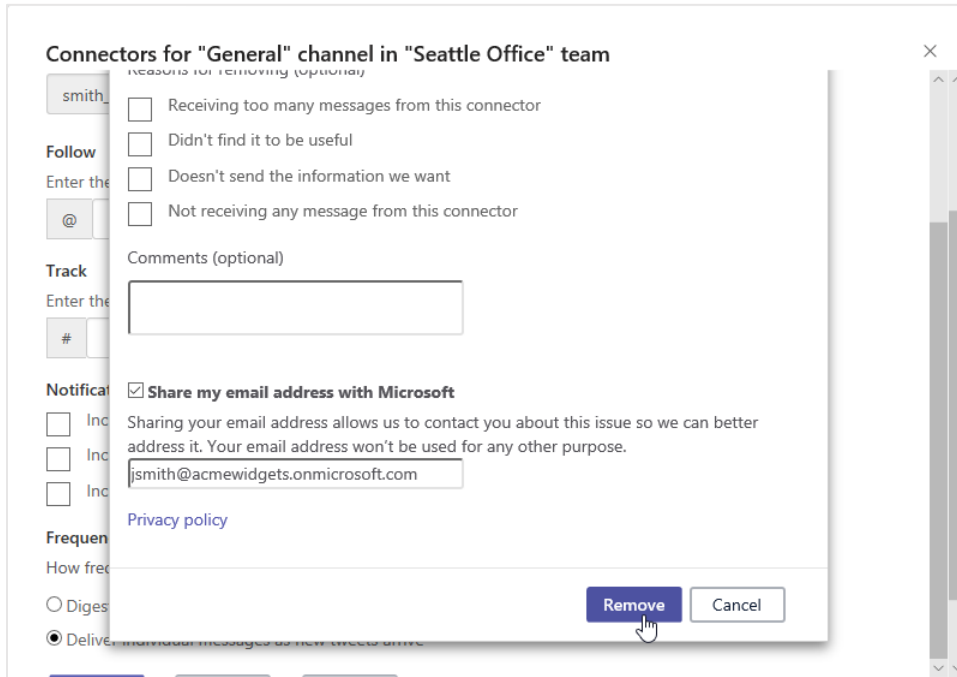
Now, click “Manage” next to the service you want to modify:



Scroll to the bottom of the dialog box and click “Remove:”



Review the information provided and click “Remove” to complete the operation:

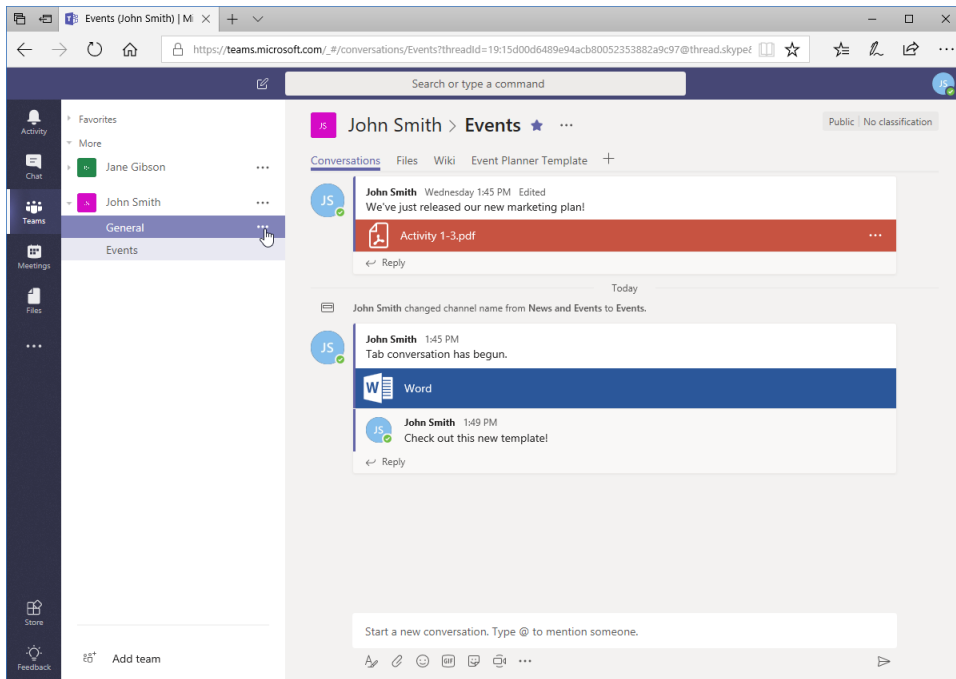


If all services for a particular connector are removed, the connector itself will also be removed.

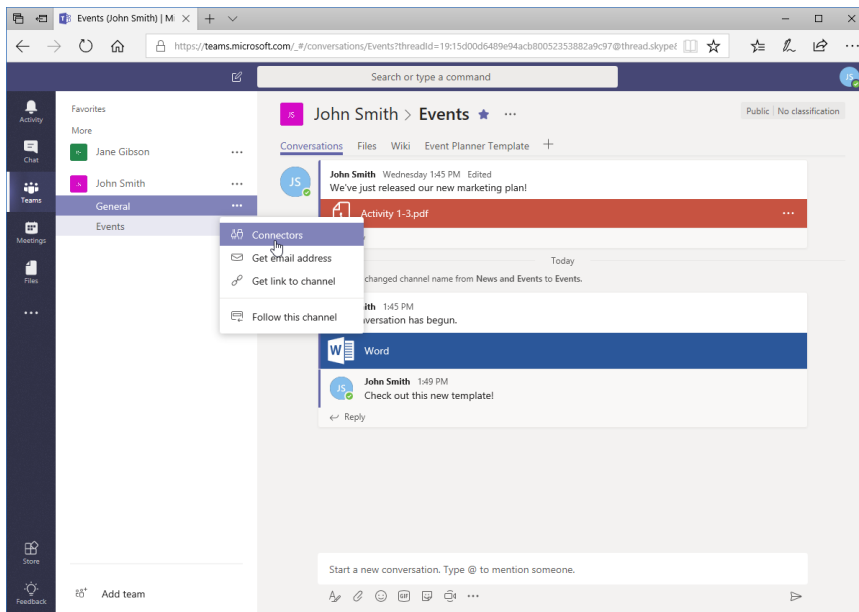
Activity 4-3: Adding Connectors to a Channel

In this activity, you will add a connector to your General channel.

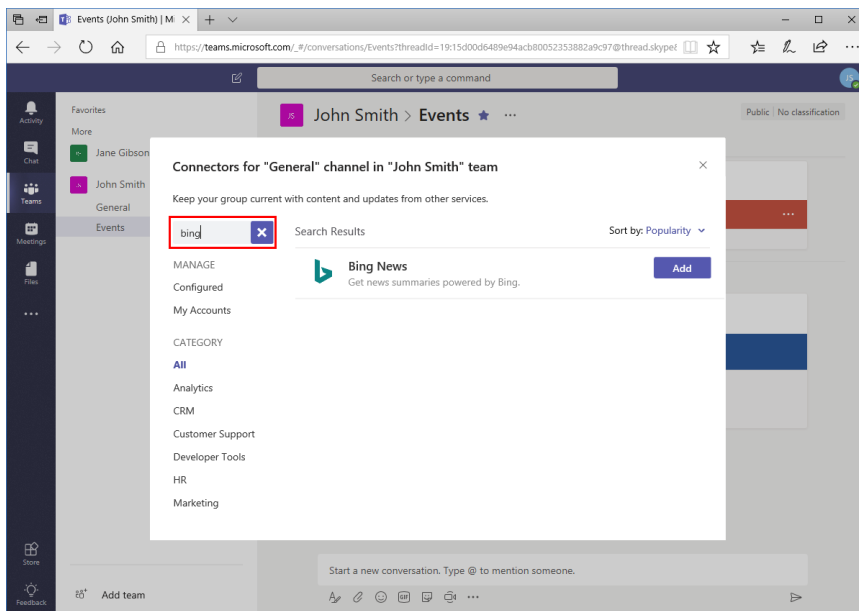
1. Ensure you have completed all previous activities and that Microsoft Teams is open.
2. The Teams list should be displayed. (If not, click the related icon in the sidebar.) Move your mouse over the General channel in the task pane and click the ellipses icon:



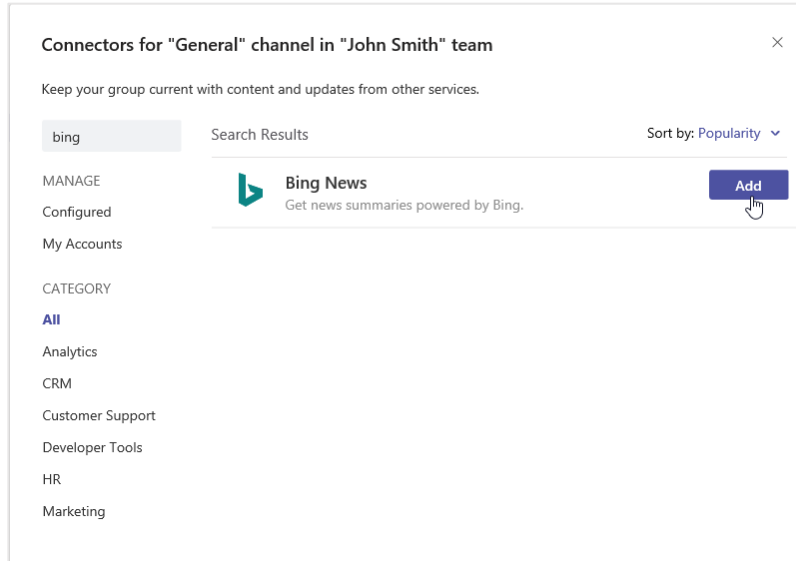
3. Click “Connectors:”



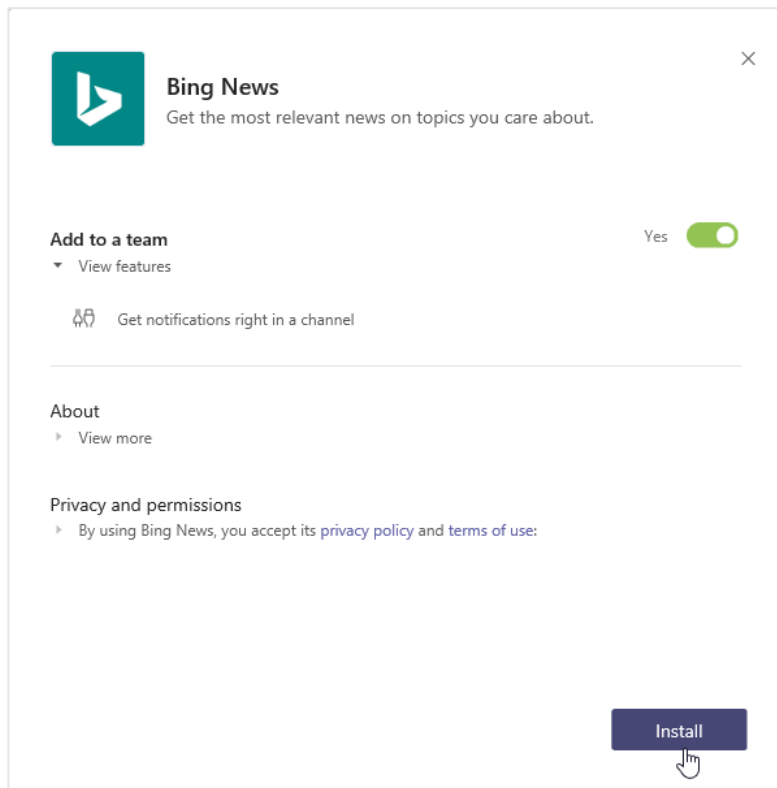
4. The Connectors dialog will open. Type, “bing” in the Search field:



5. Click “Add” next to the appropriate result:



6. Another dialog box will open. Click “Install:”



- Next, you will be prompted to specify the settings for this connector. Type, “Bing News” for the name:

The screenshot shows a configuration window titled "Connectors for 'General' channel in 'John Smith' team". At the top left is the BingNews logo, and at the top right is a "Send feedback" link. Below the logo is the text "Get the most relevant news on topics you care about." The "Name of digest" field contains "Bing News". The "Select topics" field is empty, with a red border and a red error message below it: "Please add at least one topic." The "What time would you like your digest delivered?" dropdown menu is set to "8:00 AM". At the bottom are "Save" and "Cancel" buttons.

- Next, click in the “Select topics” field. Start typing “microsoft” and click the appropriate result:

This screenshot is similar to the previous one, but the "Select topics" field now contains the text "micros". A dropdown menu is open below the field, showing a list of suggestions: "micros", "Microsoft", "Microsoft Windows", "Microsoft Corporation", "Microsoft Studios", "Microsoft Bing", "Sun Microsystems", and "Microsoft Office". The "Microsoft" option is highlighted in blue. The "What time would you like your digest delivered?" dropdown menu is still set to "8:00 AM".

9. Leave the default time selected and click “Save:”

Connectors for "General" channel in "John Smith" team

BingNews [Send feedback](#)

Get the most relevant news on topics you care about.

Name of digest

Select topics

What time would you like your digest delivered?

10. You will be taken back to the Connectors dialog box, where you can see that the connector has successfully been installed. Close the dialog to return to Teams:

Connectors for "General" channel in "John Smith" team

Keep your group current with content and updates from other services.

Search Results [Sort by: Popularity](#)

MANAGE

Configured **Bing News**
Get news summaries powered by Bing.

CATEGORY

All

Analytics

CRM

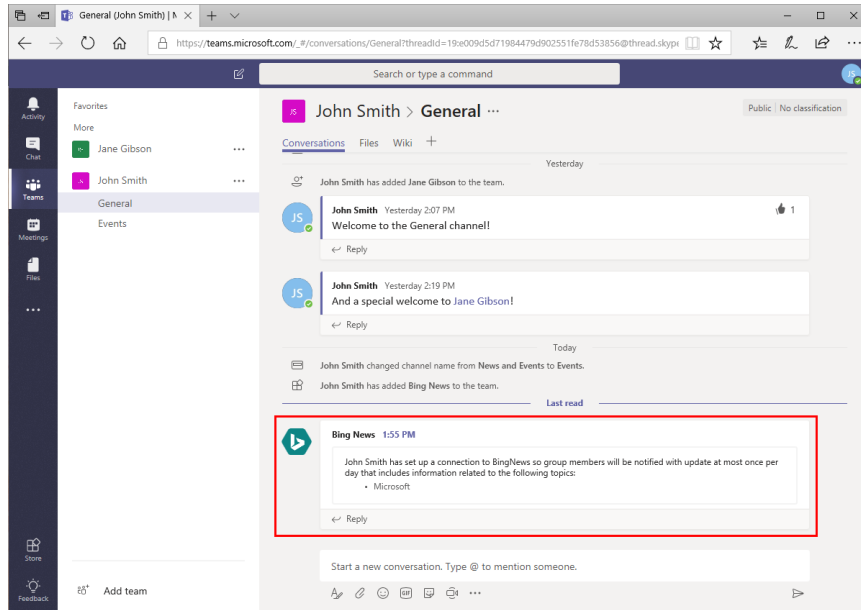
Customer Support

Developer Tools

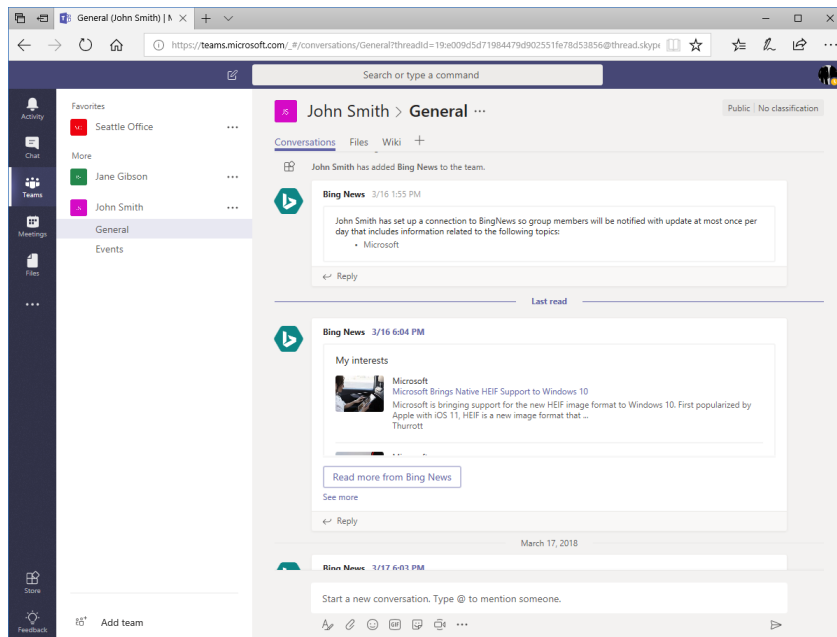
HR

Marketing

11. View the General channel. You should see a notification about the new connector:



12. Now, Bing will automatically deliver a news digest to this channel once a day:



This activity is now complete.

Summary

In this lesson, we learned how to customize a channel and add functionality to it using tabs and connectors.

Review Questions

1. You have created a team. Now, you would like to create a SharePoint site linked with it. How will you do this?
2. Which tabs can be renamed?
3. How do you add a connector to a channel?
4. True or False: When a channel is deleted, all conversations and files are deleted too.
5. How do you start a conversation in a custom tab?

LESSON 5: CUSTOMIZING YOUR TEAMS EXPERIENCE

Lesson Objectives

In this lesson you will learn how to:

- Manage your Teams profile
- Manage teams
- Add bots and apps to Teams

TOPIC A: Managing Your Teams Profile

Your Office 365 profile is linked to Teams so your colleagues can identify who you are. You can also set your status to let people know when you are not available and customize your Teams experience.

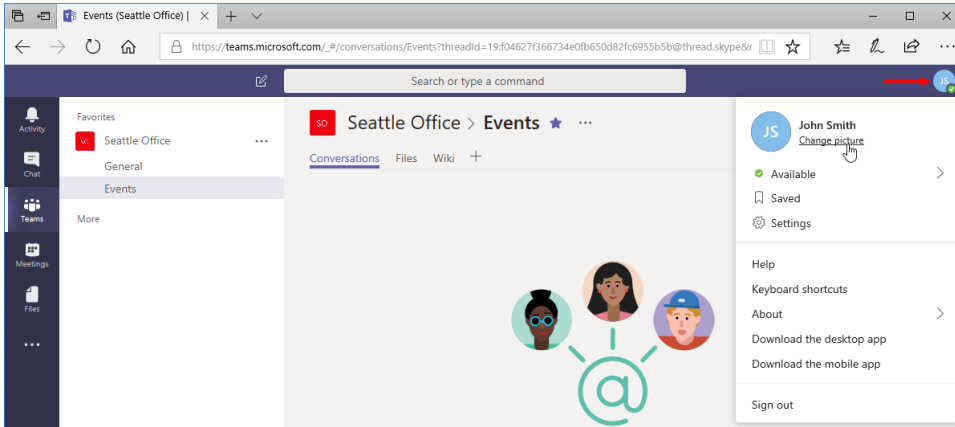
Topic Objectives

In this section, you will learn how to:

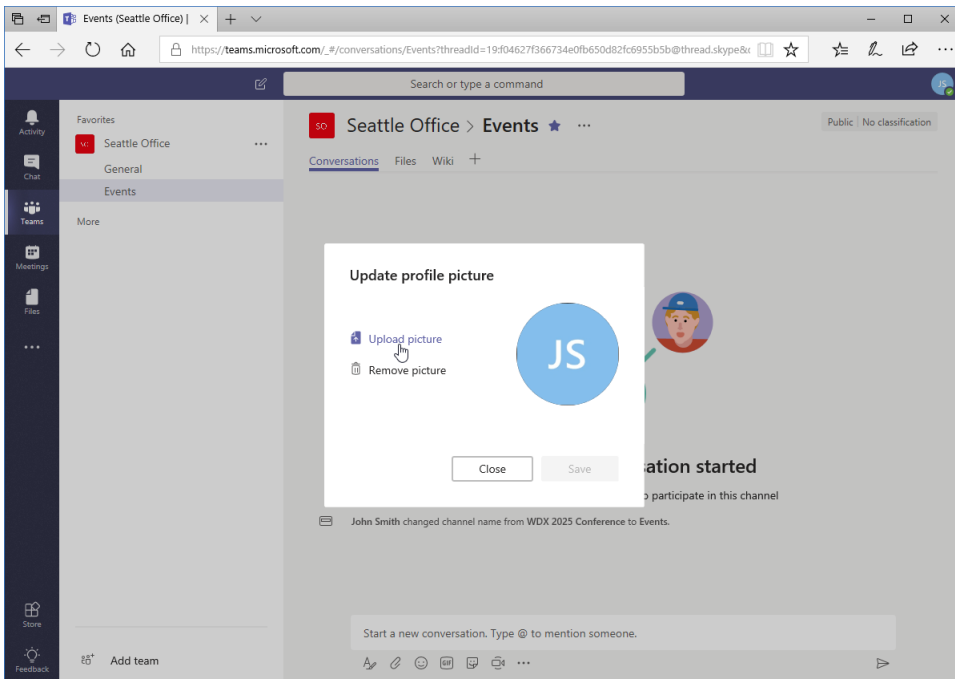
- Update your profile picture
- Change your status
- Change Teams settings
- Log out of Microsoft Teams

