



Getting started with Microsoft Teams

Client Relations and Communications

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SIU SOUTHERN ILLINOIS UNIVERSITY
CARBONDALE OFFICE OF
INFORMATION TECHNOLOGY

Reasons to Love Microsoft Teams



Team Empowerpoint

Make sure no perspective is lost. Get involvement from everyone on your team from various backgrounds, age groups, and cultures which sparks ideas and innovation that wouldn't have happened without getting all these people involved in one common thread of communication.



Enhanced Communication

Have chats with one person or multiple people. Jazz up your messages with emojis, stickers, and formatting tools. Show someone appreciation by sending them a customizable "praise" card. Start conversations with your team have a constant thread of communication that you can go back in history and see.



Real-time Collaboration

Easily share files with your team members and work on them together in real-time. Working on the same file? See the exact spot in the file that your team member is working on so that you don't overlap each other. Have a question about a specific document? Start a conversation and invite specific team members (or the whole team) to discuss it—all without having to exit the document.



Streamlined Meetings

Check team member availability and schedule meetings. Change your phone call into a video call with the click of a button. Realize during a meeting that you need another team member to be a part of it? Invite them to join! Need someone in a meeting that is outside of your team? Invite them, too!



Seamless Integration

Access websites, videos, surveys, and so much more from outside applications like YouTube, Survey Monkey, and Adobe PDF Reader, all without leaving Teams. Need to access something, but you're not on campus? You can access everything in Teams whether you're on campus or not.



Reliable Security

Feel confident about the security of your Team, Channels, files, and projects with end-to-end security powered by Microsoft Office 365.

MS Teams Guide

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Team Owners

Microsoft Teams Owners

Requesting a New Team

1. In your browser, go to **ithelp.siu.edu**.
2. Select **Communications and Collaboration**.
3. Select **Office 365**.
4. Select **MS Teams Request**.
5. Complete the form with the **necessary information**.
 - a. Careful consideration should be made before selecting Group Should be Public. This option will allow anyone to see, join, and make modifications to the Team.
 - b. The Teams Enabled option is selected by default. Do not deselect it.

Organizational Information for O365 Group

Requested Department:

Group Display Name:

Group Email Address: ?

☐ Check if the group requires an SIU email address.

Description: ?

Adds team chat, conversations, and other tools in a single workspace.
Visit <https://support.office.com/en-us/teams> for more information.

☒ Teams Enabled

Note: Please enter the name and email of each owner on a separate line, or separated by commas.
Owners can add/remove users and change other group settings even after group has been created.

Group Owner(s): ?

Group Member(s):

☐ Group Should be Public

6. Click the **Submit** button.

Team Owners/Members/Guest Defined


Every member in Teams has a role, and each one has different permissions associated with it.

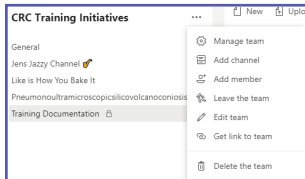
Role	Permissions
Owners	Manages certain setting for the team. They add and remove members, add guest, change team settings and handle administrative tasks. There can be multiple owners in a Team.
Members	The people in a Team. They talk with other team members in conversations. They can view and usually upload and change files. They can also do the usual sorts of collaboration that the team owners have permitted.
Guests	Guests are people from outside of your organization that team owners invite, such as partners or consultants to join the team. Guests have fewer capabilities than team members or team owners, but there is still a lot that they can do.

Microsoft Teams Owners

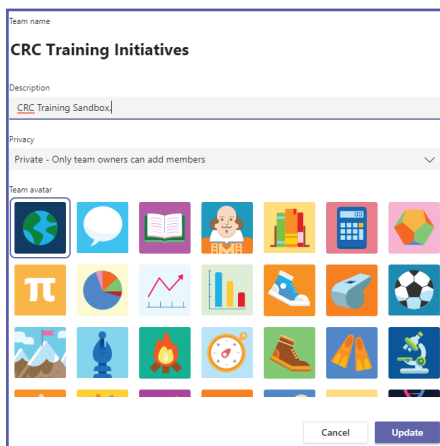
Customizing your Team

Change Team Name


1. Click the **ellipses**  next to the Team name.
2. Click **Edit Team** in the dropdown window.




3. Delete the **Team Name** that is already there and type a new one.
4. When you are done, click the **Update** button to save your change.




Change Team Description

1. Click the **ellipses**  next to the Team name.
2. Click **Edit Team** in the dropdown window.
3. Delete the text that is already in the **Description field** and type a new description.
4. When you are done, click the **Update** button to save your change.

Change Team Privacy

1. Click the **ellipses**  next to the Team name.
2. Click **Edit Team** in the dropdown window.
3. Click on the **Privacy** dropdown.
4. Select whether you want your team to be **Private** or **Public**.
4. When you are done, click the **Update** button to save your change.


Change Team Picture

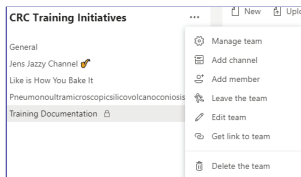
1. Click the **ellipses**  next to the Team name.
2. Click **Edit Team** in the dropdown window.
3. Click a **Team Avatar** icon to set it as your team picture.
4. When you are done, click the **Update** button to save your change.

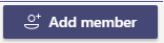

Microsoft Teams Owners

Changing Member Permissions



Adding a Team Member

1. Click the **ellipses**  next to the Team name.
2. Click **Manage Team** in the dropdown window.


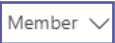


3. Click the **Add Member**  button.
4. Type the **name of the person(s)** you would like to add.
5. Select the **appropriate person(s)** from the dropdown list.
6. Click the **Add**  button. The person(s) will receive an email notifying them that they have been added.

