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What is Microsoft Teams?

Microsoft Teams is a cloud-based team collaboration software. The core capabilities in Microsoft Teams include business messaging, calling, video meetings and file sharing. Microsoft describe Teams as a ‘chat-based workspace in Office 365’ allowing teams to work together within one window to enhance teamwork.

Teams will soon allow Microsoft to retire skype for Business. Teams already has more features than Skype for Business and new features are being added all the time.

Watch the online video

What do I use it for?

Teams allows you to work more effectively as a team, it offers a convenient way to share files with your colleagues and gives you the ability to hold conversation via instant messaging about current progress. You can organise your conversation and files into different topic areas called Channels. Teams also allows you to host meetings and invite external collaborators to join in your Team.

Take a look at the Microsoft Interactive Teams Demo

Who is it available to?

Microsoft Teams is available to all University staff and students.

Create a Microsoft Team

If you require a new team creating then you'll need to complete the 'create a new Microsoft Team' self-service request form available on the IT website and IT will set this up for you.

This form can be found on the Knowledge Base article KB0012997 and you will need to sign in to view the entire article. The create team form is located under the “Related Requests” section of the page.

Note: You don’t need to set up a team or belong to a team in order to communicate with other users. You can start a conversation and collaborate on files without being part of a team, all you need is the Teams app.
Accessing Teams

Accessing Teams via the Internet

You can access Teams through Office365 as follows:

- Open a **browser** and enter the address: [https://office365.leeds.ac.uk](https://office365.leeds.ac.uk)
- **Login** with your university credentials
- Click the **Teams** tile (if the Teams tile is not visible, click **All apps** to find it)

![Figure 1: Apps tiles in Office365](image)

Downloading the Teams app

If you are downloading the Teams app to your desktop computer at the University, you can use the Software Centre:

- On your University computer, use the search feature and enter the search term “Software Center”
- Click **Applications** at the left of the window and click **Microsoft Teams**

![Figure 2: Software Center](image)

- Click **Install**

If you want to download Teams to a personal/home computer, go to [https://teams.microsoft.com/downloads](https://teams.microsoft.com/downloads) and follow the onscreen instructions.

Teams on mobile devices

The Microsoft Teams app can be downloaded from the apple store for ios and play store for android devices. Once downloaded you will need to login with your university credentials.

Note: If you are using Teams on a personal device you must ensure that you have a password or pin protection on your device in order to comply with security and GDPR. Always ensure you sign out of Teams on your devices rather than just closing the app.
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Teams Window

The Purple bar on the left contains icons that let you visit different areas such as your Teams list, Chat history and Activity Feed. The white area to the left of the screen is the “list” area. This will show you a list of teams, list of chats and list items in your activity feed. The main area to the right of the screen is the content area and this is where you will see the conversations & posts, chats etc.

Sign in

Once you have Teams on your device you will need to sign in using your university credentials.

- Open the Teams app
- Enter your username (example, issann@leeds.ac.uk) and click Sign In
- Enter your password if prompted

Note: If you are logged in to a University computer, Teams will recognise your user details and you won’t need to enter your password. If you are using an external device, you will be prompted to enter your password or may be taken to the “organisation” sign in page.

Sign out

When you have finished using Teams it is recommended that you Sign Out rather than just closing the Teams app, particularly if you are using your own device.

- Click your profile icon (usually located at the top left of the screen) and click Sign Out

Note: If you are using a mobile device you may find the process is slightly different.
Profile menu

At the top right of the Teams app you will see your profile icon which you can use to manage your profile settings.

- Click the **profile icon**

![Profile menu](image)

**Figure 4: Profile menu**

**Status**

The first item in the menu is your status which is linked to your outlook profile. If you have a meeting in your outlook calendar, teams will change your status to say “**In a meeting, Out of Office**.

You can override the automatic setting and choose a different status, however if you’ve been idle for 10 minutes or more, Teams will change your status from **Available** to **Away**.

If you’re “Out of Office” automatic reply is switched on in Outlook, it will appear below your status.
**Set status message**

You can set your status message to give users in Teams more information about what you are up to.

- Click your Profile icon and click **Set status message**.
- Enter a message (max 280 characters).
- Tick **Show when people message me** and choose when to **Clear status message after**.

![Figure 5: Set status message window](image)

- Click **Done**

Note: the Set status message is only visible within Teams and displays above the compose box when someone sends you a message. You will still receive messages as normal.

**Settings**

You change the appearance and behaviour of the information within Teams from the Settings window. A couple of settings that you may wish to change include the date format and the notifications that you receive.

**Change date format**

The default format for dates is the US format and you may prefer the UK format.

- Click your Profile icon and click **Settings**.
- Click **General** and then from the **Language** section change the **App language determines the date and time format** to **English (United Kingdom)**.

![Figure 6: Status message above compose box](image)

- Click **Save and Restart** for the changes to take effect.
**Teams Layout**

The default option is that teams are shown in a grid format, however you can switch to show the teams as a list if you prefer.

- Within the **Settings** click **General**
- Click either **Grid** or **List** within the **Layout** section

![Settings](image)

**Figure 7: Layout settings**

**Notifications**

Teams will display various notifications in different ways, but you can control how you receive them.

