

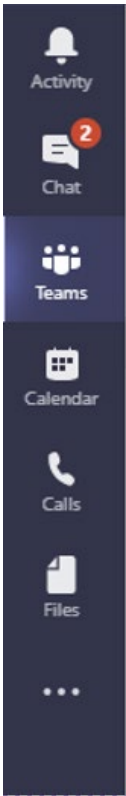
# Microsoft Teams User Basics

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# I. Basic Teams Navigation

## Teams Navigation Tabs



Microsoft teams features 6 tabs on the left sidebar:

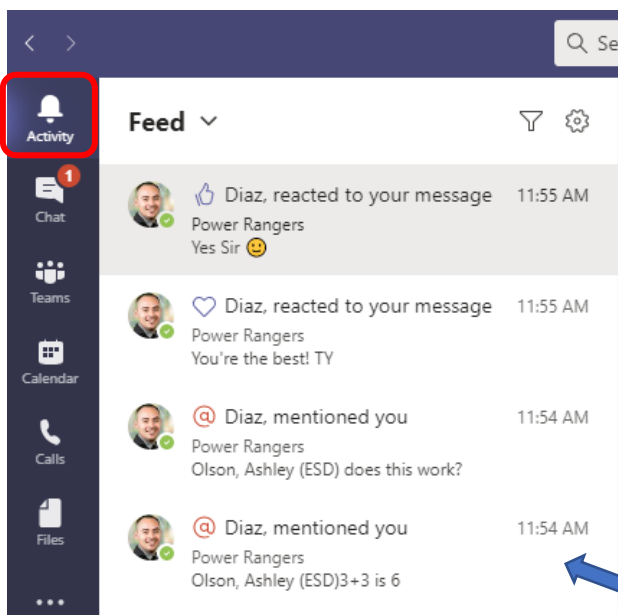
1. Activity
2. Chat
3. Teams
4. Calendar
5. Calls
6. Files

These tabs can be seen in the image to the left.

Clicking each tab will open a different feature of MS Teams

# II. Using the Activity Feed Tab

## Opening the Activity Feed



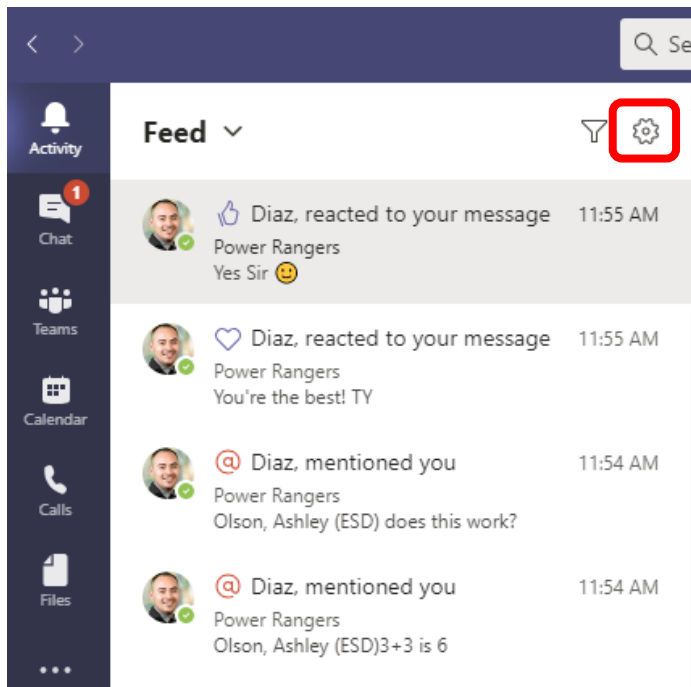
To view the activity feed, click the first tab on the left: *Activity*

The activity feed displays notifications, mentions, or replies from MS Teams

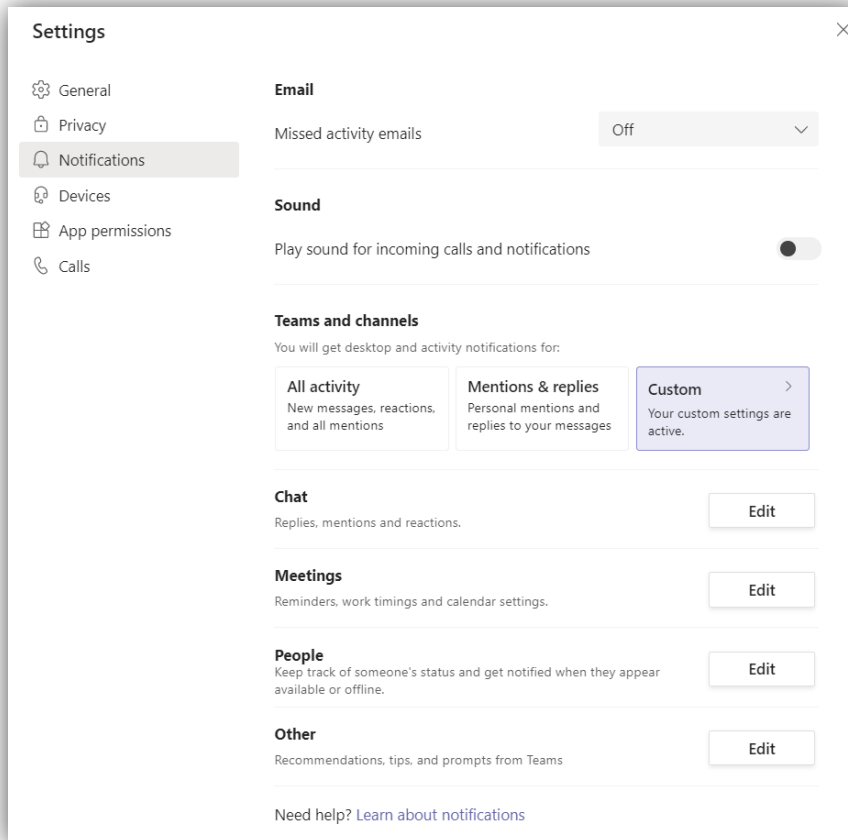
Group chat messages and Channel Posts will not show up here unless you are tagged with *@ your name*

Clicking on each notification will take you to the activity

## Adjusting Activity Settings

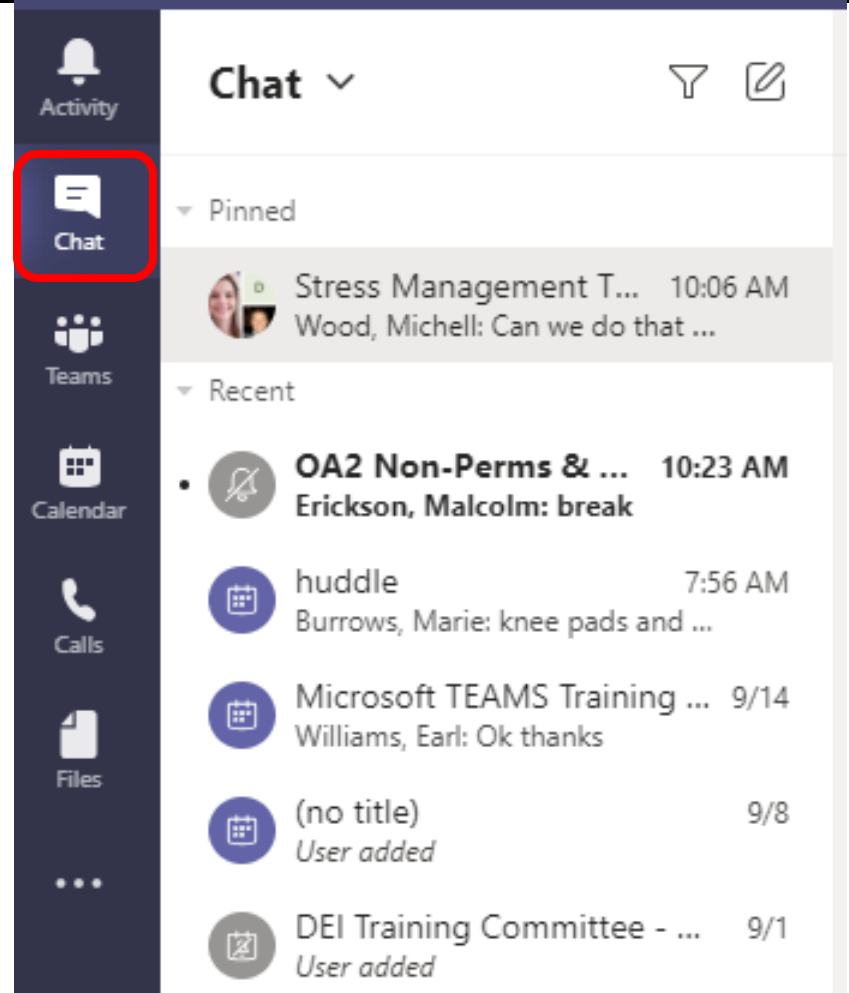


From the activity feed, select the *sprocket icon* in the top right corner to open the settings menu