Removing a Team Member


1. Click the **ellipses**  next to the Team name.
2. Click **Manage Team** in the dropdown window.
3. Scroll down to the name of the member(s) you want to remove.
4. Click the  button on the far-right side of the screen on the same line as their name.

Changing a Member's Role

1. Click the **ellipses**  next to the Team name.
2. Click **Manage Team** in the dropdown window.
3. Scroll down to the name of the member(s) you want to modify.
4. On the same line as the person's name, click the **Owner/Member**  dropdown.
5. Select whether you want the person(s) to be a **Member** or a **Owner**. Their role will change instantaneously.

Processing Member Requests

Although Team Members cannot add new members to the team, they can submit requests for you to add new individuals. As an owner, you have the ability to accept or deny these requests.

1. Click the **ellipses**  next to the Team name.
2. Click **Manage Team** in the dropdown window.
3. Click the **Pending Requests** tab at the top of the screen.
4. Review the list of pending requests and click **Approve** or **Deny** appropriately for each of them.

Initial Setup

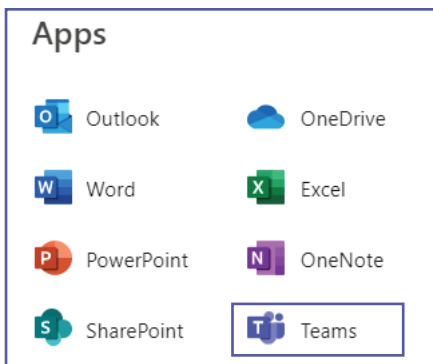
Signing into Teams

Browser Instructions

1. Using your **Network ID** and **password**, login to SIU's Microsoft Outlook Web Application at office.siu.edu.
2. Click the **App Launcher icon** in the top left corner.




3. A dropdown will appear. Click the purple **Teams icon** to launch Microsoft Teams in your browser.



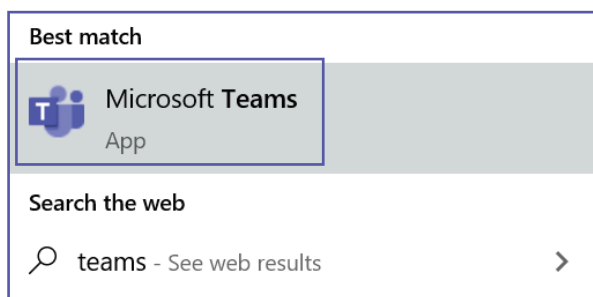
The browser application is a great tool because it can be accessed from anywhere and on any device you have access to.

Desktop Instructions

1. Click on the **Windows icon**  located at the bottom left of your screen and start typing the word "**Teams**."




2. Click the **Microsoft Teams icon** at the top of the list. This will launch the Microsoft Teams desktop application.



You can pin the MS Teams application to the taskbar at the bottom of your screen by right-clicking on the MS Teams icon and selecting "**Pin to Taskbar**."

Updating Your Profile and Settings

Accessing Your Profile Settings

1. Click the **Profile icon**  in the top right corner of MS Teams.
2. Browse through the settings and change the ones that you would like or leave them set to their defaults.

Changing Your Profile Picture

1. Click **Change Picture**.
2. Click **Upload Picture**.
3. Select a picture from your files and click **Upload**.
4. Click **Save**.

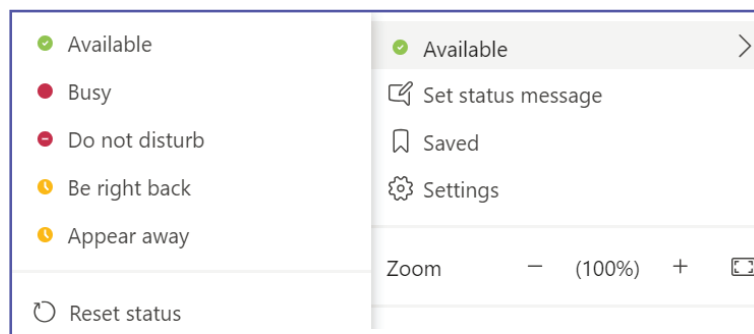


The picture you select for profile will become your default profile picture in MS Outlook (and visa-versa).

Changing Your Status

By default, your status in MS Teams will update based on the events that are scheduled in your Outlook Calendar.

1. Click on (or hover over) your **current status**. A drop-down will appear with additional options.
2. Choose the **appropriate status**.

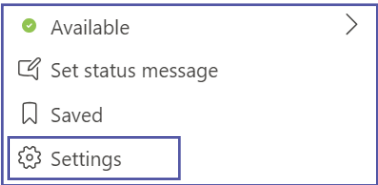


If your status is set on “Do Not Disturb”, you will not receive any notifications. However, you can set “Priority Access” for contacts that you would like to receive notifications from regardless of your status. When you have chosen this setting, a message will appear at top of your screen. Click **Change settings** to manage your priority access.

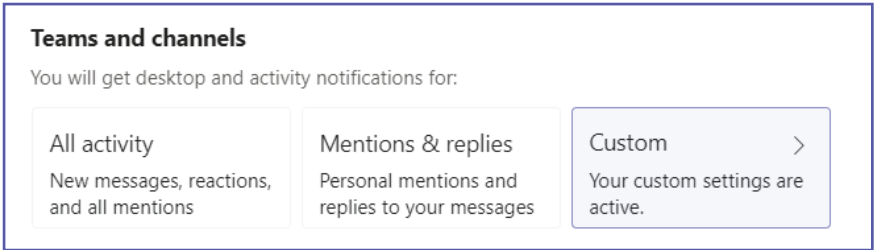
Updating Your Profile and Settings

Changing Notification Settings


1. Click **Settings**.



2. Click **Notifications**. This opens the default notification settings which you can adjust.



Mentions:

 **Personal mentions:** When you are mentioned in MS Teams.

Channel mentions: When a Team Channel is mentioned in MS Teams.