- **Email** notifications means that you will receive an email in your Outlook Inbox.
- **Banner** notifications appear momentarily at the bottom right corner of the window.
- **Only show in feed** means that the notification will only appear in the feed.
- **Off** means that you won’t be notified.

- Click your **Profile icon** and click **Settings**
- Click **Notifications** and then choose the type of notification you want to receive for each item.

**Zoom**

You can change the zoom magnification to make items look bigger / smaller to suit your preference

- Click your **Profile icon**
- Click + to Zoom in or – to Zoom out
Team Settings

If you are the owner of a Team there are various settings which can change what your users are able to do within the team.

- Locate the Team and click the More Options button to the right of the team name
- Click Manage Team

![Figure 8: More options for Team](image)

- Click the Settings tab
- Click the expand icon for each section to view /change the default settings

![Figure 9: Team settings](image)
Team membership

If you are setting up a team you will become the Team Owner and as the team owner you will need to adhere to and agree to the terms and conditions as specified in “Appendix A-Terms and conditions of Team Ownership”. We recommend that you have at least two team owners (max 100 owners)

Add members

The maximum number of members you can have per team is 5000. The team owners are able to add members to the team as follows:-

- Click the More Options button to the right of the team name (the ellipses button)

![Figure 10: More Options](image)

- Click Add member option
- Start typing the user name and then choose the name from the list

![Figure 11: Add member to team](image)

- Click Add

Generate a code

Adding users individually can be time consuming so an alternative method is to invite users by generating a code.

- Click the More Options button to the right of the team name and click Manage Team
- Click Settings and then expand the Team Code section
- Click the Generate Code button and then share the code with the users who wish to join the team

![Figure 12: Generate a code to join a team](image)

Note: Only members of the University of Leeds will be able to join the team with this code. If you want to disable this feature, click the Remove option within the Team code section which means users will no longer be able to use this code.
Join a Team using the code

- Open Teams
- Click Join or create team
- Enter the code under “Join a team with a code”
- Click Join team (The joined team name will appear in the Teams list)

![Figure 13: Join a team with a code](image)

Change Team member role

There are two types of team membership, Team Owner and Team Member and you can change the role anytime.

- Click the More options button to the right of the team name
- Click the Manage team option
- Locate the team member and click the drop down arrow to the right of the role
- Click Owner (or Member)

![Figure 14: Change role to owner (or member)](image)

Delete Members

- Click the More options button to the right of the team name
- Click the Manage team option
- Locate the team member and click the X under the role column
**Hide a team**

You may belong to multiple teams but you don’t always need to see them all on a daily basis. Hiding teams will move them into the “Hidden teams” section of the Teams list which you can expand and collapse. Hiding teams can help you focus on the teams you need.

- Click the **More options** button to the right of the team name
- Click **Hide**

![Figure 15: Hide a team & Hidden teams section](image)

Note: Even if you have hidden a team you will still receive notifications if there is any activity in these teams

**Show a team**

- Expand the **Hidden teams** section and locate the team you want to show
- Click the **More options** button to the right of the team name
- Click **Show**

![Figure 16: Show a team](image)
Channels

Channels are used to subdivide the team into different areas that could be used for projects, ideas, agendas, plans, and events, to name but a few. You can use these channels to focus the information for a specific topic and can include members that will need to work here.

Each new team that is set up automatically includes the “General” channel and all members of the team will be able to use the channel. The maximum number of channels you can create is 200 standard channels, and 30 private channels.

Create a new channel

- Click the More Options button for the required team
- Click Add channel
- Enter a Channel name, Description (optional) and choose Standard channel
- Check the “Automatically show this channel in everyone’s channel list” option (this will ensure all team members will see the new channel)
- Click Add

Create a channel for “IT Training” team

Channel name
New Features

Description (optional)
Descriptions and discussions of new features, new apps and new techniques

Privacy
Standard - Accessible to everyone on the team

Automatically show this channel in everyone’s channel list

Figure 17: Create a new channel

Private Channel

A private channel is created in the same way as a standard channel, however you will need to add members to each private channel. Private channels are useful if you need to discuss sensitive information whereby the whole team does not need to be involved.

Note: You can only add members of the team to a private channel.

Send email to channel

When you want to share information from an email message with a team, rather than copy and paste information from an email into a new post in a channel, you can forward the email message directly to the channel.

- Locate the channel within the team that you want to send the email to
- Click the More options button for the channel
- Click Get email address
- Click Copy
- Forward the email to the copied address
Get email address

See advanced settings for more options.

New Features - IT Training <9e527702.leedc365>

- Remove email address

Figure 18: Get channel email address

Note: The email message will appear as a post in the channel with all the details from the email.

Hide a channel

The teams that you belong to will likely have multiple channels which may not always be relevant to you so you can “hide” the channels you don’t want to see.

- Locate the channel you want to hide
- Click the More options button
- Click Hide

Note: You will not be able to hide the General channel in any team and you will not receive notifications for hidden channels

Unhide a channel

- Expand the Team to show the channels (Hidden channels will appear at the bottom of the list)
- Click Hidden channels to display the list of currently hidden channels
- Click Show to the right of the hidden channel name

Pin a channel

The “pinned” channels list appears at the top of the list of teams so you can easily access the channels from different teams that you regularly visit.