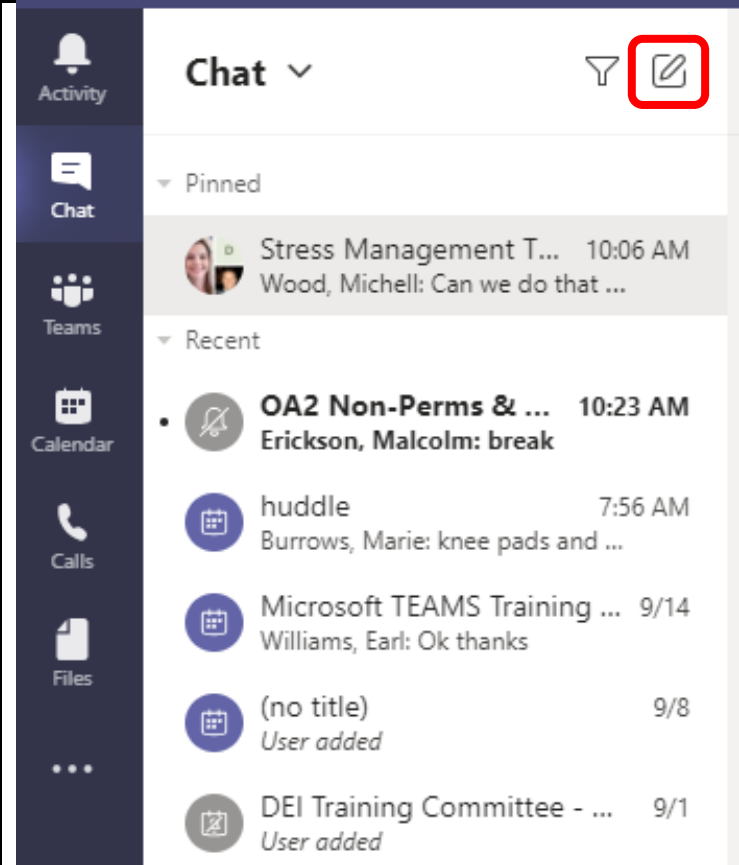
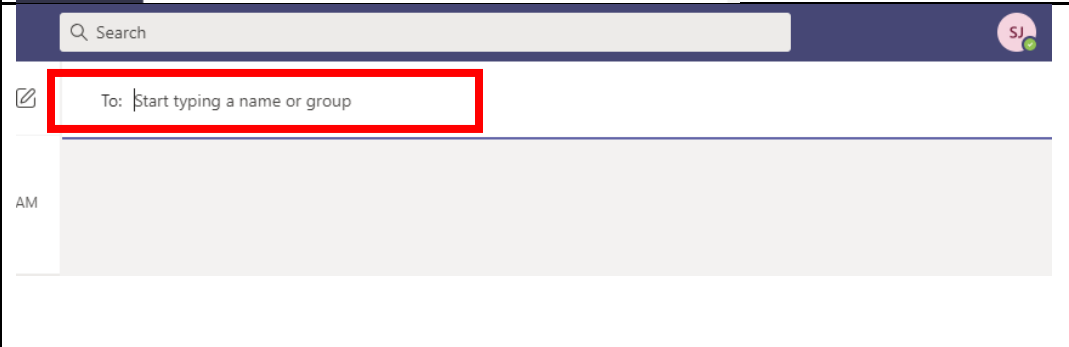
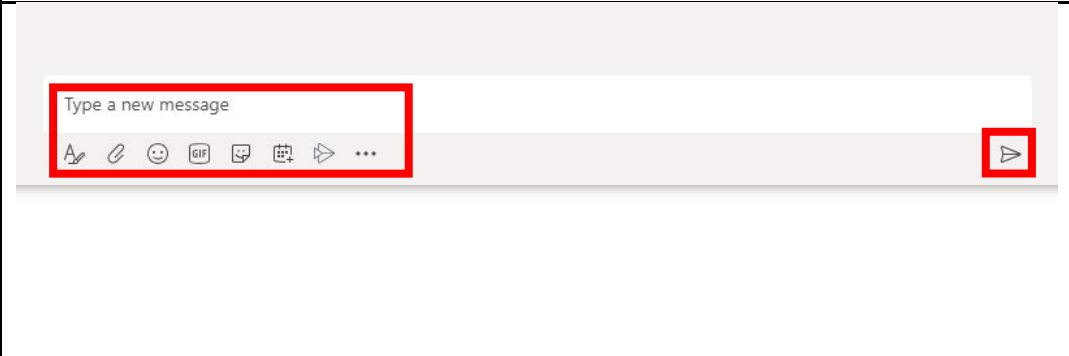


Here you can adjust how you're notified of activity in Microsoft Teams

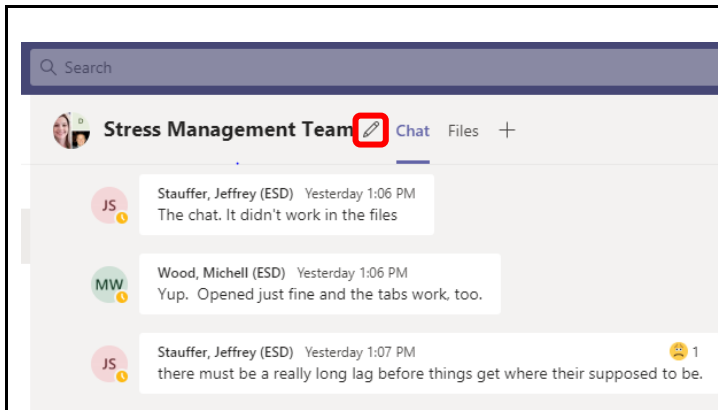
### III. Using the Chat Tab

 <p>The screenshot shows the Microsoft Teams interface. On the left-hand side, there is a dark blue navigation bar with several icons: Activity (bell), Chat (speech bubble, highlighted with a red box), Teams (group of people), Calendar (calendar), Calls (phone), and Files (document). The main area is titled 'Chat' and shows a list of chat messages. The 'Pinned' section contains one message from 'Stress Management T...' at 10:06 AM. The 'Recent' section contains several messages, including one from 'OA2 Non-Perms &amp; ...' at 10:23 AM, 'huddle' at 7:56 AM, 'Microsoft TEAMS Training ...' on 9/14, '(no title)' on 9/8, and 'DEI Training Committee - ...' on 9/1.</p>	<p>Click on the <i>Chat</i> tab to open chat feature</p> <p>From this menu you can view existing chat messages</p> <p>Click an existing chat to begin using it</p>
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## Starting a Chat

	<p>Click the new chat icon</p> <p>This will open a chat box (see picture below)</p>
	<p>Type the name(s) of the people you wish to include in that chat</p>
	<p>Type your message in the box</p> <p>Add attachments using the icons beneath the message box</p> <p>Press enter or click the paper airplane icon to send the message</p>

## Naming a Chat



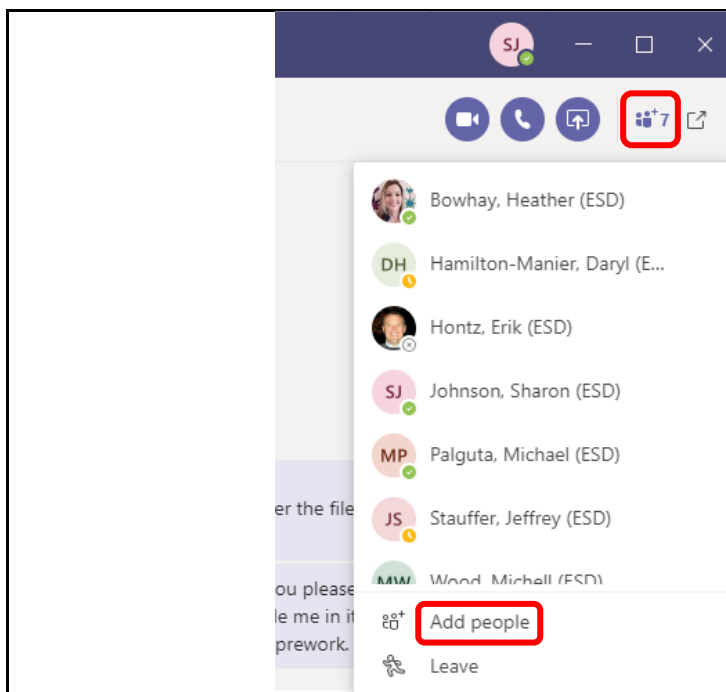
After a chat is created, it can be given a name

Click the *pencil icon* to name the chat

This feature can be used to track the purpose or topic of the chat.

