

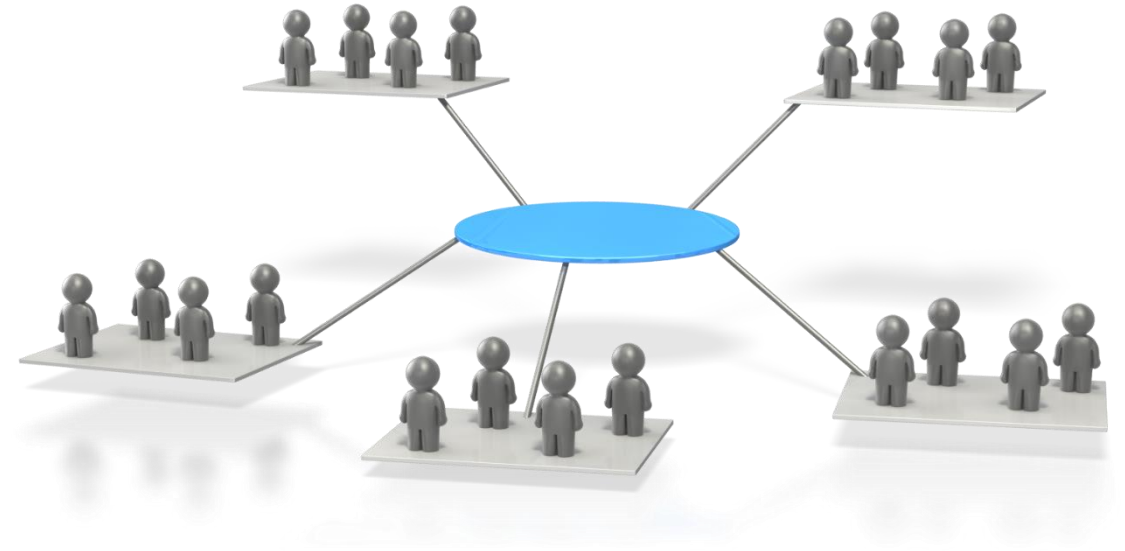
Microsoft Teams

A Quick Guide for New Users Across AFB



Have you ever...

- Wanted to find a better way to stay connected to your colleagues, even if they are miles away?
- Asked colleagues to review a document only to have five versions come back to your email inbox?
- Felt like managing your projects is a project in itself?



If you answered, 'Yes' to any of the above questions, you'll find Teams really useful!



What is Teams?

Microsoft Teams enables you to chat, meet, call and collaborate with your colleagues, all from a single app, simplifying the number of tools you need to get your job done

A seamless solution:

...and because Teams is a Microsoft product it works seamlessly with all your other Microsoft applications...



This guide will help you:

- See how **Teams** can make it easier to communicate with colleagues
- See how **Teams** can save time when working and collaborating with colleagues
- Understand how **Teams** can help you manage projects, resources and activities in one central space with effective and efficient teamwork results



Creating and Managing Teams & Channels



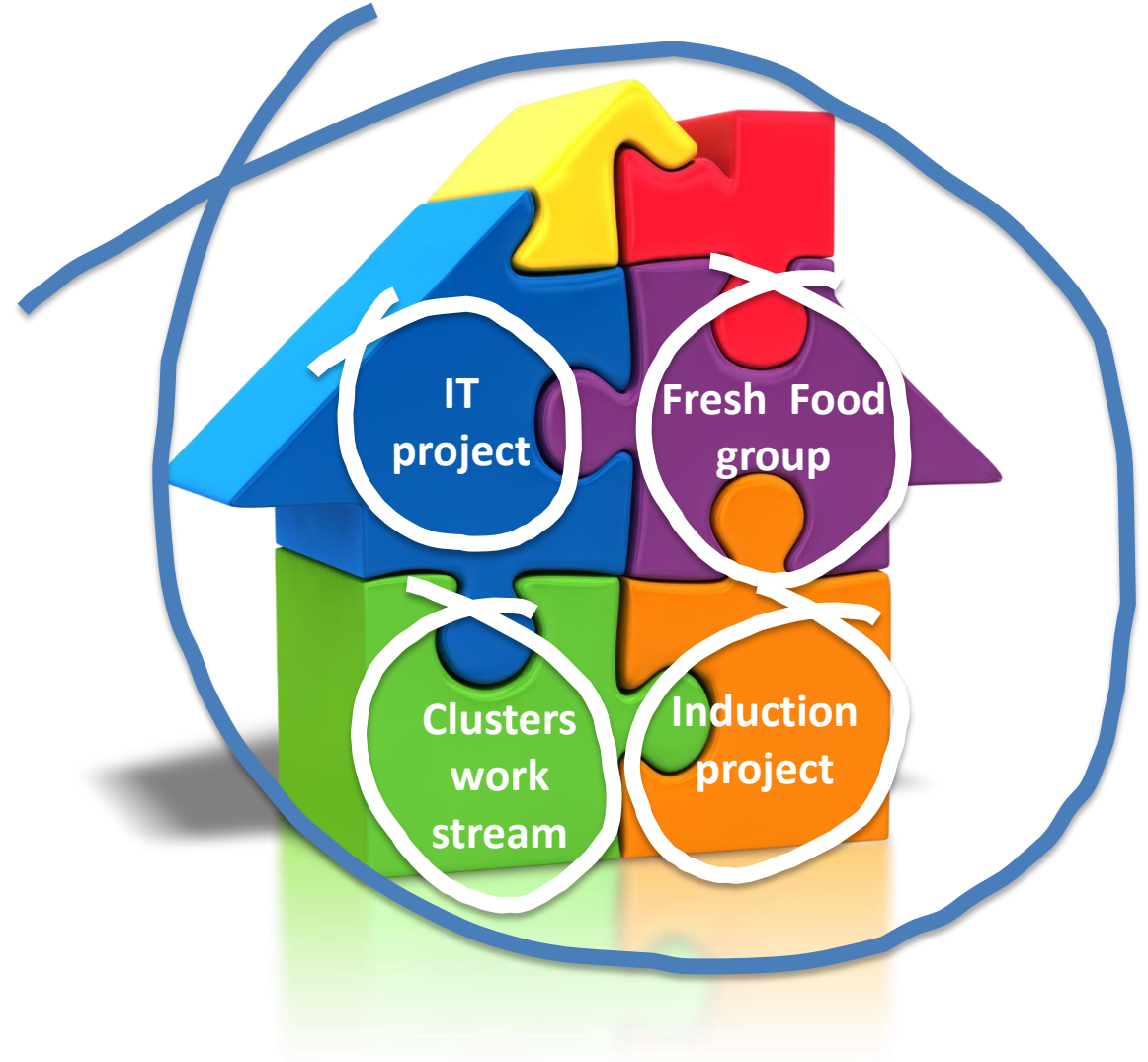
Let's get started: Teams & Channels

A **Team** is a group of people you want to communicate with
Think of a team as a whole house

A **Channel** is a sub-group within the team
Think of a channel as a room in a house

A **Team** could comprise of everyone in your department, work-stream or project group (whoever you choose). You can have as many teams as you like

A **Channel** is a segment of your **Team**. You'd typically create a channel or channels for team members that are working on specific projects or tasks. You can have as many channels as you like