- Locate the channel you want to pin
- Click the More options button
- Click Pin

Note: Use the same technique to Unpin a channel
Post Messages

Within a team, the **General channel** is where most of the conversations that involve all team members take place. Posts or conversations are usually the first thing you see when you click on a channel.

**Team Posts**

This is a tab in each channel where you can post messages to all the members of the team/channel. All members can reply and everyone can keep track of the conversation trail. Think of this as an alternative to holding a meeting to discuss stuff.

**Compose Box**

The compose box sits at the bottom of the screen and displays the default text “**Start a new conversation. Type @ to mention someone**”, and this is where you type your message.

**Start a new conversation**

Before you start a new conversation make sure that you are displaying the correct channel.

- Click the **channel** in which you want to start a new conversation
- At the bottom of the Teams window, click in the **compose box**

![Start a new conversation. Type @ to mention someone.](image)

**Figure 19: Compose box**

- Type your **message/post**
- Press **Enter** or click **Send**

**Tip:** To start a new paragraph in the post, press **SHIFT + ENTER** as pressing Enter will send the post

**Reply to a post**

To continue the conversation:-

- Click **Reply** at the end of the post
- Enter the text
- Press **Enter** or click **Send**

**Formatting Posts**

You can write a more detailed post using the formatting tools.

- Click in the **compose box** (or **Reply** box)
- Click the **Format button** to expand the compose box
Microsoft Teams Introduction Workshop

Figure 20: Expanded compose box

- Add a **subject** in the subject line
- Enter the post **text** below
- Click **Send** (or Press **CTRL+Enter**)

### Table 1: Description of formatting tools

<table>
<thead>
<tr>
<th>This Tool</th>
<th>Does This:</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New conversation" /></td>
<td>Choose whether you want to create a <strong>New conversation</strong> or create an <strong>Announcement</strong></td>
</tr>
<tr>
<td><img src="image" alt="New conversation" /> <img src="image" alt="Announcement" /></td>
<td>Everyone can reply</td>
</tr>
<tr>
<td><img src="image" alt="Pos in multiple channels" /></td>
<td>Post in multiple channels</td>
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<tr>
<td><strong>B</strong></td>
<td>Apply <strong>bold</strong> formatting</td>
</tr>
<tr>
<td><strong>I</strong></td>
<td>Apply <strong>italic</strong> formatting</td>
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<td>Apply <strong>underline</strong> formatting</td>
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<td><strong>S</strong></td>
<td>Apply <strong>strike-through</strong> formatting</td>
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<td><strong>H</strong></td>
<td>Apply <strong>highlight</strong> text colour</td>
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<td><strong>A</strong></td>
<td>Apply a different <strong>font</strong> colour</td>
</tr>
<tr>
<td><strong>AA</strong></td>
<td>Change font size to small, medium or large</td>
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<td>Apply a style to text e.g. Heading 1</td>
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<td>Clear all formatting</td>
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<td>Mark as important</td>
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<td>Undo</td>
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<td>Redo</td>
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<td>Delete post</td>
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<td>Attach a file to the post</td>
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<td>Add an emoji to the post</td>
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<td>Add an animated gif to the post</td>
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<td></td>
<td>Add a sticker to the post</td>
</tr>
<tr>
<td></td>
<td>Meet now icon</td>
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</tbody>
</table>

**Edit a post**

If you need to change your post you can use the edit facility.

- Locate your post
- Click the **More options** button
- Click **Edit**

![Figure 21: Edit a post](image)

- Change (or format) the post as required
- Click **Done**
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Note: you can also delete a post using the more options button, however you will only be able to edit or delete a post that you have created. If you are a Team Owner you will be able delete any post within the team.

**Respond to a post with an emoji**
Some posts don’t always require you to provide a written response and a good way of acknowledging a post is to use an emoji
- Position the mouse pointer at the top right of the post to display the emoji toolbar
- Click the appropriate emoji 🧸❤️😭😢😡

**Save/flag a post**
If you need to revisit a post you can Save (flag) the post so that you can find it easily.
- Locate the post and click the More options button
- Click Save this message

**Retrieve saved post/messages**
- Click your user icon at the top right of the window
- Click Saved, a filter applies to show you all your saved messages

**@ mention**
If you want to draw attention to a post you can use @mention to name an individual, a channel or a team.
- Create a new conversation or reply to a conversation
- Type “@” followed by the person name (a list of users will pop up)
- Click the user name
- Type a message after the users name

Note: you can use the @mention for a channel or the whole team. Type “@channel” and click the channel name, or type “@team” and click the team name

---

**Figure 22: @mention example**

**@mention notifications**
If you have been @mentioned either as an individual or part of a channel/team, Teams will display a banner at the lower right of the Teams window

---

**Figure 23: @mention notification banner**
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When you read the post where you have been @mentioned, you will see the symbol at the top right of the post.

![@mention symbol displayed in the feed](image)

**Figure 24: @mention symbol displayed in the feed**

**Quick poll**

A quick way to gather information is to create a poll.