Team mentions: When your entire team is mentioned in MS Teams.

Messages:

When you get a direct message in MS Teams.

Other:

When changes occur such as modifications to team membership, team role changes, or missed activity.

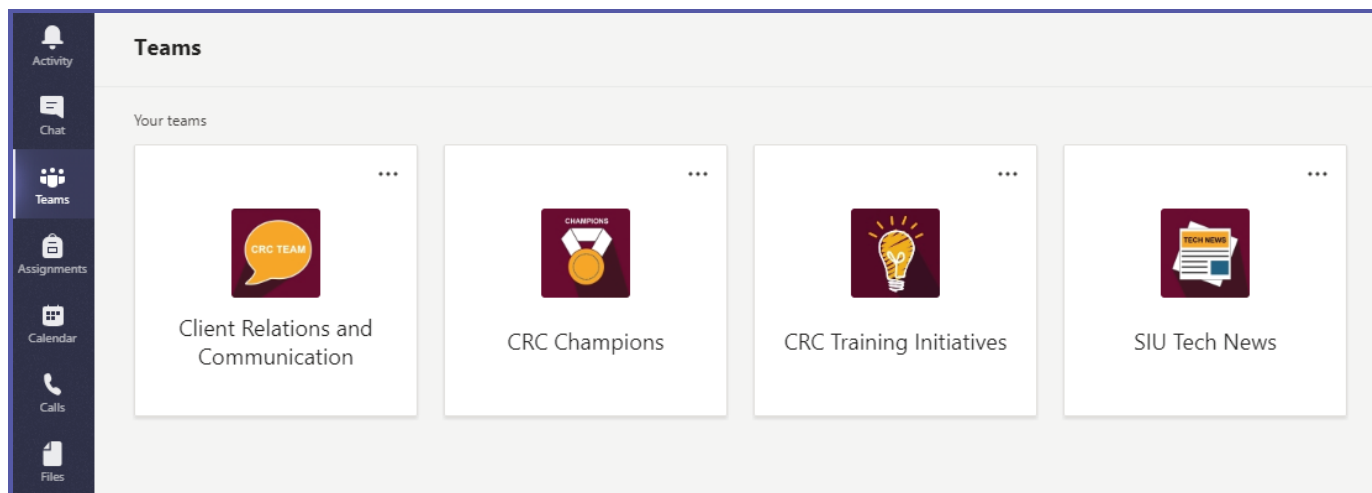
Status:

Follow a person's status and get notified when their status changes to Available or Offline.


Working with Teams

Team Interface

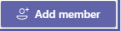
The Team Interface lists all the teams that you are a member of (you may only have one team). If you want to access conversations or files within a specific team, you will select that Team from the interface. If you click an option on the left-hand navigation (Activity, Chat, Calendar, Calls, or Files) these are not tied to a specific Team.



Managing a Team

1. Click on a **Team** on your Team Interface (you may only have one team).
2. Click the **ellipses**  to the right of the team name.
3. Click on **Manage Team** in the drop down window. A list of owners, members, and guests appears.

Adding Team Members (only owners can add members)

4. Click on the purple **Add Member button**  on your Team Interface (you may only have one team).
5. Enter the name of the potential team member in the **search** field. A list of names appears as you type.
6. Choose a name from the list.
7. Click **Add**.




If you are not an owner, but believe someone should be added to your Team, you can request for the owner to add them. Follow the instructions as stated above. Instead of clicking **Add**, you will have the option to **Submit Request**. Your Team owner will have to approve/deny the request.

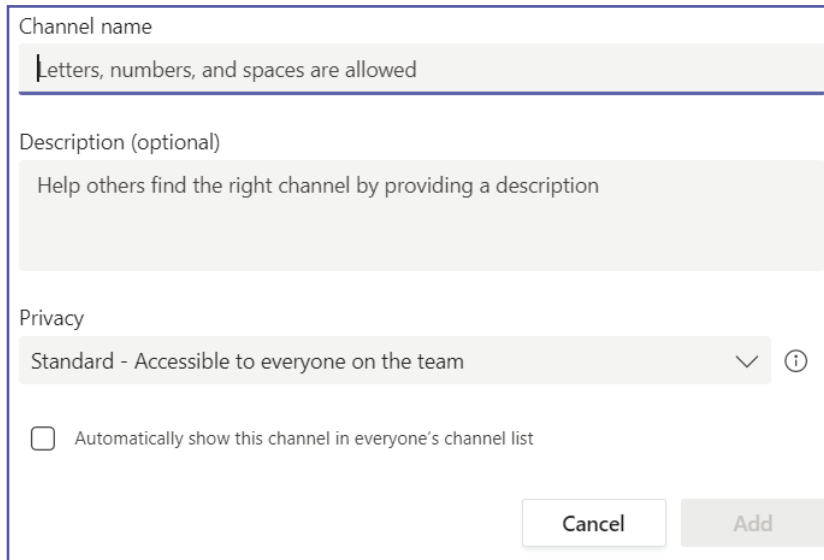
Channels & Tabs

About Channels

Creating a Channel

Create a Standard Team Channel

1. Click the **ellipses**  to the right of the Team name.
2. Click **Add Channel**.
3. Enter **Channel Name** and a **Description** of the channel's purpose.