Creating Teams

1. Open up 'Teams'

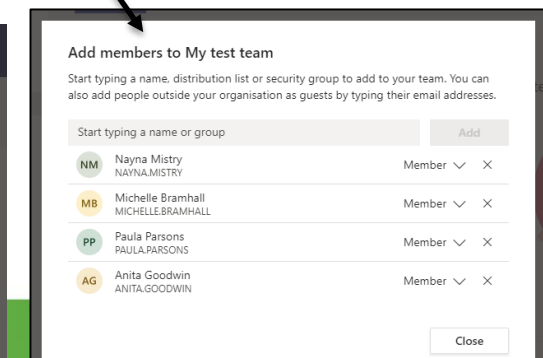
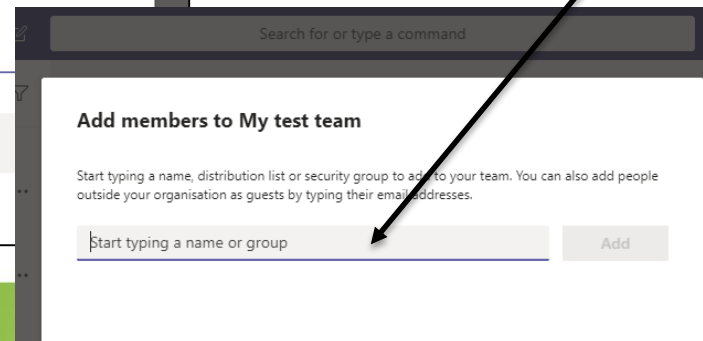
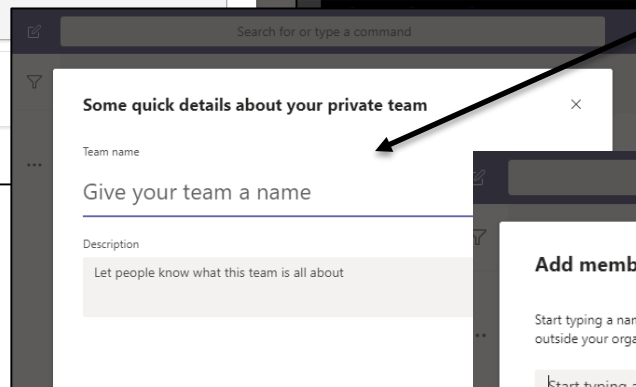
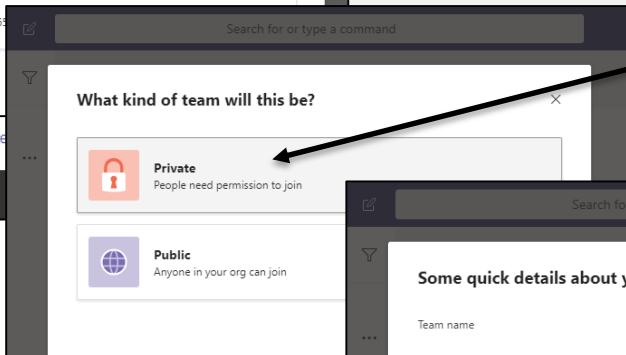
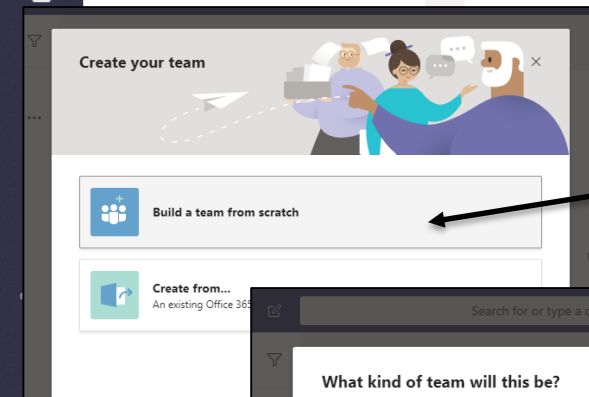
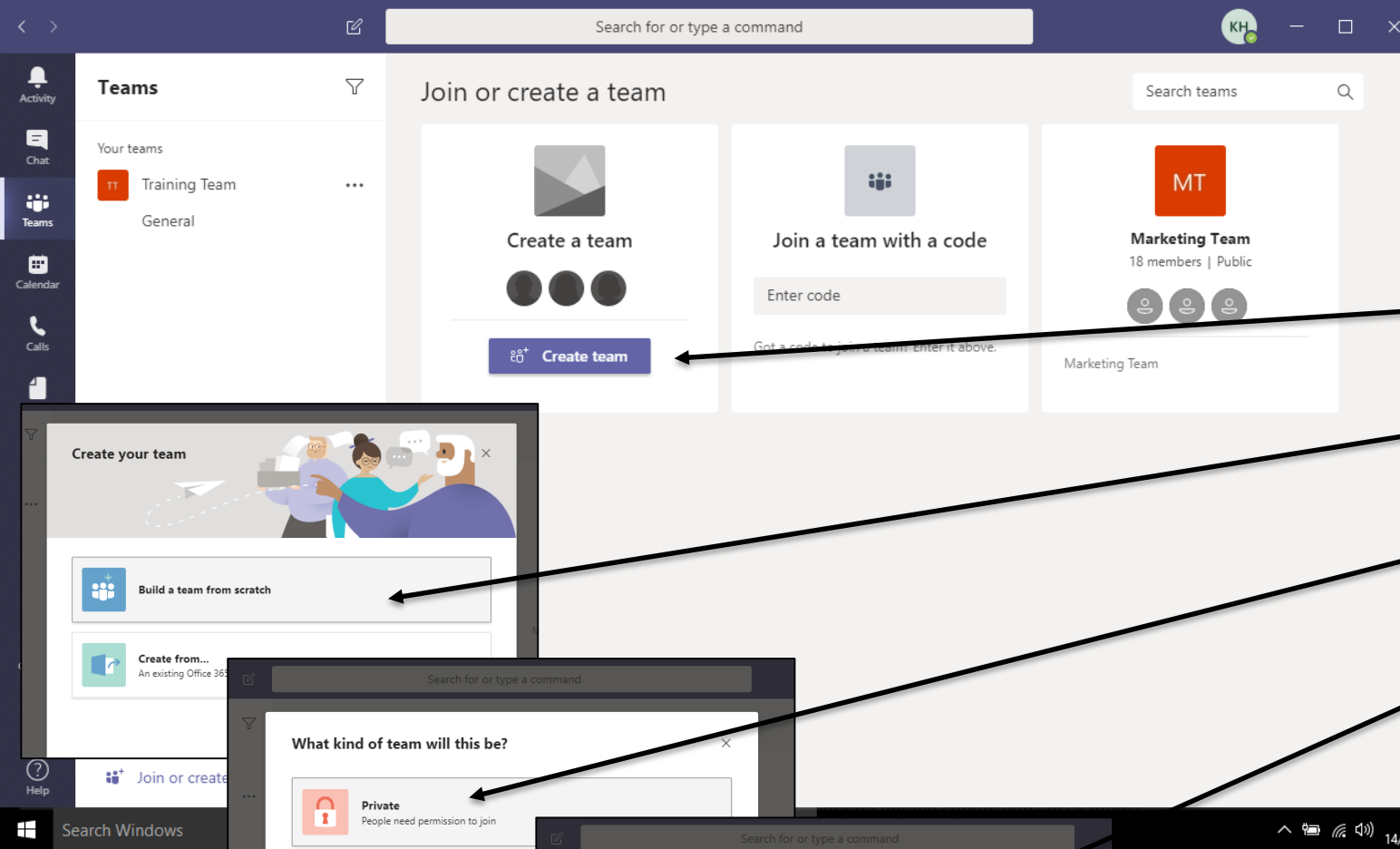
2. Select 'create team'