- Click in the “Start a new conversation.” box (or Reply box)
- Type “@Forms”
- Type your question (make sure you put a question mark “?” at the end to signify the end of the question)
- Type the responses with each separated by a comma and Send

![Quick poll example](image)

**Figure 25: Quick poll example**

When you send the message, Teams will convert the information to appear as a form where you can choose from the options as shown in Figure 26.

![Poll options and responses](image)

**Figure 26: Poll options and responses**

**Note:** As your team respond to the poll, you will be able to see a tally of how many people chose each option.
Chat

You don’t need to be part of a team to be able to chat with another user. You can create new chats with individuals or a group chat with a select few. Think of this as replacing a phone call to have a direct conversation that doesn’t involve the whole team.

**Individual chat**

- Click the Chat button from the left side of the Teams window
- Click the New chat button at the top of the chat list
- Start typing the name of the person you want to chat with

![Figure 27: Find the person you want to chat with](image)

- Click the person name
- Type your message and send

*Note: If you have chatted with this person before, messages from previous conversations will display.*

**Group chat**

Group chat means that you can include more than one person in the conversation and works in the same way as individual chat.

- Click the Chat button from the left side of the Teams window
- Click the New chat button at the top of the chat list
- Start typing the name of the person you want to chat with
- Click the person name
- Repeat this process until everyone is included
- Type your message and send
Name a group chat
An easy way to identify your group chat is to allocate a name to the group.

- When you have added all the users to the group chat, click the **create a new group chat** drop down arrow
- Enter a **Group name**

![Figure 28: Add a group name to group chat](image)

- Type your **message** and **send**

Add another person to a group chat
You can add other people to a group chat even if you have already started the conversation.

- Click the group chat from the chat list to display the chat
- Click the **View and add participants** button at the right side of the group chat name
- Enter the **user name** to be added
- Choose which part of the conversation the user can see
- Click **Add**

![Figure 29: Add another user to an existing group chat](image)
Manage chat

Over time your chat list will grow and every single chat that you have had may not be current or relevant so it’s useful to perform a bit of housekeeping.

- Click the Chat button from the left side of the Teams window
- Locate the Chat and click the More Options button
- Click the appropriate option

![Figure 30: Chat options]

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mark as unread</strong></td>
<td>The chat message will appear bold to indicate that it hasn’t been read and the Chat icon will display the number indicator so that you know how many chats are still outstanding</td>
</tr>
<tr>
<td><strong>Pin</strong></td>
<td>This will move the chat to the top of the chat list so that it is always visible (this option will change to “unpin” if you have pinned the chat)</td>
</tr>
<tr>
<td><strong>Add to favourite contacts</strong></td>
<td>At the top of the chat list you can switch between a list of recent chat and contacts. This feature will add the contact in the Contact list.</td>
</tr>
<tr>
<td><strong>Mute</strong></td>
<td>When you Mute a chat you will still be included in the conversation but you will no longer receive notifications (you can Unmute).</td>
</tr>
<tr>
<td><strong>Hide</strong></td>
<td>You can hide chat if it’s no longer relevant to you or if the chat has ceased, and the chat will remain hidden unless someone posts a new message to it (you can unhide chat)</td>
</tr>
</tbody>
</table>

Delete chat

You can’t delete an entire conversation but you can delete individual messages that you have sent.

- Click the More options button to the right of the chat message
- Click Delete
Attachments

Just like an email message you can attach files to your messages.

- **Type** your message
- Click the **Attach** button
- Choose **OneDrive** or **Upload from my computer** (depending on where the file is stored)
- **Select** the file and click **Open**
- **Send** the message

![Figure 31: example attachment](attachment.png)
Activity Feed

The Activity feed within Teams shows a summary of everything that’s happened in the teams that you are a member of. The activity feed shows the following items:

- **Unread posts** – posts that you haven’t read yet and this could be part of a chat conversation or a conversation within a team
- **@mentions** – posts where you have been mentioned either as an individual or as part of a channel/team
- **Replies** – posts where someone has replied to your original post
- **Reactions** – posts that you created where a user has added an emoji
- **Missed Call** – when someone has tried to contact you through “meet now” and you missed it.

The notifications remain in your feed for 14 days after which they expire and no longer show in your feed.

**Activity feed symbols**

---

**@** @mentions of you specifically.

@team mentions for teams you’re on.

@channel mentions in teams you’re on.

↩️ Replies to your posts.

♢️ Posts you liked.

💡 You were added to a team.

💡 You were made a team owner.

 <$> Trending posts.

♀️ Suggested posts.

---

**Figure 32: Activity feed symbols**
Files

Files that you share in a channel are stored in your team’s SharePoint folder which can be found in the Files tab at the top of each channel.

Files that you share in a private or group chat are stored in your OneDrive for Business folder and are only shared with the people in that conversation. These will be found in the Files tab at the top of a chat.

Create a new file

- Display the channel in which you want to create a new file
- Click the Files tab

![New Features](image)

**Figure 33: Example Files tab in a channel**

- Click New and choose the type of file you want to create, such as Word document
- Enter a name for the file and click Create

![Create a new Word document](image)

**Figure 34: New Word document window**

- **Type** the information into the document
- When you have completed your work on the document click the Close button (Close) at the top right of the screen

Note: The document is saved automatically when you are working on it within the Teams environment (new files can only be created in a Team Channel, you won’t be able to create a new file in chat).
**Edit a file**

You can add or change the information in the document.