Renaming a chat changes the name for all participants

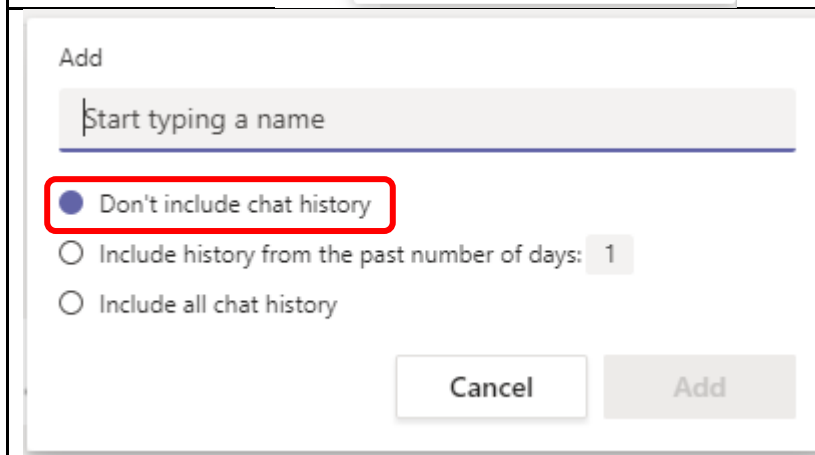
## Adding Participants



To add more people to an existing chat, use the icon at the top right of the chat window

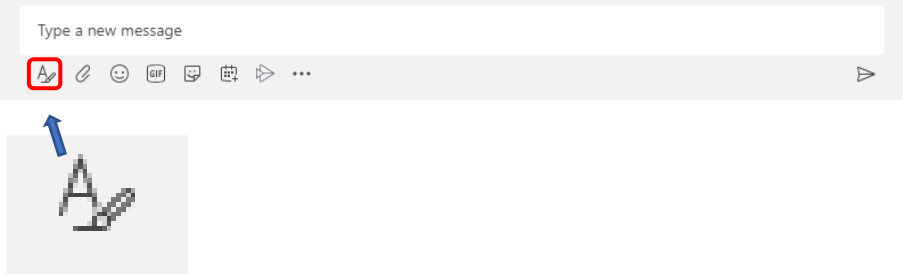

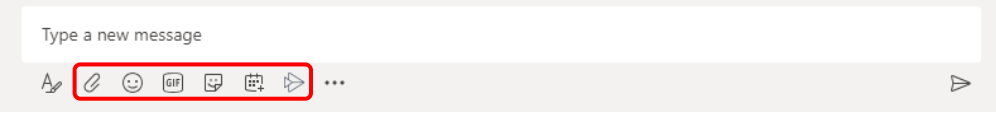
This opens a box displaying all current chat participants

Click *Add people* and select the participants that you wish to add

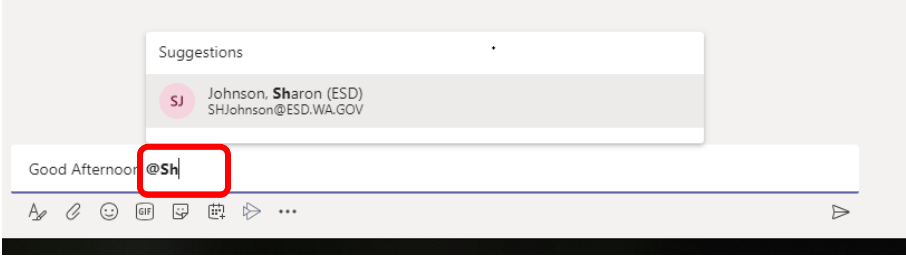


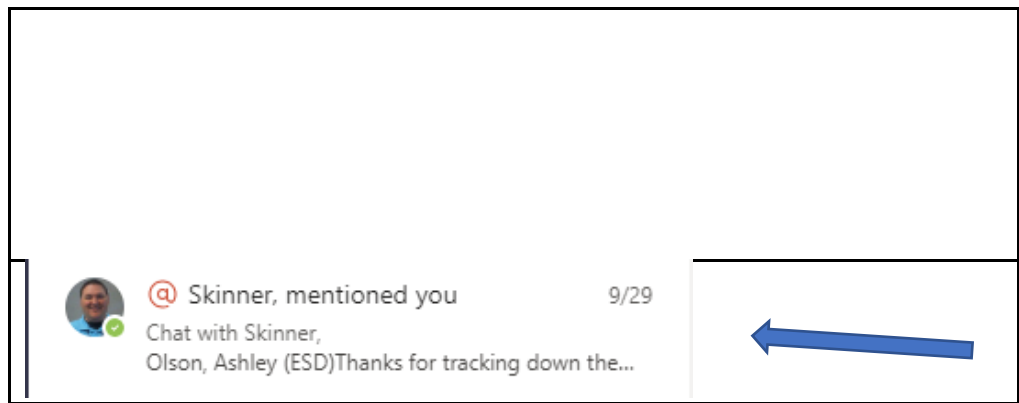
Be aware that new participants will be able to see the entire chat history unless you choose to exclude them from chat history

## Chat Formatting Extras

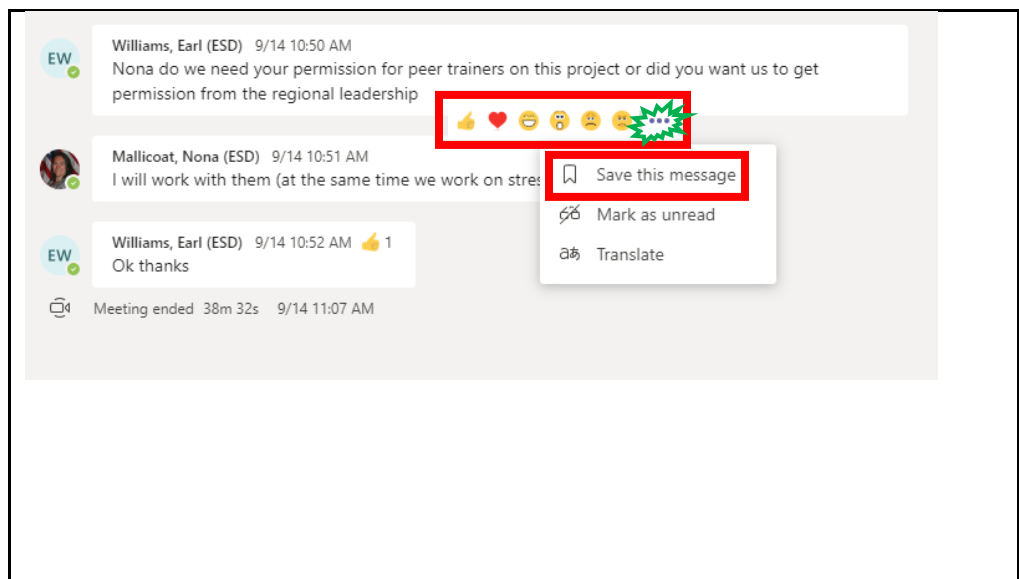
 <p>Type a new message</p> <p><b>A</b> [Link] [Emoji] [GIF] [Sticker] [Meeting] [More] [Send]</p>	<p>There are several options available for additional formatting when sending a message</p> <p>Click the A symbol to open the expanded formatting options (see picture below)</p>
 <p><b>B</b> <i>I</i> <u>U</u> <del>S</del>   <b>A</b> <b>AA</b> Paragraph ▾   <u>I<sub>x</sub></u>   ← → ≡ ≡   ‘ ’   @ [More] [Trash]</p> <p>Type a new message</p>	<p>This menu gives a variety of formatting options</p> <p>The ellipsis (the three dots) on the right-hand side feature expanded options including:</p> <ul style="list-style-type: none"> <li>• Undo</li> <li>• Insert Table</li> <li>• Code snippet</li> </ul>
 <p>Type a new message</p> <p><b>A</b> [Link] [Emoji] [GIF] [Sticker] [Meeting] [More] [Send]</p> <p><i>**Remember all messages, posts, correspondence, etc., are subject to public disclosure and FOI requests. When referencing a customer, please only include their ETO number, or UTAB Claim ID number, do NOT include personally identifiable info. like a social security number. Additionally, personal conversations are not appropriate on the platform**</i></p>	<p>Other options include:</p> <ul style="list-style-type: none"> <li>• Attach Files</li> <li>• Emojis</li> <li>• GIFs</li> <li>• Stickers</li> <li>• Schedule a meeting</li> <li>• Stream</li> </ul> <p><b>Please remember state ethics &amp; values when using these features</b></p>