Updating Your Profile Picture

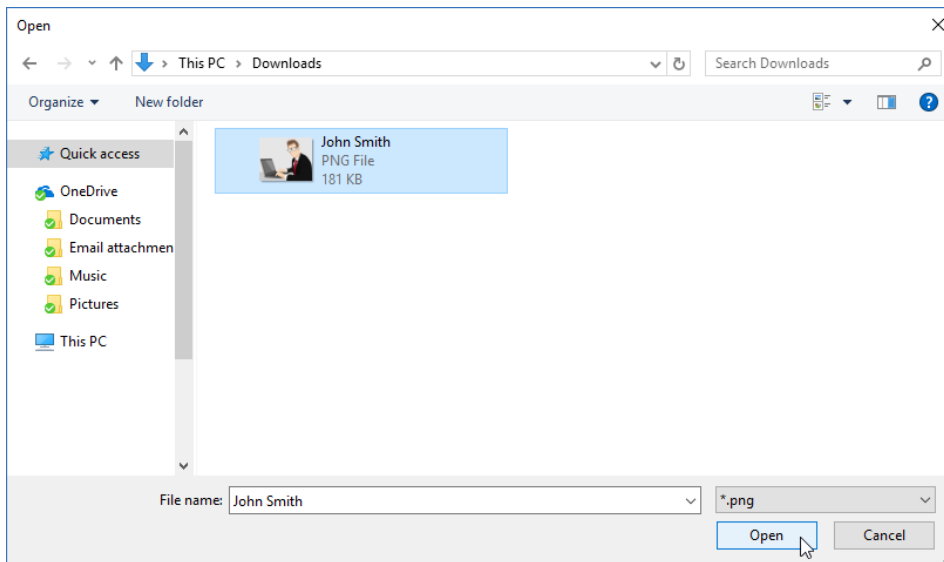
To update your profile picture, click your profile icon in the top-right corner of the Teams window. Then, click the “Change picture” link:



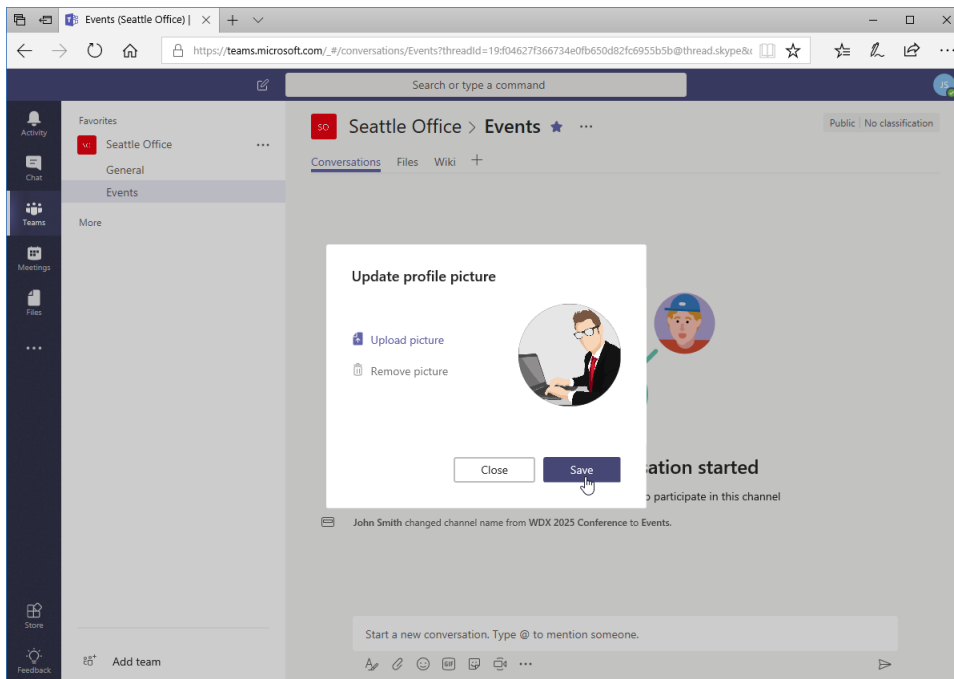
The “Update profile picture” window will open. Here, you can remove the current picture (resetting it to your initials, as shown here), or upload a new one. Let’s upload a new one:



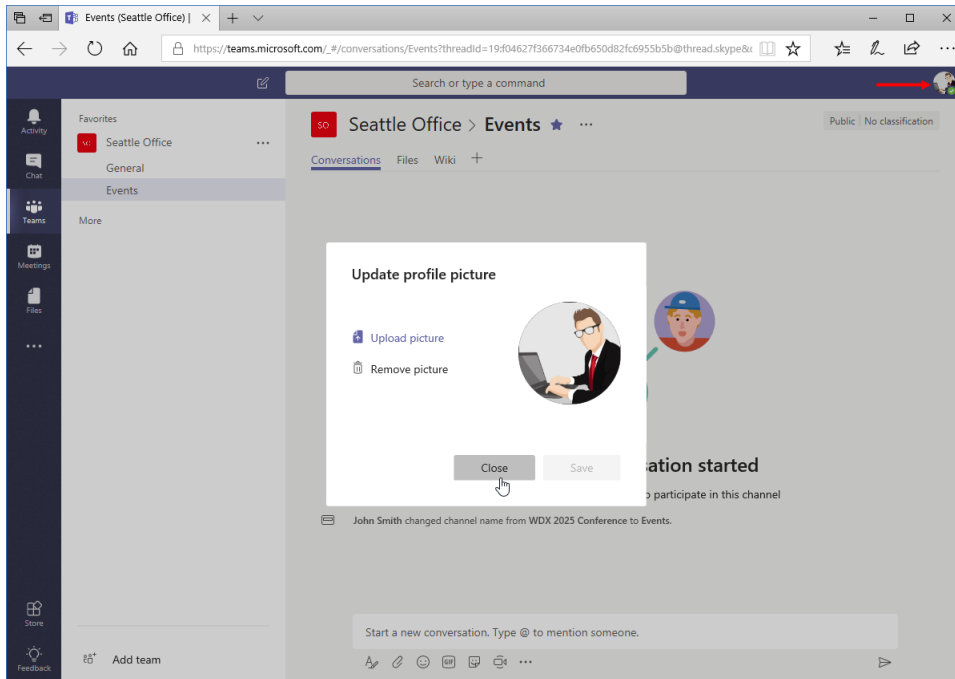
Then, the Open window will appear. Browse to your image, select it, and click “Open:”



You will now be taken back to Microsoft Teams. Click “Save” to complete the operation:

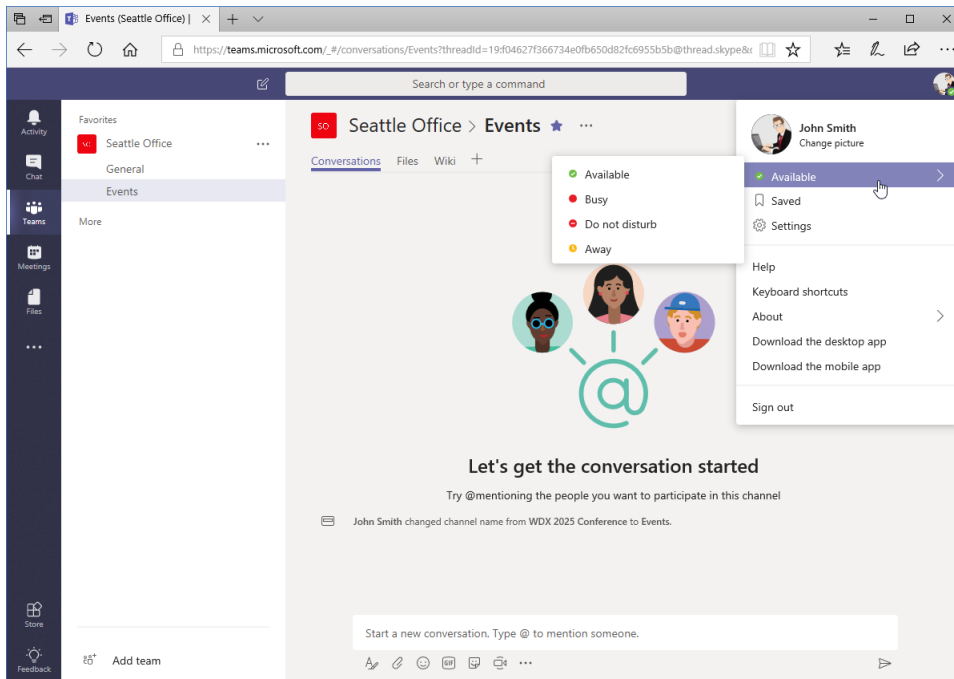


You can now close the dialog as your changes have been applied:



Changing Your Status

Just as with other messaging and collaboration apps, Microsoft Teams lets you set your status so your colleagues know whether you are available or not. You can set your status from the profile menu:

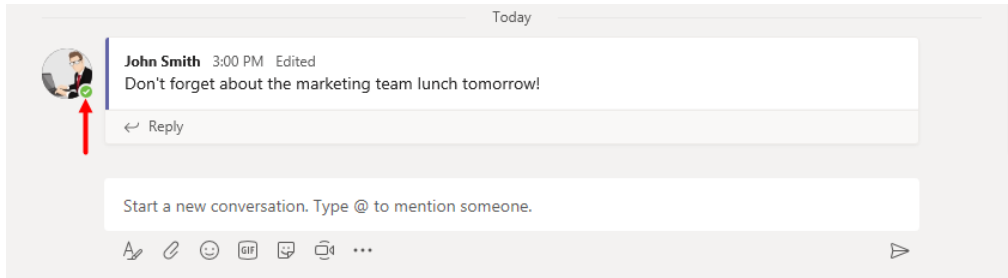


There are four statuses:

- Available (green check)
- Busy (red circle)
- Do Not Disturb (red circle with a white line)
- Away (yellow clock)

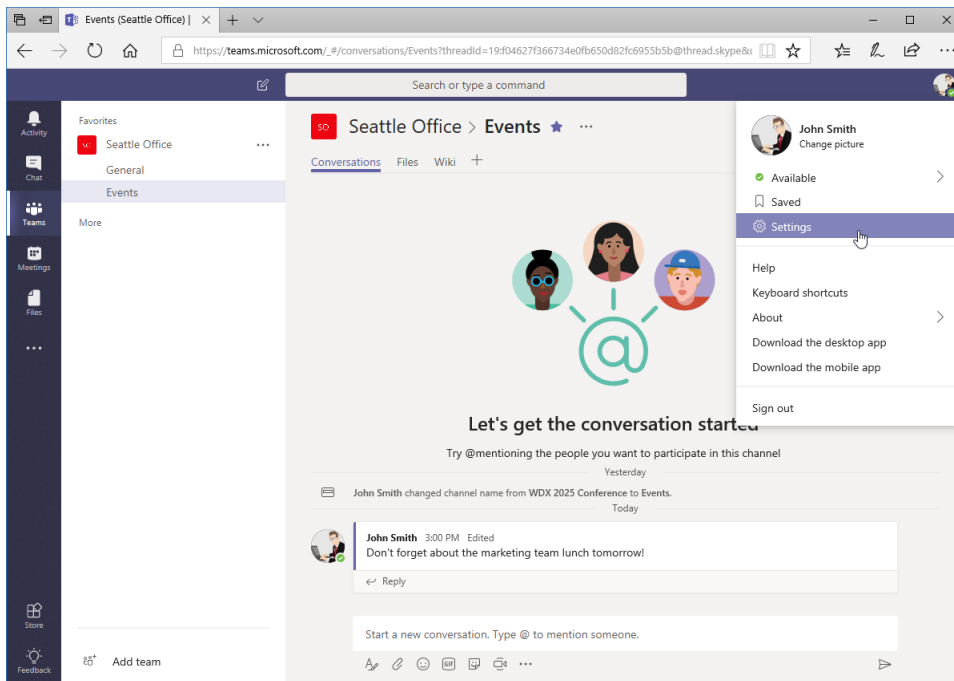
Note that some of these statuses may be applied automatically. For example, if you are in a call, your status will automatically be changed to Busy.

The icon in the bottom corner of a person’s profile icon (including your own) will indicate their status:

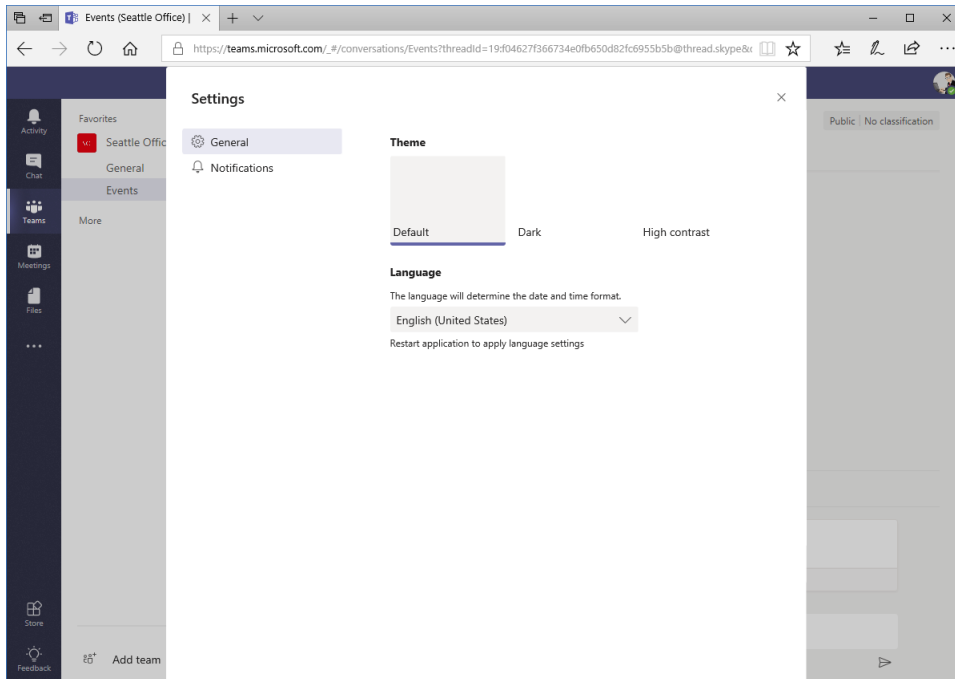


Changing Your Teams Settings

To change your personal Teams settings, click your profile menu and click “Settings:”

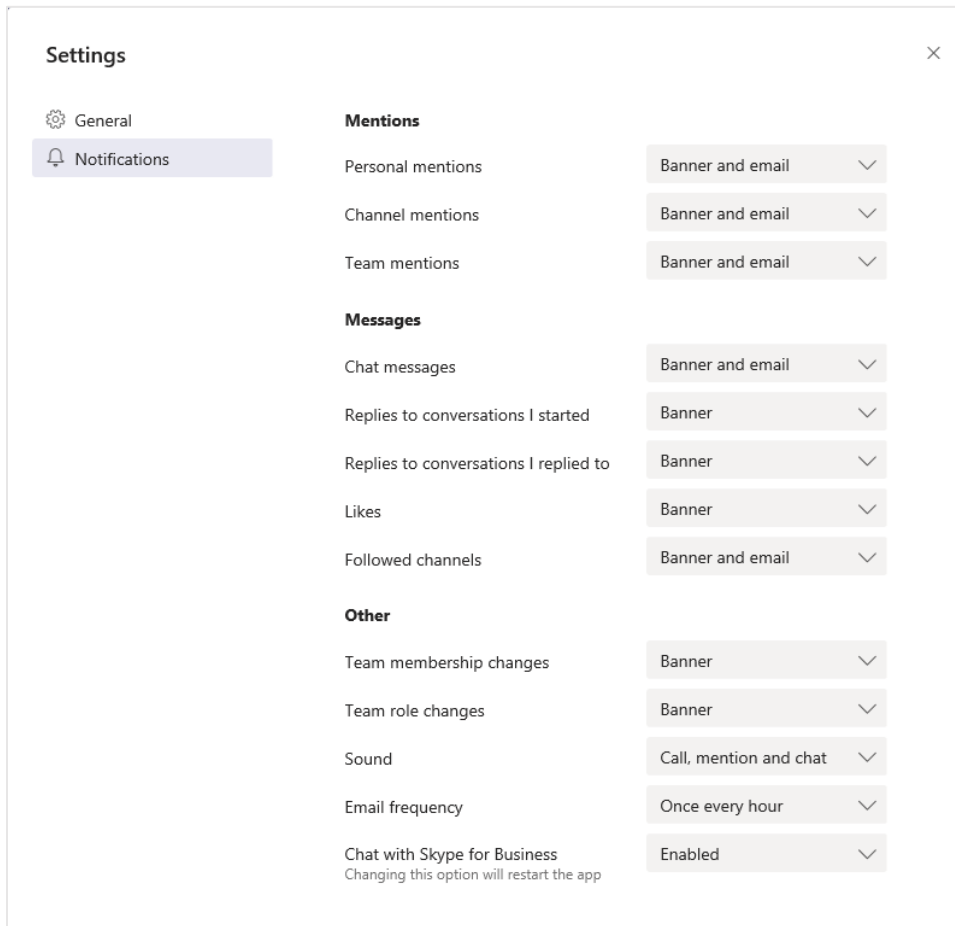


The Settings dialog will open:



There are two categories in this dialog. The **General** category (displayed by default) allows you to change the theme and language.

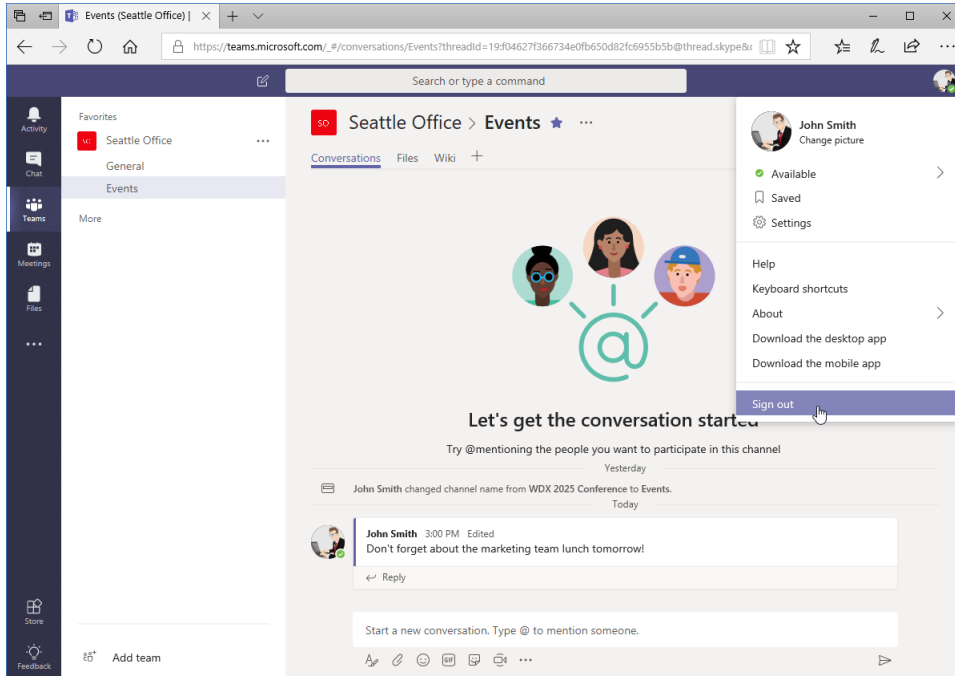
The **Notifications** category allows you to customize notifications for all Teams events:



Any changes you make in this dialog will automatically be saved, so you can close it at any time.

Logging Out of Teams

To log out of teams completely, click the profile menu and click “Sign out:”

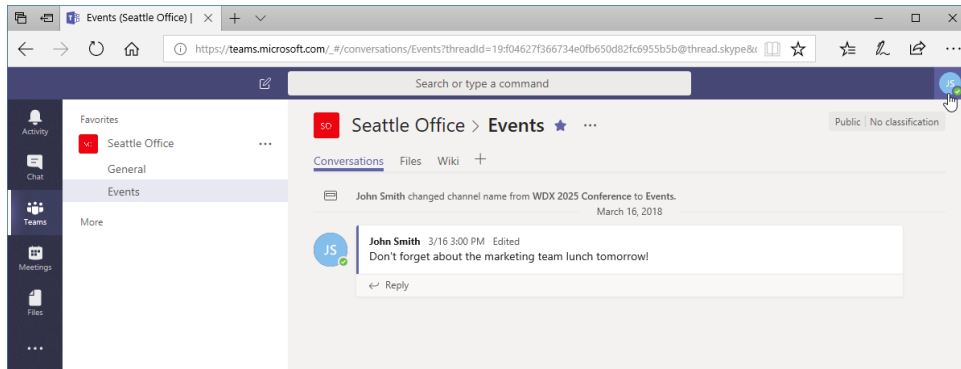


You will now be signed out of Teams, which means you will no longer see notifications. You will need to sign back in to access the app.

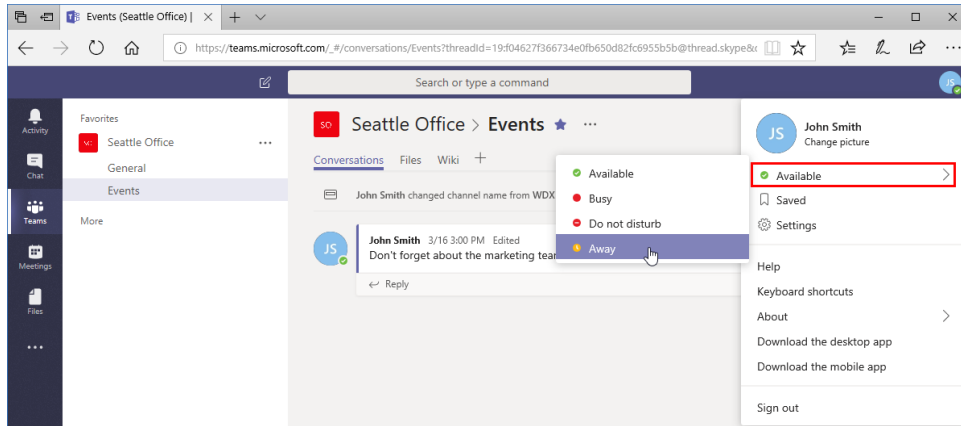
Activity 5-1: Managing Your Teams Profile

In this activity, you will update your status, profile picture, and settings.