3. Select 'build a team from scratch'

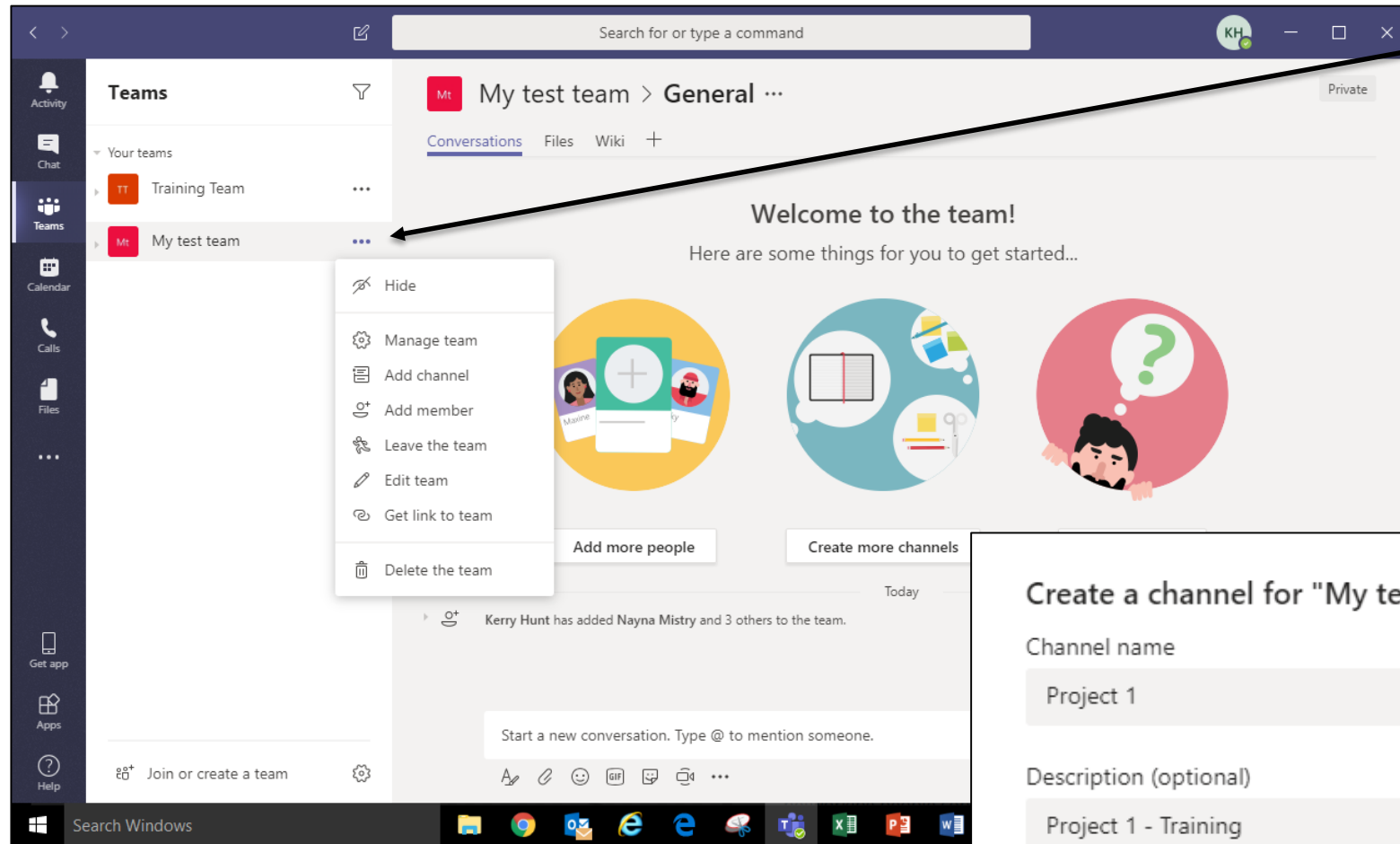
4. Select 'private'

5. Give your team a name (*in this case the Team name is 'My test team'*)

6. Add your team members



Managing Your Team



Select ...

From the drop down you can add, edit, delete your team members

You can also create a channel or send a link

Create a channel for "My test team" team

Channel name

Project 1

Description (optional)

Project 1 - Training

☐ Automatically show this channel in everyone's channel list

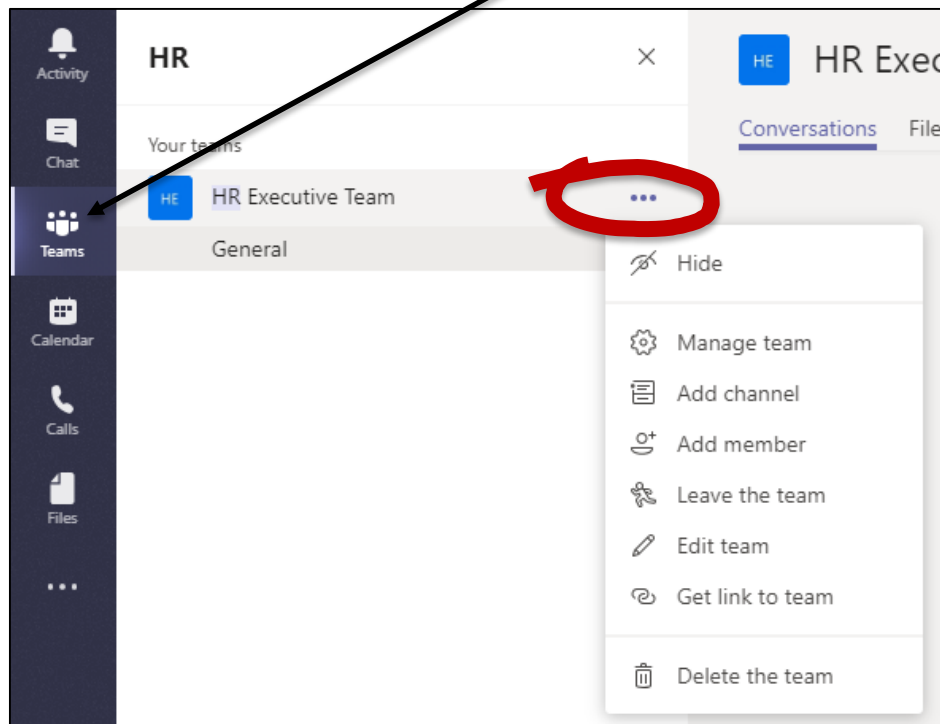
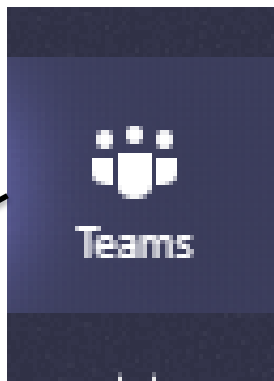


Editing Your Profile

Click your 'profile' icon
Select 'settings'

The screenshot shows the Microsoft Teams application window. In the top right corner, there is a profile icon with the initials 'KH'. A dropdown menu is open, showing options: 'In a meeting', 'Set status message', 'Saved', 'Settings', 'Zoom', 'Keyboard shortcuts', 'About', 'Check for updates', 'Download the mobile app', and 'Sign out'. An arrow points from the 'Settings' option in the menu to the 'Settings' window. The 'Settings' window is open, showing a sidebar with 'General', 'Privacy', 'Notifications', 'Devices', 'Permissions', and 'Calls'. The 'General' tab is selected, showing options for 'Theme' (Default, Dark, High contrast), 'Application' (Auto-start application, Open application in background, On close, keep the application running, Disable GPU hardware acceleration, Register Teams as the chat app for Office), and 'Language' (English (United Kingdom), English (United States)).

From here you can change the theme (look) of your Teams, privacy setting, language settings & a whole host of other things



Teams & Permissions

The creator or **owner** of a team can edit the **Team**. They can delete or add channels or add team members

They can also nominate **co-owners**, by changing their status from **member** to **owner**. This means **owners & co-owners** have the same rights

Members cannot edit a team

Both **owners & members** can schedule meetings (shown later in this guide)

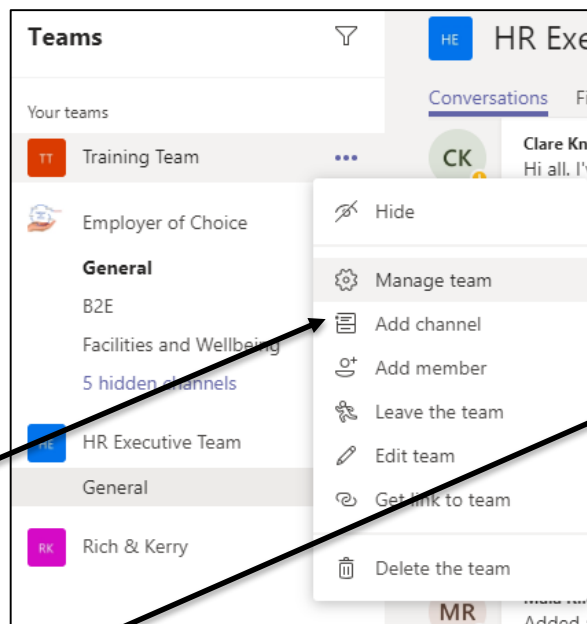
Channels & Privacy

You can create a standard **Channel** or private **Channel**

Standard channels are open & visible to all team members. Private channels are only open & visible to the owner & invited members of the **Team**

Creating a standard or private **Channel**:

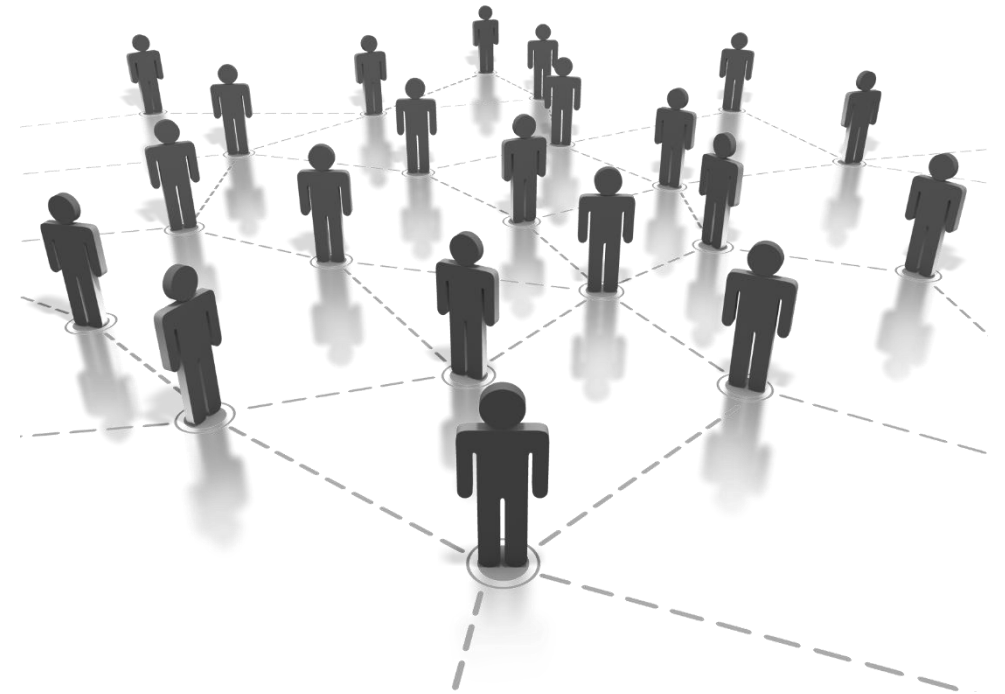
- Select 'add channel'
- Give your channel a name & description
- From the drop down box, choose 'standard' or 'private'
- Create the channel & add members

A screenshot of the 'Create a channel for "Training Team" team' dialog box. It has three main sections: 'Channel name' with a text input field containing 'Letters, numbers and spaces are allowed'; 'Description (optional)' with a text area containing 'Help others find the right channel by providing a description'; and 'Privacy' with a dropdown menu showing 'Standard - Accessible to everyone on the team' and 'Private - Only accessible to a specific group of people within the team'. An arrow points from the 'Add channel' option in the previous screenshot to this dialog.A screenshot of the 'Create a channel for "Training Team" team' dialog box. The 'Channel name' field now contains 'Training Strategy'. The 'Description (optional)' field contains 'Planning for 20/21'. The 'Privacy' dropdown is still set to 'Standard - Accessible to everyone on the team'. At the bottom, there are 'Cancel' and 'Next' buttons. An arrow points from the 'Add channel' option in the previous screenshot to this dialog.A screenshot of the 'Add members to Training Team' dialog box. It has a text input field with 'AG Anita Goodwin' and an 'Add' button. Below the input field, there is a 'Close' button. An arrow points from the 'Add members' step in the list to this dialog.



Teams & Channels

- Think carefully about how many **Teams & Channels** you actually want or need
- We recommend 4-6 members for a **Team** or **Channel** if you are to manage purposeful video conferencing or chats and want to give everyone a chance to participate
- If you have a large team & need more than 4-6 members this can be done but the **Team** owner must set the rules about participation & questions otherwise it's very easy to get off topic & drift from the purpose of the call. Large **Teams** are probably useful when members need to do more listening than talking !



Introduction to Chat



Starting a Chat

Chat is similar to Facebook messenger or the chat boxes that are often used when you are browsing in an on-line store

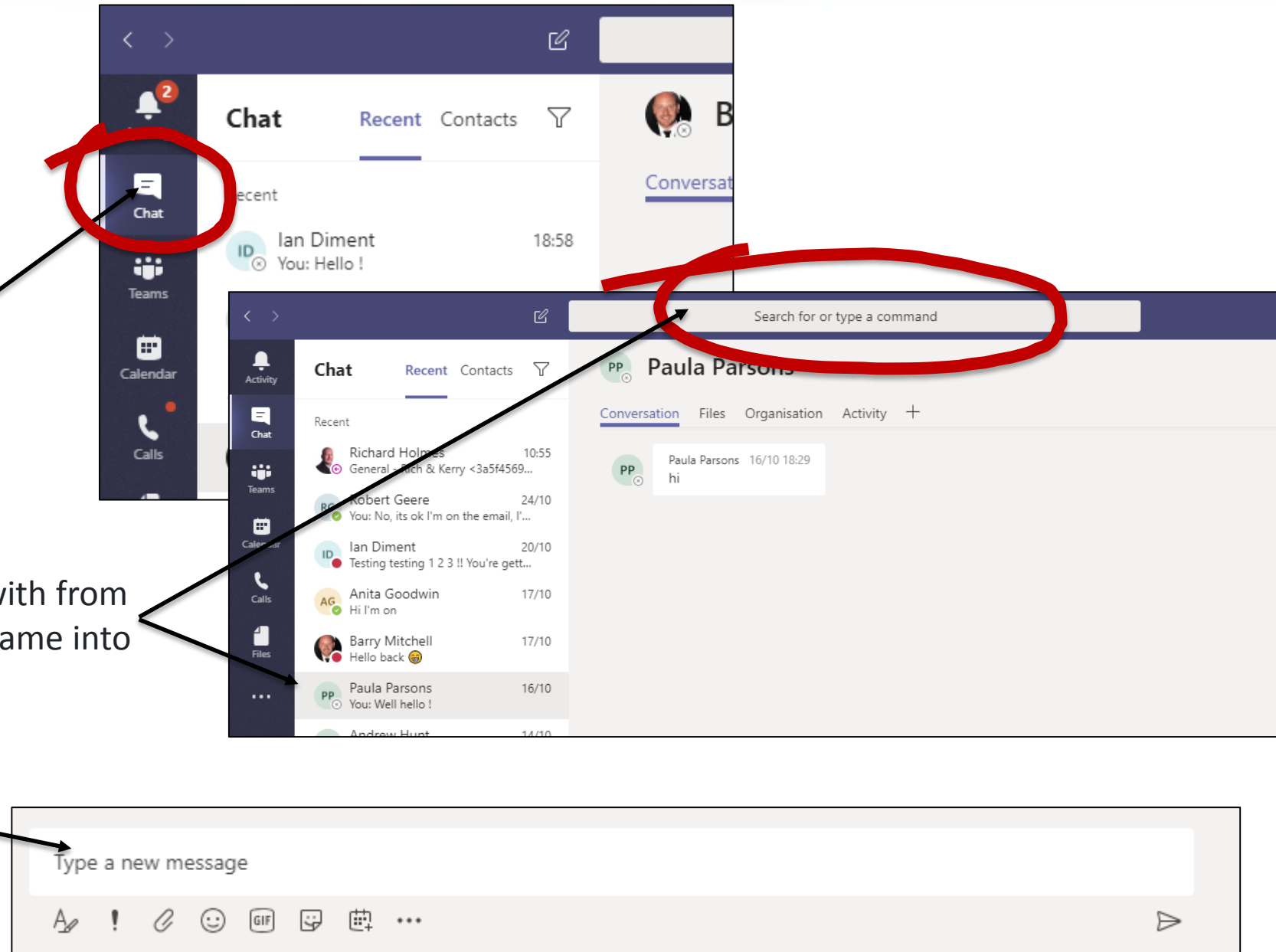
You can chat to one person or several people in your team



Starting a 1:2:1 Chat

To start a chat:

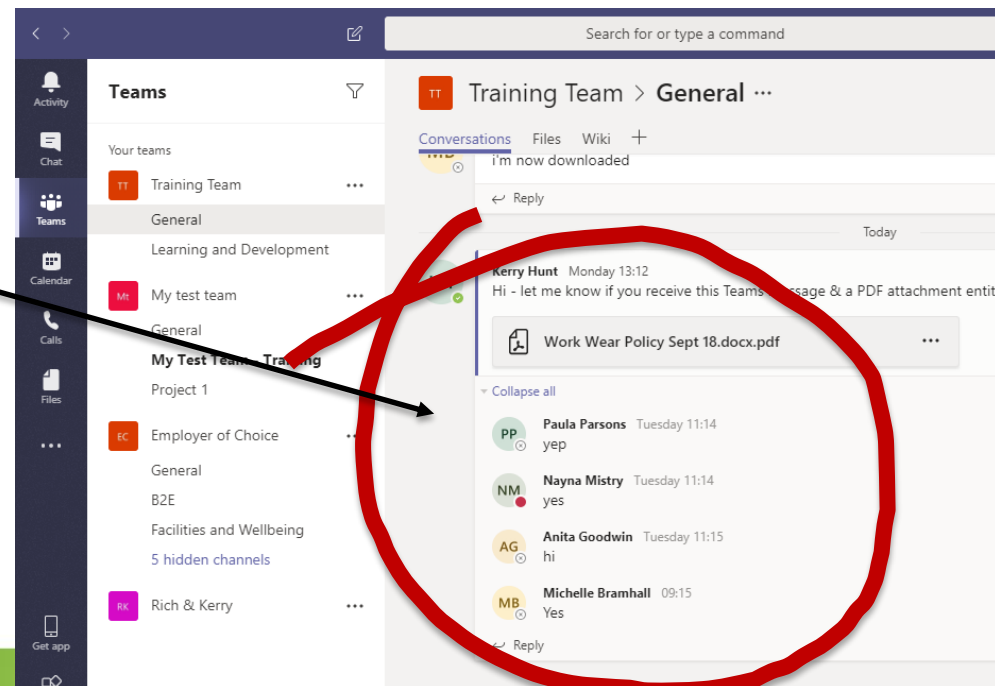
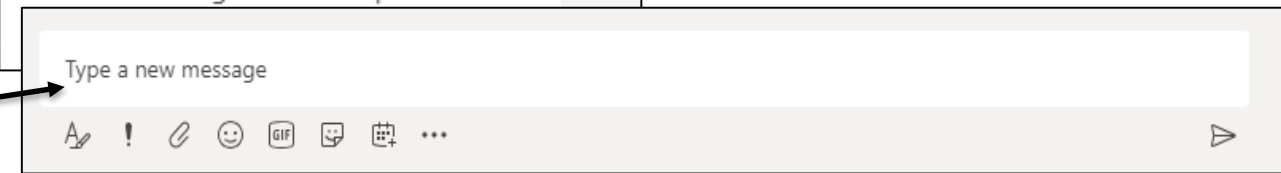
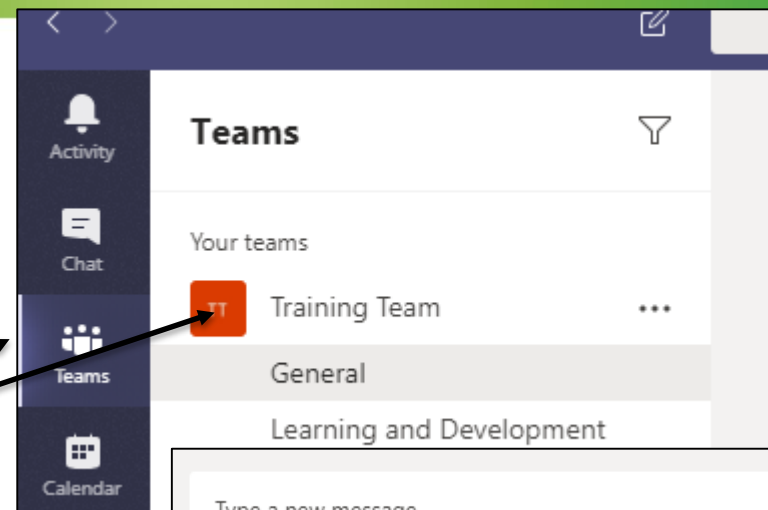
- Select the 'Chat' icon
- Select the person you want to chat with from your 'recent' chat history or type a name into the search bar to find someone
- Then chat away!



Starting a Group Chat

To start a chat:

- Select the 'Teams' icon & the team or channel you want to chat with
- Chat away!
- The whole group can see the chat & will be able to respond





Group Chat

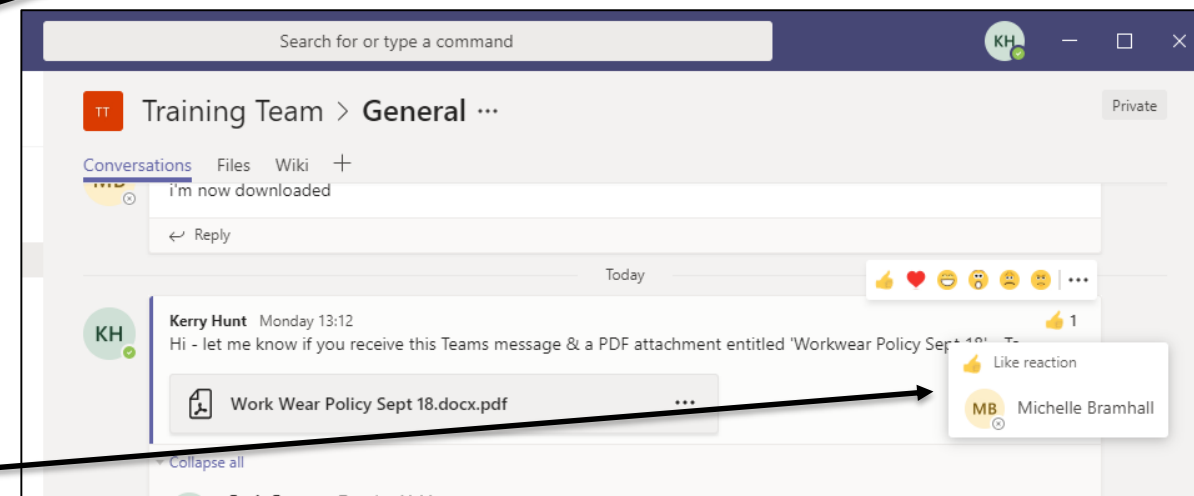
- Don't start a new conversation (thread) if you are continuing an existing conversation (imagine being in a group chat where everyone responds with a new thread – you wouldn't know who was responding to what!). Start a new conversation where it is genuinely a new conversation

- You can send attachments via chat or...



- ...you can liven up your chat by selecting from a choice of emoji, stickers & gifs, just as you may do on your smartphone (obviously make sure these are appropriate for the recipient & nature of the chat)

- To reduce the amount of text in a group chat, we recommend you use emoji as a response where practical. By hovering over the emoji you can see who has sent the response as shown in the example here