## Tagging Participants

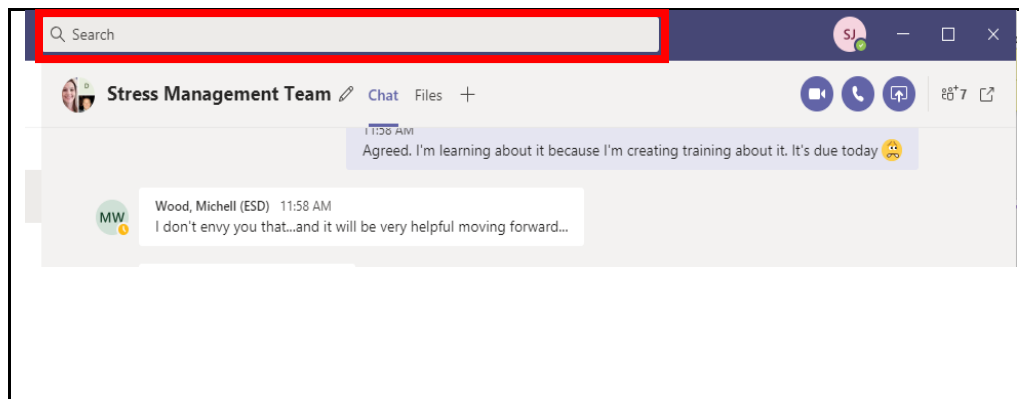
 <p>Good Afternoon @Sh</p> <p>Suggestions</p> <ul style="list-style-type: none"> <li>SJ Johnson, Sharon (ESD) SHJohnson@ESD.WA.GOV</li> </ul>	<p>Tags are used to grab the attention of a specific person, and will alert them in their Activity Tab</p> <p>To use a tag, type the @ symbol, followed by the name of the person</p>
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	<p>A pop-up box will appear, displaying suggested names</p> <p>Select the name or continue typing to narrow the choices</p> <p>When a person is tagged, they will receive a notification in the activity tab</p>
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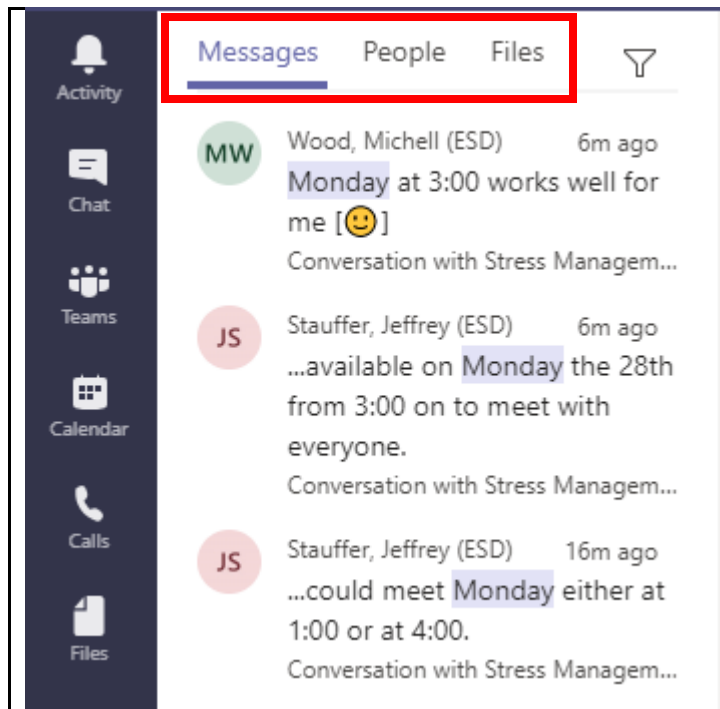
## Saving a Message

	<p>Messages can be saved for later reference</p> <p>To save a message, hover over a specific message</p> <p>This will display a menu with emojis &amp; an ellipsis</p> <p>Click the ellipsis and select <i>Save this message</i></p> <p>To find a saved message, see <b><i>Finding Saved Items</i></b> in the <b><i>Tips &amp; Tricks</i></b> section of this guide</p>
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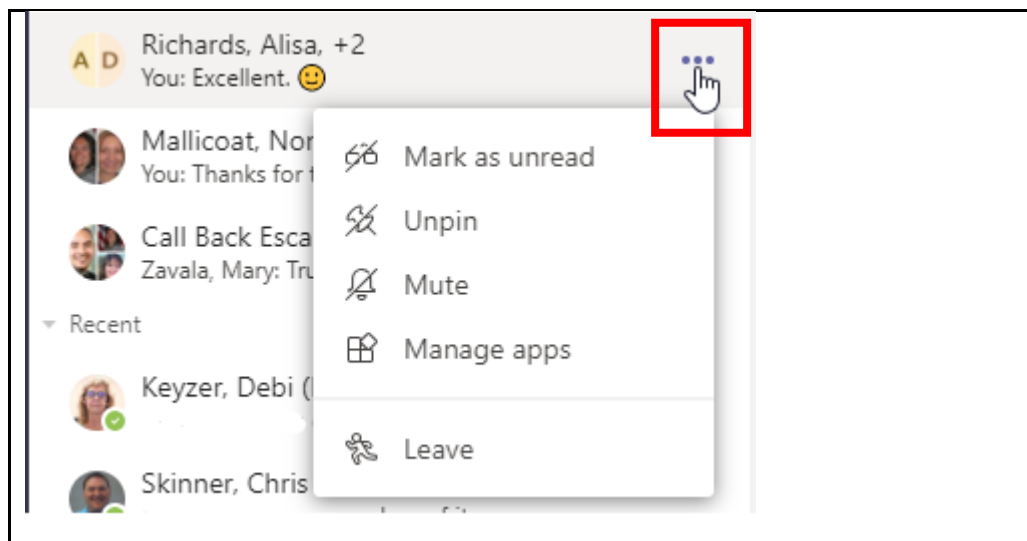
## Searching Previous Messages

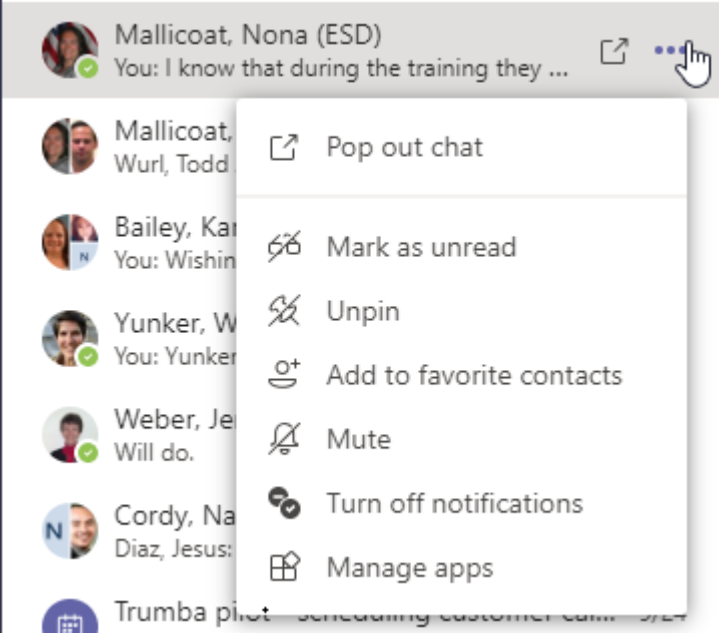
	<p>To find previous messages, use the search bar at the top of Teams</p> <p>Enter search terms and press enter</p> <p>Relevant results including the keyword will appear</p>
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 <p>The screenshot shows the Microsoft Teams navigation bar on the left side of the interface. The 'Messages' tab is highlighted with a red rectangular box. Other tabs visible are 'People' and 'Files'. Below the navigation bar, a list of messages is shown, including one from Wood, Michell (ESD) and two from Stauffer, Jeffrey (ESD).</p>	<p>Results can be sorted by:</p> <ul style="list-style-type: none"> <li>• Messages</li> <li>• People</li> <li>• Files</li> </ul> <p>Select <i>Messages</i> to view results for messages</p> <p>Click on the message to view the full message</p>
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## Additional Chat Settings

 <p>The screenshot shows a chat window with a list of chat items. The top item is 'Richards, Alisa, +2' with the message 'You: Excellent. 😊'. Below it are other chat items like 'Mallicoat, Nor...' and 'Call Back Esca...'. A context menu is open over the top chat item, showing options: 'Mark as unread', 'Unpin', 'Mute', 'Manage apps', and 'Leave'. The ellipsis icon (three dots) in the top right corner of the chat header is highlighted with a red rectangular box.</p>	<p>There are additional chat settings that can be used to customize individual chats</p> <p>To access the settings, hold your mouse over a specific chat</p> <p>Select the ellipsis (three dots) on the right corner of the right side of the chat menu</p>
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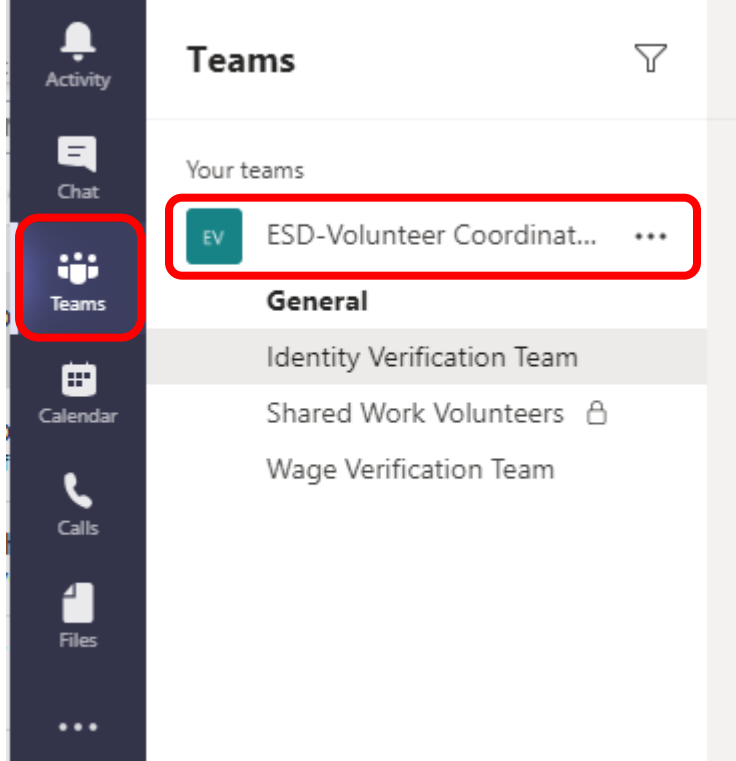
	<p>The options are different for chat with individuals versus group chats.</p> <p><b>Individual Chat:</b>  <i>Pop Out Chat:</i> open that chat as a separate window</p> <p><i>Pin/unpin:</i> pins the chat to the top of the chat menu)</p> <p><i>Mute:</i> turn off sounds for that chat</p> <p><i>Turn off notifications:</i> turn off notifications for that chat</p> <p><b>Group Chat:</b> see picture for all available options</p> <p><i>Mark as unread:</i> remind yourself to return</p> <p><i>Leave:</i> exit the group chat</p>
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## IV. Best Practices