Channel name

Letters, numbers, and spaces are allowed

Description (optional)

Help others find the right channel by providing a description

Privacy

Standard - Accessible to everyone on the team

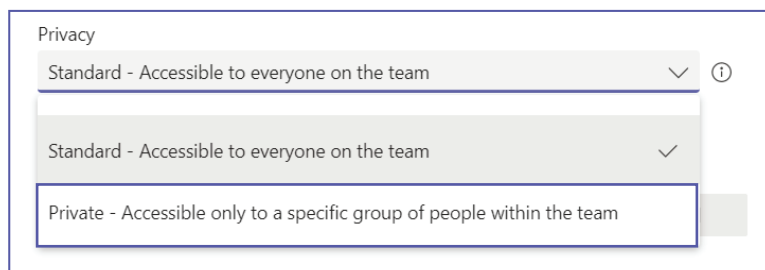
☐ Automatically show this channel in everyone's channel list

Cancel Add

5. Click **Add**.

Create a Private Channel

1. Follow steps 1-3 above.
2. Click the **Privacy** drop-down menu and choose **Private**.



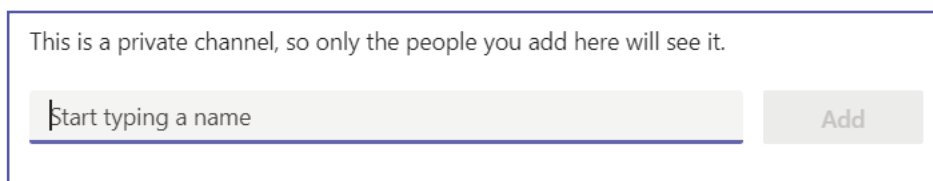
Privacy

Standard - Accessible to everyone on the team

Standard - Accessible to everyone on the team

Private - Accessible only to a specific group of people within the team

3. (*Optional*): Enter the name(s) of the individual(s) you would like to also have access to the channel.



This is a private channel, so only the people you add here will see it.

Start typing a name

Add

4. Click **Add**.

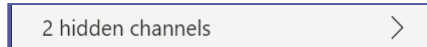
About Channels

Show/Hide a Channel

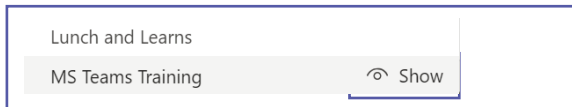
When your Team has multiple channels, some channels may become “Hidden” on your Channel List by default. You can customize your list by choosing which channels you want shown or hidden.

To Show a Channel:

1. At the bottom of your channel list, click the **Arrow** next to “**Hidden Channels.**”

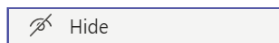


2. A drop-down will appear. Click the **Show** icon next to name of the channel you would like to add to your list.



To Hide a Channel:

1. Right-click on the **name** of the Channel you want to hide from your list.
2. Click **Hide**.



Channel Notifications

You can choose to be notified when there are new posts to Channel, when posts in a Channel receive a reply, or when a Channel is mentioned in a conversation. These settings are unique to each channel. Changing your notification settings on one channel will not change your settings on any other channels.

1. Right-click on the **Channel Name** in your list of Channels.
2. Click **Channel Notifications**.
3. Choose the **settings** you prefer.
4. Click **Save**.

Editing a Channel

1. Right-click the **Channel Name**.
2. Click **Edit This Channel**.
3. Edit the **name of the channel** or the **description** in the window.
4. Click **Save**.

Deleting a Channel

1. Right-Click the **Channel Name**.
2. Click **Delete This Channel**.
3. Click the **Delete** button.



When you delete a channel, conversations, files, and tabs that were created within the channel can still be recovered up to 30 days after deletion.

About Channels

Restoring a Channel

1. Right-click on the **Team Name**.
2. Click **Manage Team**.
3. Click the **Channels** tab to access a list of all current and deleted channels.
4. Scroll to the bottom of the page and click the **Deleted** option. A list of deleted channels will appear.
5. Click the **Restore** option to the right of the channel name.



6. Click the **Restore** button to confirm.



Using Tabs within a Channel

Every channel has its own set of tabs. Tabs have a wide variety of uses; they store your conversations and files within a channel and also allow you to include links to websites, play videos, conduct surveys and more.


Posts Tab:

Each channel has its own Posts Tab. This is where you can collaborate with team members and have conversations and share files related to that specific channel. For example, if you have a channel called “Annual Report,” this is where you would have all conversations related to working on the report. This keeps your posts organized and easy to search. Channel posts are viewable by all team members.

Files Tab:

Like Posts, each channel has its own Files tab. For additional information on the Files tab and working with Files in Microsoft Teams (*section 4, page 2*).

Adding a Tab/Application:

1. Click the **Channel Name** to open the channel.
2. Click the  icon on the Tab Bar.
3. Select the **application** you want to add to the channel.
4. Click **Save**.



Some applications may require additional information or setup to add it to your channel.

Files & Folders

Files and Folders



Make sure to use the Files tab at the top of the Channel window instead of the Files button on the left-hand navigation bar. The Files button accesses all of your SIU cloud files (Teams, OneDrive, etc.), whereas the Files tab will only show the files available in that channel.

Download a File


1. Click the **File(s)** that you want to download, which highlights in gray when they are selected.
2. Options will appear at the top. Click **Download**.



Create a new Folder

1. Open the **Files Tab** in your Channel.
2. Click **New**. A drop-down list will appear.
3. Select **Folder**.
4. **Name** the folder.
5. Click **Create**.

Upload a File

1. Open the **Files Tab** in your Channel.
2. Click the **Upload button**  located under the channel name at the top of the screen.
3. Select the **file(s)** on your computer that you would like to upload.
4. Click **Open**.

OR

1. Open the **Files Tab** in your Channel.
2. On your computer, open the **Folder** that has the **File(s)** you want to upload.
3. Click and drag the **File(s)** from the current location, using your mouse.
4. Drop the **File(s)** into the **Teams Files window**.