- Locate the required file in the **Files** tab and click the name of the file to open it in Teams
- **Edit** the document as required and **Close** when finished

Note: Multiple users are able to edit the file at the same time

**Edit a file in Desktop App**

When you edit a file in Teams you are using the online app which has limited functionality so you may need to edit the file in the desktop app.

- **Open** the file in Teams and click the **More Options** button
- **Click** **Open in Desktop App**

![Figure 35: Open in Desktop App](image)

Note: If you are editing a document in Desktop App you will need to remember to **Save** your work as Auto save is not switched on in the Desktop App.

**Upload files**

You can upload existing documents into the files tab within a channel.

- **Click** the **Files** tab within the channel
- **Click** the **Upload** button
- **Select** the required file and **click** **Open**

Note: When you add an attachment to a post within a channel, the attached document is automatically added to the **Files** tab within the channel.

**File conversation**

If you are collaborating on a document with other users you may not need to change the content but want to add suggestions or ideas. Starting a conversation about the document means that you can view the document and the chat pane in order to discuss the document.

- **Open** the file within Teams
- **Click** the **Conversation** button at the top right of the screen
- **Type** your message in the conversation pane

Note: When you close the document the conversation will be visible in the channel posts.
File Locations

The Files area will allow you to locate files stored in different areas.

- From the left side bar, click the **Files icon**

![Files icon](image)

Figure 36: File locations

Recent Files

This is a list of files you have recently opened and the location column will allow you to see where the file is stored.

Microsoft Teams

The Microsoft Teams view shows you all the documents that have been created or edited recently within your favourite channels.

Downloads

In the Downloads view, you’ll see a list of all the files you’ve downloaded from Teams.

OneDrive

All the folders and files that are in your OneDrive for Business will be displayed.

Search for files/Find files/Files in office 365 (personal files – not team files)

Search for a file

If you need to search for a specific file all you need is part of the file name in order to find it.

- Click in the **Search/Command** box at the top of the screen
- Type **“/files”** and then enter part of the file name
- Click the **file** you want to see

![Example file search](image)

Figure 37: Example file search

The example in Figure 37 is searching for a file with the word “Training” in the name.
Tabs

Each channel or chat has two tabs by default which are “Posts” (for the messages and conversation) and “Files” (to store the relevant documents). Tabs give you quick access to the tools you and your team work with regularly and you can add further tabs if you need them.

Turn a file into a tab

Let’s say you and your team need to update the information in a word document, or you just need quick access to it. Turn the file into a tab so that it takes just one click to start working in the document.

- Click the **Files** tab within a channel and locate the file you need
- Click the **More options** button for the file
- Click **Make this a tab** and edit the document as normal

Note: Click the **Show tab conversation** button at the top right of the screen to start a conversation about the contents of the file.

Remove a file from a tab

If there is no longer a need for a file to be set up as a tab, you can remove the tab. The file will still be accessible through Files, and removing the tab will not delete the file.

- Click the **Tab options** arrow (located to the right of the tab name)
- Click **Remove**

Add a tab

- Click the **Add a tab** button at the top of the channel
- Choose the required **app**
- Follow the onscreen instructions

![Figure 38: Remove a file tab](image)

![Figure 39: Add a tab for an app](image)
### Apps

<table>
<thead>
<tr>
<th>This App:</th>
<th>Does This:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>Enter a web address so that you can visit the sites quickly, all within Teams.</td>
</tr>
<tr>
<td>Planner</td>
<td>Microsoft Planner is a shared task manager and is a way to organise teamwork and tasks. Planner provides a hub for team members to create plans, organise and assign tasks to different users and to check updates on progress through dashboards.</td>
</tr>
<tr>
<td>OneNote</td>
<td>OneNote is a digital notebook made up of sections and pages where multiple users can gather ideas and store information.</td>
</tr>
<tr>
<td>Forms</td>
<td>Microsoft Forms is a simple online tool for creating surveys, questionnaires and quizzes and forms you have already created can be added as tabs</td>
</tr>
</tbody>
</table>

Note: The University has a limited number of apps that are available.
Calendar

The Calendar icon gives you access to your main calendar and is synchronised with your outlook account. This means that you can see what you have planned without the need to open desktop or web app outlook.

Within Calendar you can create, edit, delete and respond to appointments and meetings just as if you were using Outlook.

Appointment vs Meeting

So what’s the difference between an appointment and a meeting? Well, both items have a subject, start & finish time, location and the option to add reminders and further information. A meeting allows you to invite other participants whereby an appointment is just you!

Create an appointment

You can use appointments to block out time in your diary to concentrate on specific tasks and to let other users know that you are not available.

- Within the Calendar click the New Meeting button
- Enter the Title, location (optional), Start & End times, any other Details (optional)
- Click Schedule

Note: The appointment will appear in your Outlook calendar with the time shown as “busy” and will use the default reminder settings (usually 15 mins).
Schedule a meeting

When you schedule a meeting you invite other users to attend, and the meeting will take place online. An online meeting uses audio, video and chat to communicate.