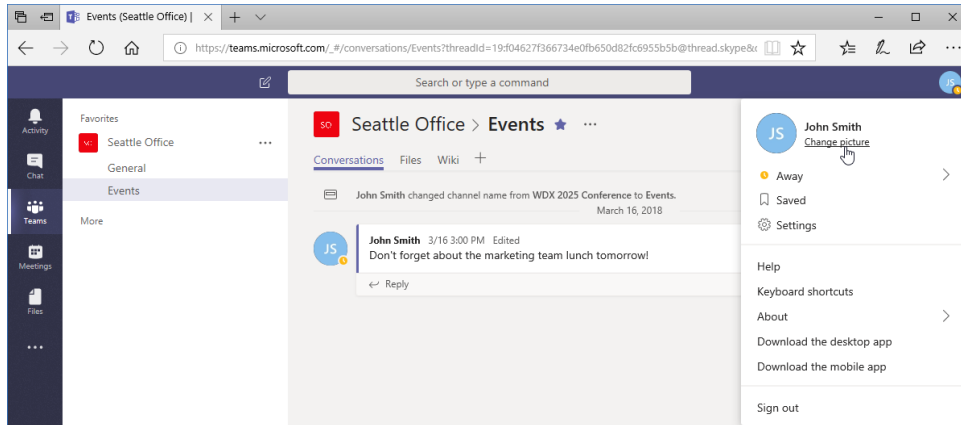
1. Ensure you have completed all the previous activities and that Microsoft Teams is open.
2. First, let's set your status to Away while we update your profile. Click your profile icon in the top right corner of the window:



3. Move your mouse over the first item in the menu (which indicates your status) and click “Away” from the sub-menu:

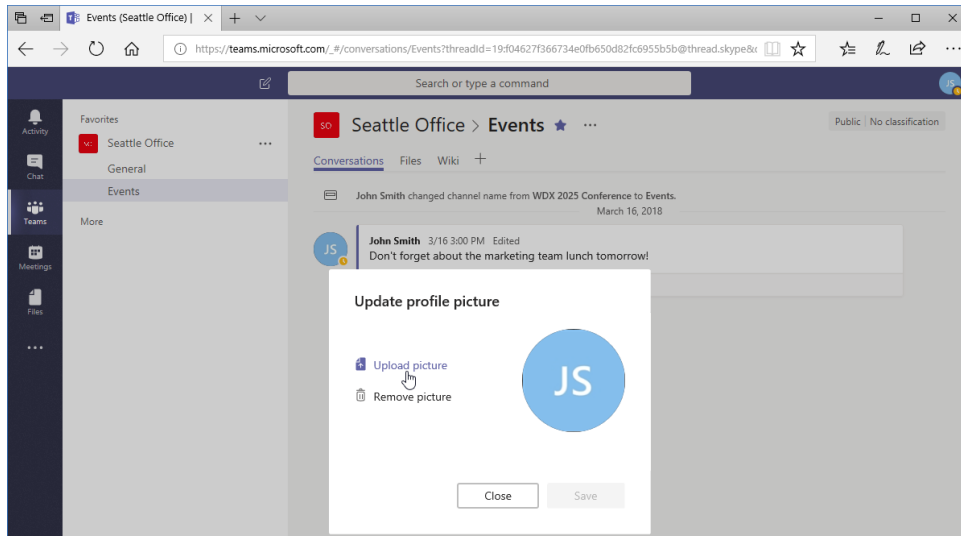


4. Click the profile menu again and click “Change picture:”

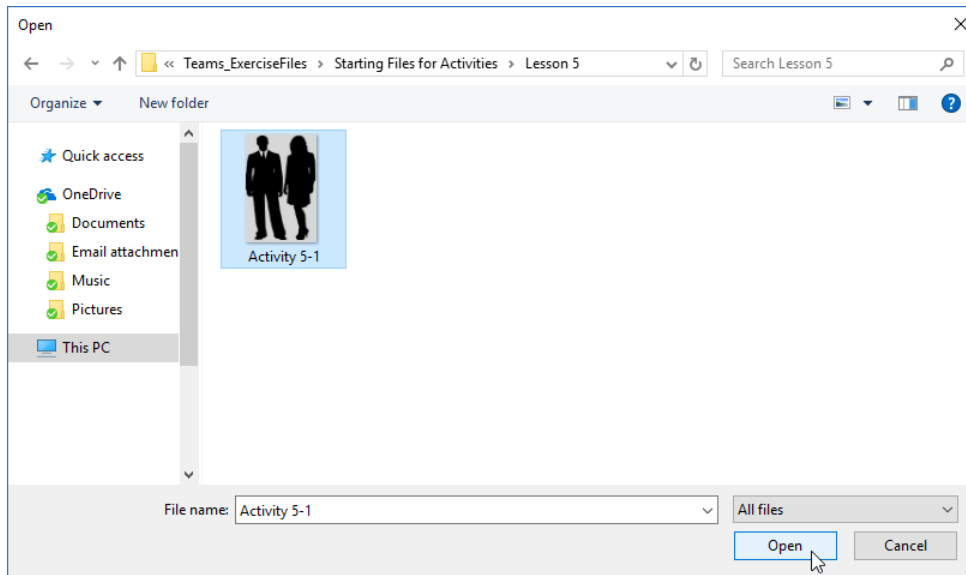


(Notice that your status is now set to Away.)

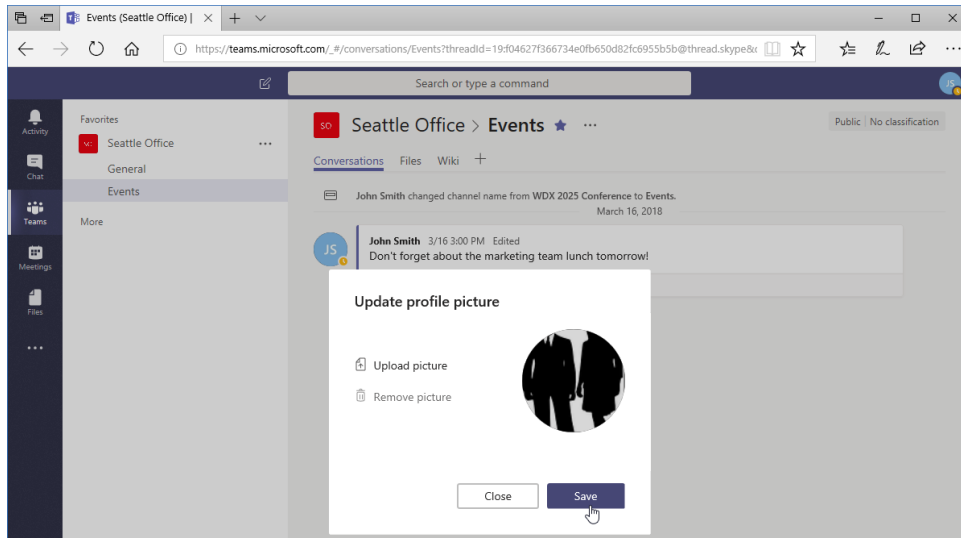
5. In the dialog box that appears, click “Upload picture:”



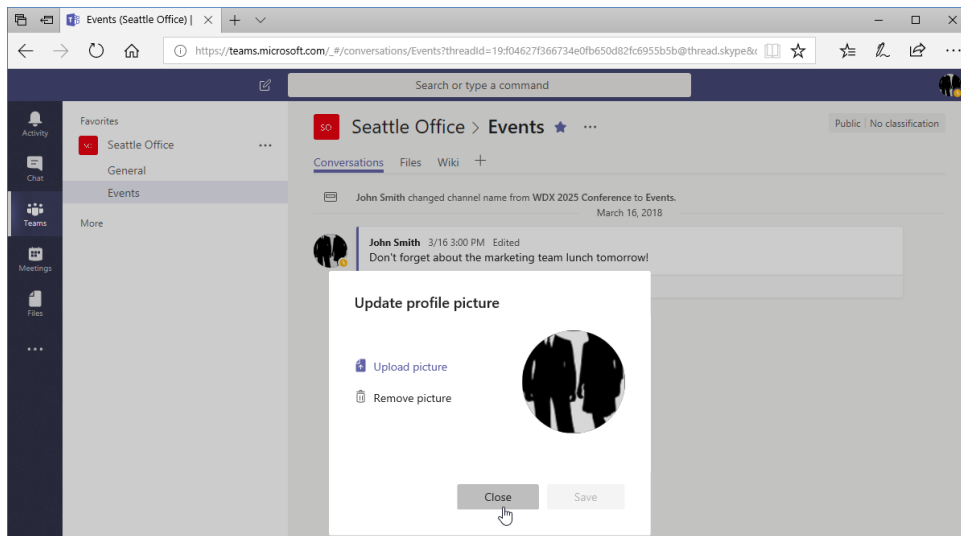
6. Browse to Lesson 5 of your Exercise Files. Select the Activity 5-1 image and click “Open:”



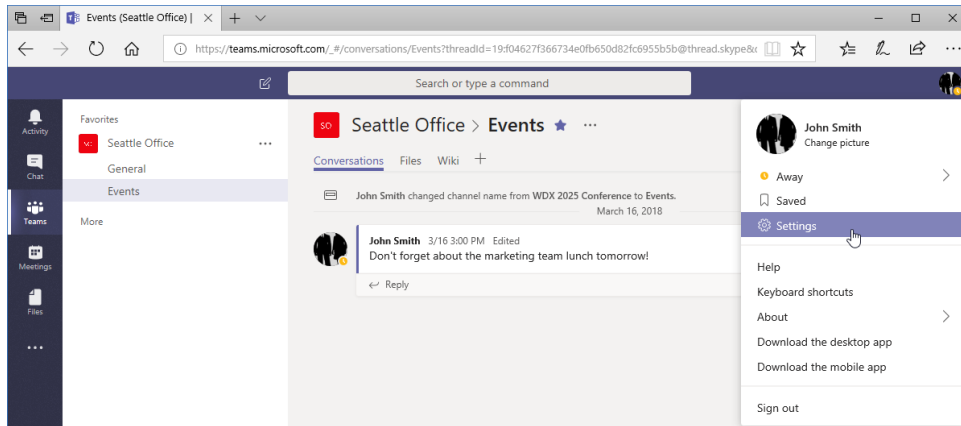
7. Click “Save” to complete the process:



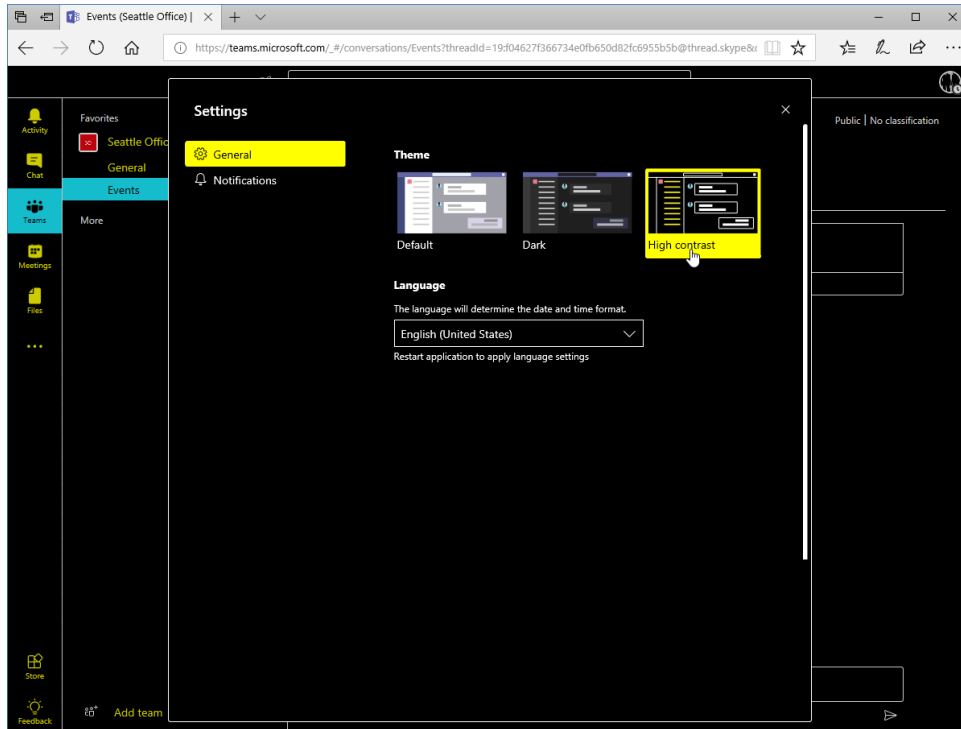
8. Close the dialog box:



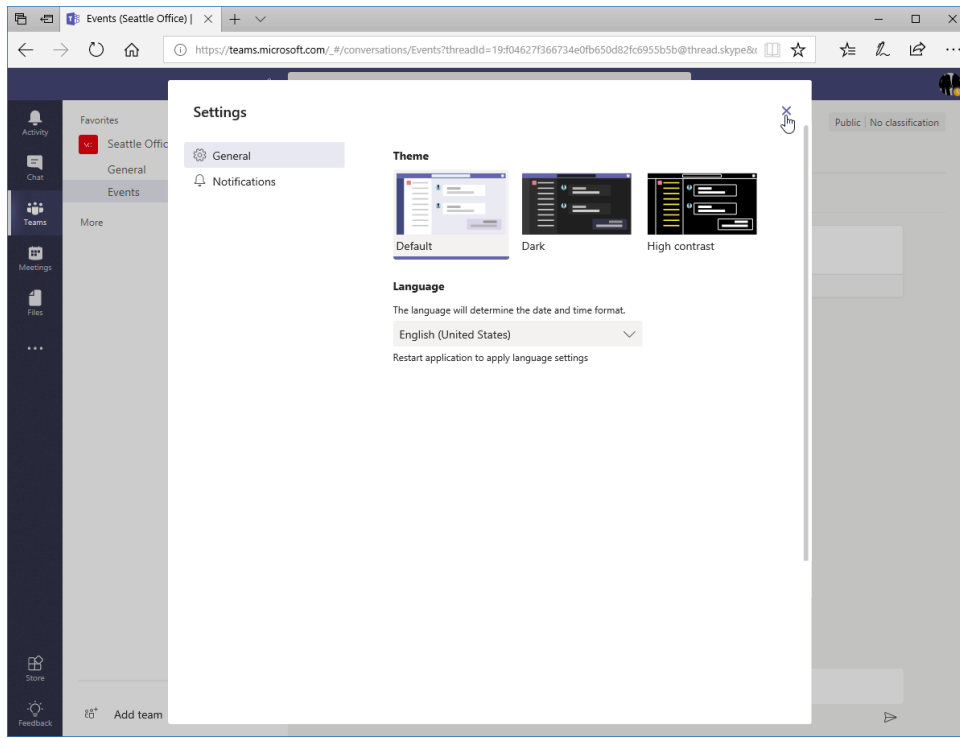
9. Click the profile menu again and click “Settings:”



10. The Settings dialog will open to the General tab. Try applying the other available themes:



11. To complete this activity, ensure the Default theme is selected and close the Settings dialog box:



TOPIC B: Managing Teams

If you are the owner of a team, you may need to edit its name or change its settings. There are two places to find these settings – we will explore both in this topic.

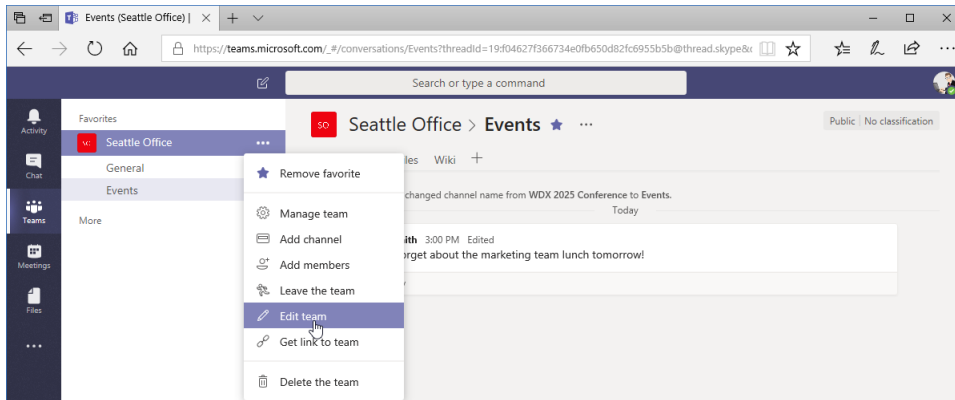
Topic Objectives

In this section, you will learn how to:

- Edit a team's name, description, and privacy
- Access team settings to manage its members, channels, settings, and apps
- Delete a team

Editing the Team

To change the name, description, and/or privacy of your team, move your mouse over its name in the task pane. Click the ellipses and click “Edit team:”



The “Edit team” window will open:

Edit "Seattle Office" team

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Watch a quick overview](#)

Team name

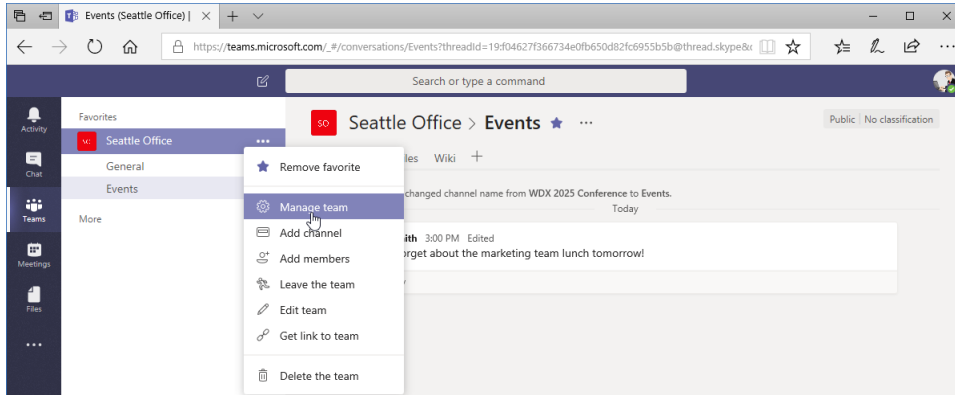
Description

Privacy

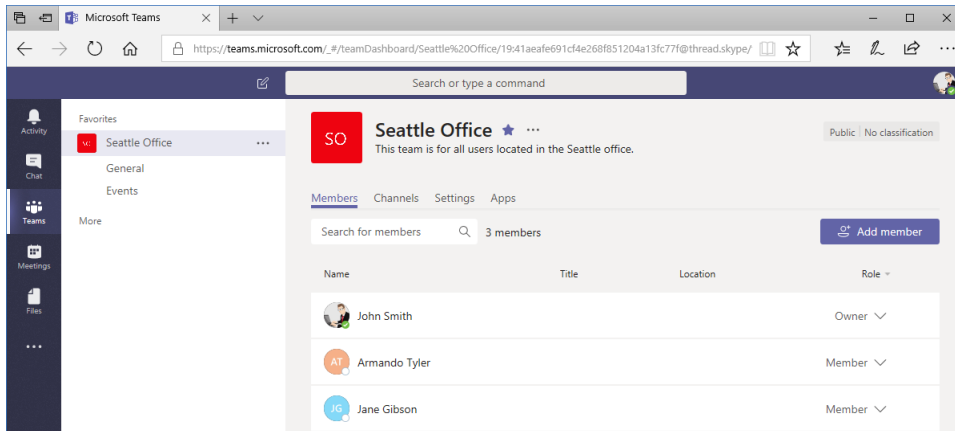
Simply make your changes and click “Done” to return to the Teams window.