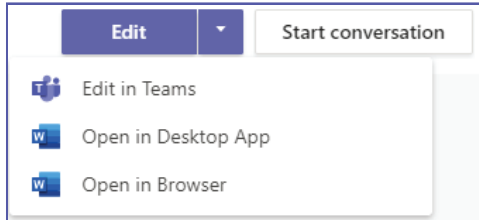
Create a new File within Teams

1. Open the **Files Tab** in your Channel.
2. Click **New**. A drop-down list will appear.
3. Select one of the **File Options** to create.
4. **Name** the file.
5. Click **Create**. The file automatically opens.
6. Add **text** to your file. Changes will save automatically.
7. Click the **Close** button at the top of the screen to exit.

Files and Folders

Collaborate on a File in real-time

1. Open the **File** that you want to edit by clicking the name.
2. Click the **Edit** button at the top of screen.




3. Choose the way you want to open the document to make changes to it.
 - **Edit in Teams** and **Open in Browser** will open the document in your Teams App. These options allow you to work on a document with your team members in real-time, if they also have it open.
 - **Open in Desktop App** opens the file with the corresponding desktop application (Word, PowerPoint, Excel, etc). This option works better when only one person is making updates, due to the small lag in displaying the updates. Changes have to upload to the server before your team members can see them.
4. Click the **Close** button at the top of the screen when you are done editing.

Move a File

A file can be moved:

- to another Team
- to another Channel
- to another Folder

To move a file from the Files Tab:

1. Click the **File**, which highlights in purple, and adds a checkmark to the left of the name.
2. Click the **Move**  button at the top.
3. Select the **location** you want to move the file to.
4. Click **Move**.

Copy a File

1. Click the **File**, which highlights in purple, and adds a checkmark to the left of the name.
2. Click the **Copy** button at the top.
3. Select the **location** you want to copy the file to.
4. Click **Copy**.




If you are working on a file and would like to have a backup, creating a copy of it can be a great option. If something happens to the document that you are working in, you can always revert back to the copy you made. However, copies can also get confusing. If you copy a document into another folder, channel, or team, it will not automatically update whenever a change is made to the original document. This is why we recommend only making copies of documents if you using them as backups.

Files and Folders

Rename a File

1. Click the **File**, which highlights in purple, and adds a checkmark to the left of the name.
2. Click the **Rename** button at the top.
3. Type a new name in the field.
4. Click anywhere on the screen to save the new name.

Deleting Files and Folders

1. Click the File or Folder you would like to delete, which highlights it in purple and adds a checkmark to the left.
2. Additional options appear at the top. Click **Delete**.  Delete
3. Click **Confirm**.



If you delete a file or folder by accident, it can be restored! Contact SalukiTech at 618/453-5155 or salukitech@siu.edu and they will assist you.

Collaborating in MS Teams

Collaborating in MS Teams

Posts

Posts occur within Team Channels. Each channel has its own Posts tab. All team members can view messages or posts that occur in the Posts Tab. They are **not private**.

1. Select the **Channel** you would like to start a conversation in. The Posts Tab opens automatically.
2. Click the **New Conversation** button and type a message in the **text box** that appears at the bottom of the screen.




3. Click **Send** .


Mention a Team Member or a whole Team

To get someone's attention in a channel post, you can @mention them! This will send them a notification letting them know that you have started a post that requires their attention. You can mention individual people or whole teams.

@Mention your Team (@Team)


1. Select the Channel you would like to start a post in. The Post Tab opens automatically.
2. Click the **New Conversation** button.
3. Type **@Team** in the text box at the bottom of the screen. Your team will appear.
4. Select your **Team**.
5. Type the rest of your **message**.
6. Click **Send** .

@Mention an individual

1. Select the channel you would like to start a post in. The Post Tab opens automatically.
2. Start typing @theirname in the text box at the bottom of the screen. A list of people will appear.
3. Click the name of the person you want to mention.
4. Type the rest of your **message**.
5. Click **Send** .

Mention a Channel

A post using an @Channel can be used to announce and supply a link to a new channel. For example: "@Team, here's a new channel I made: (@channel name). Check it out!"

1. Select the Channel you would like to start a post in. The Post Tab opens automatically.
2. Click the **New Conversation** button.
3. Type the **@ symbol**, plus the name of the channel in the text box at the bottom of the screen. A list will appear.
4. Select your **Channel**.
5. Type the rest of your **message**.
6. (Optional) @Mention your team or an individual to notify them about the Channel mention.
7. Click **Send** .





Use the Team's General Channel to post about miscellaneous topics. Posts about specific topics should be held in a specific channel related to that topic. When changes occur in a channel (a new post, new file, etc.) the channel's name appears in bold.


Collaborating in MS Teams

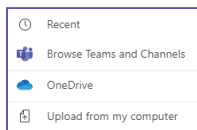
Reply to a Post

Posts are organized by date and then threaded. The replies in a thread are organized under the initial post so it is easier to follow multiple posts.


1. Find the **Post Thread** you want to reply to.
2. Click the **Reply** button .
3. Type your **message**.
4. Click **Send** .

Share a File in a Post


1. Click the **channel** you want to share the file in.
2. Click the **Attachment icon**  below the text box at the bottom of the Posts tab.
3. Choose which of the three **location** options you want to share the file from.




Option One: Browse Teams and Channels

4. Select the file you want to share, which highlights it in purple.
5. Click **Share Link**.
6. *(Optional)* Type a message and @mention your team to provide context for the file and notify them that you have shared it. If you skip this step, your team will not get a notification that you have shared a file.
7. Click **Send** .

Option Two: OneDrive

4. Select the file you want to share, which highlights it in purple.
5. Click **Share Link**.
6. *(Optional)* Type a message and @mention your team to provide context for the file and notify them that you have shared it. If you skip this step, your team will not get a notification that you have shared a file.
7. Click **Send** .