- Within the Calendar click the New Meeting button
- Enter the Title, Start & End times, any other Details (optional)
- Under Invite people type the users name to search for them
- Click the user you want to invite
- If the Attendee shows as “Busy”, click the Scheduling Assistant to find a time that works for everyone
- If the meeting is a recurring one, check the Repeat box to choose how often it will occur
- Click Schedule

![New meeting example](image)

**Figure 41: New meeting example**

Join a meeting

When you are invited to a meeting you will receive the traditional outlook calendar invite message in your mailbox where you will be able to respond to indicate your attendance. Whilst it is not necessary to accept an invitation to attend an online meeting, it is still best practice to “RSVP” so the organiser knows who to expect.

Note: The maximum number of people who can join an online meeting is 250.
There are multiple ways that you can join a meeting:

**Join a meeting from Teams Calendar**
- Click the Calendar icon at the left of the Teams window
- Locate the meeting within your calendar
- Click Join

![Figure 42: Join a meeting through the Calendar](image)

Note: If you have overlapping meetings in your calendar, the join button won't be available. But you can still right-click the event and select Join online.

**Join a meeting from Outlook Invitation**
- Display your Outlook Calendar and open the meeting
- Click the link “Join Microsoft Teams Meeting” within the message area

![Figure 43: Outlook calendar meeting](image)

**Channel meeting**

When you schedule a meeting and select a channel to meet in, everyone in the team will be able to see and join it in that channel, so you won’t need to invite each person. You will not be able to include people who are not part of the team in a channel meeting.

- Within the Calendar click the New Meeting button
- Enter the Title, Start & End times, any other Details (optional)
- From the Select a channel to meet in, select the appropriate channel

![Figure 44: Hold a meeting in a channel](image)
• Click **Schedule**
If you are the organiser of the meeting, it will appear in your calendar however everyone else will see it in the channel post. Users can join the meeting by opening the post and click **Join**

![Figure 45: Channel meeting](image)

**Note:** channels can’t be edited or added once the invite is sent. You’ll need to send a different new invite with the updated channels.

**Meet Now**

If you want to meet with people online, you can use the **Meet Now** feature to create an instant meeting.

**Meet with individuals**

• Click the **Calendar** icon within Teams
• Click the **Meet Now** button
• Enter a **name** for the meeting, for example “Meeting with Jane”

![Figure 46: Meet now feature](image)

• Click **Join Now**

**Note:** You will be the only one in the meeting and you will need to invite other users to join you. When you have ended the meeting, the chat and recording (if recording is made) will appear in your chat window, not the team chat.
Microsoft Teams Introduction Workshop

**Meet with the team**

- Click the Channel in which you want to meet.
- Click the **Meet Now** icon 📩 below the compose box
- Enter a **name** for the meeting and click **Join Now**

Note: You will need to invite other users to join you. When you have ended the meeting, the chat and recording (if recording is made) will appear in **channel** chat window.

---

**Meetings with external users**

To communicate with people outside of the university via Teams you will first need to make them a member of the team. The external person will need to download the Teams app (desktop or mobile – and they will need a Microsoft account to be able to download it). When you schedule a new meeting or want to chat with an external user, you will need to enter their Microsoft email account.

Note: you will not be able to chat or video chat with an external user if they are not a member of the team, you will need to use Skype for Business.

---

**Meeting Controls**

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Duration</strong></td>
<td><strong>Turn on/off video camera</strong></td>
<td><strong>Mute/ unmute microphone</strong></td>
<td><strong>Share Screen</strong></td>
<td><strong>Options</strong></td>
<td><strong>Show conversations</strong></td>
<td><strong>Show participants</strong></td>
<td><strong>Hang up</strong></td>
</tr>
</tbody>
</table>

**Share Screen**

When you choose to **Share Screen** during a meeting you can choose to present your entire desktop, a window, a PowerPoint file or a Whiteboard (only available in meetings conducted in a team channel)

**Entire Desktop**

Choose this option if you want to be able to share multiple windows and show all computer activity.

- When the meeting has started, click the **Share Screen** button
- Click **Entire Desktop**

**Window**

Choose this option if you only want to show one window and you can keep the rest of your screen to yourself.

- When the meeting has started, click the **Share Screen** button
- Click the **window** that you want to share (this could a specific app such as demonstrating something in Excel)
PowerPoint
Choose this option if you want to present a PowerPoint file others can interact with and are able to move through the slides at their own pace.

The PowerPoint section lists the most recent files you’ve opened or edited within your Team or your OneDrive.

If you use a PowerPoint that is not stored within Teams files or OneDrive, it will be uploaded as part of the meeting. If you are presenting in a channel meeting, the file is uploaded to the files tab in the channel, where all members will have access to it. If you’re presenting in a private meeting, the file is uploaded to your OneDrive, where only the meeting participants will be able to access it. The maximum file size for a PowerPoint presentation is 2GB.