Accessing Advanced Team Settings

To access advanced team settings, open the settings menu by moving your mouse over its name in the task pane and clicking the ellipses. Now, click “Manage team” from the menu:

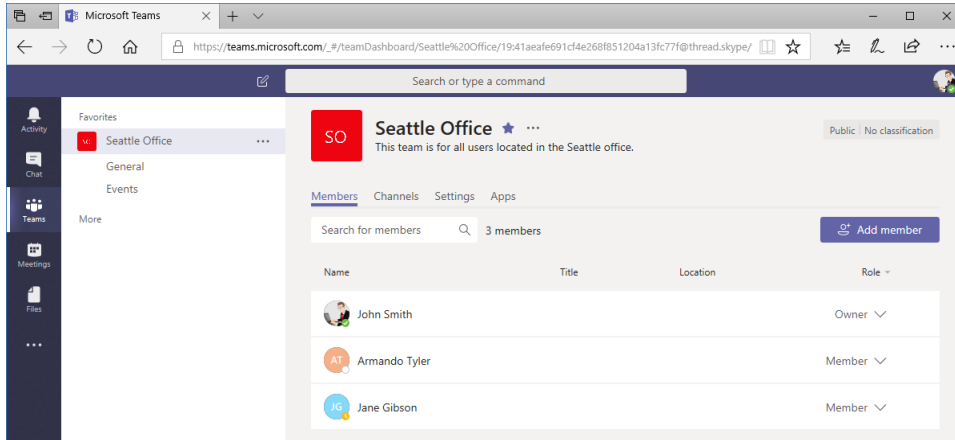


You will then see the following window:

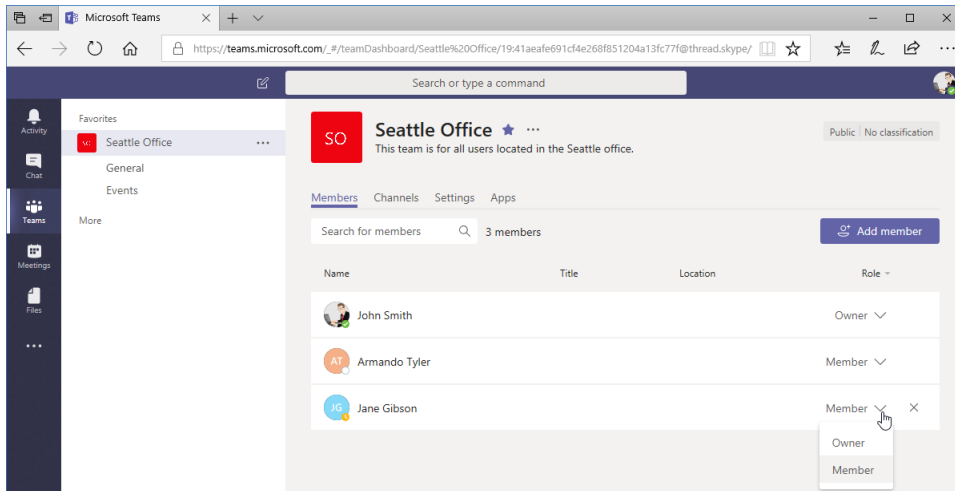


Managing Team Members

Let's look at the first tab in this window, which lists all team members:

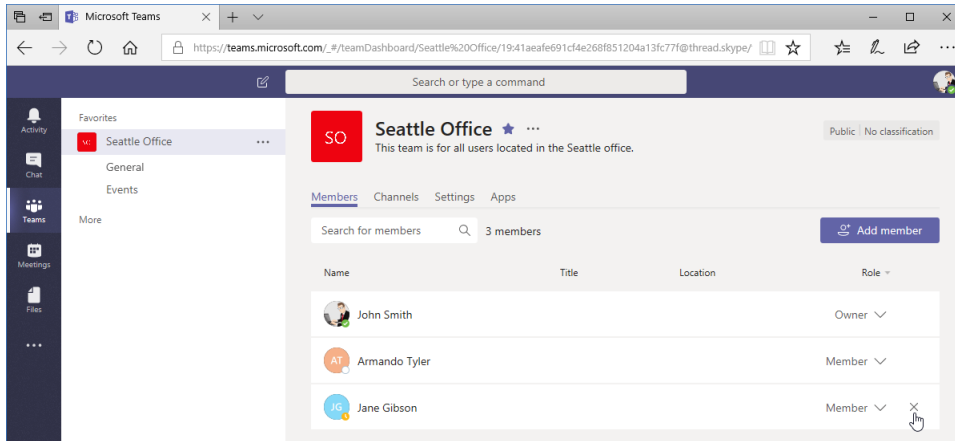


At the top of the window, you can search the team list or add a new member. To change a user's permission level, click the arrow next to their role:



You can now make the user an owner or a member.

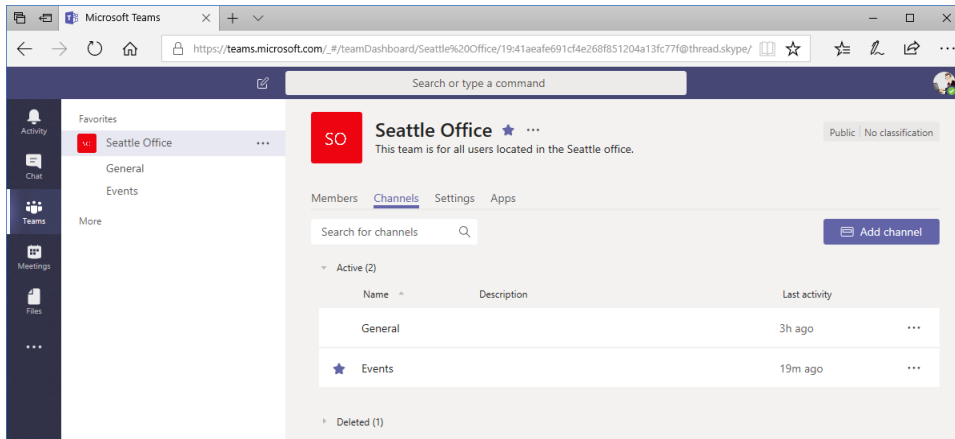
To remove a member, move your mouse over their name and click the “X” on the right edge:



Note that there is no warning to confirm this operation, so be very careful!

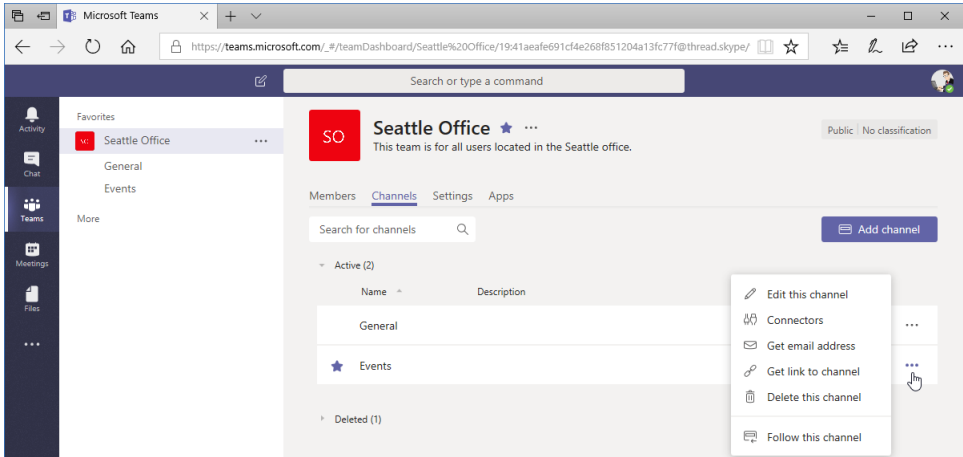
Managing Channels

The next tab provides a central place to manage channels:

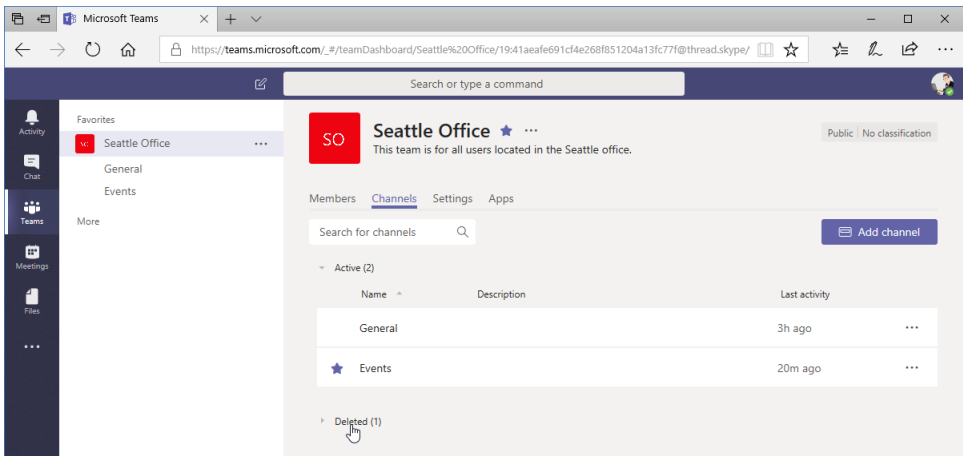


Similar to the Members tab, you can view, search, and add channels.

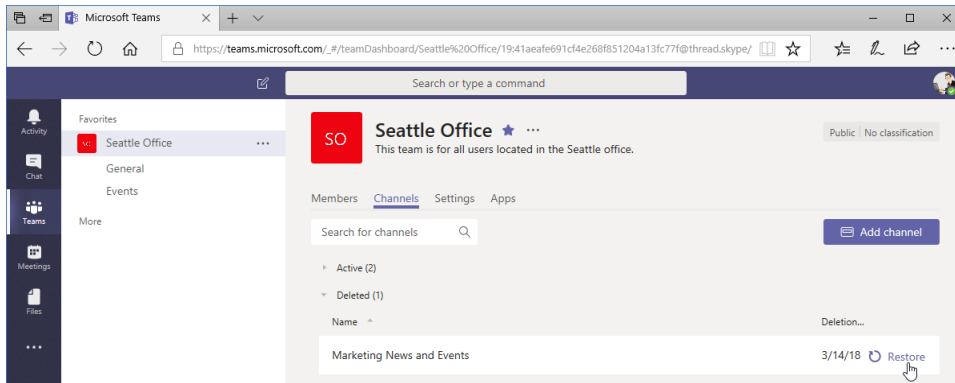
Click the ellipses to manage an individual channel:



Notice that there is a category for deleted channels, too. Click the heading to see deleted items:

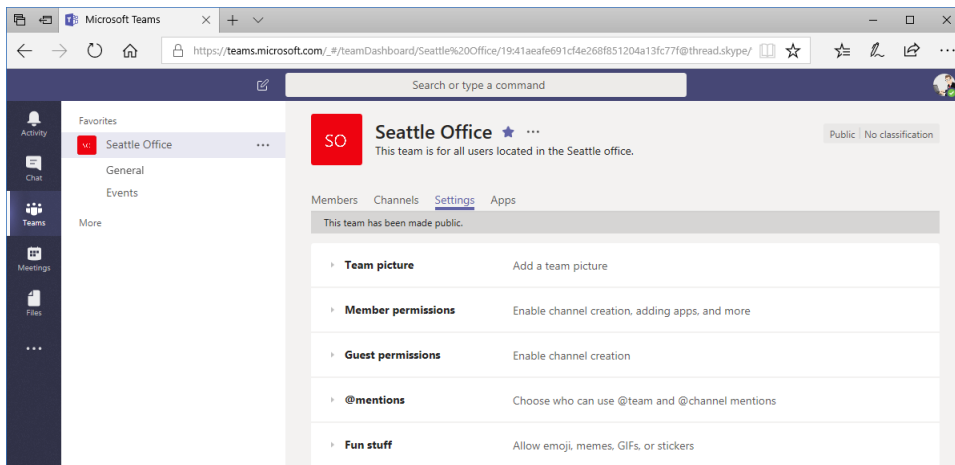


This will show the deletion date and an option to restore the channel:



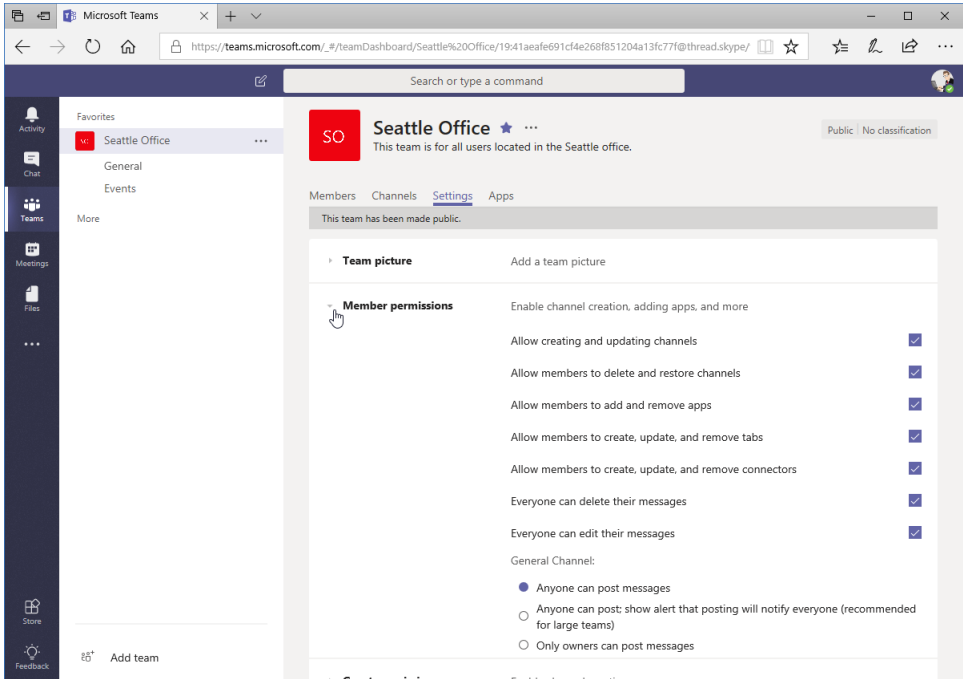
Managing Settings

The next tab is Settings:



This tab contains a variety of different options, which are set per team.

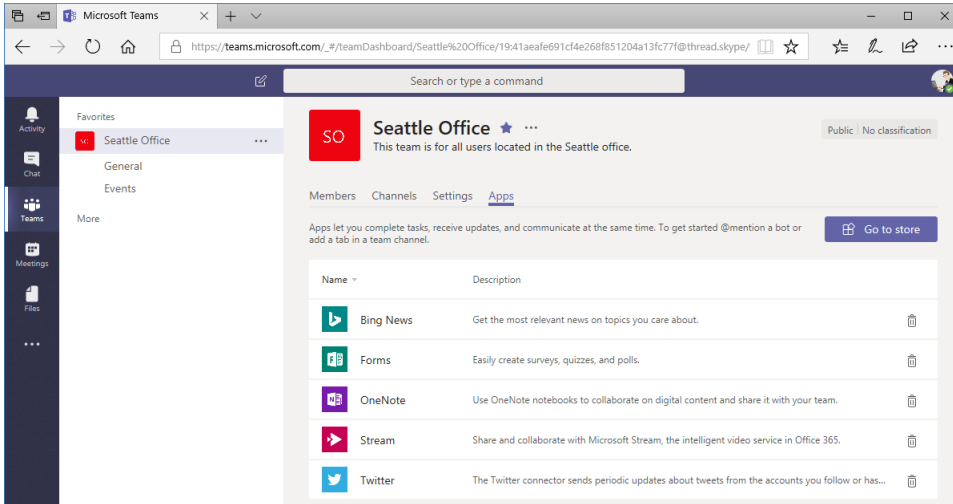
Click a heading to expand it and then change the desired options:



Note that all changes are saved automatically.

Managing Apps

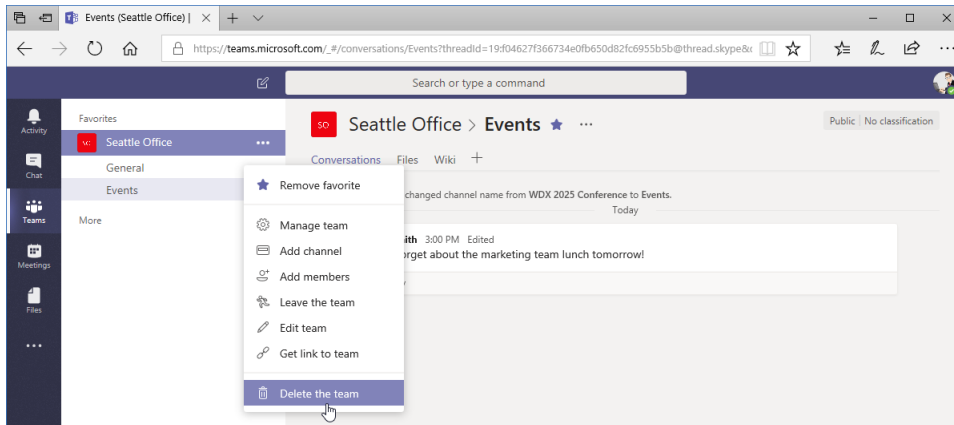
The final tab is Apps, which includes both connectors and Teams apps (which we will learn about in the next lesson):



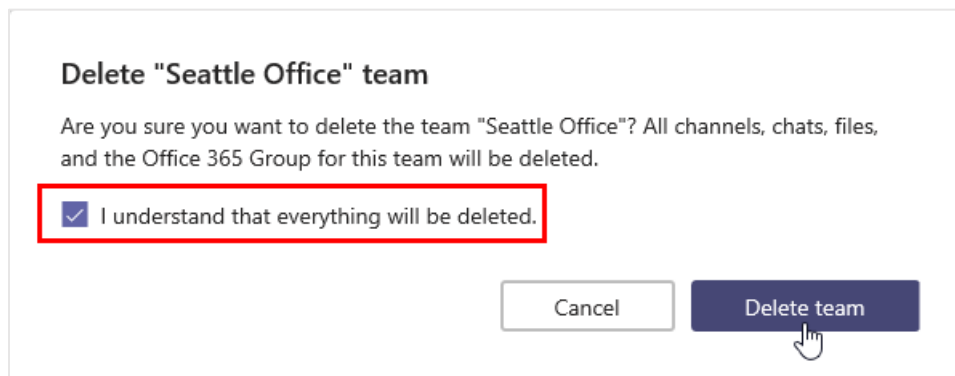
Here, you can see some of the connectors we installed in the last lesson, as well as some default tools. You can click the trash can to remove an app, or click “Go to store” to install new apps.

Deleting the Team

The final option we would like to explore is deleting a team. Move your mouse over the team name, click the ellipses, and click “Delete the team:”



A confirmation box will appear. **Read the information carefully.** If you are sure you want to delete the team, check the “I understand” box and click “Delete team:”

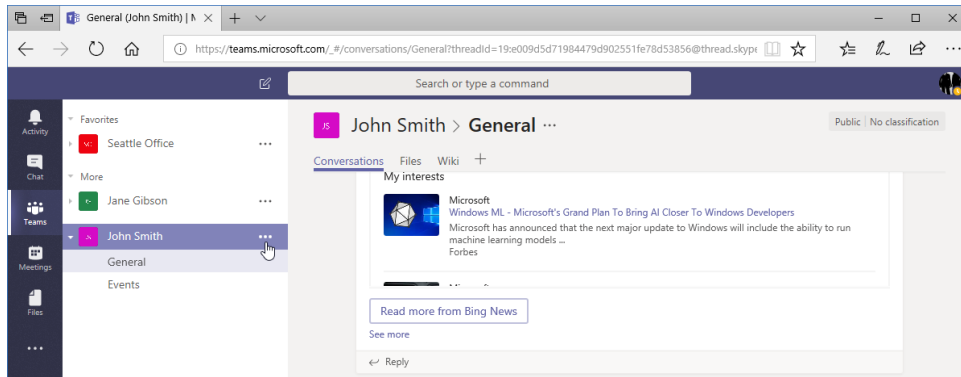


The team will then be deleted and cannot be restored.

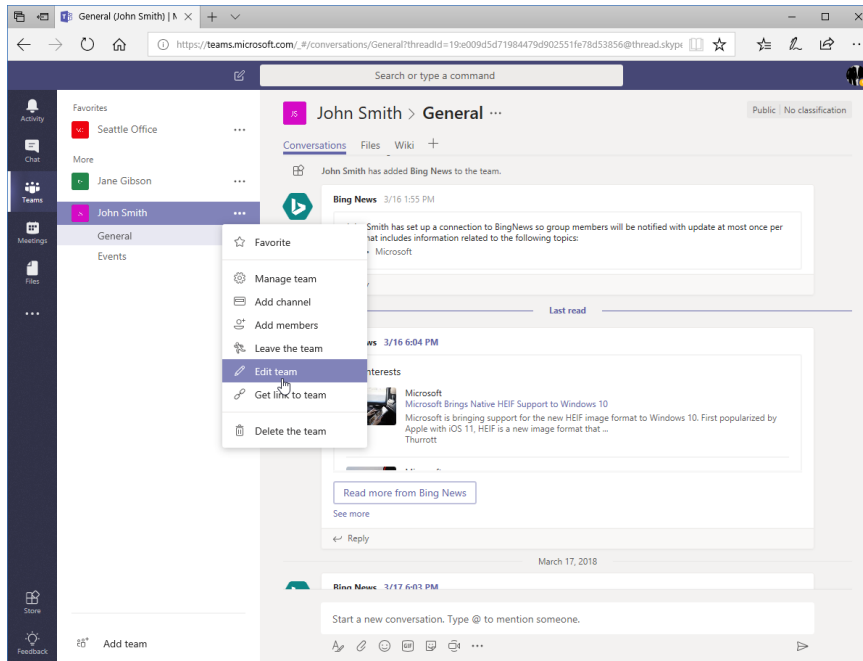
Activity 5-2: Managing Teams

In this activity, you will review your team's settings.