Option Three: Upload from my Computer

4. Navigate to the **location** on your computer where the file is stored.
5. Select the **file** you want to share.
6. *(Optional)* Type a message and @mention your team to provide context for the file and notify them that you have shared it. If you skip this step, your team will not get a notification that you have shared a file.
6. Click **Send** .




All Files/Documents posted to a channel can be found in the Files tab located at the top of the channel, next to the PostsTab.


Collaborating in MS Teams

React to a Conversation



Similar to Facebook, the reaction buttons can be used to acknowledge that a conversation was read, or indicate how you feel about content of the conversation.

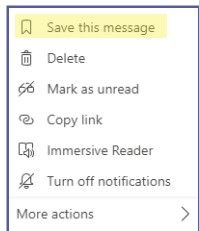
1. Hover your mouse over the **post** or **message** you want to react to.
2. Click one of the **reaction buttons** like the thumbs-up icon . The person who initially sent the message will receive a notification that you reacted to it.

Undo your Reaction


When you react to a conversation or message, the icon of your reaction choice will be shown in the top right corner . To undo your reaction, click the icon and it will be removed.

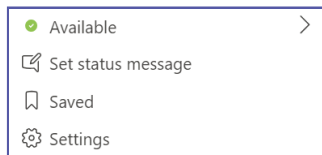
Save a Conversation Message

1. Hover your mouse over the conversation or message you want to save.
2. Click the **ellipses**  that appears in the top right corner of the message.
3. Click the **Save this message** option  on the list.



View a Saved Message

1. Click on your **profile icon**  at the top right corner of the MS Teams application.
2. Click the **Saved** option. A list of your saved messages will open.



OR

1. Type **/saved** in the **Search Bar** at the top of the MS Teams application.



2. Hit **Enter** on your keyboard. A list of your saved messages will appear.

Collaborating in MS Teams

Chat Notifications



As in Skype for Business, Chat in Teams provides a way to have a private 1 on 1 conversation or, an ad hoc group conversation that provides immediate notifications and quick answers from team members whether they are in the office or on the go.

Default Notifications


Each team member will need to setup their Notifications for Chats in Settings—Notifications located in the drop-down list under your profile picture.

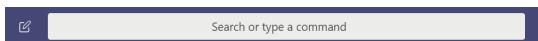
- A notification will appear on the **Teams icon** in the Task-bar and in the **Teams Interface**.
- A notification will appear on the **Chat** button on the App Bar.
- An email is sent with a link to the message (only if the message isn't viewed within 5-10 minutes).

Notification Preferences


1. Click your **profile icon** in the top right corner of the MS Teams application.
2. Click **Settings** on the drop-down.
3. Click the **Notifications**  button.
4. Change the **notification settings** you would like.
5. When you have finished, click the  icon in the top right corner. Your preferences will be saved.

Start a New 1:1 Chat



1. Click on the **Chat icon**  located on the Application bar to the left of your screen.
2. Click in **Command/Search box** at the top of the screen.



A screenshot of the Command/Search box in MS Teams. It is a horizontal bar with a dark blue background. On the left, there is a small icon of a speech bubble with a plus sign. To its right is a light gray rectangular input field with the placeholder text "Search or type a command".

3. Enter the **name of the person** you want to message.
4. Choose the **correct person** from the drop-down list.
5. Click in the **textbox** at the bottom of the screen.
6. Type your **message**.
7. Click **Send**  to start a chat.

Start a Group Chat Message


1. Click on the **Chat icon**  located on the Application bar to the left of your screen.
2. Click on the **New Chat icon** to the left of the Command/Search box at the top of the screen.
3. Type the **names** of the people you want to add to the chat in the To Field.
4. To name the group, click the **down arrow**  to the far right of the To Field.
5. (Optional) Type a **group name** for the chat in the Group Name field.




A screenshot of the Group Name field in MS Teams. It is a rectangular input box with a light gray border. Inside the box, the text "Group name: " is followed by a vertical line cursor.

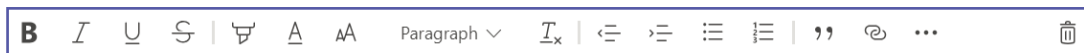
Collaborating in MS Teams

Add More People into a Group Chat

1. Click on the **Chat** that you want to add more people to.
2. Click the **Add People**  icon in the top right corner of the screen.
3. Type the **name(s) of people** you want to add.
4. Click on the **appropriate person(s)** from the drop-down list that appears.
5. Click **Add**.
6. Determine how much **chat history** to allow the new person to have access to.
7. Repeat steps #2-#6 until you have added everybody that you want to the chat.

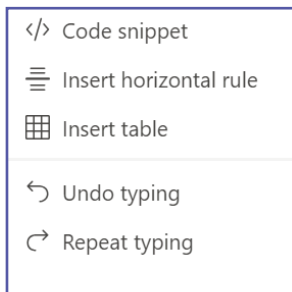
Chat Message Format Options

1. Click on the **Chat** that you want to send a message in.
2. Click the **Format button**  located under the text box at the bottom of the screen.



This expands the compose box and exposes more formatting options.

3. Click the **ellipses**  to view additional formatting options.





Sharing a File in a Chat

There are three ways that you can share a file in a chat:

1. Upload the file to your chat.
2. Share a OneDrive Link.
3. Share a MS Teams Link.



Uploading a File to your Chat

1. Click on the **chat** you would like to share your file in.
2. Click the **attachment**  icon at the bottom of the screen.
3. Click **Upload from my Computer**.
4. Select the **File** you want to upload.
5. Click **Open**.
6. Click the **Send**  icon to send the file in your chat.



Collaborating in MS Teams

Sharing a File in a Chat (Cont.)