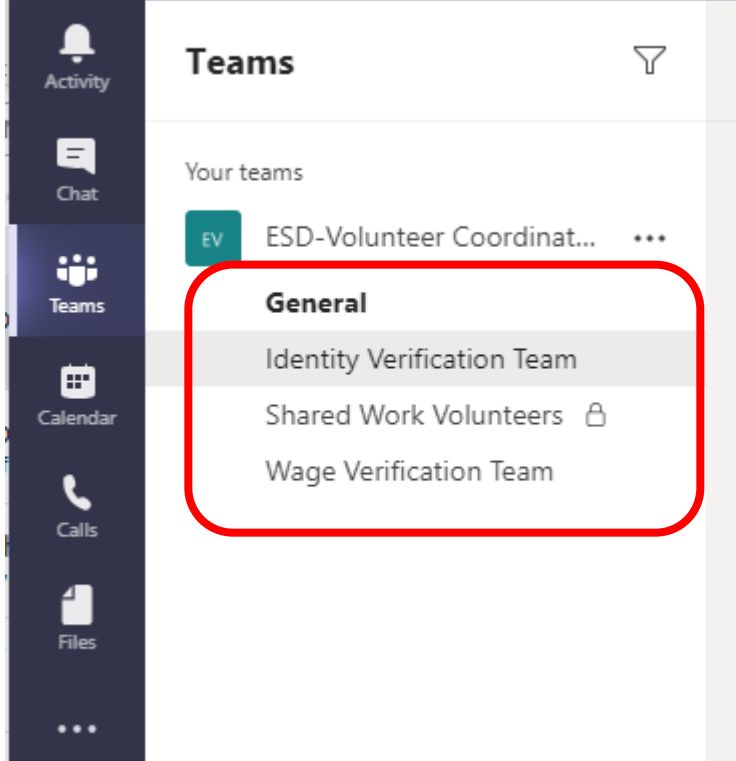
**Confidentiality and Ethics:** Remember all messages, posts, correspondence, etc. are subject to public disclosure and FOI requests. When referencing a customer, please only include their ETO number, or UTAB Claim ID number, do **NOT** include a social security number.

Additionally, personal conversations are not appropriate on the platform. We recognize that this may be difficult in our new telework and virtual world, but please be aware that the content on Teams could be subject to an open records request.

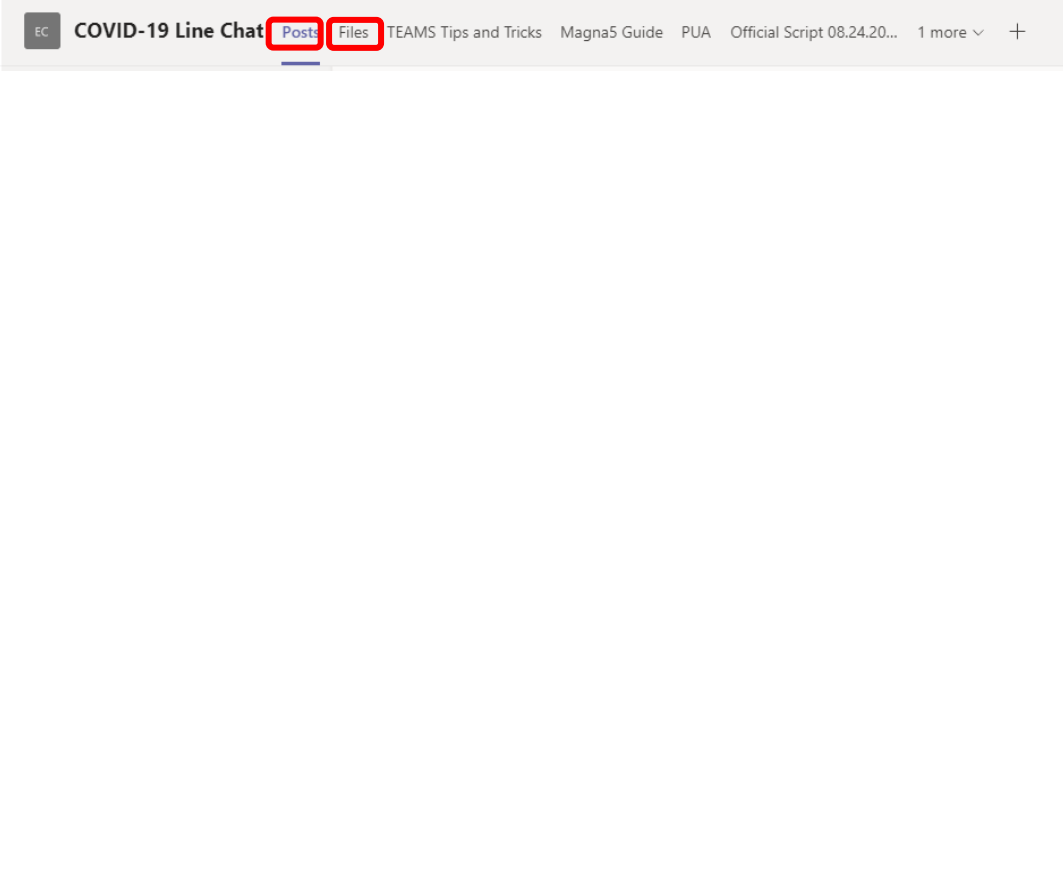
## V. Using the Teams Tab

	<p>The Teams tab displays all the teams you belong to.</p> <p>To access your Teams, click the <i>Teams</i> tab on the left side.</p> <p>Each Team you are a part of will be displayed under the Teams menu</p>
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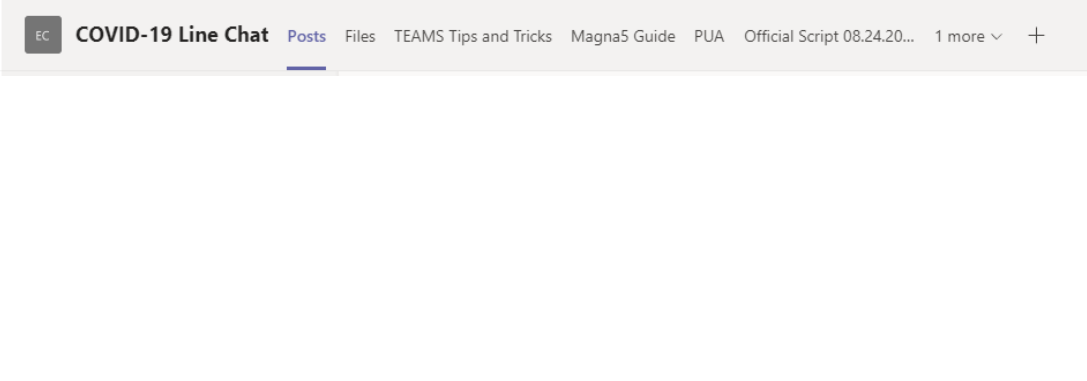
## Understanding Channel Structure and Function

	<p>Each Team is a general organization that users belong to</p> <p>Within every Team there are specific channels that are organized around more specific topics under the larger team</p> <p>Each Team has a general channel, as well as other channels created by the Team owner(s)</p> <p>Posts in a channel are visible to all members of that channel</p>
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## Channel Navigation

	<p>When a channel is selected, there is a menu displaying navigation and features for the selected channel</p> <p><i>Posts:</i> Click here to view all user posts and discussions can be found here</p> <p><i>Files:</i> Click here to view any resources uploaded or posted in this channel are stored here</p> <p>Additional tabs can be added by channel owners. Each Team uses channels slightly differently, so not all tabs will look the same for each Team</p>
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## Posts Tab

