

Microsoft Teams Orientation Manual


Microsoft Teams is a unified communication and collaboration platform that combines persistent workplace chat, video meetings, voice and video call, and file storage for collaboration on files.

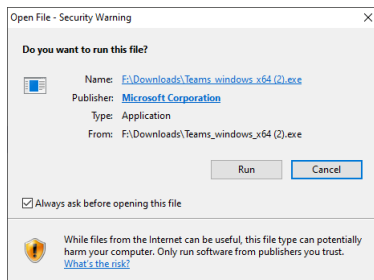
Note: This document is intended for internal use by UFV staff and faculty. However, you may also use the information provided here to connect from your UFV MS Teams account with others outside of our organization if they have their own Microsoft 365 license.

Download Microsoft Teams

Microsoft Teams can be installed and used on multiple devices (work and home desktop, tablet, and mobile device)

Install Teams on your Desktop

- Click on  on the Microsoft Teams [website](#).
- Once the download is complete, click on the downloaded file.
- Execute the file once the download is complete by clicking **Run** to perform the installation.



Install Teams on your Mobile device


- Search for Microsoft Teams on your app store





Sign in and get started with Teams

Sign-in to Teams

- Start Teams.
 - In Windows, click **Start**  > **Microsoft Teams**.
 - On Mac, go to the **Applications** folder and click **Microsoft Teams**.
 - On mobile, tap the **Teams** icon.
- Sign in with your **full UFV email address** as username and your **network login** as password.



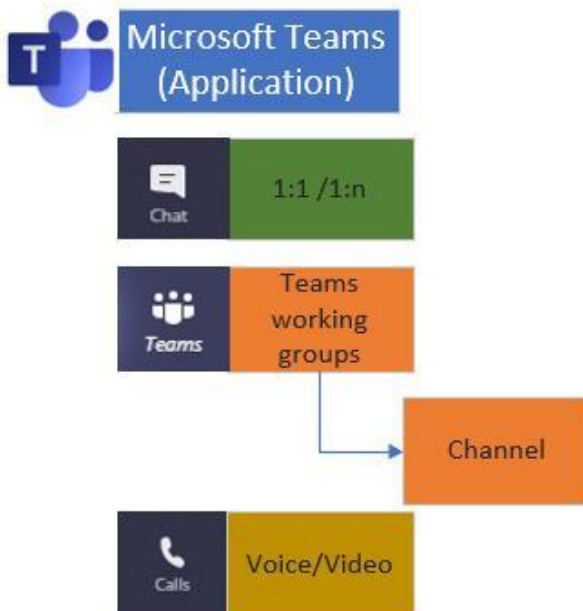
**Enter your work, school,
or Microsoft account.**

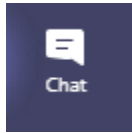
Firstname.Lastname@ufv.ca

Sign in

Microsoft Teams Features

The following features are currently available at UFV.







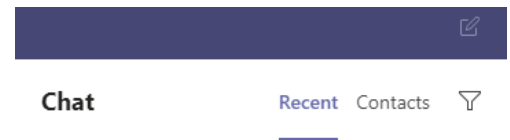
Start chats and make calls

View a chat

- Select **Chat** and select a one-on-one or group chat from the chat list.



Start a chat

- Select **New chat**  in the header by the command bar.
- Type the name of the person or people you want to contact.
- Select the down arrow  to add a name to your chat group.





Leave a chat


If you are in a group chat and no longer want to be part of then:

- Select the chat you want to leave.
- Click the view/add participants .
- Select **Leave** .




Format your chat message

- Type a chat message.
- Select  **Format**.
- Format your post with the following options:
 - Bold, Italic, Underline, Strikethrough
 - Bulleted & Numbered list
 - Insert hyperlink
- Select **Send**  or hit **Enter**.

Get one person's attention in a group chat


- Type a message in a reply or start a new conversation.
- Type **@** and the person's name.
- Select the person's name you want to mention.
- Finish your message and select **Send**  or hit **Enter**.

Save a message


- Hover over your message, select **More options**  and then select **Save this message**  just to the right of the text.
- To see a list of your saved messages, select your profile picture  at the top of the app, then choose **Saved**, or type **/saved** in the command box at the top of the screen.

Use Recent and Pinned Chats

On the left side of the Chats, you'll see your Recent conversations as well as your Pinned ones.


- Hover over a conversation, select the three dots, and then select **Pin**  to keep your chat in your Pinned list.

Hide chats


- While you can't delete an entire chat, you can hide a chat from your chat list if it's not relevant to you anymore. Select the chat you want to hide, then **More options**  > **Hide**.

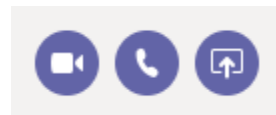
Unhide chats

Search or type a command

- Search for the chat in the **search/command box** and select it
- Click the **More options**  > **Unhide**.




