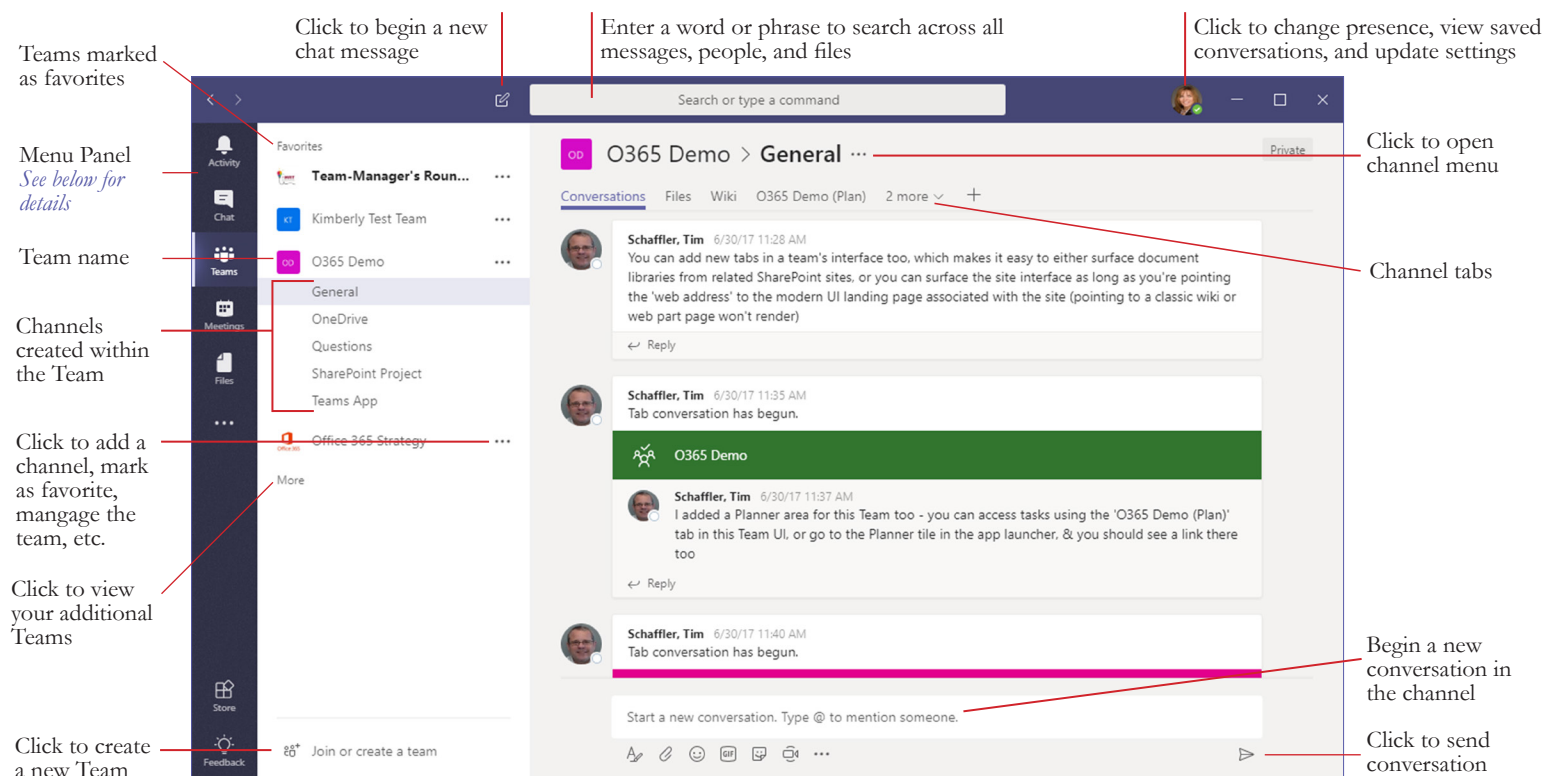# Microsoft Teams

# Reference Guide

Microsoft Teams is a versatile, collaborative environment that serves as a hub for message conversations, file sharing, and content creation within Office 365. This fully-integrated, chat-based workspace provides seamless access to the expansive Microsoft Office software suite so that your team can meet, organize, and develop content with the power of Office 365 right at your fingertips. Microsoft Teams makes it easy for team members to follow projects between applications, and notifications help to keep everyone informed of conversation updates, document changes, and upcoming meetings. Channels allow teams to focus conversations or projects around a specific topic, and members can upload files to a channel, save channel conversations, and follow the channel's activity. Teams is available in both desktop and mobile app versions, allowing you to remain connected across devices.
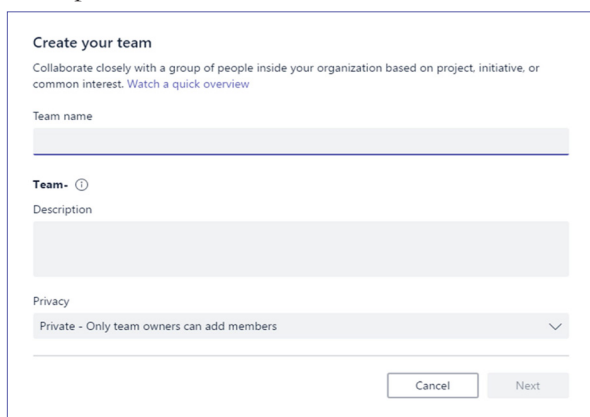
Teams marked as favorites

Click to begin a new chat message

Enter a word or phrase to search across all messages, people, and files

Click to change presence, view saved conversations, and update settings

Menu Panel
*See below for details*

Team name

Channels created within the Team

Click to add a channel, mark as favorite, mangage the team, etc.

Click to view your additional Teams

Click to create a new Team

Click to open channel menu

Channel tabs

Begin a new conversation in the channel

Click to send conversation

| Menu Panel | Description |
|---|---|
| **Activity** | Displays the last activities of the Teams you are a member of, as well as any conversations you were @mentioned. |