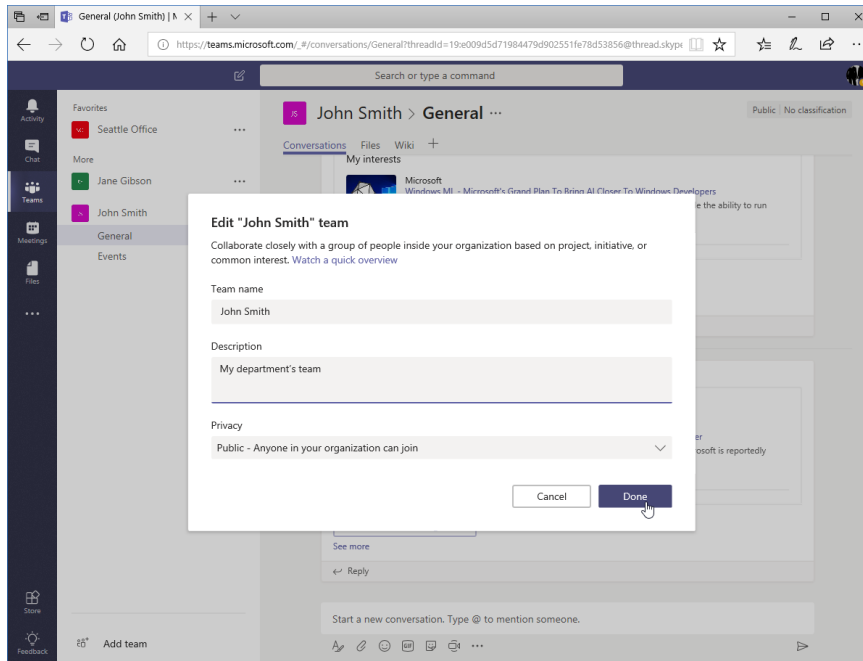
1. Ensure you have completed all the previous activities and that Microsoft Teams is open.
2. Ensure the Teams icon is selected from the sidebar. Move your mouse over the team with your name and click the ellipses:



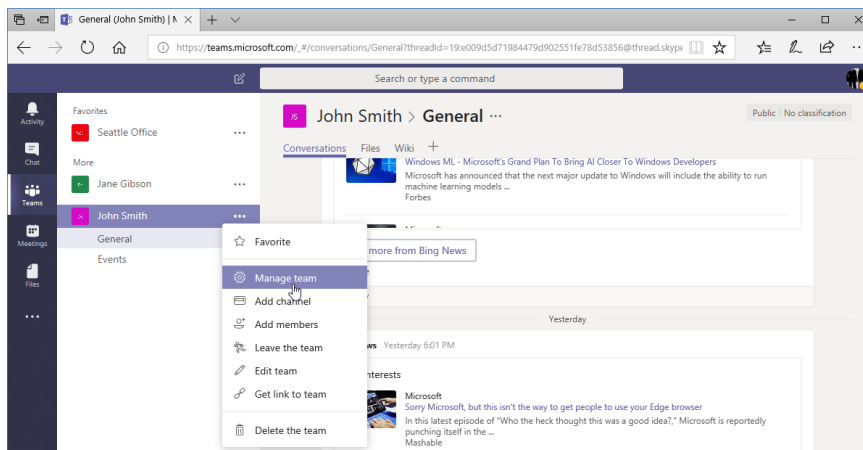
3. Click “Edit team:”



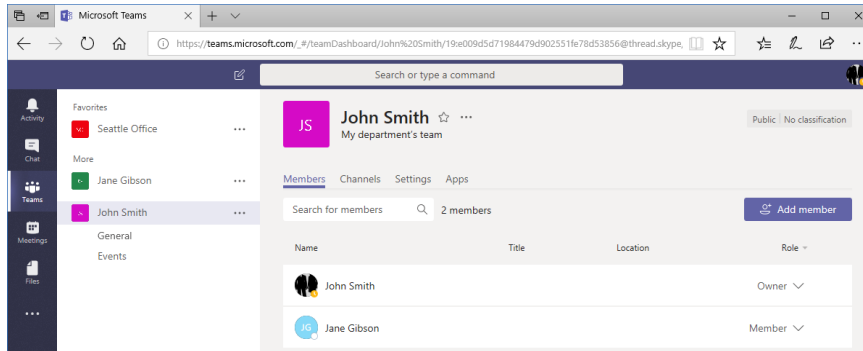
4. Change the description to, “My department’s team” and click “Done:”



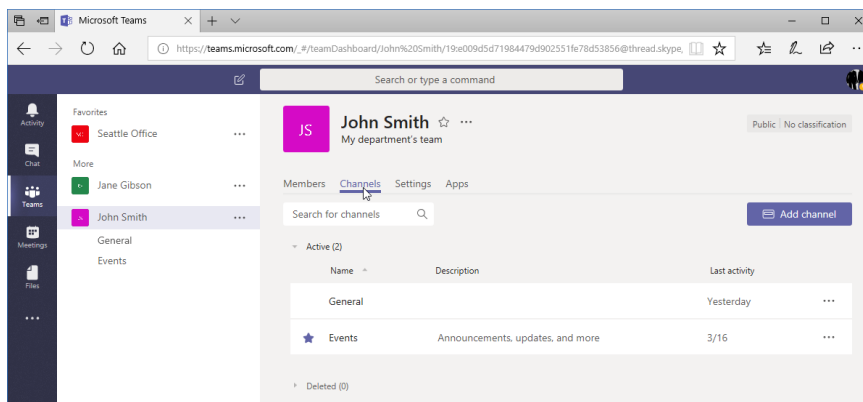
5. Now, let’s review the team’s advanced settings. Move your mouse over the team with your name, click the ellipses, and click “Manage team.”



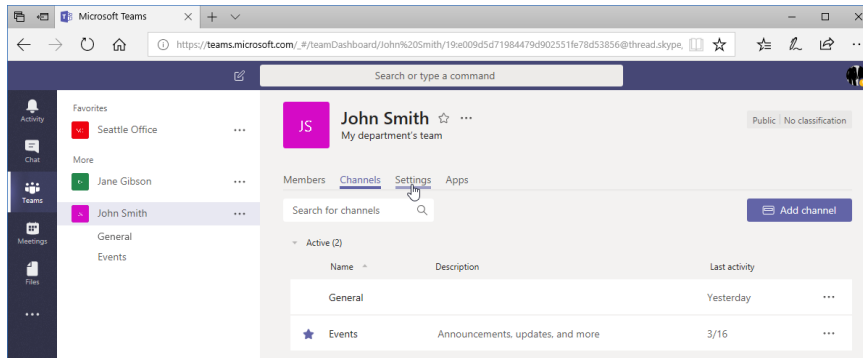
- By default, the Members tab will be displayed. You should have two members on your team:



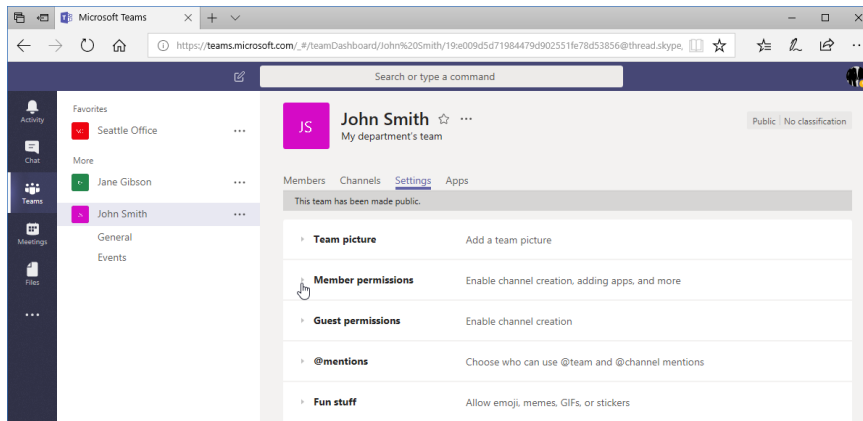
- Click the Channels tab. You should have two channels (General, the default, and Events, which you created):



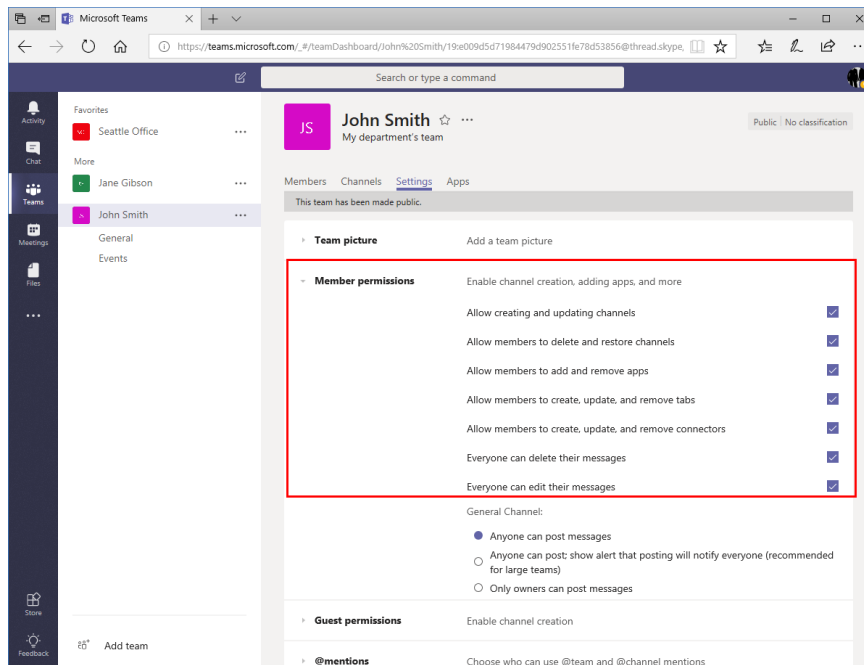
8. Next, click the Settings tab:



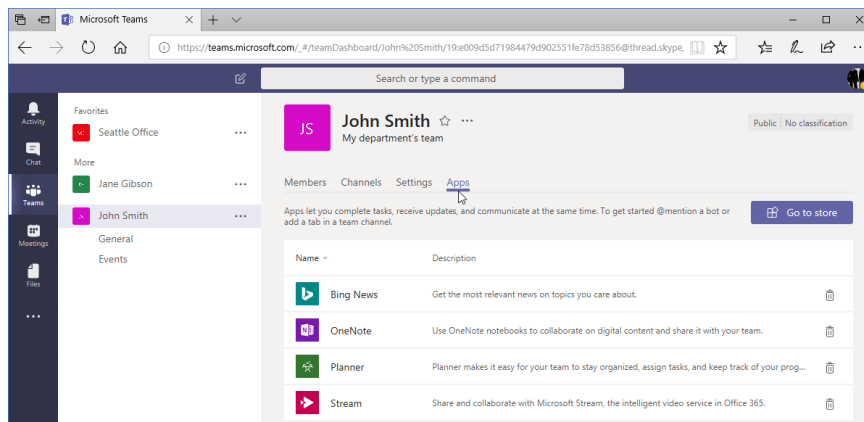
9. Let's make sure our members have as much control over their content and the team as possible. Click the "Member permissions" heading:



10. Ensure all boxes in this section are checked:



11. In our next lesson, we will learn about apps. Before we start, click the Apps tab to see what apps are currently installed for your team:



Remember that we installed Bing News and OneNote as connectors and tabs, respectively, in the last lesson.

- 12.** This activity is now complete. Leave Teams open for the next activity.

TOPIC C: Adding Apps and Bots

One of the biggest advantages of Microsoft Teams is the ability to add apps, which integrate existing services and provide you with data from other apps. This data is usually displayed within the channel (via a connector) or one of its tabs. Bots are installed in the same way, but provide a bit of a different user experience.

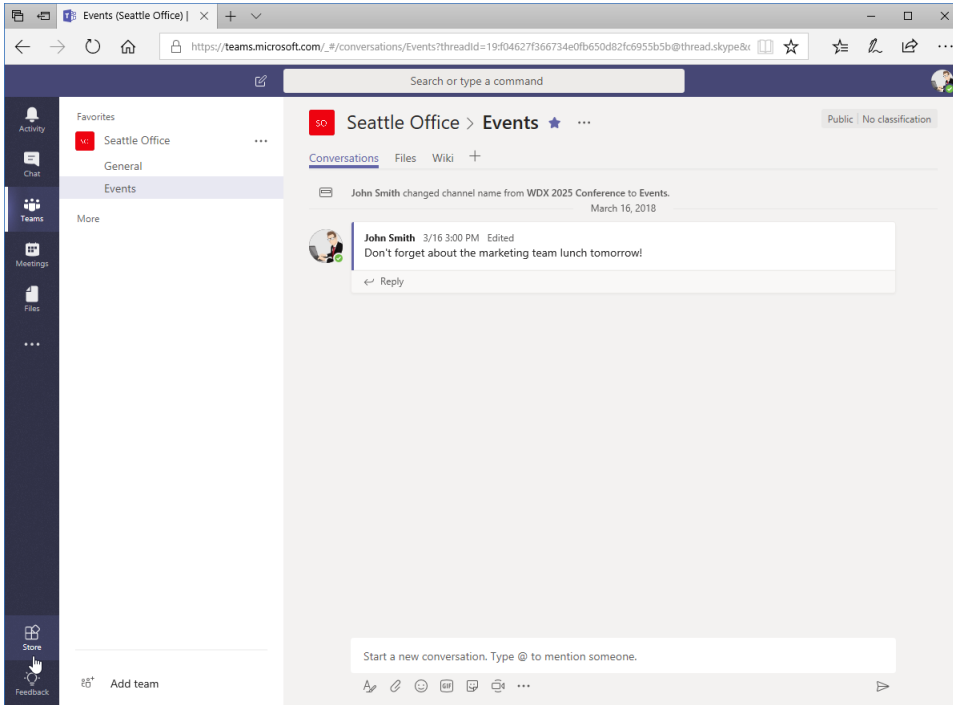
Topic Objectives

In this section, you will learn how to:

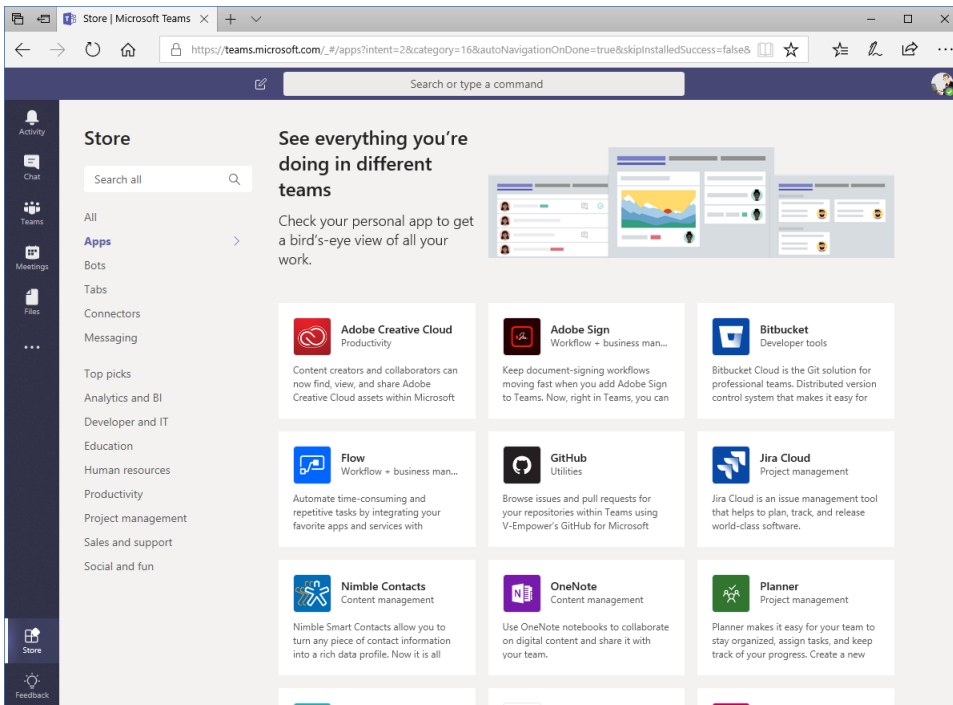
- Open and use the Store
- Install, use, manage, and remove apps and bots

Opening the Store

Apps are installed from the Store, which you can access from the Teams sidebar:



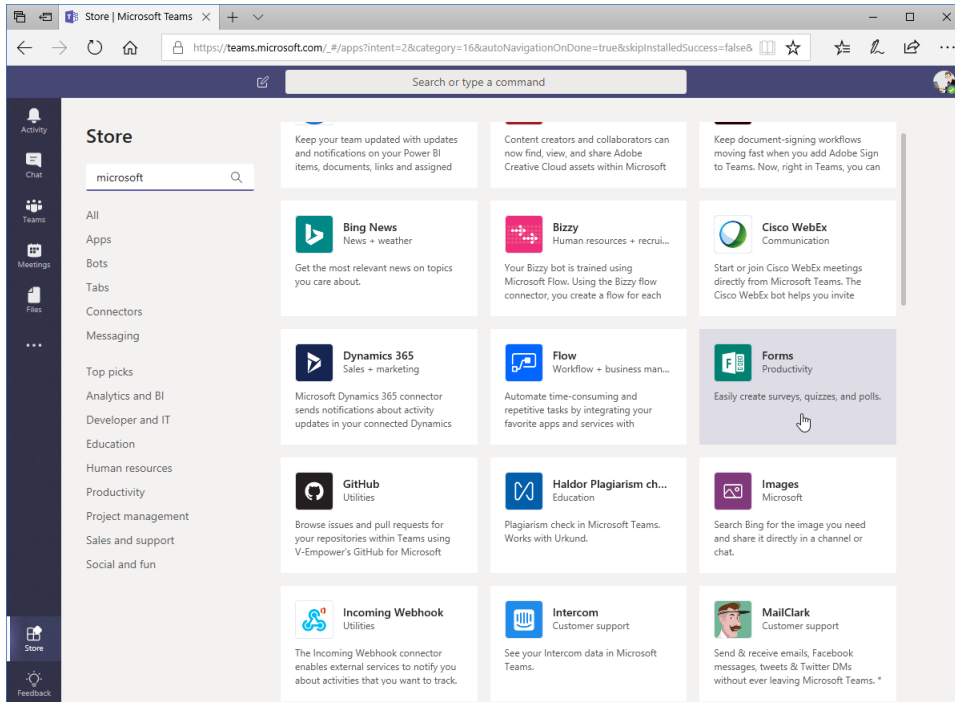
The Store will be displayed:



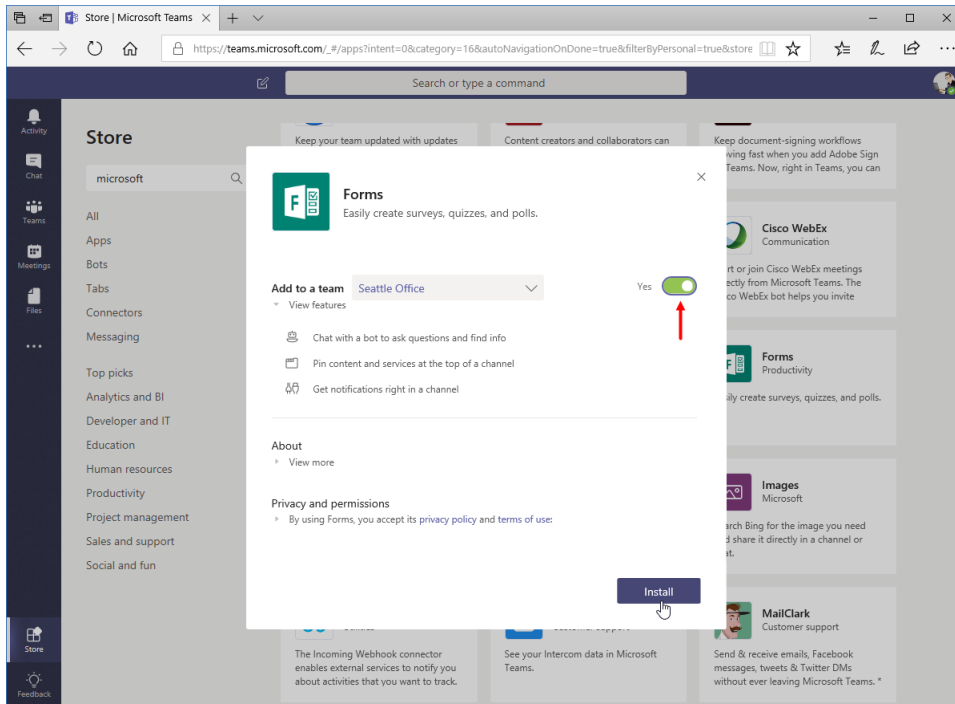
You can browse apps using the categories on the left, or use the search field.