Share a OneDrive Link

1. Click on the **chat** you would like to share your file in.
2. Click the **attachment**  icon at the bottom of the screen.
3. Click **OneDrive**.
4. Click on the **File** you want to share a link to.
5. Click **Share**.
6. Click the **Send**  icon to send the file in your chat.

Share a MS Teams Link

1. Navigate to where your file is located in MS Teams.
2. Click on the **file**. The file name will highlight in purple when it is selected.
3. Click the **Get Link**  button at the top of the screen.
4. Click the **Copy** button.
5. Click the **Chat** icon on the navigation bar on the left of the screen.
6. Click on the **Chat** you want to share the file in.
7. Click in the **text box** at the bottom of the screen.
8. Right-click and **Paste** (or use the keyboard shortcut ctrl+v) to insert the link.
9. Click the **Send**  icon to share a link to your file in the chat.

Message Search

There are two ways that you can search for a chat message:

1. Search based on a person's name.
2. Search based on a keyword.

Search Based on a Person's Name

1. Click in the **Search bar** at the top of your MS Teams screen.
2. Type the **person's name** into the box. When you are done typing, hit **enter** on your keyboard.
3. A list of messages including the person's name will pop-up. This list will include conversations that you've had with this person, as well as conversations with other people where you mentioned their name.
4. Click on a **conversation** with the person to resume chatting with them, or click on a conversation that mentioned that person to view the full context of the message.

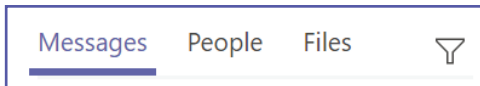
Search Based on a Keyword


1. Click in the **Search bar** at the top of your MS Teams screen.
2. Type the **keyword** into the box. When you are done typing, hit enter on your keyboard.
3. A list of messages including the keyword will pop-up.
4. Click any of the messages to view the conversation surrounding that key word.

Collaborating in MS Teams

File Search

1. Click in the **Search bar** at the top of your MS Teams screen.
2. Type the **file name** (or key words that you can remember) into the box. When you are done typing, hit **enter** on your keyboard.
3. A search window will open with three tabs:





4. To see a list of relevant files, click the **Files** tab at the top left of the screen, near the search bar.
5. Click on the **file name** and MS Teams will open a preview of the file.
6. (Optional) While in the preview window, click the **ellipses**  in the top-right corner to download the file.

Meetings in Teams

Microsoft Teams meetings are a great way for colleagues and clients, both inside and outside of SIU, to come together for a meeting. These meetings include options such as audio and video calling, screen sharing and meeting recordings.

Schedule a Meeting in MS Teams

1. Click on the **Calendar**  icon on the navigation bar on the left-hand side of the MS Teams screen.
2. Click on the **New Meeting** button  located in the top-right corner.
3. Enter a **Title** for the meeting.
4. (Optional): Enter a channel to meet in. The occurrence of the meeting and who participated in it will be stored in the Channel's conversation tab. You can schedule/have a meeting without linking it to a channel.
5. To invite people, click within the **Invite Someone** text box.
6. Type the **name of the person(s)** you would like to invite.
7. Select the **correct person(s)** from the drop-down that appears as you type.
8. Click the **Schedule Assistant** button to determine a meeting date and time based on the invitee's Outlook Calendar. If the invitee's calendar is up-to-date, it will show you when they are busy or available.
9. Click on a block of time to select it for your meeting. From here, you have two options:
 - Click the **Back** button to return to your meeting invite and add additional details.
 - Click the **Schedule** button to Schedule your meeting and email the invitee(s).

All invitees will receive an email containing a link to join the meeting in MS Teams.



You can also schedule a meeting in Teams through your **Outlook** calendar. To do this, open your Outlook calendar and click the **New Teams Meeting** option at the top of the screen.

Collaborating in MS Teams

Meetings in Teams (Cont.)

Invite Outside Guests to a Meeting

To invite an outside guest to a MS Teams meeting you simply supply them a link to the meeting.

1. Enter the guest's email address in the MS meeting invite (*see steps 1-5, above*).
2. Click the Schedule button to sending an email invitation to the guest. The email will contain a link for the guest to click on to join your meeting.

Join a Meeting as a Guest


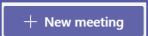

Once the guest has received their emailed invitation, they will need to click the link within the email to join. Once they have clicked the link, they will have two options to join your meeting:

1. Download the Windows/Mac Desktop App.
2. Join using the Web App.

Channel Meetings

Channel Meetings occur in a Teams channel, based on the topic Channel meetings can only be scheduled using the MS Teams app. All team members receive an email notification when a channel meeting is scheduled. It is obvious to team members that a meeting is occurring in a channel by the fact that a camera icon appears to the right of the channel name. The message shows each person that has joined the meeting at the top right of the message screen. In the bottom of the meeting message, you can see the chat. A message is posted in the channel's conversations tab, when the meeting starts. A timer also shows how long the meeting has been in progress.

Schedule a Channel Meeting

1. Click the **Calendar icon**  located in the Application Bar on the left side of the screen.
2. Click on the **New Meeting** button  located on the top right of the screen.
3. Enter a **Title** of the meeting.
4. Enter a **Start/End Date** and **Time**.
5. Pick a Channel from the **Select a Channel to Meet** in drop-down list.
6. Click the **Schedule button**  at the bottom of the screen.



After a meeting is complete, the total time of the meeting, meeting attendees and the chats are saved in the channel automatically.


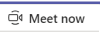

Collaborating in MS Teams

Meet Now Meetings


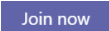
Meet Now meetings allow spontaneous meetings that are open for all team members to join. They are similar to channel meetings as they are also initiated and take place in a channel. When a Meet Now Meeting begins, it starts a conversation message that looks the same as it does for a channel meeting.