| **Chat** | Displays the chat history with an individual or group of individuals. T-Bot can also be found here. T-Bot provides help, FAQs, videos, and allows you to ask questions and get answers. |
| **Teams** | Displays all Teams you are a member of and allows you to drill-down into each Channel within the Team. This is also where you can create Teams. |
| **Meetings** | Pulls your meetings in from Outlook and also allows you schedule meetings within the Meetings tab that are sent to a Team. |
| **Files** | Quickly find and view files across OneNote, OneDrive and within Teams. There's also a very helpful 'Recent' tab so you can quickly access the latest documents you were working on, as well as a shortcut to your Downloads. |
| **...** | Displays other apps you can open such as OneNote, Planner, and T-Bot. |

## Creating Teams

**To create a team:**

1. Click **Teams** in the menu panel on the left to view the Teams list.

2. At the bottom of the Teams list, click the **Add team** icon.

3. On the S**uggested Teams** page, hover your cursor over the **Create a Team** tile and click **Create Teams**.

4. In the **Create your team** dialog box, add a team name and description.



5. Click **Next**.

6. In the **Add members** dialog box, begin typing the name of a St. Jude employee, as a matching name appears, click **Add** to add it to your team. Otherwise, click **Skip** (you can add members later). The created team is added to the teams panel.

**To add members to a team:**

1. Hover your cursor over the **...** **More options** icon next to the team in the **Teams list**. Then, click **Add members** in the fly-out menu.
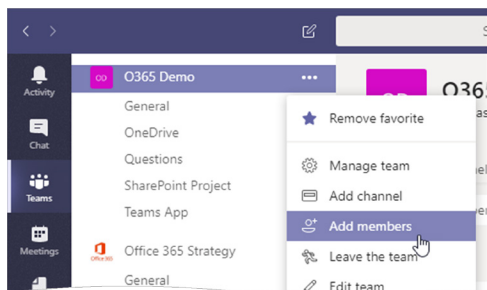


2. In the **Add members** dialog box, begin typing the name of a St. Jude employee. Names appear as you type. Click **Add** to add a contact to your team.