Installing an App

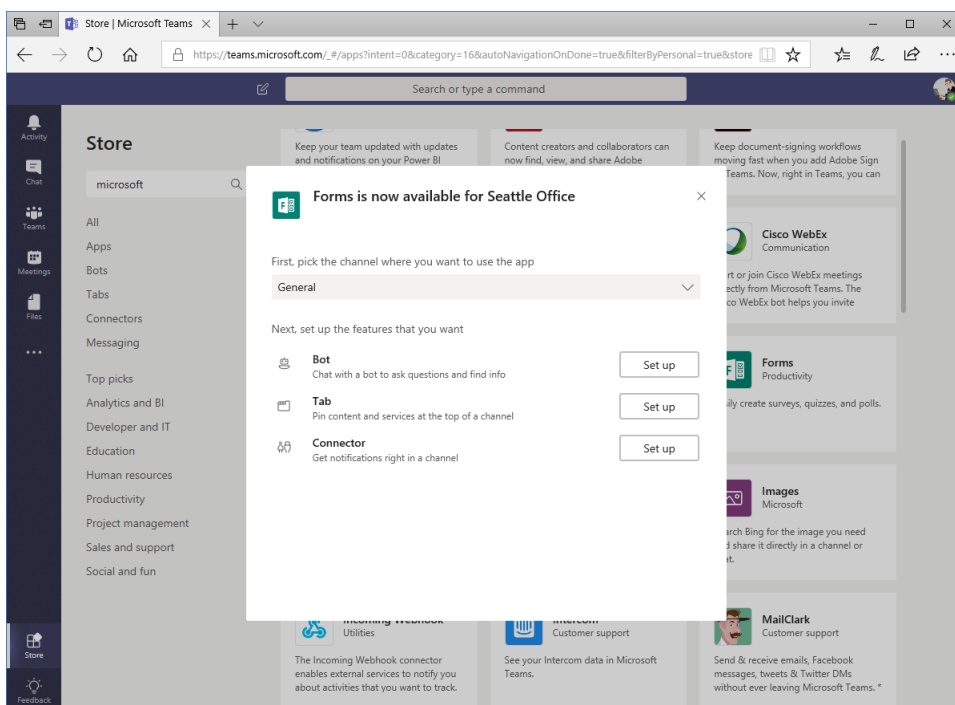
To install an app, simply locate the app you want and click it:



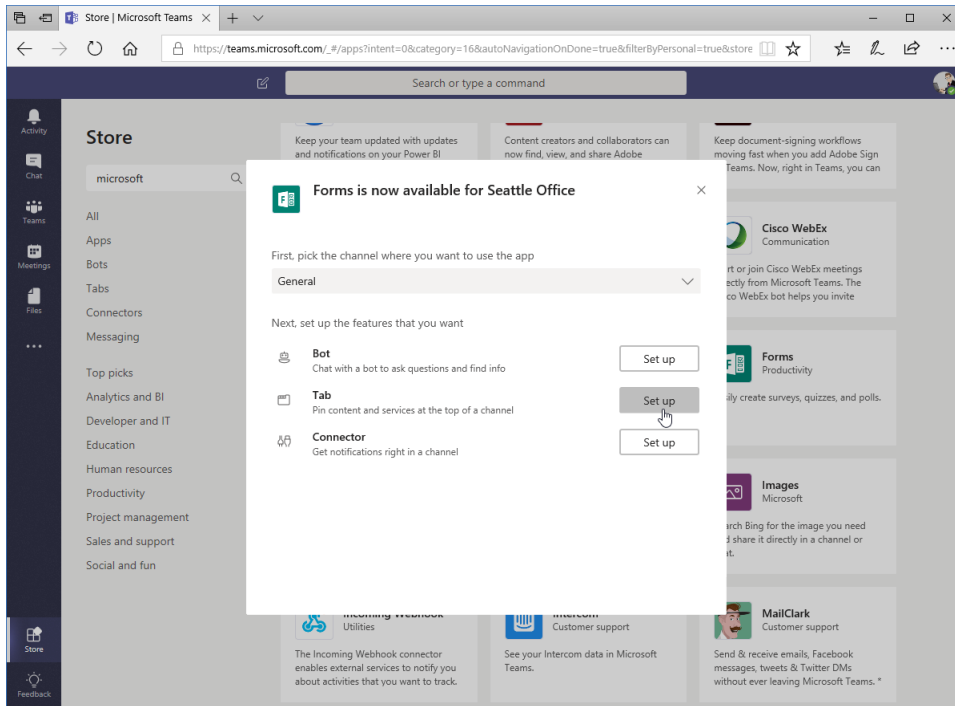
Now, choose the team you wish to add it to and click “Install:”



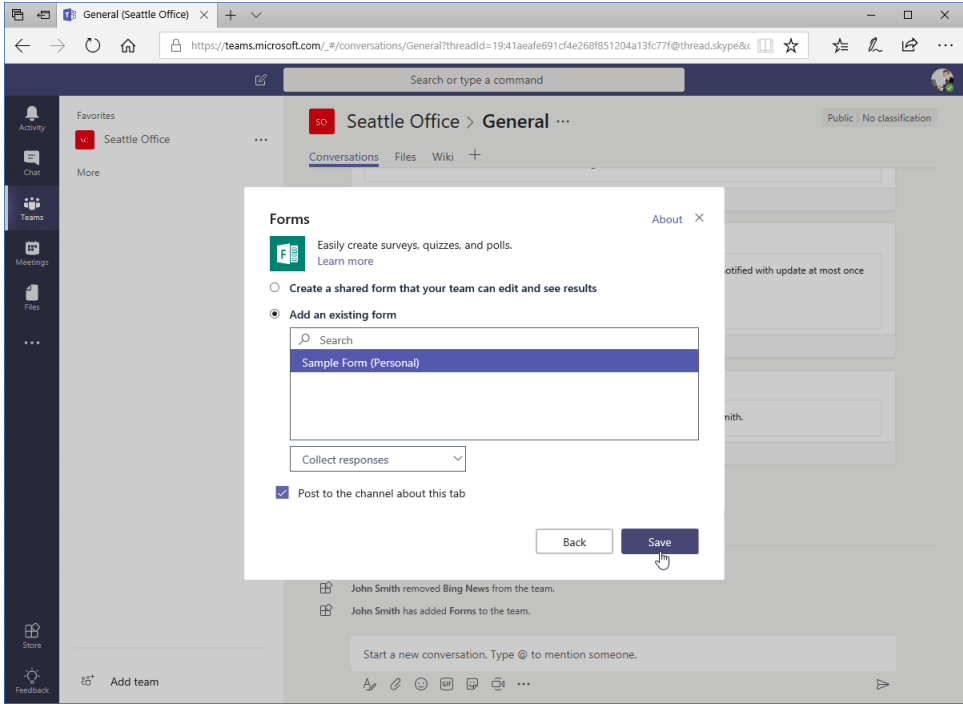
Depending on the app, you may be prompted to enter credentials for the selected service. In this case, since we are already signed into our Microsoft account and this is a Microsoft app, we do not need to provide additional credentials. However, we will be prompted to set up different aspects of the app:



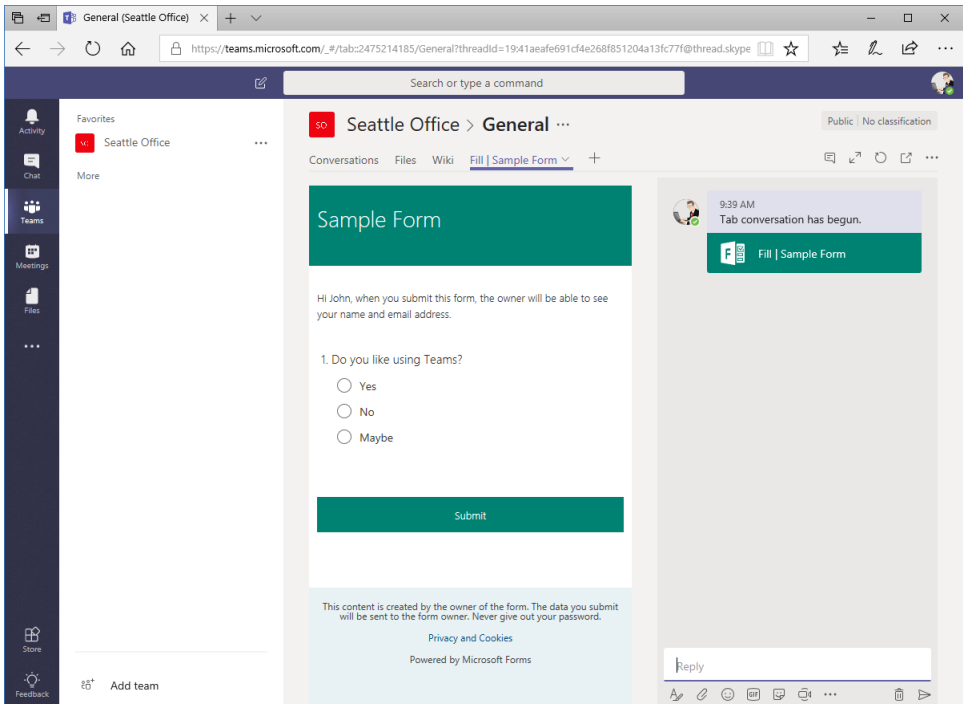
In this case, we will set up a tab for the General channel:



Now we can specify what we want to include in the tab – in this case, a form we have already created:



Once we click “Save,” the app will now be available and the form we chose will be displayed:

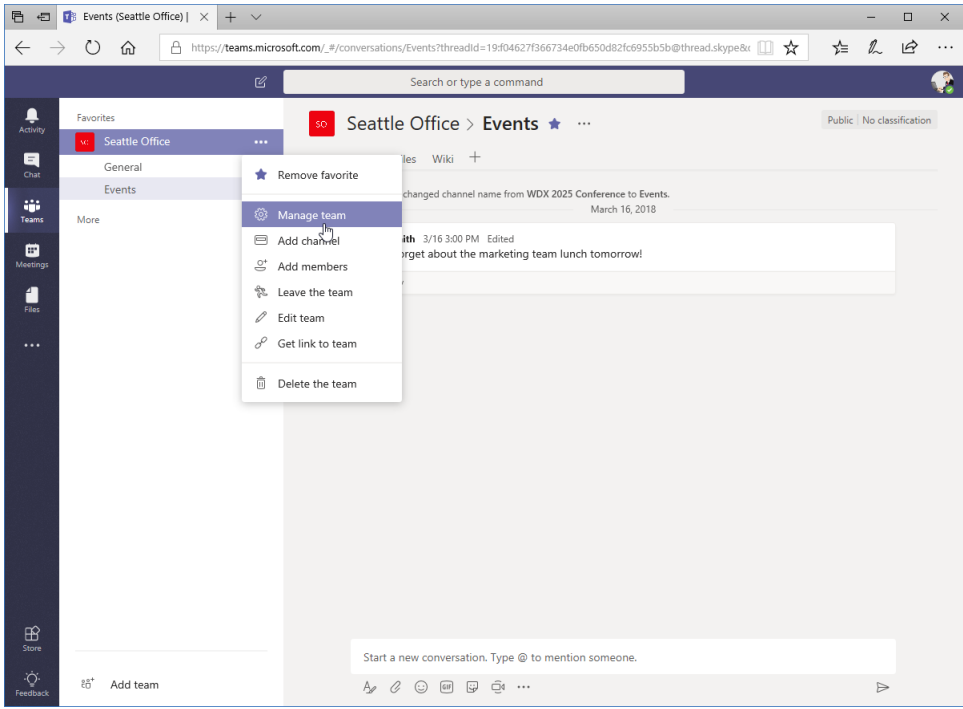


Using Apps

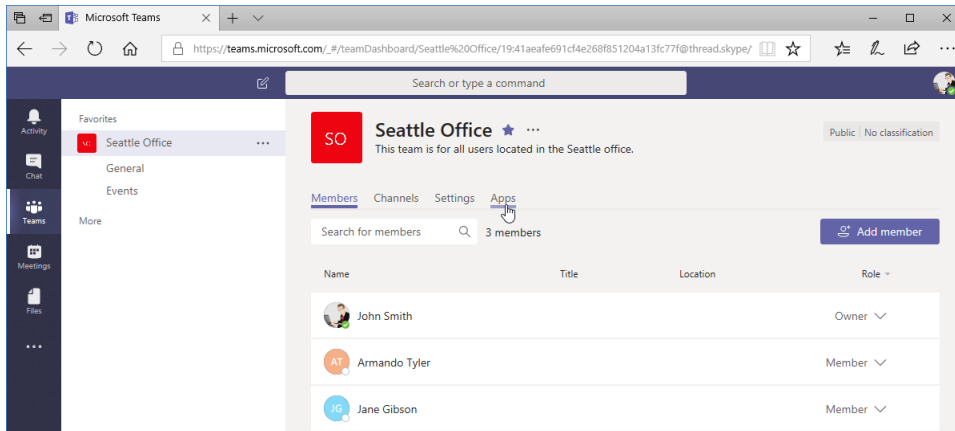
You will use each app in a different way. In the example above, we added a form as a tab. Other apps might add search options to the compose box, additional file sources to upload from, or ways to display data in a channel.

Managing Apps

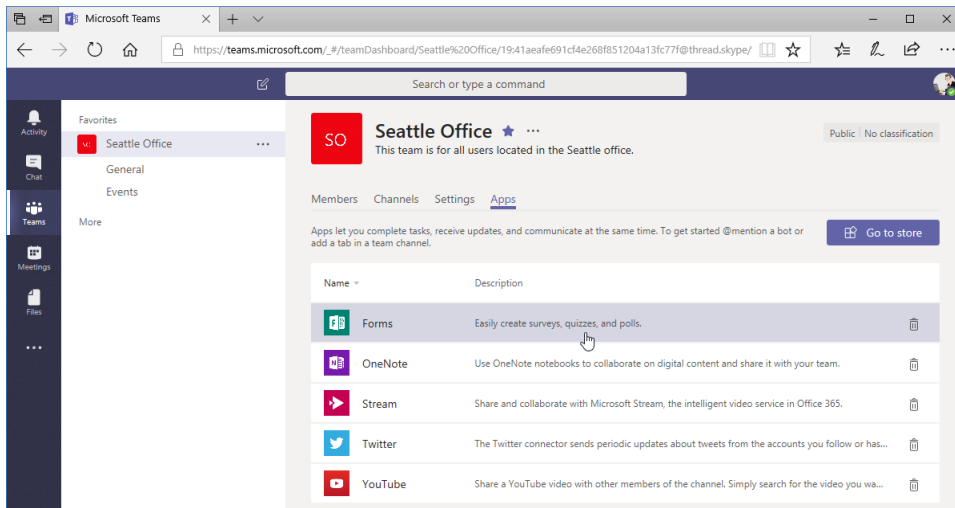
To manage apps, open the team’s advanced settings by clicking the Teams icon from the sidebar, moving your mouse over the target team, clicking the ellipses, and clicking “Manage team:”



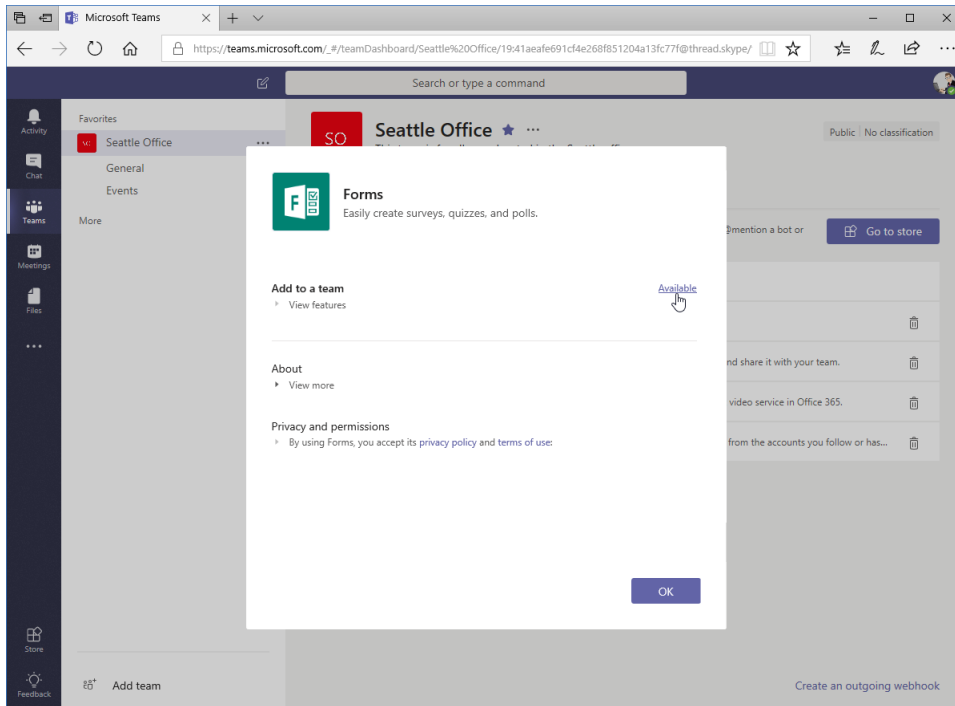
Now, click the Apps tab:



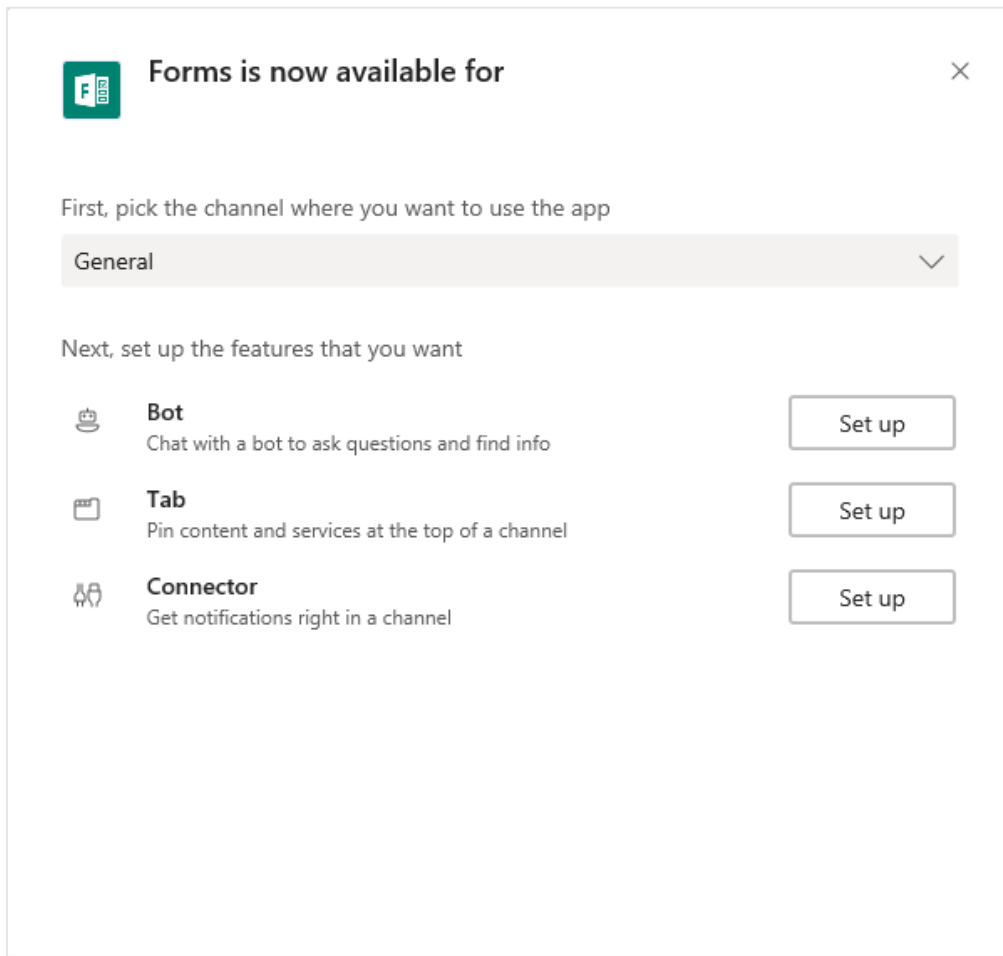
And click the app you want to modify:



Click the Available link to view the app's settings:



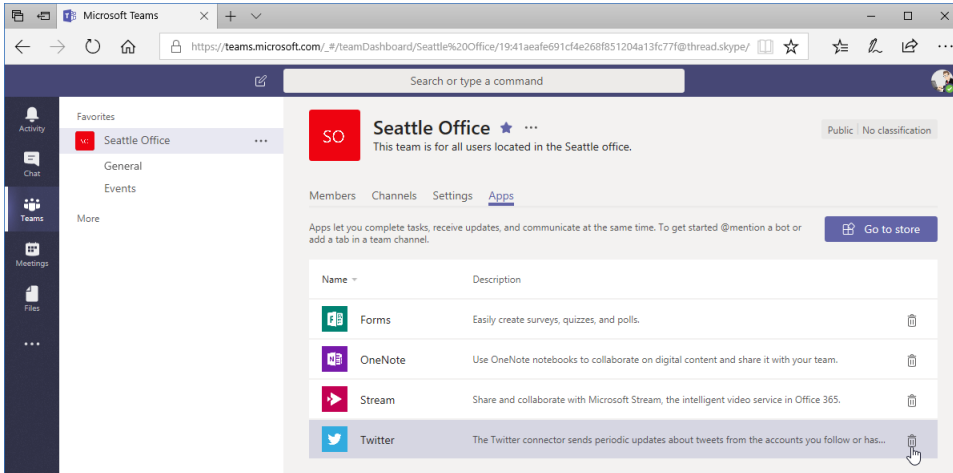
You will now see the same dialog box as when we installed the app, allowing you to configure the channel it will be displayed in and its features:



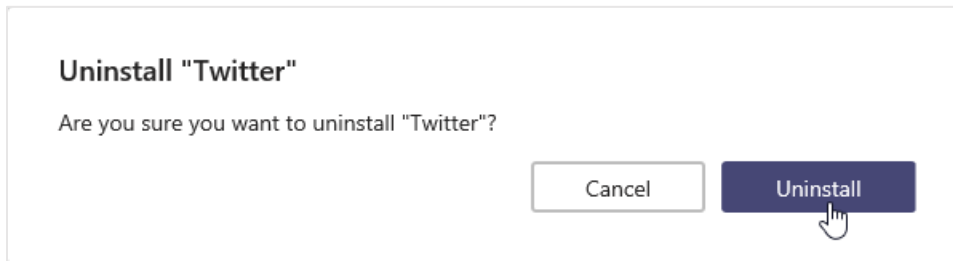
Simply make your changes and close the dialog box when you are finished.

Removing Apps

You can also remove apps from the team settings window. Simply click the trash can icon next to any app:



Next, click “Uninstall” to confirm the operation:

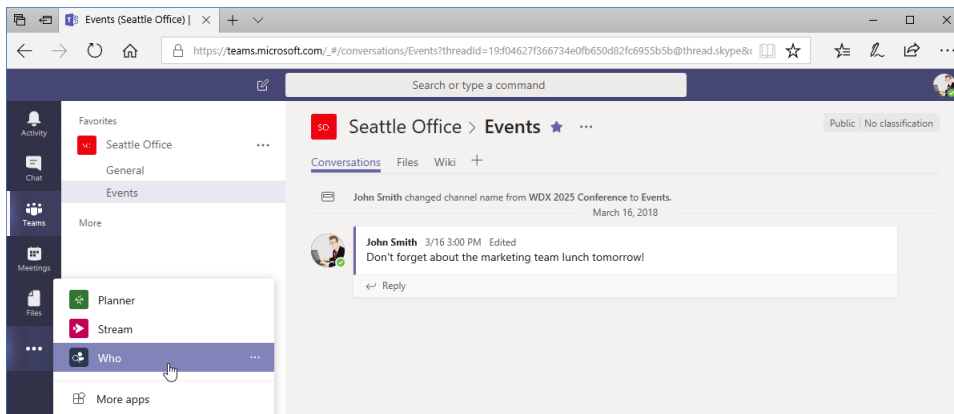


The app will now be removed.