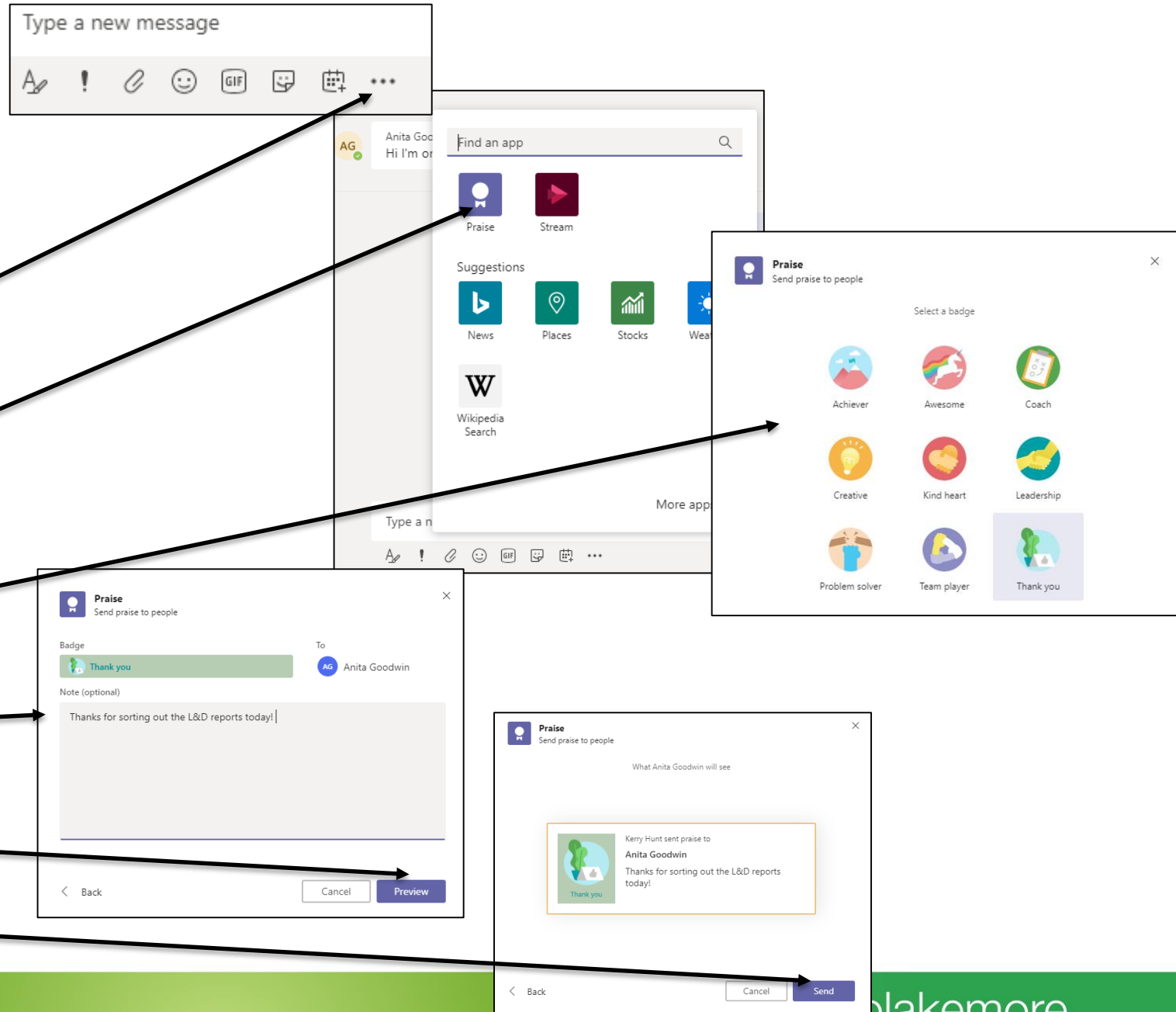


Recognition & Praise in Chat

A quick way to recognise great work is to use the 'praise' badges. To do this:

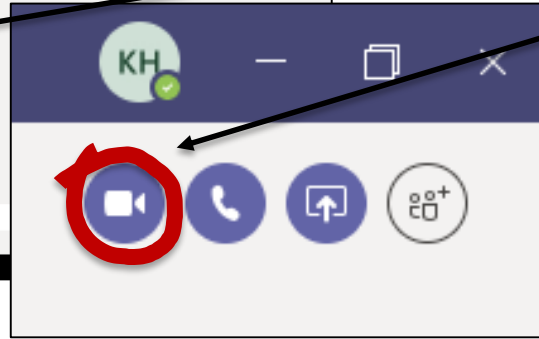
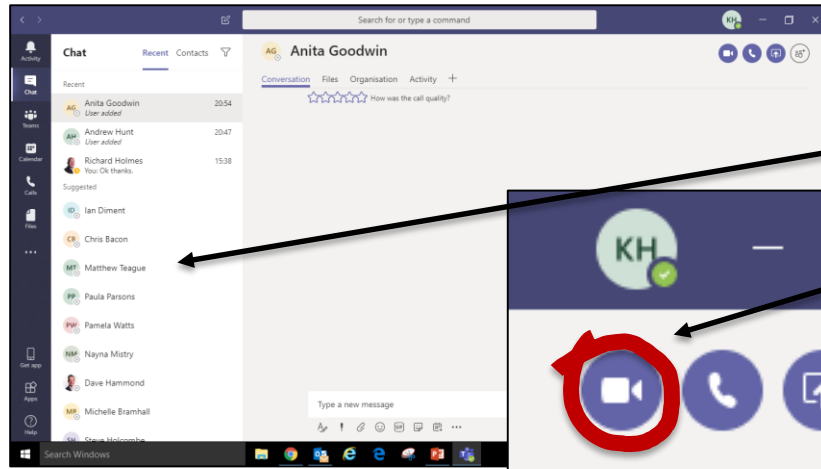
Select:

- Message extension
- Select the 'Praise' icon
- Select the appropriate badge
- Add a personal note
- Preview
- Send



Making Video Calls to Other Teams Members

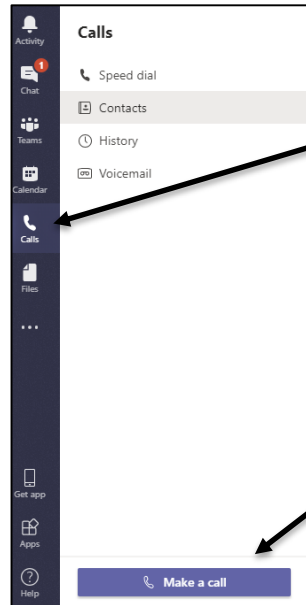




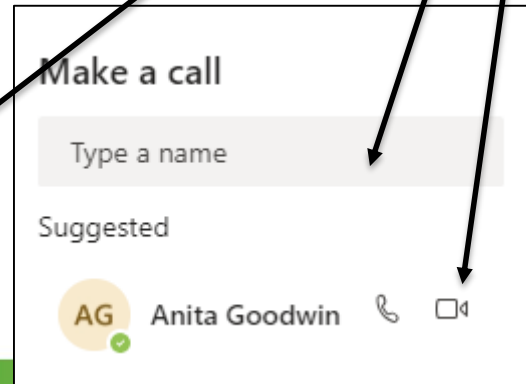
You can video call other **Teams** members:

- Select who you want to call from your list of contacts
- Select the 'video' icon from the top left hand side of the screen

OR

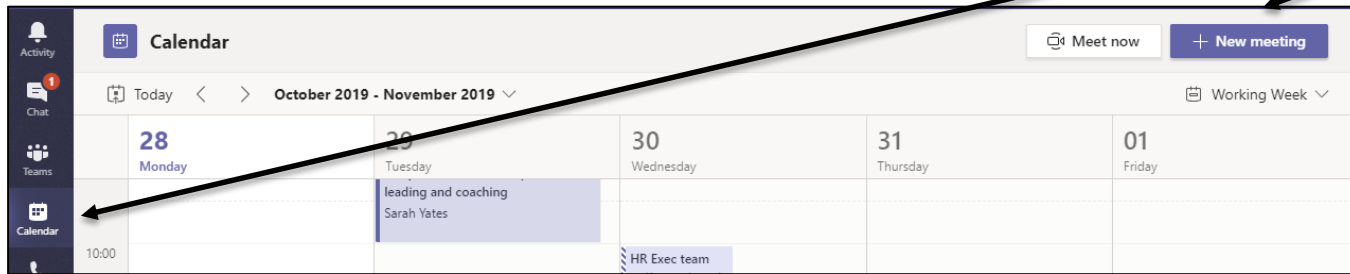


- Select 'Calls'
- Select 'Make a Call'
- Type the name of the person you want to video call OR choose from your suggested list
- Click the video icon



Arranging Video Meetings





Select 'Calendar'

Select 'New Meeting'

Populate the meeting title, location (this will default to '**Teams**'), date, time & details of the meeting

Then invite people who you want to attend. You can check their availability for the meeting by selecting 'scheduling assistant'

You can also invite people from outside the business to your meeting. To do this, simply type in their e-mail address into the 'invite people' box

The meeting will be scheduled into your outlook calendar & the calendars of all your invitees

All attendees need to ensure they have access to suitable Wi-Fi at the time of the **Teams** call in order to participate

New meeting

Title

Location

Start

28 Oct 2019

13:00

End

28 Oct 2019

13:30

Repeat

☐

Select a channel to meet in

None (optional)

Invite people

Invite someone

Organiser

KH

Kerry Hunt

kerry.hunt@afblakemore.co.uk

Details

B

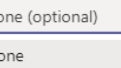
I

U

~~S~~

Paragraph

Type details for this new meeting



Select a channel to meet in

None (optional)

None


Pick a channel so anyone in it can join the meeting.