3. Click **Done** when finished.

## Managing Team Settings and Membership

**To access team settings:**

1. Hover your cursor over the **...** **More options** icon next to the team name in the Teams list.

2. Select **Manage team** to open the team page, where you can add or remove members, assign owner privileges, manage channels, and configure team settings.
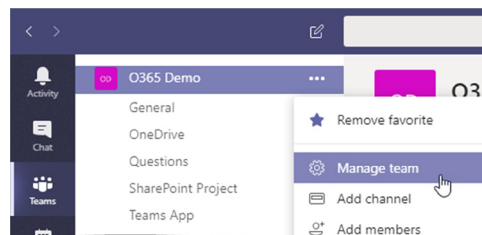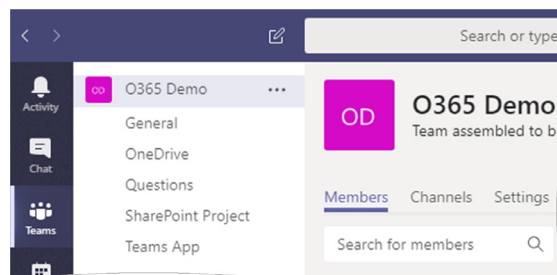


### Team Owners

Team owners can add or delete members, set member permissions, control some team attributes, and manage @mentions, along with other team functions.

**To assign or remove owner privileges:**

1. From the team page, click the **Members** tab.



2. In the **Role** column, click the role menu next to the team member and select **Owner**.

**To add or change the team picture:**

1. On the **Settings** tab, click **Change picture** in the **Customization** section.

2. In the **Change picture** dialog box, click **Upload picture**.

3. Locate the image file on your computer and click **Open**.

4. Click **Save**.

**To change member permissions:** on the **Settings** tab, select or clear boxes in the **Member permissions** section. You can add or remove the ability of members to create, update, or delete channels, tabs, connectors, and bots.

### Deleting a Team

Click the **...** **More options** icon next to the team name in the Teams list and choose **Delete the team**. In the **Delete** dialog box, check the notification box to confirm you understand that everything will be deleted and click **Delete team**.

**Important Note:** Deleting a team deletes everything that is associated with the team, this includes all documents, chats, channels, forms, notes and lists.

## Working with Channels

Channels help to organize conversations around a specific topic or theme. Any team member can create a channel, and all team members can view and participate in channel conversations.

**To create a channel:**
1. Click the ⋯ **More options** icon next to the team name in the Teams list and choose ▭ **Add channel**.
2. Name the channel, add a description (optional), and click **Add**. Channels are listed below a team in the Teams list (the list can be expanded and collapsed). Favorited channels appear at the top of the list of channels.

**To notify team members about a channel:** use an @mention in the conversation box. For example, type **@Huffman, Kimberly** to send a notification to Kimberly.

**To follow a channel:** click the ⋯ **More options** icon next to the channel name in the Teams list, then click 🗨 **Follow this channel**. Notifications for new channel activity will appear in your 🔔 **Activity** feed.

**To delete a channel:** click the ⋯ **More options** icon next to the channel name in the Teams list, then 🗑 **Delete this channel**. Click **Delete** in the confirmation dialog box.

## Using Tabs

You can add apps such as Word or Excel as tabs at the top of a channel and then store related files in them so that they are quickly accessible for viewing and editing by your team.

**To add a tab to a channel:**
1. Click the ➕ **Add a tab** icon at the top of the channel.
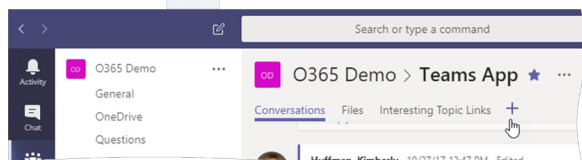


2. From the Tab gallery, select the app you want to add.
3. In the tab dialog box, update the name of the tab, if desired.
4. Select the file to save in the app.
5. Follow any additional instructions for the selected app.
6. Click **Save**.

**To begin a conversation in a tab:** click the tab to display the app. Then, click the 🗨 **Tab Conversation** icon (located in the top-right of the tab window) to open the tab panel. Type in the **Reply** box to begin a conversation.

**To remove a tab:** click the menu arrow next to the tab name and choose **Remove** from the menu, then click **Remove**.
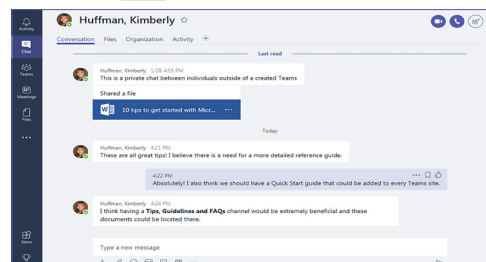
## Conversations

**To start a new conversation in a channel:**
1. Navigate to the channel where you want to begin the conversation.
2. Compose the message in the conversation box at the bottom of the channel.