	<p>The <i>Posts</i> function is more similar to a message board rather than to a chat, and it is where you can start a conversation, ask a question, or share any updates</p>
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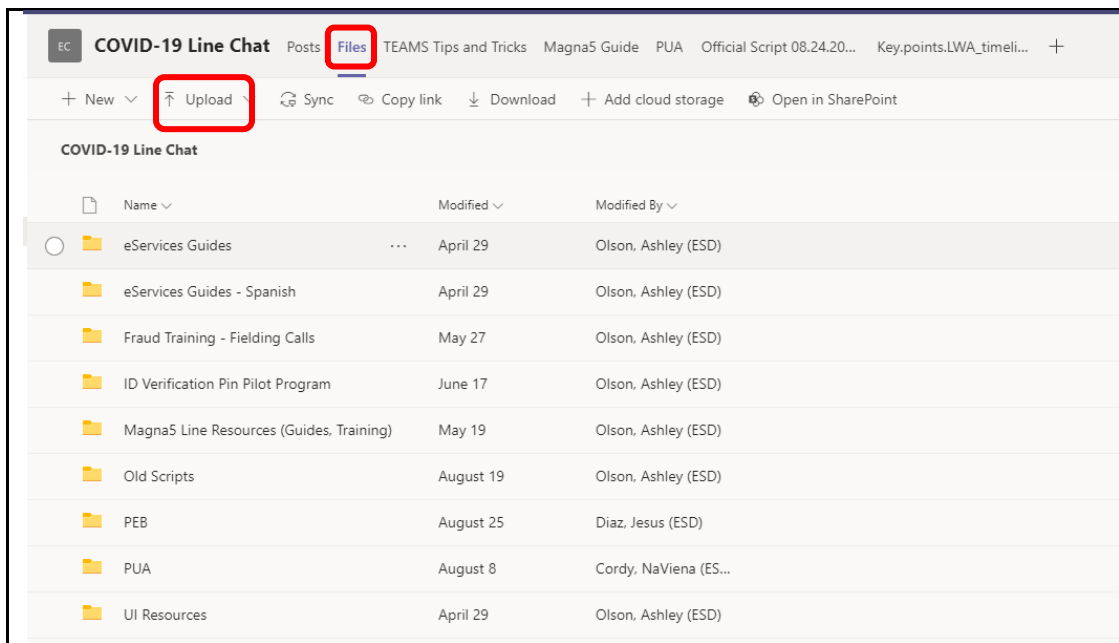
## Streamlining Channel Conversations



When replying to a post, click the *Reply* button to streamline the discussion.

To tag a Team member, use the @ symbol, followed by the member's name

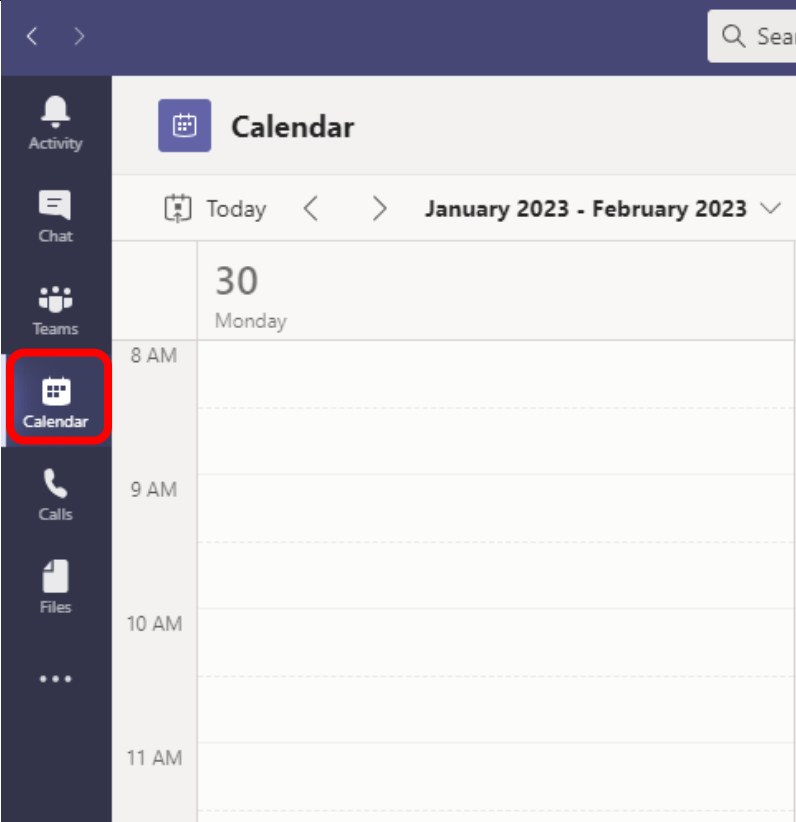
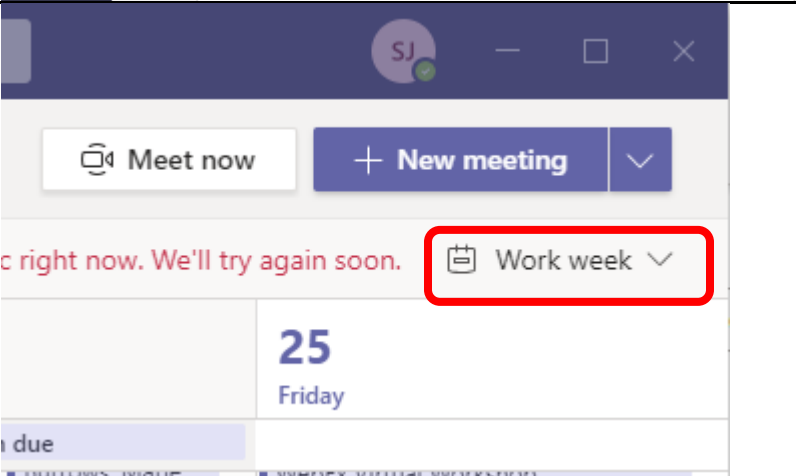
## Team Specific Files



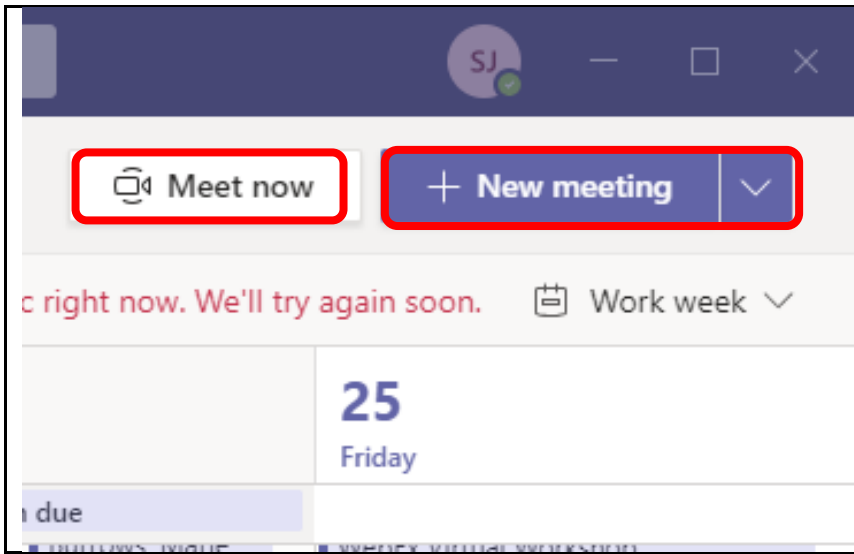
The *Files* tab displays all files from the channel you are currently viewing

To share a file to a channel, click upload and select your file

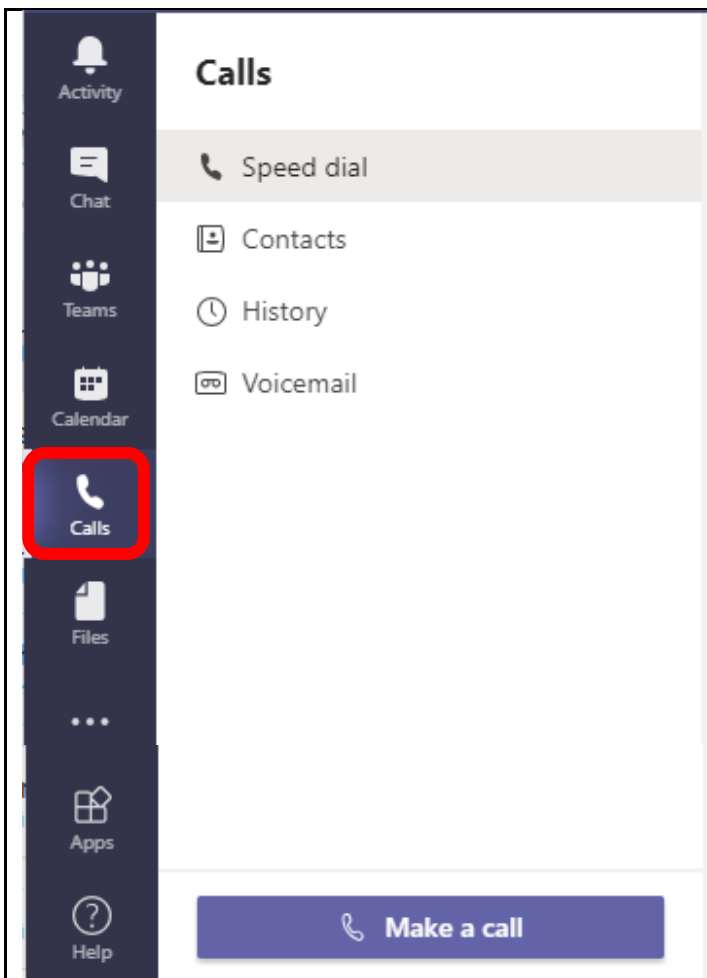
## VI. Using the Calendar Tab

	<p>To access the calendar, click <i>Calendar</i> on the left side</p> <p>The Calendar displays your entire Outlook calendar</p> <p>However, it does not display color coded events on the calendar</p>
	<p>To change the layout from day to week, select the drop-down menu (see picture) on the right side</p>