The only difference in a Meet Now meeting vs. a scheduled meeting is the video option is automatically on when the meeting is first initiated. Hence, starting with the video camera icon.

Start a Meet Now Meeting from your Calendar

1. Click the **Calendar icon**  located in the Application Bar on the left side of the screen.
2. Click on the **Meet Now button**  located on the top right of the screen.
3. Enter a **Title** of the meeting so your team members know what you want to discuss.
4. Click the **Join Now button**  to begin the meeting.

Start a Meet Now Meeting within a Channel

1. Click the **Camera icon**  located below the text box in the conversations tab associated with the channel.
2. Enter a **Title** of the meeting so your team members know what you want to discuss.
3. Click the **Join Now button**  to begin the meeting.

Invite Someone to a Meeting


Add Someone Before a Meeting

1. Open the **meeting invite** in MS Teams.
2. Click on the **Invite people box** to search for a person.
3. Begin typing their **name** in the field
4. Select the **appropriate name(s)** from the drop-down. This will invite the person(s) you selected.

All additional invitees will receive an email containing a link to join the meeting in MS Teams.

Invite Someone During a Meeting

When you are in an active meeting, you can invite additional people to join as necessary.

1. Click the **Participants**  button.
2. Type a **name or email** in the in the field.
3. Select the **appropriate person(s)** from the drop-down list. If you are using an email for a person outside of your organization, you will not see a drop-down, but they will still receive an emailed invitation to join.
4. Select **Ask to Join**.


Collaborating in MS Teams

Screen Sharing in Microsoft Teams

Common uses of screen sharing are to show presentation slides, or to walk participants through some process or work tool. All participants, except unauthenticated guests can share their screen. Unauthenticated guests are given a call-in number, and will have to wait in a Lobby until the organizer allows them access to the meeting.

Start Screen Sharing

Screen sharing can take place within a chat, call, or meeting.

1. Click on the **Share Screen icon**  within the chat, call, or meeting.
2. Choose to **share**:
 - Your entire desktop
 - Just one window (monitor screen)
 - A PowerPoint presentation
 - A whiteboard

The chart below demonstrates how to use the above sharing options.

Share your...	If you want to...	Great when...
Desktop	Show your entire screen, including notifications and other desktop activity.	You need to seamlessly share multiple windows.
Window	Show just one window, and no notifications or other desktop activity.	You only need to show one thing and want to keep the rest of your screen to yourself.
PowerPoint	Present a PowerPoint file that others can interact with.	You need to share a presentation and want others to be able to move through it at their own pace.
Whiteboard	Collaborate with others in real time.	You want to sketch with others and have your notes attached to the meeting.

Collaborating in MS Teams

Give and Take Back Control of the Screen

If you want another meeting participant to change a file, help you present, or demonstrate something, you can give control to that person. You will both have control of the screen sharing. You can take away their control at any time.

Give Control of the Screen

1. Click the **Give Control button** on the tool bar at the top of the screen.
2. Select the **name of the person** you want to give control to.

MS Teams sends a notification to the person to let them know you are sharing control. They will then be able to make selections, edits, and other modifications in the shared screen.

Take Back Control of the Screen

Select the **Take Back Control button** on the tool bar at the top of your screen.

System Audio in a Teams Meeting

Sharing your system audio allows you to stream your computer audio to meeting participants through Teams. It can be used to play a video or audio clip as part of a presentation.

Share System Audio in a Teams Meeting

1. Click the **Share icon** in the meeting controls. Once screen sharing begins, this option is visible.
2. Choose to **Include System Audio**.

Adjust Teams audio output in the devices system settings in Teams. To share your system audio, your MS Team Device settings and your computer need to be set to the same speaker.



When you share your system audio, all audio (including notifications) will play during the meeting.

Collaborating in MS Teams


Upcoming Meetings in MS Teams

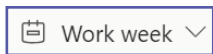
View all of your upcoming meetings and appointments within your MS Teams calendar. The calendar shows you everything that was scheduled in Teams, Exchange or Outlook.

Select a meeting on your calendar to get details about it. From there, you can also:

- Join the Meeting
- View and chat with participants
- Respond to meeting invitations
- Cancel the meeting (if you are the organizer of the meeting)

View all Meetings in MS Teams

1. Click on the **Calendar button**  on the application bar to the left of your screen.
2. Switch between **day**, **work week**, or **full week** views. The drop-down menu is located on the top right corner of the screen below the New Meeting button.



3. Find the **month and year** drop-down menu located in the top left corner of your screen.




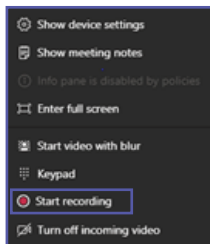
4. Click on **Today** to get back to the current day/week.

Record Meetings in MS Teams

Meetings can be recorded in Teams to capture audio, video and screen sharing activity. The recordings take place in the cloud, but can be saved to a local desktop or shared network drive. Only meetings and group calls have the ability to be recorded.

Record a Meeting or a Group Call

1. Start or join a meeting or group call.
2. Click the **ellipses**  for more options.
4. Select **Start Recording**.




Everyone in the meeting is notified that the recording has started. The meeting notification is also posted to the Chat History. Multiple recordings of the same meeting at the same time cannot be done. If one person starts recording a meeting, that recording will be stored on the cloud and available to all participants.

Collaborating in MS Teams

Record Meetings in MS Teams

End a Recording

1. Go to the **meeting controls**.
2. Click the **ellipses**  for more options.
3. Click **Stop Recording**.

The recording begins processing (this may take awhile). Once processed, it is ready to play. A link is provided to the recording in the meeting chat or in your meeting channel, if your meeting was in a channel. The link is only available for download for 7 days. If someone from outside of your organization participated in the meeting, you will need to provide them with the recording—they will not be able to access it in MS Teams.