   **Tip:** Click the 🄰 **Expand** icon to expand the conversation box.

3. Click the ➤ **Send** icon to send the message.



**To reply to a message:** click **Reply** below the message.

**To notify the whole team in a message:** type **@** followed by the team name. For example, **@Office 365 Demo**.

**To edit a message:** hover your cursor over the message, then click ⋯ **More options** icon and choose ✏ **Edit** from the menu. Make changes as needed and click ➤ **Send**.

**To add a file or attachment to a conversation:** click the 📎 **Attachment** icon below the conversation box. Select the file in the dialog box that opens and click **Upload**. Wait for the file to upload, then click ➤ **Send**.

**To save a message:** hover your cursor over the message, then click 🔖 **Save**.

**To view saved messages:** click on your profile image in the upper-right of the screen. Click 🔖 **Saved** in the menu to display a list of saved messages. Use the **Search** box above the list to search for a specific message.

**To delete a message:** hover you cursor over the message, then click the ⋯ More options icon and choose 🗑 **Delete**.

**To start a private or group chat:**
1. Click the 🗨 **Chat** tab in the menu panel on the left.
2. Click the ✎ **New chat** icon and select the person(s) you want to begin a chat with.
3. On the Conversation tab, compose your message in the chat box at the bottom of the window and click ➤ **Send**.

**To name a group chat:** click the ✏ **Name Group Chat** icon at the top of the group chat window. Type a name in the **Group name** dialog box and click **Save**.

## Team Meetings and Calls

### Team Meetings

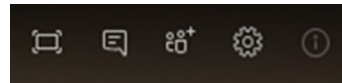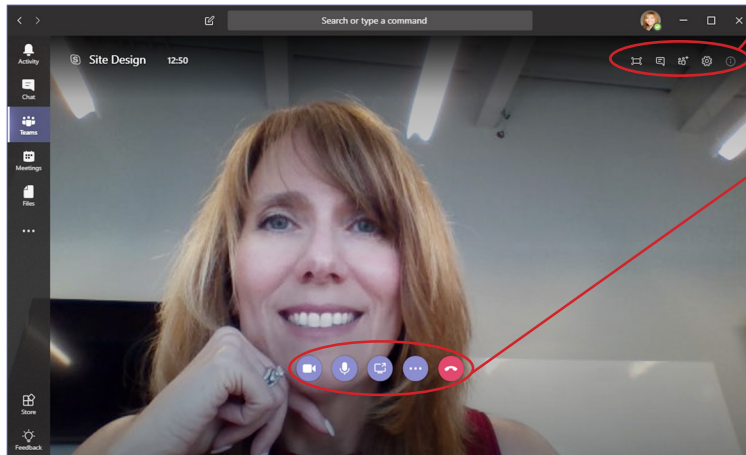Team meetings combine audio, video, and sharing features. You can schedule a team meeting, or turn a conversation into an instant meeting and bring any additional participants as needed. You can also join a meeting that is already in progress.



Meeting tools allow you to show meeting full screen, send messages to meeting participants, invite others to the meeting, and control meeting settings.
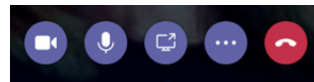


Addition tools include video, mute, share desktop, more actions, and hang up buttons.
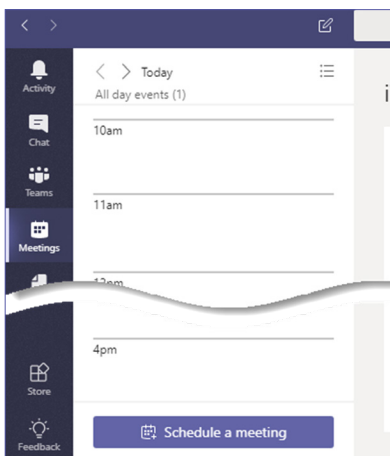
**To edit meeting details:**