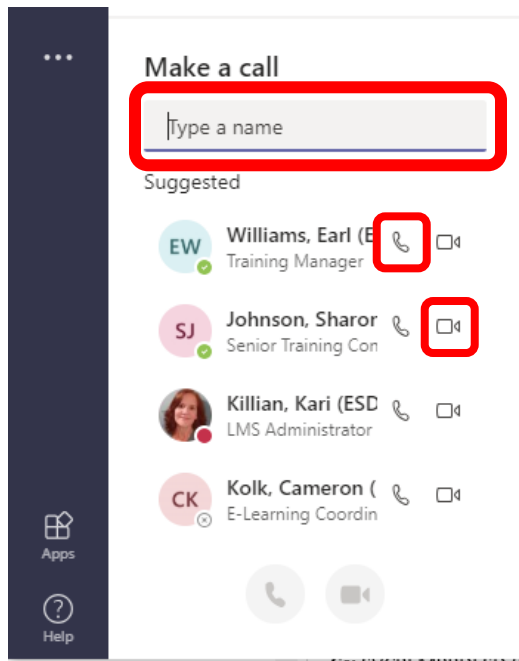
## Meetings

		<p>To schedule a future meeting, select <i>New Meeting</i> in the Calendar tab</p> <p>To start a meeting immediately, select <i>Meet now</i></p>
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## VII. Using the Calls Tab

		<p>To access the calls menu, click the <i>Calls</i> tab on the left menu bar</p>
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## Making Calls

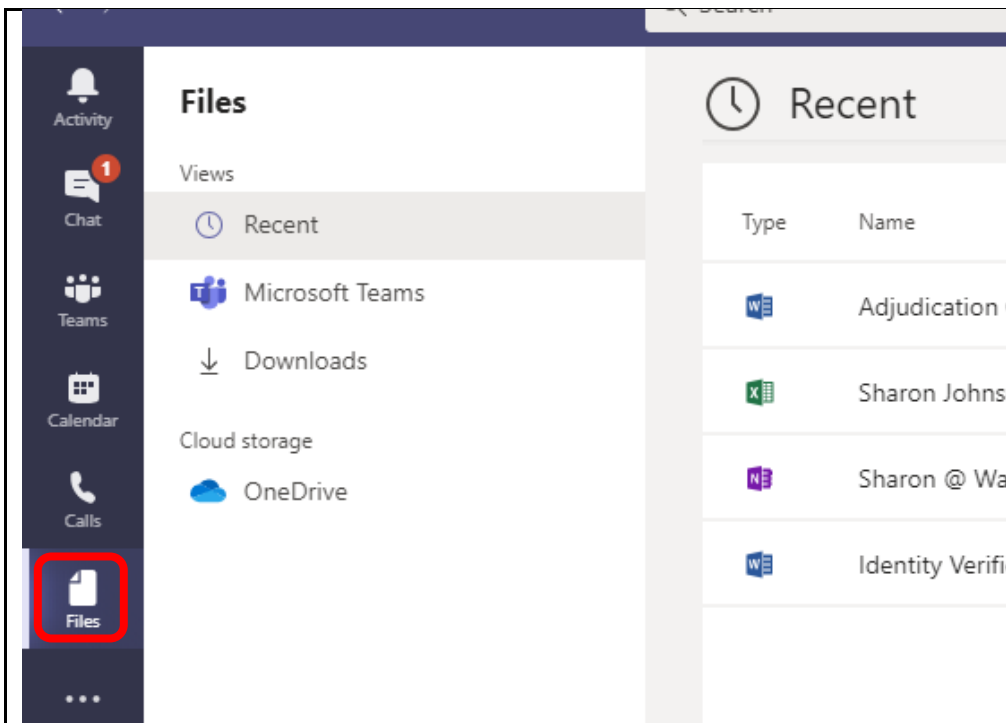


To make a call, type the name of the person you wish call into the search box

Next select either the phone icon (voice call) or the video camera icon (video call) to make a call to the selected person

You can use the phone/video icons to make calls through speed dial (displays most used contacts) or history (displays recent contacts) as well

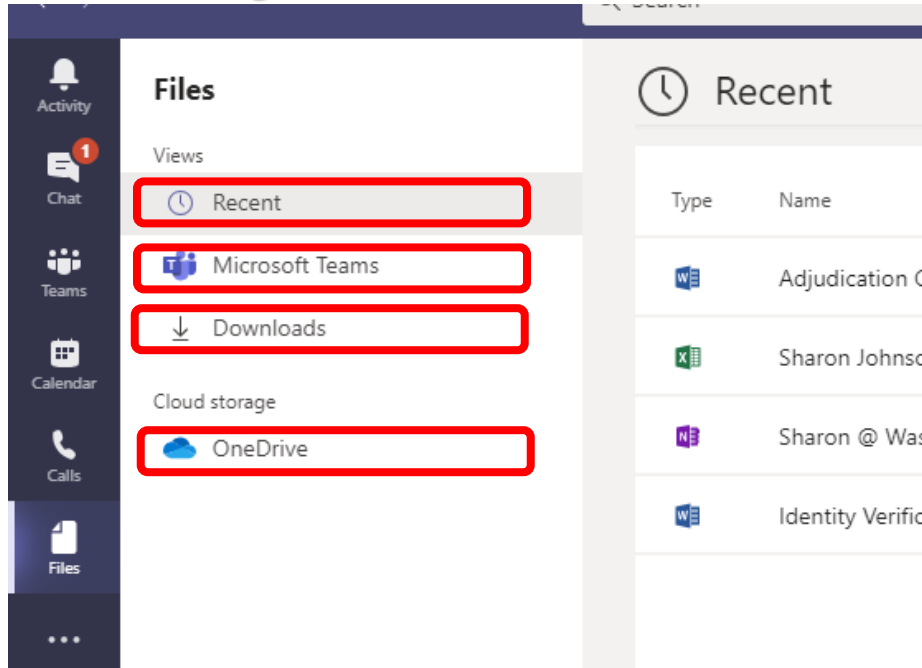
## VIII. Using the Files Tab



To access Team files, click the *Files* tab on the left menu bar



## Accessing Files



The *Files* icon gives you access not just to files that have been uploaded to Teams, but also to files you have opened recently on your computer

*Recent* is the default; your recent documents will appear in the screen

Click *Microsoft Teams* to see the files that have been uploaded to any Team or Channel you belong to

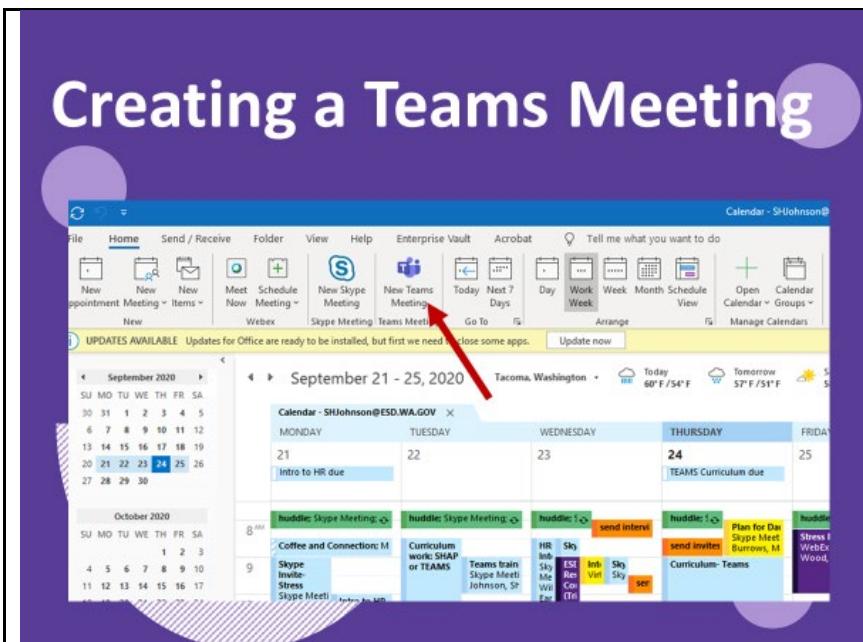
*Downloads* will show you the documents you have downloaded via Teams