- Employer of Choice
- My test team
- Rich & Kerry
- Training Team




OR


Select a channel to meet in

None (optional) 

Invite people

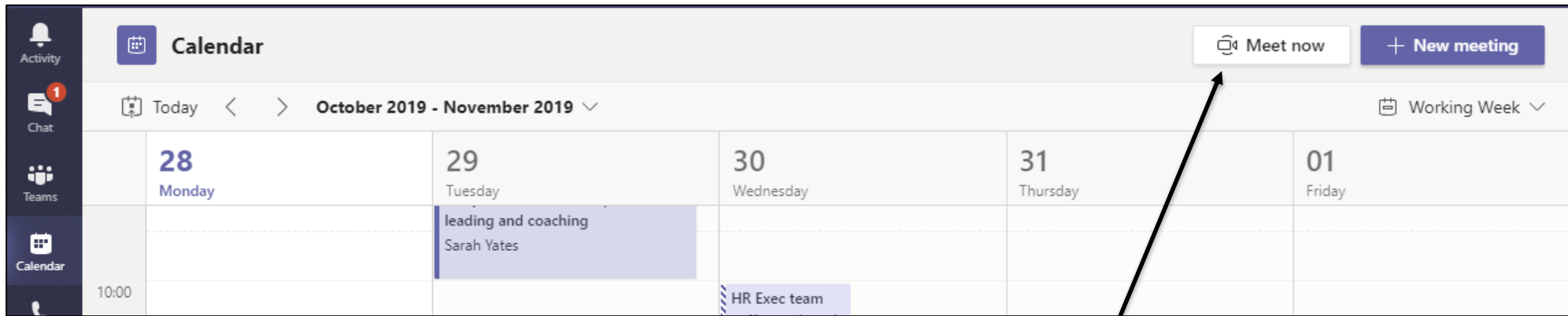
Invite someone 

Organiser

 Kerry Hunt
kerry.hunt@afblakemore.co.uk

Close Schedule

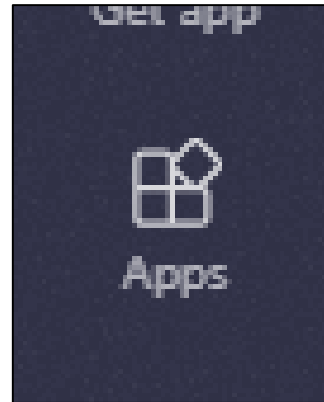
- If they are already in your contacts, start typing their name, **Teams** will find them
- If they are an external participant, type in their email address in order for them to receive the invite



Alternatively you can start a private video meeting by selecting the 'meet now' option



Apps

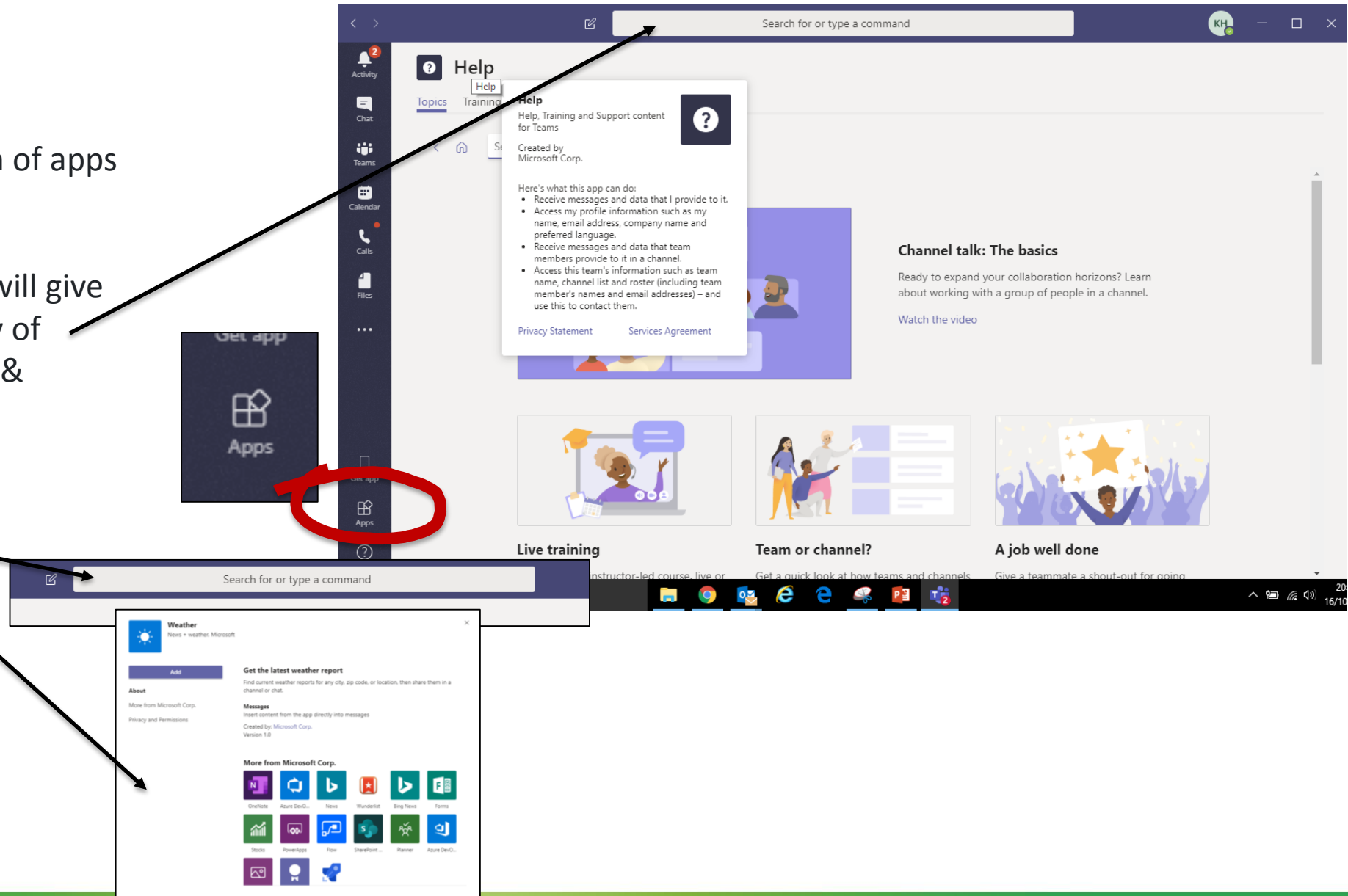


With **Teams** you have a wealth of apps available to you

For example typing in **'/help'** will give you access to a massive library of Microsoft **Teams** tips, training & tutorials

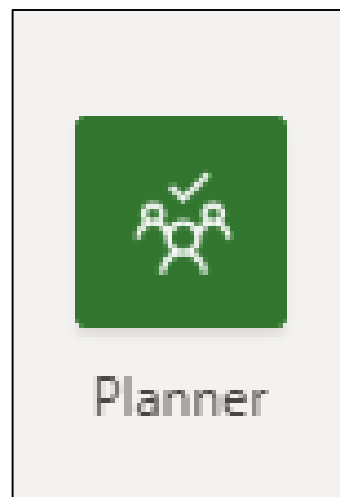
Want a weather forecast?
Type in **'@weather'**

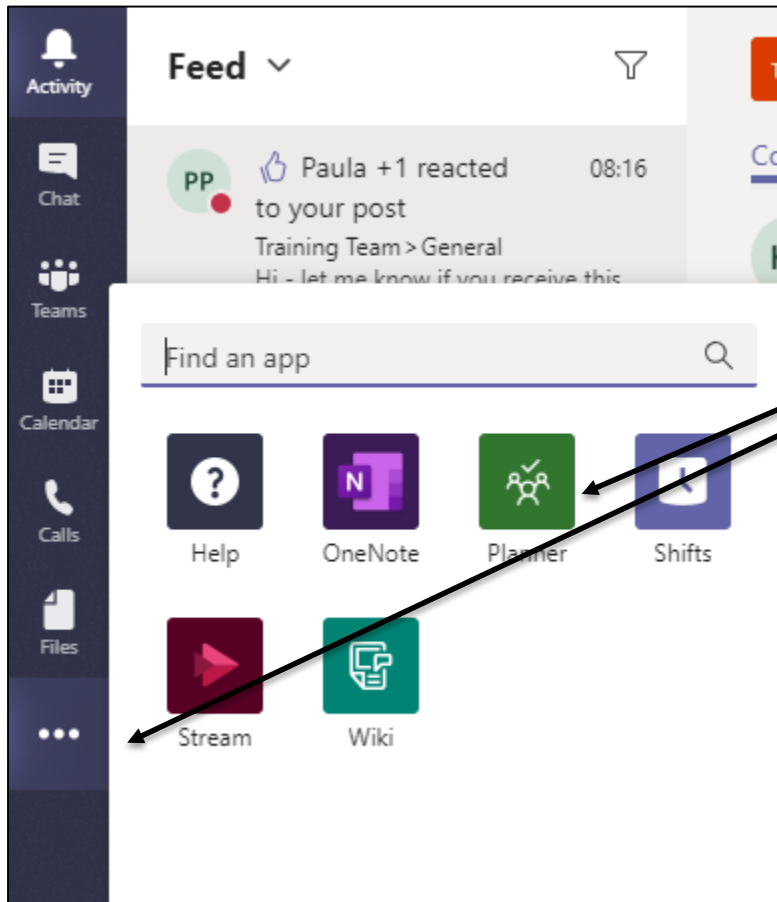
All apps searches should begin with **/** or **@**