1. From the left menu panel, click on **Meetings**.

2. Select the meeting in the **Meeting** list, then click **Edit** at the bottom of the meeting page.

3. Make changes as needed and click **Update**.
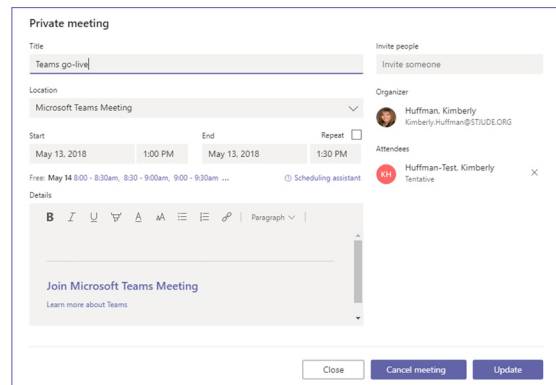


**To schedule a team meeting:**

1. From the left menu panel, click **Meetings**, then click **Schedule a meeting** at the bottom of the Meetings list.



2. In the **New Meeting** dialog box, add a meeting title and select a location.

   **Note:** If you select a team channel to meet in, anyone who has access to the channel will be able to join. Set the channel to **None** if you don't want uninvited team members to join the meeting.

3. Select a start and end time.

4. In the **Invite people** field, type the names of meeting participants. Contact names appear as you type, press Enter to add them.

5. Add a brief explanation about the meeting in the **Details** box.

6. Click **Schedule a meeting** when finished.

**To join a team meeting:**

1. Do one of the following:

   - From the **Meetings** tab, click **Join** next to a scheduled meeting.

   - In a conversation, click **Join** next to a meeting request.

   - If a meeting notification appears as you work, click the **Join** button at the bottom of the meeting request.

### One-On-One and Group Calls

**To start a call:**

1. From the left menu panel, click on **Chats**.

2. Click the **New chat** icon at the top of the **Chats** list.

3. Add participant names to the **To:** field and press Enter.

4. Click the audio call or video call button at the top of the window to start the desired call type.

## Files

### Adding or Creating Files in a Channel

**To create a new file:**
1. Select the channel in the **Teams** list.
2. Click the **Files** tab at the top of the channel window.
3. Click **New** and choose the app you want to use to create the file (e.g. Word).
4. Name the document in the window that opens and click **Create**. The file will open in a new window, and you can continue editing the document as needed.

   **Tip:** Click **Share** at the top of the window to invite other team members to view the document. In the **Share** window, use the **Invite people** box to share the document with individual users, or click **Get a Link** to create a link that you can send to team members as needed.

**To upload a file to a channel:**
1. Select the channel in the **Teams** list.
2. Click the **Files** tab at the top of the window, then click **Upload** and locate the file on your computer.
3. Click **Open**. The file appears in the **Files** list.

   **Tip:** You can also click and drag files to the **Files** page to add them.

**To move a file to a different channel:**
1. Locate the file in the **Files** list
2. Click the ⋯ More options icon next to the file and choose **Move**.
3. In the Move to dialog box, navigate to the Home level of your team channel structure to display all channels.
4. Select the channel folder you want to move the file to and click **Move**.
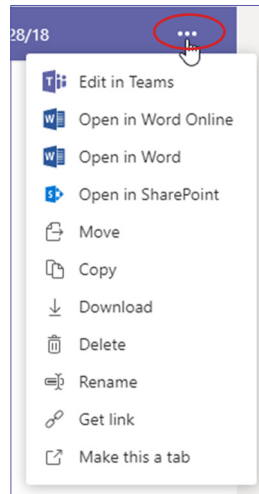
**To download a file**
1. Locate the file in the **Files** list.
2. Click the ⋯ More options icon next to the file and choose **Download**. The file will appear in the default download location on your computer (e.g. Downloads folders).

   **Tip:** You can also rename, copy or delete a file from the More options icon.

## Managing Files

### File Locations
Created documents are saved automatically to the team's SharePoint folder. Conversely, files shared in a private or group conversation are stored in OneDrive for Business, and are only accessible to participants of the conversation.

### The Files List
The **Files** list provides access to files that you've recently viewed or modified, a list of the files that were created or edited within a favorited channel, and the files in your OneDrive for Business folder.

### Viewing All Team Files
Navigate to the team, then click the **Files** tab at the top of the team window.

### Editing Files

**To open and edit a file in an app**
1. Click the More options icon next to a file (in a list, or in a conversation).
2. Choose the "open online" option (e.g. **Open in Word Online**). The file opens in the selected Office Online app. Files are saved automatically as you edit them, but you can save a file with a new name or download a file to your computer from the **File Save As** menu.