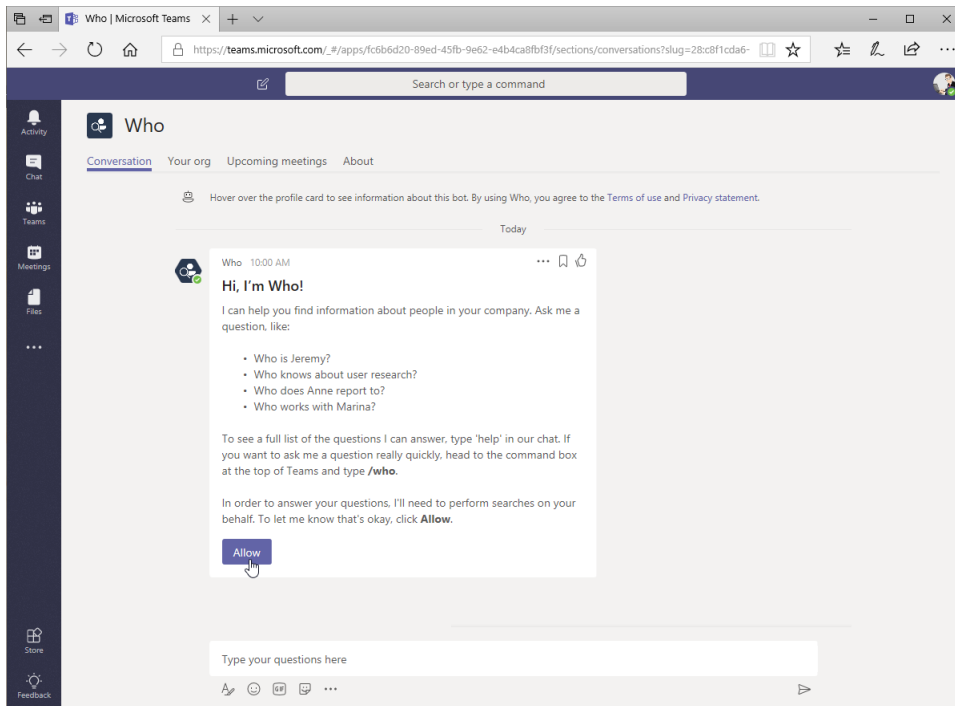
Using Bots

Bots are a special type of app that allow you to ask questions to perform a task or find information. (T-Bot, the Teams help assistant, is one type of bot.)

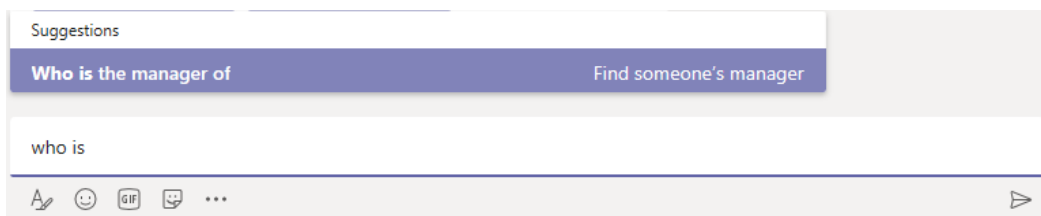
Most bots are accessed the same way as apps: directly through channels or using a dedicated tab. However, you may also be able to access some bots directly, such as Who (another default Teams bot). To access this bot, click the three dots in the sidebar and click “Who:”



The Who window will be displayed. On your first use, you will need to click “Allow” to confirm that Who can access your data:

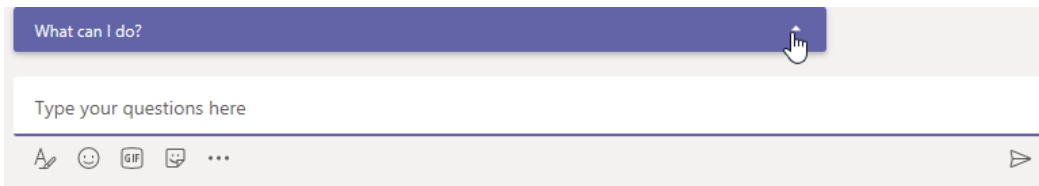


Once you have authenticated Who, you can ask it questions by typing in the compose box:

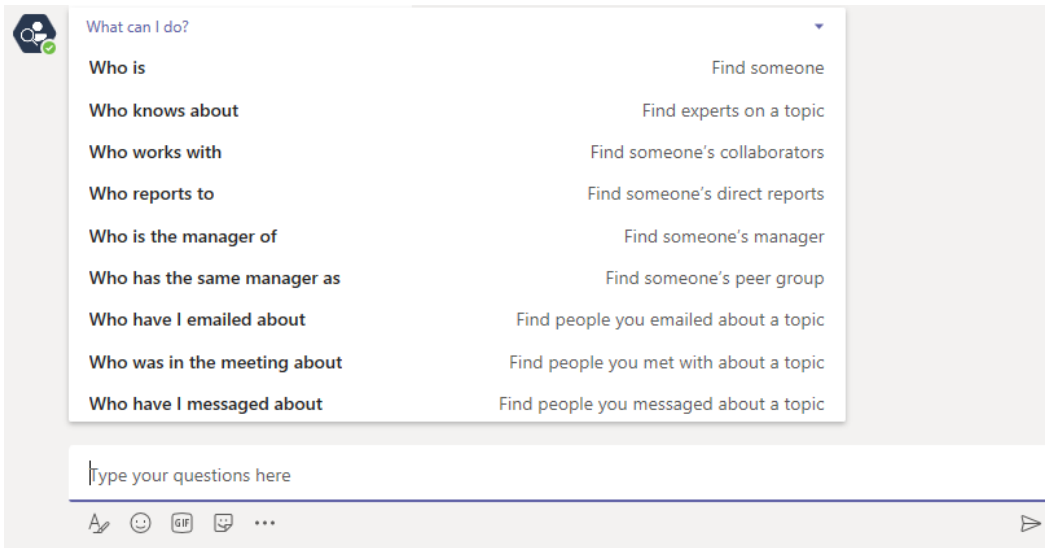


Just like other parts of Teams, suggestions will be displayed as you type.

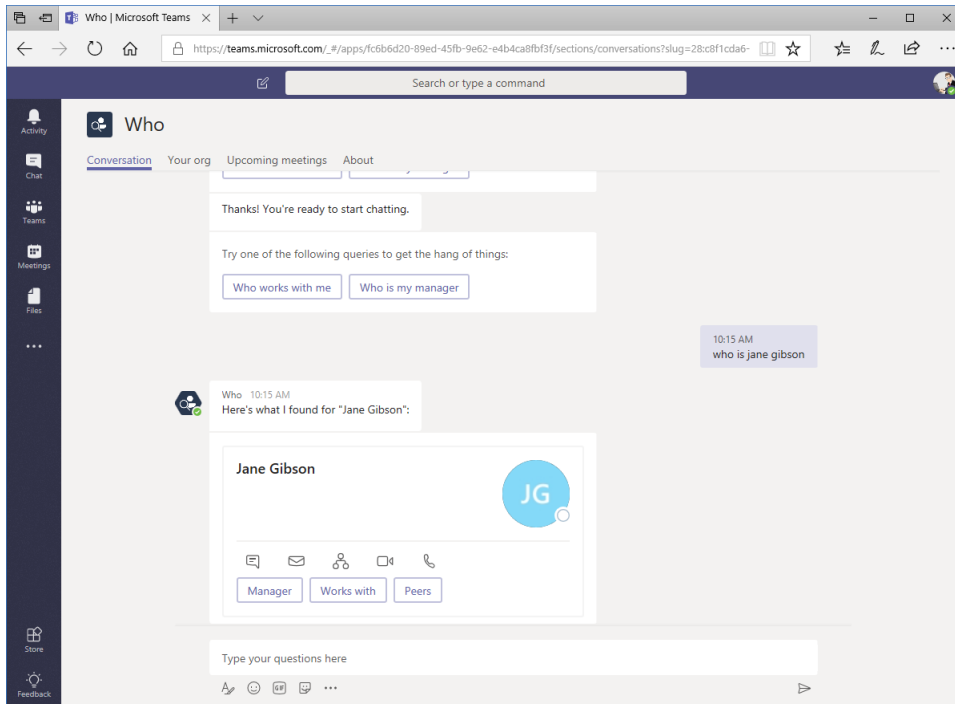
If you click in the compose box, you will see a “What can I do?” box:



Click it to see a full list of questions you can ask Who:

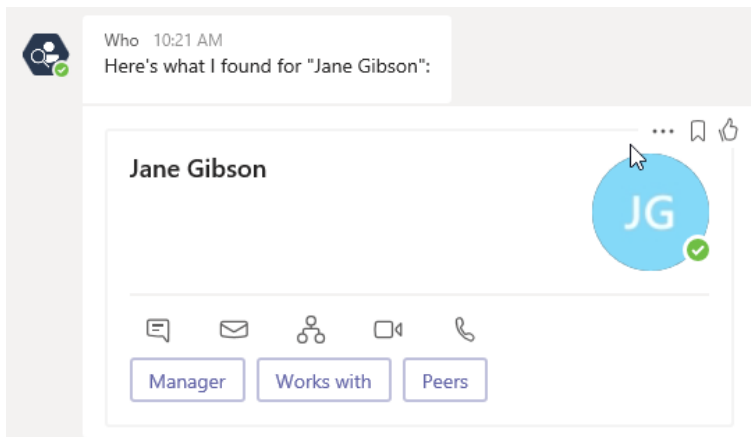


Let's see what happens when we ask Teams who Jane Gibson is:



Who shows us Jane's contact card, as well as options to send her a chat message, email her, view her org chart, or start a video or audio call. You can also click the buttons below the command list to view her manager, who she works with, and her peers.

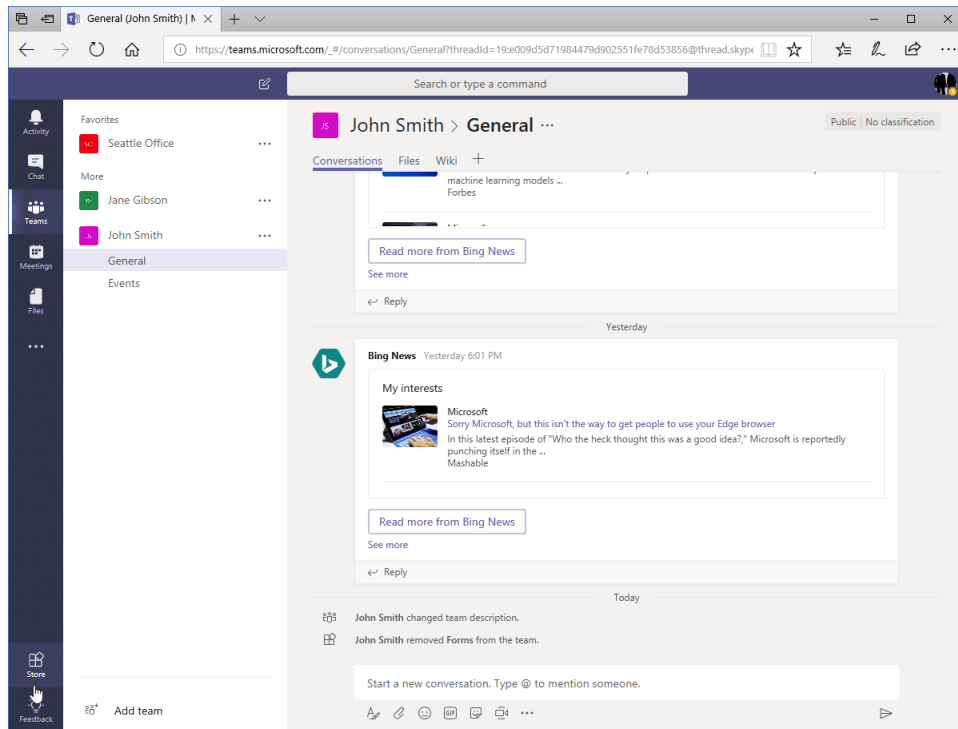
If you move your mouse over the response, you will see options to work with it just like a regular channel message:



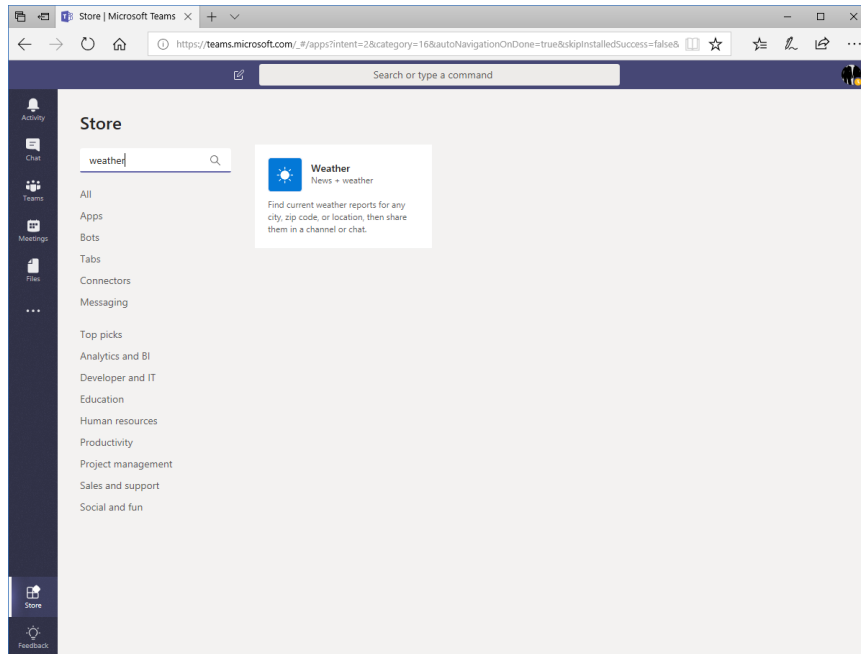
Activity 5-3: Adding Apps and Bots

In this activity, you will add an app to Microsoft Teams.

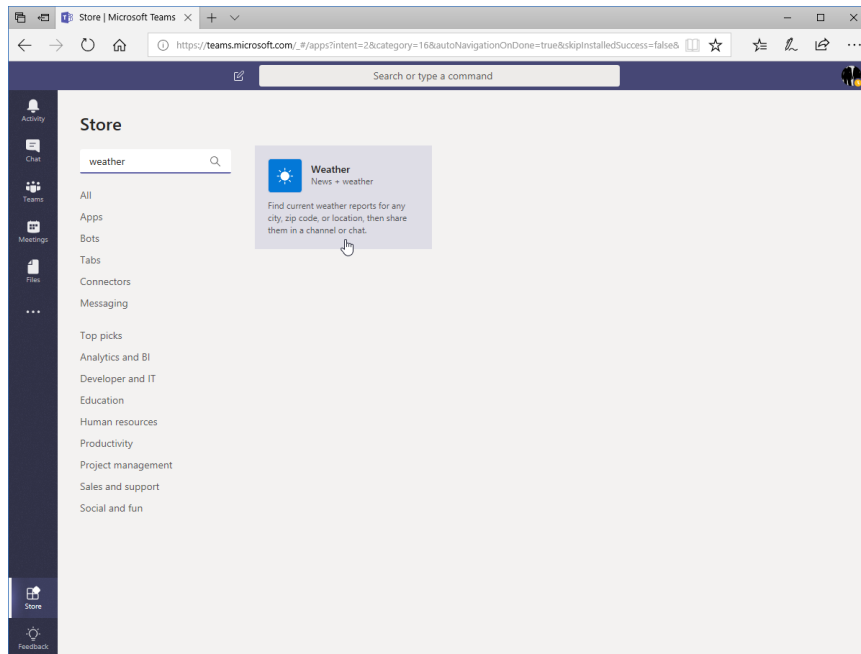
1. Ensure you have completed all the previous activities and that Microsoft Teams is open.
2. Click the Store icon from the sidebar:



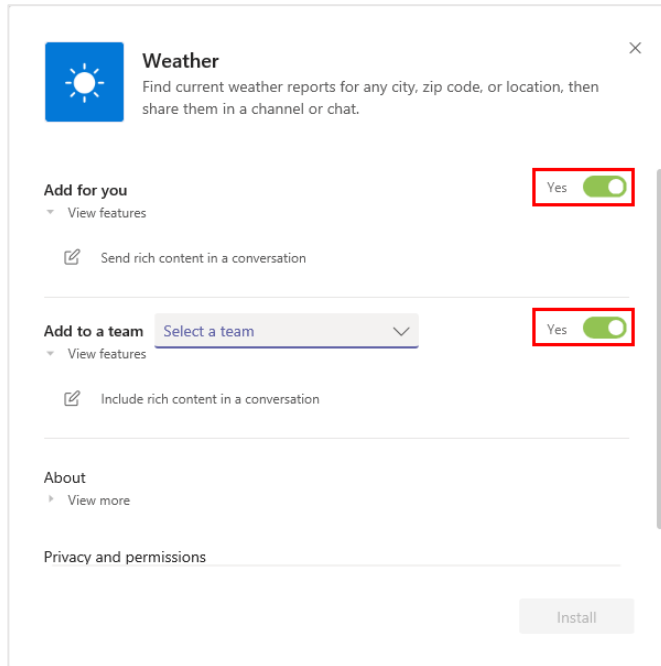
3. Type, “weather” in the search field. Results will be displayed as you type:



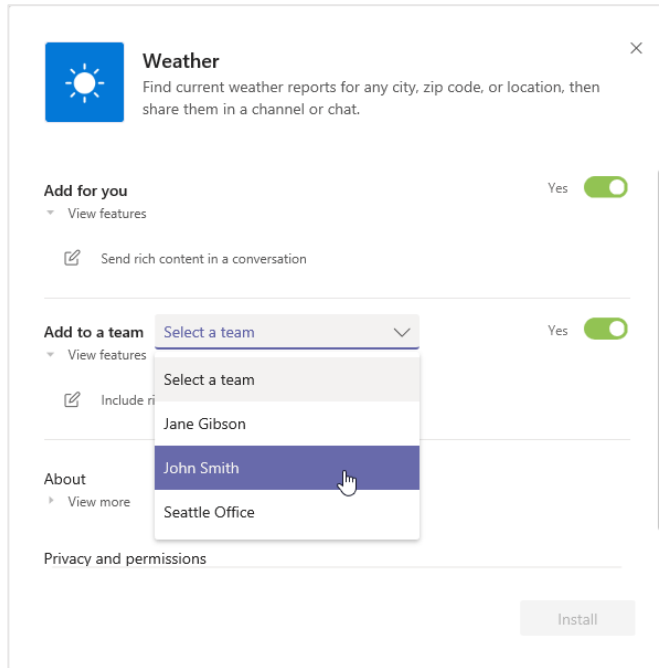
4. Click the icon shown here – this is the Microsoft weather app:



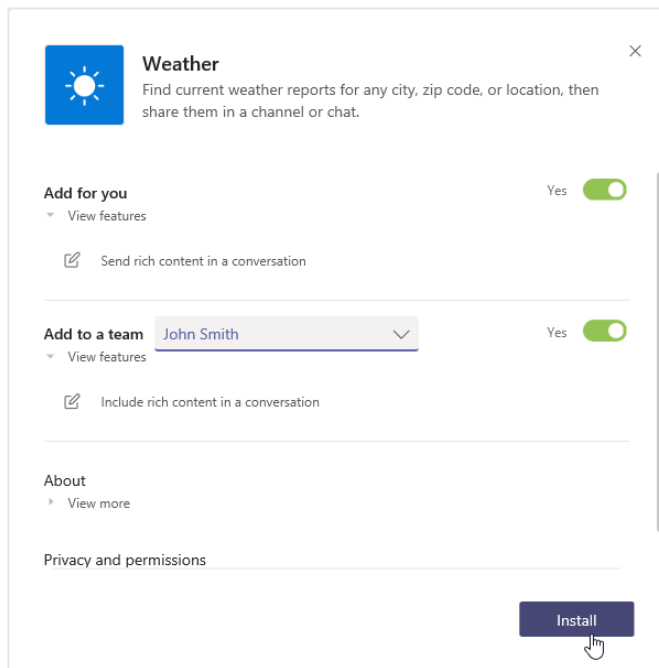
5. The Weather dialog will open. Ensure both sliders are set to Yes:



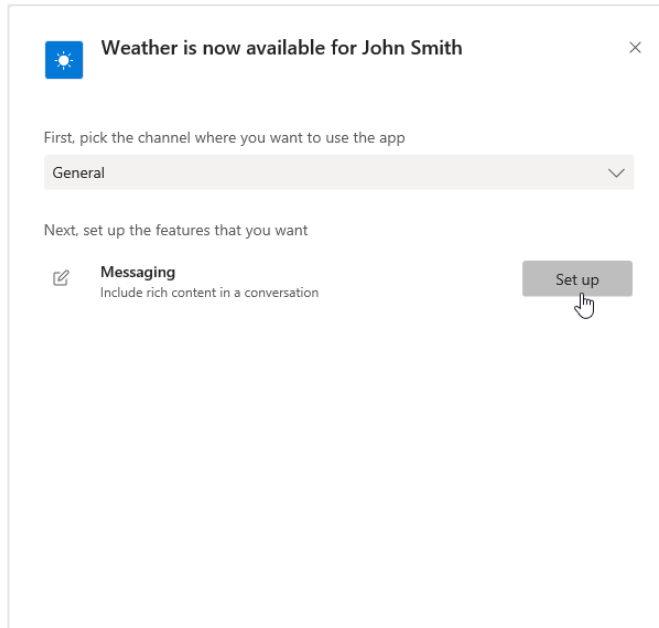
6. Click the “Select a team” menu and click your name:



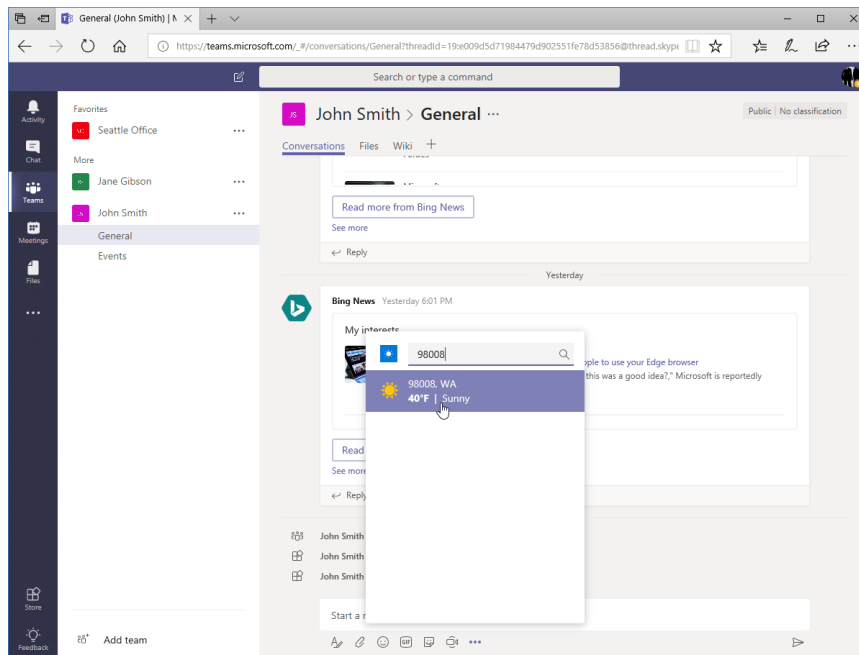
7. Click “Install:”



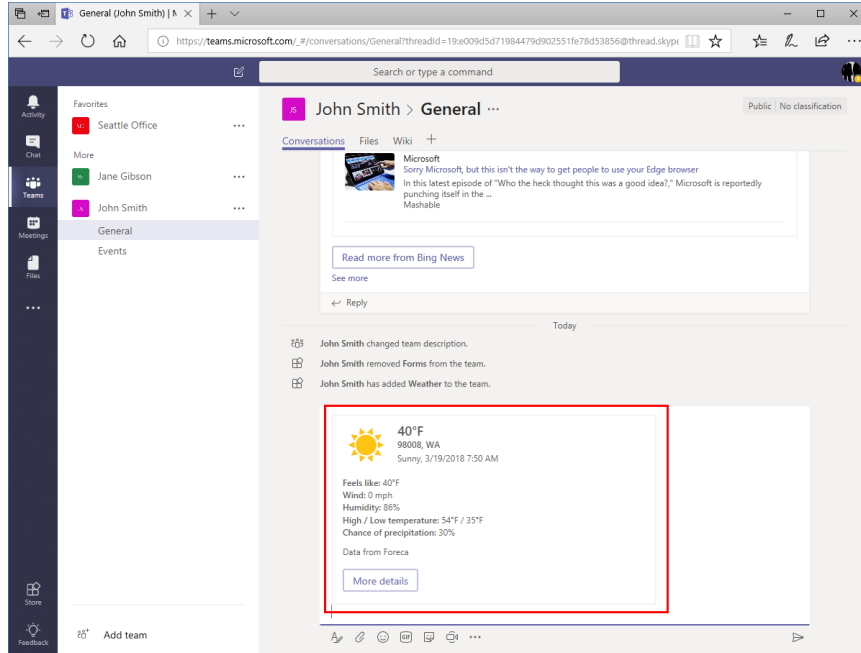
- Now you will be prompted to set up the app. Click “Set up:”



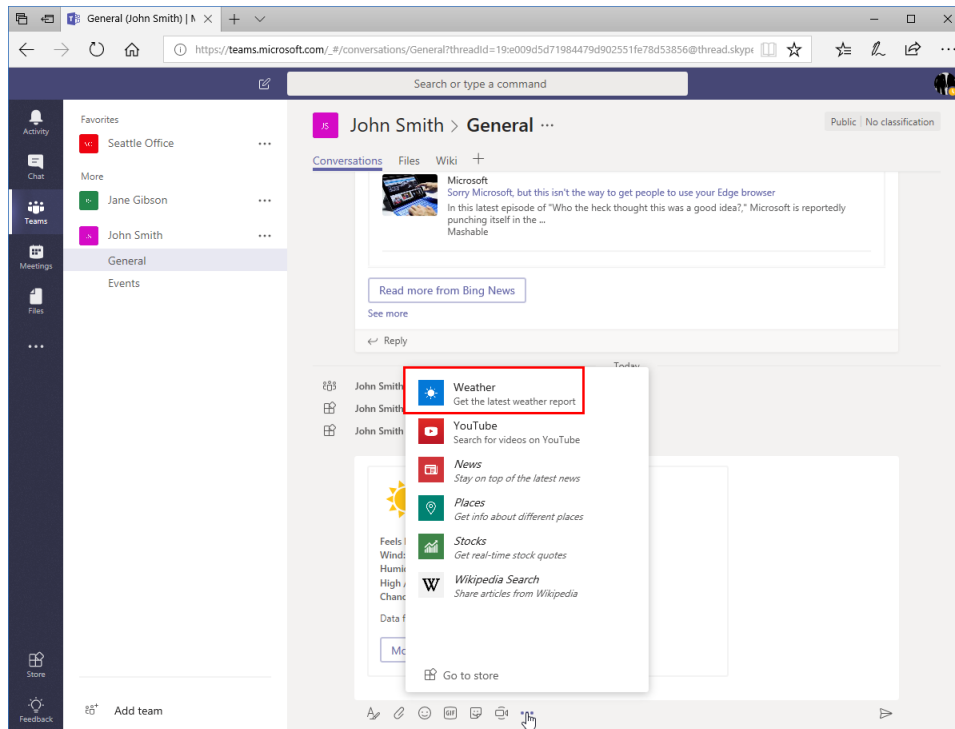
- Enter the zip code “98008” in the search field and click the single result that appears:



10. A message with the current weather will be created:



11. Click the ellipses next to the command box. Notice that there is now a command to send weather to the channel whenever you like:



12. Send your message and close your browser to complete this activity.

Summary

In this lesson, we learned how to customize your Microsoft Teams experience, including team settings and your profile. We also learned how to add bots and apps to Teams.

Review Questions

1. Which category of the team settings window allows you to control guest permissions?
2. How do you manage apps?
3. Where are bots and apps installed from?
4. How do you delete a team?
5. How do you change your Teams status?

LESSON LABS

Lesson 1

Lesson Lab 1-1


Objective	To set up a new team.
Briefing	You want to set up a team for your organization's safety committee.
Tasks	<ul style="list-style-type: none">• Set up a new team and invite at least three other members to it.• Post a message in the General channel welcoming everyone to your team.• Follow the General channel.• Create two additional channels: Events and Safety Procedures.• Check T-Bot for the most recent features added to Teams.
Follow-Up Questions	Install the desktop app and explore it.

Lesson Lab 1-2

- Objective** To get to know Microsoft Teams keyboard shortcuts.
- Briefing** Now that you are getting used to Microsoft Teams, you want to learn more about keyboard shortcuts that can save you time.
- Task** From Teams, press Alt + \ on your keyboard to view a list of keyboard shortcuts. Then, close the window and try a few of the shortcuts.
- Follow-Up Questions** Are the shortcuts the same in the desktop app?

Lesson 2

Lesson Lab 2-1

- Objective** To practice communicating in channels.
- Briefing** You want to use the features you learned about in this lesson to share important information with your team.
- Task** Create a new message in the Safety Procedures channel with the Sample Data file. Add the following text: “Please use this checklist when identifying and resolving hazards.”
- Once the message is posted, like it and save it. Then, check the Files tab to confirm it has been uploaded successfully.
- Sample Data**
-  **Hazard Resolution Checklist**
Microsoft Excel Worksheet
9.76 KB
- Follow-Up Questions** If there are any other cloud storage services you use, add them to Teams now.

Lesson Lab 2-2

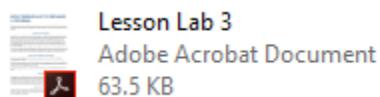
Objective	To set up a wiki for your Safety Procedures channel.
Briefing	You want to add the techniques for hazard identification process to the channel. You think the wiki is the best way to do this.
Task	Create a wiki using the Sample Data. Use pages and sections to organize the content. Then, create a conversation about the main page. Use an announcement to notify your team that they should review this content.
Sample Data	<p>Hazard Identification Techniques</p> <p>Identifying hazards is a key step in making the workplace safer. This is a task that the safety committee can take on, with the assistance of all employees in the workforce. There are several key ways to identify hazards.</p> <p>Look at accident reports. Review past accidents and near misses. List the key facts of the incidents and look for patterns.</p> <p>Perform a job safety analysis. Although this can be time consuming, it is the best way to identify hazards. With this method, you review each job. You look at each task that the job entails and the method used to perform each task. Then, review each step for possible hazards. (A good way to test the safety of the step is to think, "Would I want my child doing this task this way?") Ideally, this analysis will be performed with the employee to ensure every possible hazard is identified.</p> <p>Perform a walk through. Walk through the work site and look for hazards.</p> <p>Use a checklist. A checklist can help organize the walkthrough, ensuring that nothing is missed. It can also help identify common industry hazards. However, it may be too comprehensive or it could exclude aspects particular to your workplace. If you're going to use a checklist, have the safety committee review it first to ensure that it is applicable and appropriate.</p>

Lesson 3


Lesson Lab 3-1

- Objective** To collaborate with another Microsoft Teams user within chat.
- Briefing** You have created a draft document to help your team solve problems. You want a colleague to review it, and then you will share it in your General channel.
- Tasks**
- Choose a partner from your class, or ask a friend to help you out. The person whose name comes first in the alphabet will be Partner A. The other person will be Partner B.
 - Ensure that this person is a member of your team.
 - Partner A will:
 - Start a chat with Partner B.
 - Send a message with the Sample Data file and the text, “Please review this document.”
 - Partner B will:
 - Open the file and review it.
 - Send a message back to Partner A saying, “I think there are some improvements we could make.” Schedule a meeting for 15 minutes from now to discuss these changes.

Sample Data



Lesson Lab 3-2

- Objective** To practice using team meetings.
- Briefing** You want to finalize your problem-solving document. Your colleague has scheduled a meeting to discuss their feedback.
- Tasks**
- Ensure you have completed Lesson Lab 3-1.
 - Join the meeting scheduled by your partner. Explore some of the features in the meeting window. When you are finished, end the meeting.
 - Take note of the history recorded in the chat window.
- Hints** You will need a microphone or webcam to complete this activity.
- Sample Data**
- 

Lesson Lab 3
Adobe Acrobat Document
63.5 KB

Lesson 4

Lesson Lab 4-1

- Objective** To customize the channel you created in Lesson Lab 1-1.
- Briefing** After learning about tabs and connectors, you want to customize your Events channel.
- Tasks**
- Rename the channel to “Upcoming Safety Events.”
 - Add two tabs to the channel.
 - Add a connector to the channel.
- Hints** You might want to add a safety website, Forms, or Planner as a tab.

Lesson 5

Lesson Lab 5-1

Objective

To become familiar with customizing team settings.

Briefing

After completing Activity 5-2, you want to review the settings for your Safety team.

Tasks

- Review the basic and advanced settings for your Safety team.
- Ensure the team description is complete and accurate.
- Review all settings and make any necessary updates.
- Remove any apps the team does not use.

Follow-Up Questions

Review your Office 365 profile and Teams settings. Make any necessary updates.

Lesson Lab 5-2

- Objective** To learn more about apps and bots.
- Briefing** You would like to add a few more apps for your team.
- Task** View the Store and find three apps or bots you would like to add. Install them and post to the General channel about each app.
- Hints** Look for apps that integrate with services you and/or your organization frequently uses, such as Trello, Zendesk, or OneDrive. Or, add some fun with apps like Emojify or Growbot.
- Follow-Up Questions** Explore the Who bot.


COURSE WRAP-UP

Post-Course Assessment

1. The three default tabs in a channel are Conversations, Files, and _____.
 - a. Apps
 - b. Wiki
 - c. Connectors
 - d. Chat

2. After posting a message, you realize there is a typo in it. What is the easiest way to edit it?
 - a. Click Back in your browser
 - b. Move your mouse over it, click the ellipses icon, and click Edit
 - c. Press the Delete key on your keyboard
 - d. All of the above

3. What is the difference between a mention and an announcement?
 - a. A mention is directed at a single person; an announcement is directed at a group
 - b. A mention is directed at a group; an announcement is directed at a single person
 - c. Mentions can be liked while announcements cannot

- d. There is no difference
4. How do you add a tab to a channel while viewing it?
- a. Right-click the channel name in the task pane and click “Add Tab”
 - b. Click the plus sign at the end of the tab list
 - c. Press Alt + C
 - d. Right-click any channel tab and click “New”
5. How do you access connector settings?
- a. Open the Connectors dialog, click the Configured category, and click Configure or Manage next to the appropriate item
 - b. Right-click any connector and click Settings
 - c. Press Ctrl + C + S
 - d. Use the “/manage connectors” slash command
6. What are the two default bots in Teams?
- a. T-Bot
 - b. Cortana
 - c. Who
 - d. Microsoft Assist
7. What is the purpose of this compose box icon:  ?
- a. Expands the compose box
 - b. Minimizes the compose box
 - c. Opens the emoji selector
 - d. Shows the mini toolbar

8. What is the easiest way to start a new chat?
 - a. Use the Ctrl + H shortcut
 - b. Click the Activity icon in the sidebar and click the chat you want to continue
 - c. Click the New Chat icon on the top bar from anywhere in Teams
 - d. Create a message with a mention in the General channel

9. If you click the Files icon in the Teams sidebar, you will see files from what sources?
 - a. Teams
 - b. OneDrive
 - c. Any other connected cloud sources (such as Google Drive or DropBox)
 - d. All of the above

10. Where can you change your Teams status?
 - a. Right-click menu
 - b. Profile menu
 - c. Sidebar
 - d. All of the above

Course Summary

Congratulations on completing Microsoft Teams training. During this course, you learned how to:

- Get started with Microsoft Teams
- Use and customize channels (including adding tabs and connectors)
- Post messages in channels
- Get help in Microsoft Teams
- Manage messages and files in a channel, as well as global Teams files
- Use the wiki
- Use chat and meetings
- Manage files in Microsoft Teams
- Edit your Office 365 profile and team settings
- Add apps and bots to Teams

You should now feel comfortable using Microsoft Teams in your day-to-day workflow.

ANSWER KEYS

Lesson 1 Review Questions

1. How do you open Microsoft Teams?

Click the Teams icon on the Office 365 home page or app launcher, or enter “teams.microsoft.com” into the address bar of your web browser.

2. What command sequence displays a list of keyboard shortcuts?

Alt + /.

3. How do you access T-Bot?

Click Chat and click the entry for T-Bot.

4. You just posted a message and you realize there is a typo in it! How do you edit it?

Move your mouse over it, click the ellipses icon, and click Edit.

5. List one way to create a new channel.

Click the ellipses next to the team name and click “Add channel.” Or, open the General channel and click “Create more channels.”

Lesson 2 Review Questions

1. How do you mark a message as read or unread?

Move your mouse over it, click the ellipses in its right corner, and click “Mark as unread.”

2. How do you add other services to Microsoft Teams from a channel?

Click the Files tab and click “Add cloud storage.” Then, choose your service and follow the appropriate steps.

3. What is the difference between a mention and an announcement?

A mention is directed at a single person. An announcement is directed at a group (such as a channel or team).

4. How do you “like” a message?

Move your mouse over the message and click the thumbs-up icon.

5. What is the structure of the wiki in Teams?

Pages contain sections, which contain content.

Lesson 3 Review Questions

1. What is required to start a video call?

A webcam.

2. What file sources are displayed in the Files tab of Teams?

Files from Teams, OneDrive, and any other connected cloud sources.

3. What is the easiest way to start a new chat?

Click the New Chat icon on the top bar from anywhere in Teams.

4. How do you cancel a meeting?

Click the Meetings icon in the sidebar. Then, locate it in the calendar and click the meeting to display its details. Click “Cancel meeting” on the right side of the window.

5. True or False: Chats are restricted to only two people.

This statement is false. You can add as many users to chat as you like.

Lesson 4 Review Questions

1. You have created a team. Now, you would like to create a SharePoint site linked with it. How will you do this?

You do not need to do anything! When you create a team, an Office 365 group and SharePoint site are automatically created.

2. Which tabs can be renamed?

Wiki and any custom tabs.

3. How do you add a connector to a channel?

Move your mouse over the target channel, click the ellipses, and click Connectors. Find the connector you want, click Add, and then follow the prompts to complete the process.

4. True or False: When a channel is deleted, all conversations and files are deleted too.

This statement is false. All conversations will be deleted, but files will still be accessible from the sidebar icon.

5. How do you start a conversation in a custom tab?

Click the speech bubble icon. Then, enter your message in the Conversations pane that appears.

Lesson 5 Review Questions

1. **Which category of the team settings window allows you to control guest permissions?**

Settings.

2. **How do you manage apps?**

Open the team's advanced settings page and click the Apps tab.

3. **Where are bots and apps installed from?**

The Store.

4. **How do you delete a team?**

Move your mouse over the team name, click the ellipses, and click "Delete the team."

5. **How do you change your Teams status?**

Click the profile menu and move your mouse over the second item. Then, click the desired status.

Post-Course Assessment

1. The three default tabs in a channel are Conversations, Files, and _____.
 - a. Apps
 - b. Wiki
 - c. Connectors
 - d. Chat

The three default tabs in a channel are Conversations, Files, and Wiki.

2. After posting a message, you realize there is a typo in it. What is the easiest way to edit it?
 - a. Click Back in your browser
 - b. Move your mouse over it, click the ellipses icon, and click Edit
 - c. Press the Delete key on your keyboard
 - d. All of the above

To edit a message, move your mouse over it, click the ellipses icon, and click Edit.

3. What is the difference between a mention and an announcement?

- a. A mention is directed at a single person; an announcement is directed at a group
- b. A mention is directed at a group; an announcement is directed at a single person
- c. Mentions can be liked while announcements cannot
- d. There is no difference

While they are both created the same way, a mention is directed at a single person, while an announcement is directed at a group.

4. How do you add a tab to a channel while viewing it?

- a. Right-click the channel name in the task pane and click “Add Tab”
- b. Click the plus sign at the end of the tab list
- c. Press Alt + C
- d. Right-click any channel tab and click “New”

To add a new tab to a channel, click the plus sign at the end of the tab list.

5. How do you access connector settings?


- a. Open the Connectors dialog, click the Configured category, and click Configure or Manage next to the appropriate item
- b. Right-click any connector and click Settings
- c. Press Ctrl + C + S
- d. Use the “/manage connectors” slash command

Connectors can be managed from the Configured category of the Connectors dialog.

6. What are the two default bots in Teams?

- a. T-Bot
- b. Cortana
- c. Who
- d. Microsoft Assist

T-Bot and Who are the two default Teams bots.

7. What is the purpose of this compose box icon: ?

- a. Expands the compose box
- b. Minimizes the compose box
- c. Opens the emoji selector
- d. Shows the mini toolbar

This icon expands the compose box, giving you more room to type and access to additional formatting commands.

8. What is the easiest way to start a new chat?

- a. Use the Ctrl + H shortcut
- b. Click the Activity icon in the sidebar and click the chat you want to continue
- c. Click the New Chat icon on the top bar from anywhere in Teams
- d. Create a message with a mention in the General channel

To start a chat, click the New Chat icon from anywhere in Teams.

9. If you click the Files icon in the Teams sidebar, you will see files from what sources?

- a. Teams
- b. OneDrive
- c. Any other connected cloud sources (such as Google Drive or DropBox)
- d. All of the above

Files from all of these sources will be displayed in the Files window.

10. Where can you change your Teams status?

- a. Right-click menu
- b. Profile menu
- c. Sidebar
- d. All of the above

To change your Teams status, click the profile menu and move your mouse over the second item. Then, click the desired status.

APPENDICES

Keyboard Shortcut Quick Reference Sheet

General Shortcuts	Show keyboard shortcuts	Alt + /
	Go to Search	Alt + E
	Start a new chat	Alt + N
	Open Help	Alt + H
	Open Settings	Alt + G
	Go to the next section	Ctrl + F6
	Go to the previous section	Shift + Ctrl + F6
	Close a dialog	Esc
Navigation Shortcuts	Open Activity	Alt + 1
	Open Chat	Alt + 2
	Open Teams	Alt + 3
	Open Meetings	Alt + 4

	Open Files	Alt + 5
	Go to the previous list item	Alt + Up arrow
	Go to the next list item	Alt + Down arrow
	Go to the previous tab	Alt + Left arrow
	Go to the next tab	Alt + Right arrow
	Open the search/slash command box	Alt + Shift + G
Messaging	Reply to a message	R
	Move the focus to the compose box	C
	Expand the compose box	Alt + X
	Send a message when the compose box is not expanded	Ctrl + Shift + Enter
	Send a message when the compose box is expanded	Ctrl + Enter
	Open the emoji menu	Alt + Q
	Attach a file	Alt + A
	Start a new line	Shift + Enter
Calling	Accept an audio call	Ctrl + Shift + S
	Accept a video call	Ctrl + Shift + A

	Decline a call	Ctrl + Shift + D
	Start an audio call	Ctrl + Shift + C
	Start a video call	Ctrl + Shift + U
	Mute or unmute audio	Ctrl + Shift + M
	Turn video on or off	Ctrl + Shift + O
	Switch to or exit full screen mode	Ctrl + Shift + F

Glossary

announcement

Message directed at a specific group.

app

Feature that integrates existing services with Microsoft Teams.

bot

Automated chat service that operates like an app.

channel

Group where people can share messages, files, and more.

compose box

Field in Chat and Channel windows that allows the user to create a message.

connector

App that displays information from third-party sources in a channel.

member

Basic user who can join channels, send messages, upload files, and more.

mention

Message directed at a specific person.

message

Item within a channel or chat.

Microsoft Teams

A collaborative, cloud-based workspace for teams.

notification

Automated way of alerting users when something important happens in Teams.

owner

User who has permissions to manage members, channels, and teams.

slash command

Text-based command that can be performed from the field at the top of the Teams window.

status

Message visible to other team members that indicates a user's availability.

T-Bot

Automated personal assistant bot within Microsoft Teams.

Who

Bot designed to answer questions about people in the organization.

wiki

Default channel tab that provides a place to store detailed information.

Index

No index entries found.