Delete messages

- If you need to backtrack and delete something you just sent, go to the message, hover over it, and select **More options**  > **Delete**.




Make video or audio calls and share a screen from a chat

You can make one-on-one or group calls with anyone in your organization directly from a chat. Up to 20 people can be on the same video call.

- Go to your chat list, select a chat or click **New chat**  to start a new conversation.
- Type the name or names into the **To** field at the top of your new chat.
- Select **Video call**  or **Audio call**  on the top right of the screen to call someone directly from a chat.

When you're chatting with one or more people in Teams, you can instantly share your screen.

- Select **Share**  in the upper-right corner




You can either choose to share a specific monitor (Screen #1 or #2) or a specific window opened on your computer. You can also present a PowerPoint file or collaborate with others using the Whiteboard.

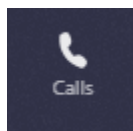
You can also Give control, Request control, and Take control of other screens.






Additional call features

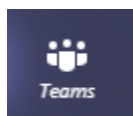
When in a call your call controls allow you to:

- You can turn on/off your camera and/or microphone
- Share your screen with the other participants, select **Share**  **...**
- Show/Hide participants, select **Show participants**  in your call controls.
- Add someone new to a group call, select **Show participants**  in your call controls, then type their name or phone number in the search box.
- For additional features select **More options** **...** to:
 - Hold,
 - Transfer
 - Consult then transfer
 - Blur my background
 - Keypad
 - Turn off incoming video



Make calls and view history

- Select **Calls** > **Make a call**, and enter contact name you want to call and then press the **Video call**  or **Audio call**  button.
- Select **Calls** > **Contacts**, search the contact and select one of the call options .
- Select **Calls** > **History** to see your call history.



Teams are logical working groups used to enhance collaboration in the workplace. In each Team you can create multiple channels where most of the action takes place.



Channels are discussion within a team. Inside channels you can hold on-the-spot meetings, have conversations, and share files. Watch the [Welcome to Microsoft Teams](#) video to learn more.

Conversations in channels can be seen and searched for by the entire team. You can participate in conversations, like or save important ones, mention specific people so they see your message, and even edit a file that's been added to the conversation.

You can post on channel the same way you do in the one-on-one or one-to-many chat.

Start with Teams and channels

Create a new Team: Team Administration is currently centralized.

- Contact MSTeamAdmin@ufv.ca
- Once the team is created, the ownership will be transferred to you

Create a new channel

- Team Owners can create new channels
- Find the team you want to add a channel and click **More options** *** > **Add channel**.
- Enter a name and description for your channel.
- Select **Add**.

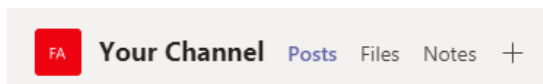
Hide or show a channel

- From within the channel, Select **More options** *** > **Hide**.
- If you want to unhide the channel, select **hidden channels** > **Show**.

Customize channel notifications

1. Select **More options** *** > **Channel notifications**.
2. Choose the settings you want such as new post notifications or channel mentions.
3. Select **Save**.

Notifications appear based on your preferred settings.



Channel Files and Notes

Within each team there are channels. Think of these channels as a place for your entire team to discuss a specific topic, like upcoming training, or project updates. Each channel has its own file folder where you can share files for that specific channel. To access that folder, go to the channel and select the **Files** tab above the conversation window.

Upload existing files

There are two primary ways to upload existing files into your library. Both methods start by going to the files folder for your channel and both methods, by default, upload copies of your files to the channel file folder.

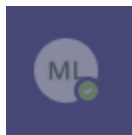
- **Drag and drop** - Using your mouse, drag the file from where it's currently located and drop it on the Teams window among the files.
- **Upload** - Select **Upload** ↑, then select the file (or files) you'd like to upload and select **Open**.

Create a file

- Select **New**
- Select the kind of file you'd like to create.
- The new file will open in Teams so you can begin editing it.


Write Notes

- Select the **Notes** tab.
- OneNote will open and you can start writing notes for this channel.








Update your user presence or status

Presence is part of a user's profile in Microsoft Teams (and throughout Office 365) that indicates the user's current availability and status to other users. By default, anyone in your organization using Teams can see (in nearly real time) if other users are available online.

- Select your profile picture .
- Click on your current status to change it to another one.
















A user can set their status (or presence) to one of the following:

-  Available
-  Busy
-  Do not disturb
-  Away
-  Be right back

More user presence or status details are also automatically updated. The changes are based on user activity (Available, Away), Outlook calendar states (In a meeting), or Teams app states (In a call,




Presenting). There's a 15-minute inactivity timeout, after which a current presence state is reset to Away.