- When the meeting has started, click the Share Screen button
- Click the presentation that you want to share
- On the presentation toolbar, click the Next Slide button, or Previous Slide button to navigate through the presentation

Take control of a presentation
- Click the Take control button on the presentation toolbar

![Figure 47: Take control of a presentation in a meeting](image)

Note: If you have control of the presentation you won’t see the “Take control” button on the presentation toolbar.

Sync with presenter
If you have moved through the slides of a presentation ahead of the presenter the presentation toolbar will show you which slide the presenter is currently talking about.

- Click the To presenter button on the presentation toolbar

![Figure 48: Return to the presenter position](image)

Note: the slide number is also shown on the “To presenter” button

Prevent participants from moving through presentation
- Click the Eye symbol on the presentation toolbar

Whiteboard
Choose this option if you want users to be able to sketch/draw on the screen.

Note: The Whiteboard option is only available to meetings that are conducted within a Team channel. You won’t be able to create a whiteboard in a one to one meeting
Share Screen Control

Whilst you are in Share Screen mode you can give another meeting participant control if you need them to help you demonstrate something or help you present. You will both be in control of the sharing, and you can take back control anytime.

Give control

- On the sharing toolbar, select **Give control**

![Figure 49: Sharing Toolbar with Give control option](image)

- Select the name of the **person** you want to give control to

Cancel control

- On the sharing toolbar, select **Cancel Control**

![Figure 50: Sharing Toolbar with Cancel Control option](image)

Record team meetings

You can record meetings so that you can view it at a later date. Only one person can record the meeting (usually the meeting organiser would be best to do this).

- Click the **More options** button on the **meeting controls**
- Click **Start recording**

Note: everyone in the meeting is notified that the recording has started and a notification is also posted to the chat history.

- Click the **More options** button on the **meeting controls**
- Click **Stop recording**

Note: The recording is processed and save to Microsoft Stream, and then ready to play. The person who started the recording will receive an email from Stream when the recording is available. It also shows up in the meeting posts.
Appendix A

Terms and conditions of Team Ownership

As a Team Owner you will need to and be responsible for:

- Managing the membership of the team, including reviewing the ongoing memberships and removing members when they no longer need access in an expedient manner.
- Manage external guest access, ensuring that guests are not in the team for longer than required. A guest is anyone outside the organisation (i.e. doesn’t have an @leeds.ac.uk email address).
- Ensure the data stored within the group matches the University data classification. Please see the ‘Information Protection Policy (IPP)’ and ‘guidance on using cloud computing services’ and ensure you and the other members of the group are complying with this.
- Be responsible for security of files within the group, ensuring that any highly confidential files are individually password protected as per the IPP.
- Ensuring the team remains set to Private. (The University of Leeds do not allow public groups)
- Nominate another owner. Your team should have between two and ten owners at all times. If you become the only owner, you will need to promote one or more members to become an owner. At that point, you will need to brief them on the responsibilities of an owner, as laid out here.
- All teams are set to expire 1 year after the creation date. As a team owner you will be notified by email and within the team itself and you will need to respond to keep your team. Failure to respond will result in the Team been deleted and all information associated with it. If you expire your team, the team and ALL the content will be deleted, and after 30 days will be unrecoverable.
- Respond to any IT security reports and required actions from IT Application Support that you may receive regarding your team. For example you may receive security reports when your team only has 1 owner.
Other Information

Add a Mailbox Calendar to Teams

When you view the “Calendar” icon in Microsoft Teams you will only see your personal calendar NOT shared calendars, but you can display the content of a shared calendar through a tab within the team/channel.

The person or username who “owns” the calendar will need to provide you with the URL of the calendar. When you have the URL you will be able to create a tab in the team that will show the calendar in read-only mode.

Find the calendar URL

- Go to https://office365.leeds.ac.uk and login with the username and password for whoever owns the calendar
- Click Settings (Cog wheel symbol)
- Click View all outlook settings
- Click Calendar
- Click Shared calendars
- Under “Publish Calendar” select the calendar and choose “Can view all details”
- Click Publish (this will generate HTML link for this particular calendar)
- Click the HTML link and click Copy

Add the calendar to a tab in Teams

- Go back to Teams and click the Add a tab button (+ plus symbol)
- Choose Website
- Enter a name and past the URL
- Click Save
Useful resources

Further information about Teams is available through the knowledge base articles from the IT Service Desk website and from Microsoft.

University Specific

If you are viewing a printed version of this document you will need to visit http://it.leeds.ac.uk and enter the KB article number in the search box (you may need to log in with your university credentials in order to read some of the articles)

What is Microsoft Teams? (KB0012997)
Microsoft Teams – Differences between chat function and Teams (KB0014055)
Microsoft OneDrive vs. Teams vs. SharePoint (KB0013252)
How to Use Planner in Microsoft Teams (KB0013197)
Responsibilities of an owner of a Microsoft Team
Microsoft Team Expiration Policy
Microsoft Teams Case Studies
How to sync Microsoft Teams files with OneDrive
Why can’t I create a Microsoft Team? (KB0014054)

Microsoft Resources

Microsoft Teams Video Tutorials
Working smarter using Microsoft Teams for higher education