*OneDrive* gives you access to cloud storage of chat files

From any of the file menus, simply click on the document to open it

## IX. Tips and Tricks

### Creating a Teams Meeting in Outlook

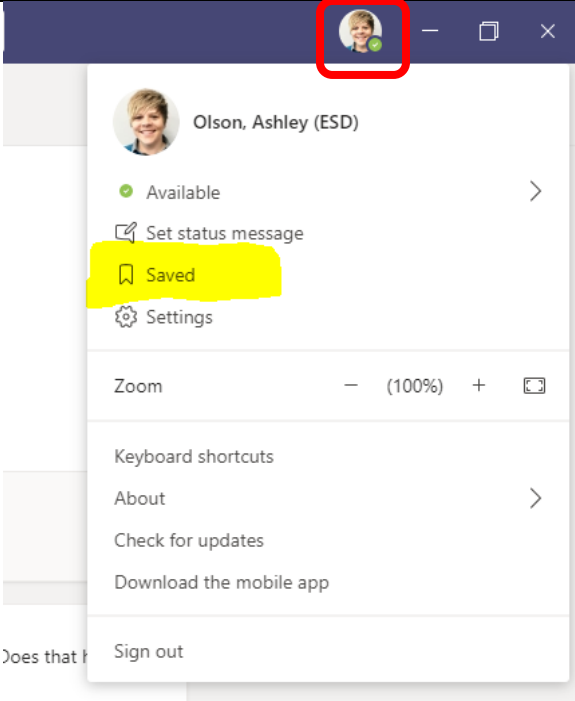
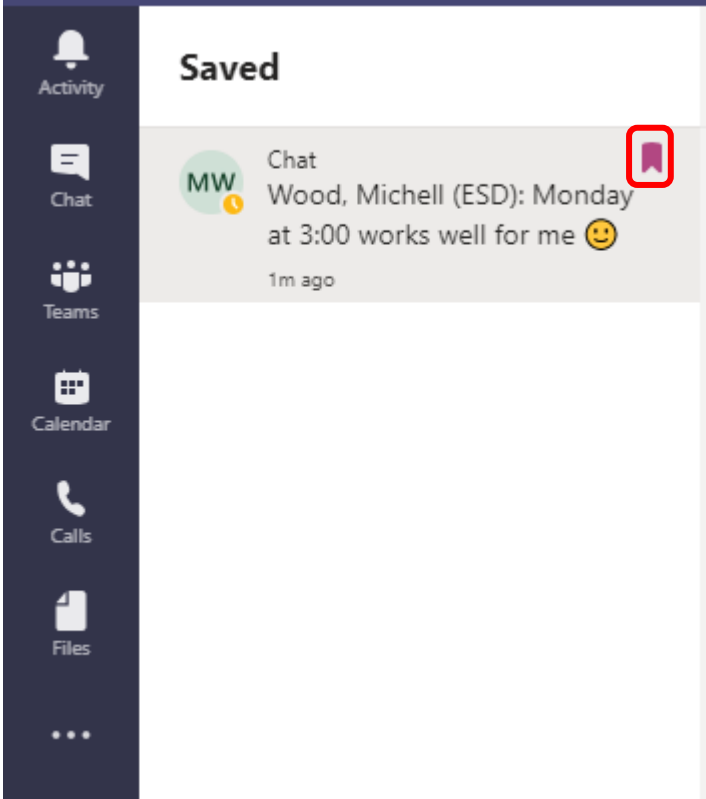


To create a meeting in Outlook, click on your calendar for the time and date you want the meeting to start, then click *New Teams Meeting*

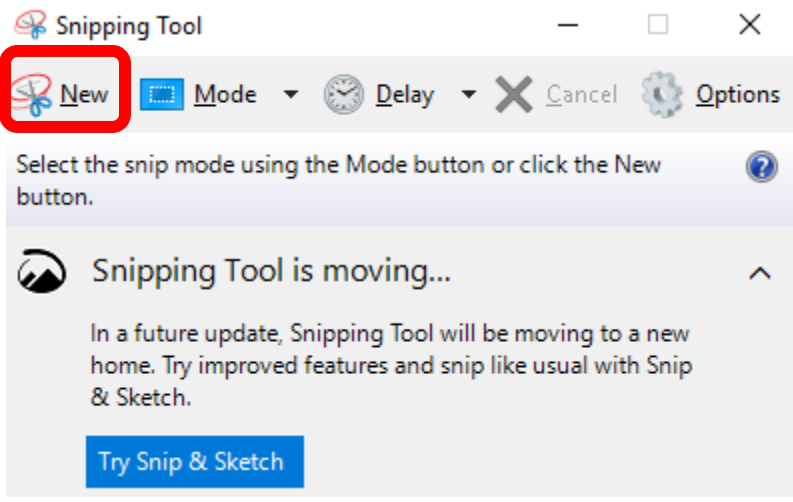
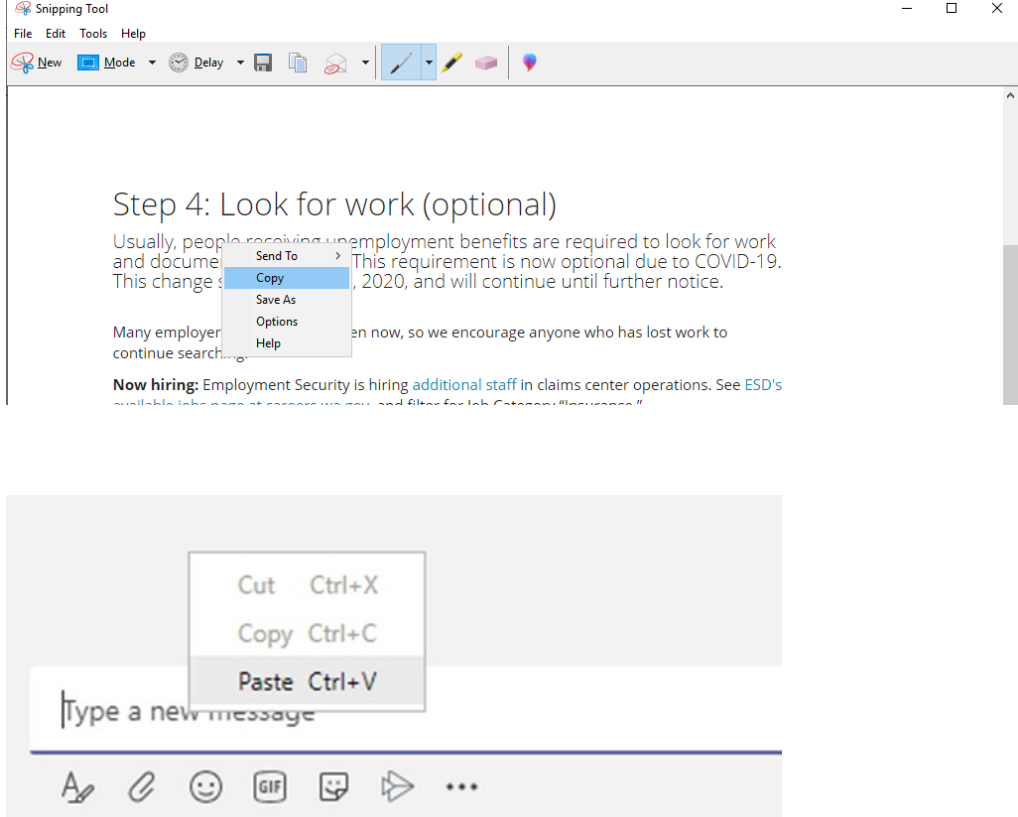
Fill in the meeting form just as you did for a Skype meeting and send

The *New Teams Meeting* button will only appear if you are logged in to Teams

## Finding Saved Items

 <p>Olson, Ashley (ESD)</p> <ul style="list-style-type: none"><li>Available</li><li>Set status message</li><li><b>Saved</b></li><li>Settings</li></ul> <p>Zoom (100%)</p> <p>Keyboard shortcuts</p> <p>About</p> <p>Check for updates</p> <p>Download the mobile app</p> <p>Sign out</p>	<p>To access saved items, click your profile picture to bring up the profile menu</p> <p>Select <i>Saved</i></p> <p>This will display all saved items in order</p>
 <p><b>Saved</b></p> <p>Chat</p> <p>MW Wood, Michell (ESD): Monday at 3:00 works well for me 😊</p> <p>1m ago</p>	<p>Click the small flag button to unsave an item</p>

## Adding Screenshots

	<p>Every file that you share in chat or a channel gets saved to the files tab associated with that chat or channel</p> <p>To avoid cluttering the Files tab, you can use your “Snipping Tool” (or other approved screen-shot software) to share images without uploading a file</p> <p>Click <i>New</i></p> <p>Click and drag to capture the image you want to send</p>
	<p>Right-click on the image you captured and choose “Copy”</p> <p>In chat, right click again and choose “Paste” (or Ctrl+v)</p> <p>This will keep unnecessary documents from being stored.</p> <p><b>**NOTE**</b>  <b>There is a new shortcut for snipping tool.</b>  <b>Windows + Shift + S</b></p> <p>Try it out – it’s awesome!</p>