   **Note:** You can also open and edit files in a desktop application (e.g. Microsoft Word).
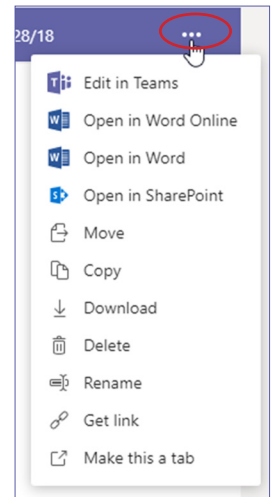
**To share a document for co-authoring**
1. With the document open, click **Share** at the top of the window.
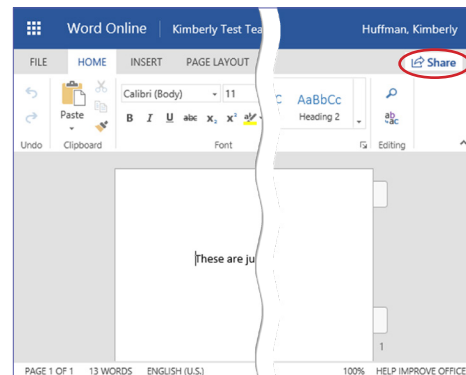
2. In the **Share** dialog box that appears, ensure that Invite people is selected and add invitee names.
3. Add a brief message if desired and click **Share**.

## Favorites

### Favorites
Favorite a team, channel, contact, or chat to display it in the **Favorites** section at the top of their related lists. For example, favorited teams or channels appear at the top of the **Teams** list.
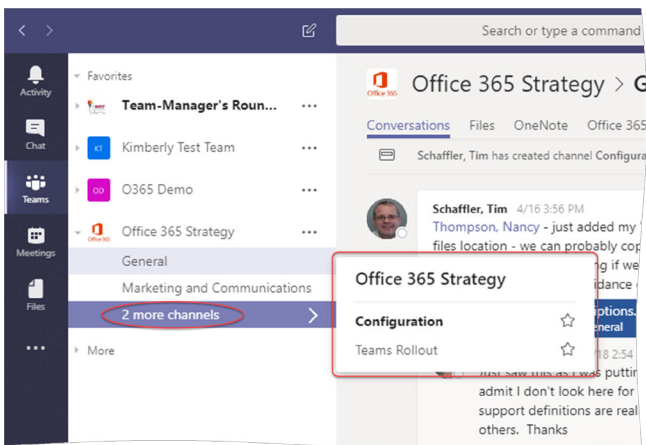
### To favorite team
1. With the **Teams** list displayed, click the More options menu beside the team name.
2. Click **Favorite**.
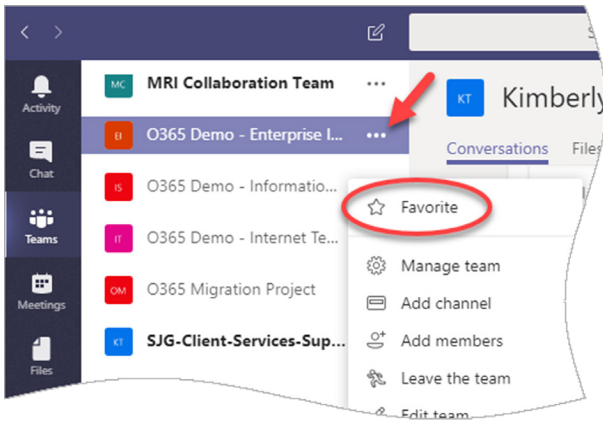


### To favorite a channel
1. Click **More channels** below the team to display a fly-out of channels that aren't favorited.



2. Click the **Favorite** icon beside the channel you want to favorite.

### To favorite a chat or contact
1. In the **Chat** list, click the More options icon beside the chat or contact name, then click **Favorite**. Alternatively, select the chat or contact, then click the **Favorite** icon at the top of the chat window.

### To remove a favorite
1. Click the ⋯ More options icon beside the item in the Favorites list, then click **Remove favorite**.