-  Available
-  Available, Out of Office
-  Busy
-  On a call
-  In a meeting
-  On a call, out of office
-  Presenting
-  Focusing
-  Away
-  Away Last Seen *time*
-  Off Work
-  Offline
-  Status unknown
-  Blocked
-  Out of Office

Users receive calls in all presence states except for Do Not Disturb states. If you are unable to reach the user, leave them a chat message as the voicemail feature has not been setup for UFV as of this version date.


Manage notification settings

You have the control to decide what notifications you receive, where you receive them, and how often you get them.

- Select your profile picture .
- Select **Settings > Notifications**.
- Change the settings as appropriate to your needs.

Manage Calls settings

You have the control to decide what calls you receive, where you receive them, choose a ringtone.

- Select your profile picture .
- Select **Settings > Calls**.
- Change the settings as appropriate to your needs.

Voicemail configuration is currently not available in the UFV implantation.



Use the command box

The command box is always there at the top of the screen to help you search or take quick actions.

Use the command box to search

- Type what you're looking for in the command box, like a message, person, or channel.
- Select one of the suggestions from the list, or press Enter to see more results.

Use slash commands to perform tasks

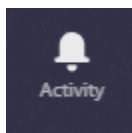
- In the command box, type a / to see a list of commands and descriptions.
- Choose a command from the list or type it.

For example, to call someone type **/call**, press Tab, and select or type the name of the person you want to call.


Check out [Available commands](#) to see a list of commands or just type / to see the menu in the command box.


Use the @ command

- Type @ [someone's name], press Tab, and then type a message to message someone without moving away from what you're working on.

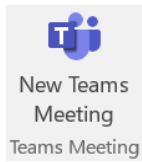


Filter your activity feed

Select **Activity**  to see your Activity feed. A summary of everything that's happened in the team channels you follow.

- Select the **Filter** icon  .
- In the menu that pops up, select what type of notifications you want to see.
- Select **X** to close the filter.

For a more specific **feed**, go to the Feed menu and select **My activity**. You'll see a list of everything you've been up to lately in Teams.



Use the MS Teams Meeting add-in in Outlook

The MS Teams Meeting add-in lets users schedule a Teams meeting from Outlook. The add-in is available for Outlook on Windows, Mac, web*, and mobile.

***Note:** This feature is not supported on the current UFV Outlook Web App (webmail.ufv.ca). For additional information on this feature visit [MS Teams for Outlook](#).

MS Teams Meeting add-in in Outlook for Windows 10 (UFV Direct desktop access)

The Teams Meeting add-in is automatically installed for users who have MS Teams installed on their Windows 10 PC. Users will see the Teams Meeting add-in on the Outlook Calendar ribbon.

To schedule a meeting

- Open **Outlook** and switch to the calendar view.
- Click **New Teams Meeting** at the top of the view.

Outlook will add a link to your meeting invite for your invitees to join the MS Teams meeting.

Note: In the future this feature will also have a phone number available for those not using MS Teams.

[Join Microsoft Teams Meeting](#)

[Learn more about Teams](#) | [Meeting options](#)

- Add your invitees to the **To** field—you can even invite entire contact groups.
- Add your meeting subject, location, start time, and end time.
- Then click **Send**.

Join a Teams meeting

If you have MS Teams on your device, you can [Join with your desktop app](#)

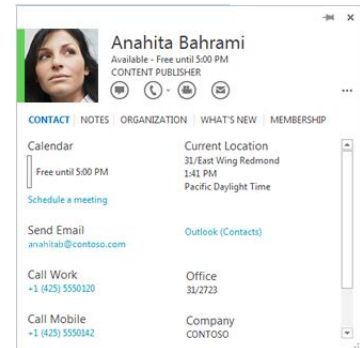
- In your email invite, select **Join Microsoft Teams Meeting**.
- **Join** a Teams meeting on the App, select **Open Microsoft Teams**.
- Choose the **audio** and **video** settings you want

Inviting someone outside UFV

You can invite people from outside UFV to join a Teams meeting by simply adding them to your meeting invite. The invitee will then join the meeting on a web-based MS Teams platform.

Send an instant message, start an audio or video call in MS Teams from contact card

The contact card can be opened from anywhere within Office applications where you see a person's picture, or a person's name with a presence icon.



- Pause on the contact's picture (or presence icon next to a person's name), and then click the down arrow to open the card.
- To send an **instant message**, either click the instant message button in the Quick Start toolbar (to right of the picture).
- To start an **audio** call, either click the audio call button to call the person at their work number or click the drop-down arrow next to the call button to select a different phone number.
- To start a **video** call, click the video call button in the Quick Start toolbar.
- To send an email message, either click the email button in the Quick Start toolbar or click the contact's email address below the **Send Email** label.