LinkedIn Learning

Microsoft Teams Essential Training
# Keyboard Shortcuts

## General

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL+E</td>
<td>Position the mouse pointer in the search/command bar</td>
</tr>
<tr>
<td>CTRL+N</td>
<td>Start a new conversation</td>
</tr>
<tr>
<td>CTRL+.  (full stop)</td>
<td>Show keyboard shortcuts list</td>
</tr>
<tr>
<td>CTRL+/</td>
<td>Show commands</td>
</tr>
<tr>
<td>CTRL+G</td>
<td>Goto</td>
</tr>
<tr>
<td>F1</td>
<td>Open help</td>
</tr>
<tr>
<td>CTRL+=</td>
<td>Zoom in</td>
</tr>
<tr>
<td>CTRL+-</td>
<td>Zoom out</td>
</tr>
<tr>
<td>CTRL+0</td>
<td>Reset zoom level</td>
</tr>
<tr>
<td>CTRL+SHIFT+F</td>
<td>Open Filter</td>
</tr>
<tr>
<td>CTRL++,</td>
<td>Open Settings</td>
</tr>
<tr>
<td>ESC</td>
<td>Close</td>
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</table>

## Navigation

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Does this</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL+1</td>
<td>Display Activity</td>
</tr>
<tr>
<td>CTRL+2</td>
<td>Display Chat</td>
</tr>
<tr>
<td>CTRL+3</td>
<td>Display Teams list</td>
</tr>
<tr>
<td>CTRL+5</td>
<td>Display Meetings/Calendar</td>
</tr>
<tr>
<td>CTRL+6</td>
<td>Display Calls</td>
</tr>
<tr>
<td>CTRL+7</td>
<td>Display Files</td>
</tr>
<tr>
<td>ALT +↑</td>
<td>Go to previous list item</td>
</tr>
<tr>
<td>ALT+↓</td>
<td>Go to next list item</td>
</tr>
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</table>

## Messaging

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Does this</th>
</tr>
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<tbody>
<tr>
<td>CTRL+SHIFT+X</td>
<td>Expand compose box</td>
</tr>
<tr>
<td>CTRL+ENTER</td>
<td>Send (expanded compose box)</td>
</tr>
<tr>
<td>SHIFT + ENTER</td>
<td>Start a new line</td>
</tr>
<tr>
<td>CTRL+O</td>
<td>Attach File</td>
</tr>
</tbody>
</table>
Meetings, Calls and Calendar

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Does this</th>
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</thead>
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<tr>
<td>CTRL+SHIFT+A</td>
<td>Accept video call</td>
</tr>
<tr>
<td>CTRL+SHIFT+D</td>
<td>Decline call</td>
</tr>
<tr>
<td>CTRL+SHIFT+U</td>
<td>Start video call</td>
</tr>
<tr>
<td>CTRL+SHIFT+M</td>
<td>Toggle mute</td>
</tr>
<tr>
<td>CTRL+SHIFT+E</td>
<td>Start screen share session</td>
</tr>
<tr>
<td>CTRL+SHIFT+O</td>
<td>Toggle video</td>
</tr>
<tr>
<td>CTRL+SHIFT+SPACE</td>
<td>Go to sharing toolbar</td>
</tr>
<tr>
<td>CTRL+SHIFT+D</td>
<td>Decline screen share</td>
</tr>
<tr>
<td>CTRL+SHIFT+A</td>
<td>Accept screen share</td>
</tr>
<tr>
<td>CTRL+SHIFT+P</td>
<td>Toggle background blur</td>
</tr>
<tr>
<td>ALT+SHIFT+N</td>
<td>Schedule a meeting</td>
</tr>
<tr>
<td>CTRL+ALT+←</td>
<td>Go to previous day/week</td>
</tr>
<tr>
<td>CTRL+ALT+→</td>
<td>Go to next day/week</td>
</tr>
<tr>
<td>CTRL+ALT+1</td>
<td>View day</td>
</tr>
<tr>
<td>CTRL+ALT+2</td>
<td>View workweek</td>
</tr>
<tr>
<td>CTRL+ALT+3</td>
<td>View week</td>
</tr>
</tbody>
</table>

Commands list

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>/available</td>
<td>Set status to available</td>
</tr>
<tr>
<td>/away</td>
<td>Set status to away</td>
</tr>
<tr>
<td>/brb</td>
<td>Set status to be right back</td>
</tr>
<tr>
<td>/call</td>
<td>Call someone (if set up)</td>
</tr>
<tr>
<td>/dnd</td>
<td>Set status to do not disturb</td>
</tr>
<tr>
<td>/files</td>
<td>See your recent files</td>
</tr>
<tr>
<td>/goto</td>
<td>Go right to a team or channel</td>
</tr>
<tr>
<td>/help</td>
<td>Get help with teams</td>
</tr>
<tr>
<td>/join</td>
<td>Join a team</td>
</tr>
<tr>
<td>/mentions</td>
<td>See all your @ mentions</td>
</tr>
<tr>
<td>/saved</td>
<td>See your saved list</td>
</tr>
<tr>
<td>/testcall</td>
<td>Make a test call</td>
</tr>
<tr>
<td>/unread</td>
<td>See all your unread activity</td>
</tr>
<tr>
<td>/whatsnew</td>
<td>See whats new in Teams</td>
</tr>
</tbody>
</table>