## Notificatons, and the Activity Feed

### Notifications
Notifications appear in the menu panel and the teams list whenever you are @mentioned or when someone responds to one of your messages.
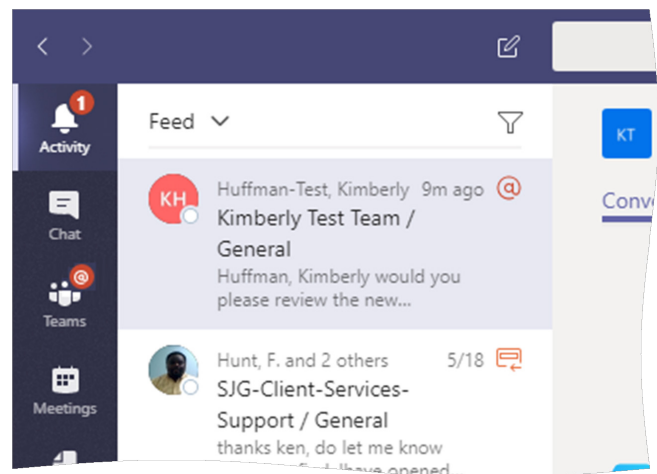
### To manage additional notification settings
1. Click your profile picture to open the profile menu.
2. Click **Settings**, then **Notifications**.
3. Make changes as needed, then click the Close button.
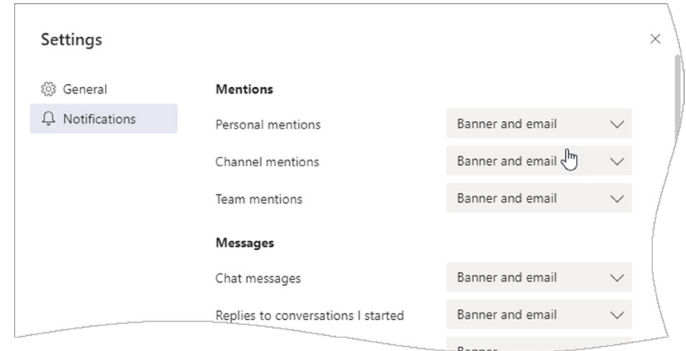


### The Activity Feed

The **Activity** feed displays a list of messages you are mentioned in, activity in all of the teams you're a part of, and a list of the messages you've posted.



### To view activity
1. From the left menu panel, click **Activity**.

### To change the feed list
1. Click the **Feed** display menu at the top of the feed and choose an option.

### To filter the list of displayed activity items
1. Click the filter menu and choose an option (e.g. **Replies**).

## Key Things to get Started

- **Download** the Teams desktop and Mobile apps. During setup in the mobile app, when prompted for your email address use the following format: **[network login name]@stjude.org** (i.e. khuffman@stjude.org).

- **Update Teams desktop application settings** to open the application in the background. Click on your picture, select **Settings**. Under **General**, be sure all 3 application settings are checked.
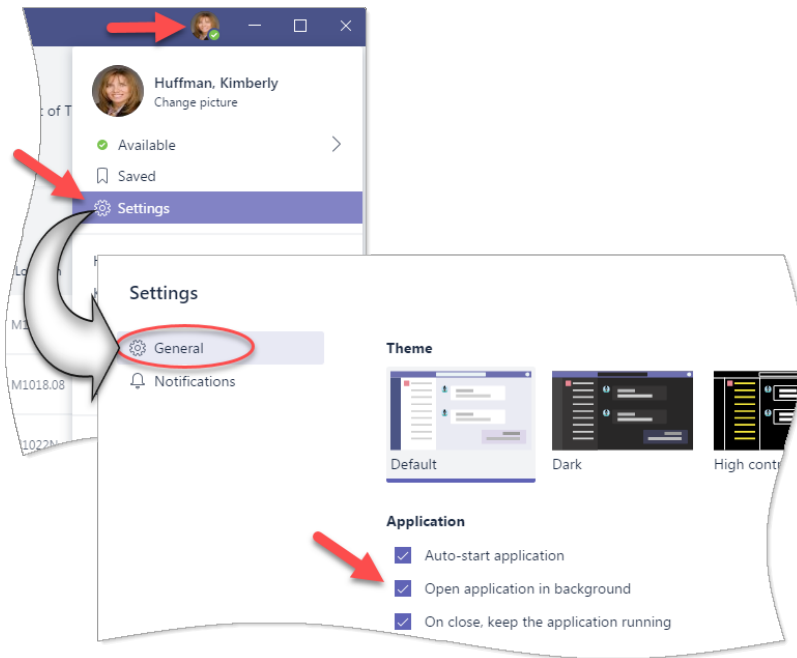


- **Follow channels**. When you follow a channel(s), you will receive notifications when activity in the channel occurs.
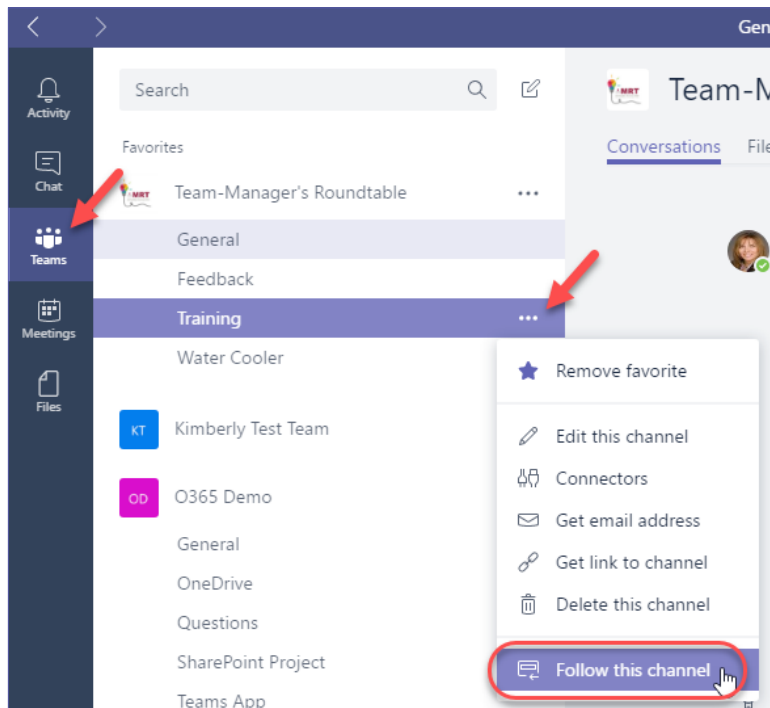
## Key Things to get Started

- **Start a conversation.** Begin a new conversation within the channel. Using the tools across the bottom of the conversation allows you to open the compose box (to add a subject, formatting, mark the as important, etc.), attach a file, add emojis, gifs, or begin a meeting (if using the desktop app).
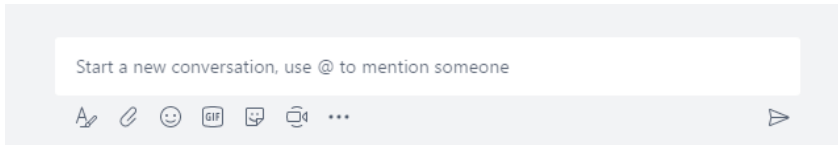


- **Respond to conversations.** Contribute to the conversation by clicking **Reply**.
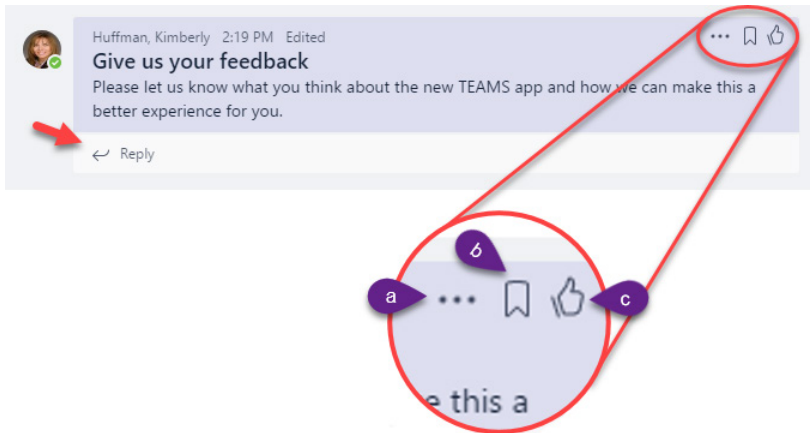


  a. Appears for conversations you have created, allowing you to **Edit**, **Delete**, or **Mark as unread**.

  b. Flags the conversation as **Saved**. To view your saved conversations, click on your picture located at the bottom of the left tabs panel, click on Saved.

  c. **Acknowledges** you have read the post.

- **Mention someone or the Team.** Typing **@** before someone's name is used to get their attention in a conversation. They'll receive a notification. You can also type **@team** to message everyone on the team.

- **Edit a document and start a conversation.** From a file attached to a conversation or from the Files tab of a channel, you can edit a document within Teams and begin a conversation around the document.

- **Check out T-Bot.** Located in Chat and More Apps, T-Bot is an excellent resource for help using Teams. You can ask a question in conversations and get an answer, find help, review FAQs, watch videos and more.