Using the Planner




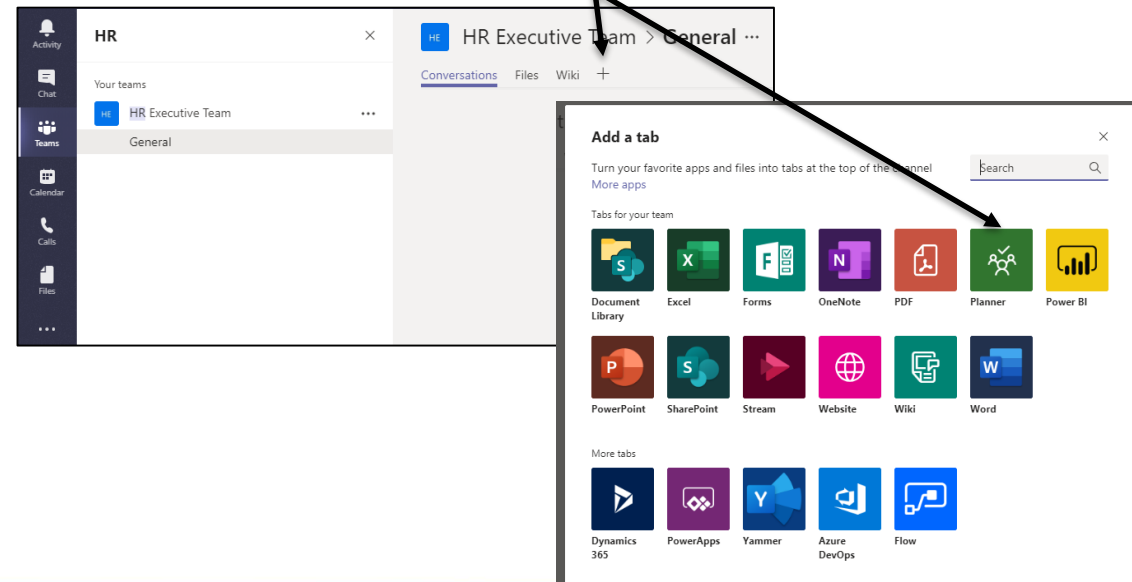


Downloading the Planner

Go to  & select the 'planner' icon to install the Planner function

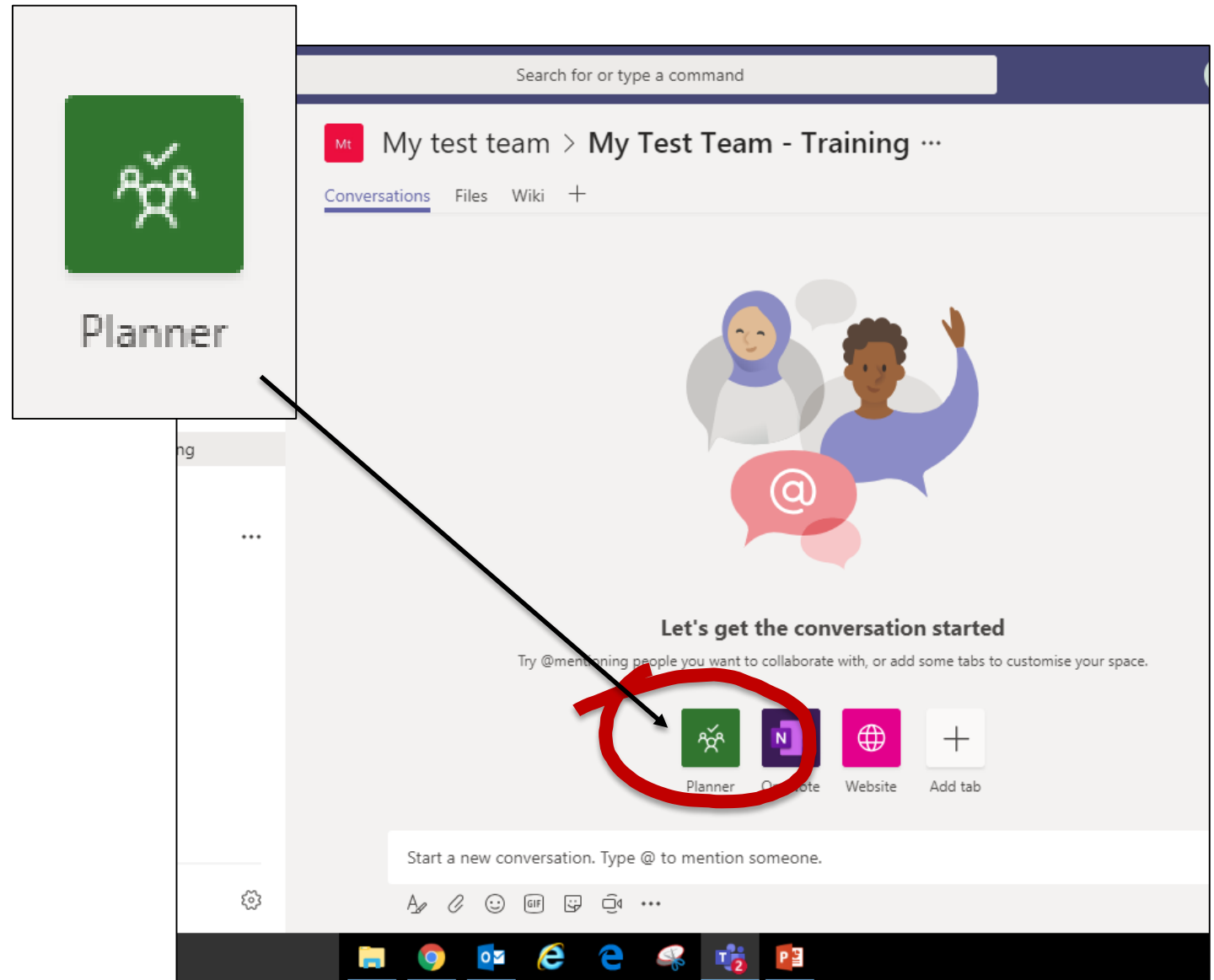
OR

Go to 'Add Tab'  & select the 'planner' icon to install




Planner

The **Planner** lets you schedule, assign & monitor tasks within a project or work stream



Planner [About](#) [×](#)

 Planner makes it easy for your team to stay organised, assign tasks and keep track of your progress. Create a new plan so you can start getting things done. [Learn more](#)

☒ **Create a new plan**

Tab Name

☐ **Use an existing plan from this team**

Looks like this team has existing plans. Select an existing plan to add it as a tab.


☒ Post to the channel about this tab


[Back](#) [Save](#)

To do [Add new bucket](#)

[+ Add task](#)

☐ Food Safety Policy

 Due 23/10

 **AG** Anita Goodwin

[Add Task](#)

Type a name or email address

Assigned

AG Anita Goodwin [×](#)

Unassigned

KH Kerry Hunt

MB Michelle Bramhall


NM Nayna Mistry


[Board](#) [Charts](#) [Schedule](#)

To do [Add new bucket](#)

[+ Add task](#)


☐ Enter a task name

 Set due date

 Assign

[Add Task](#)

☐ Food Safety Policy

 23/10

AG Anita Goodwin

[Label](#) [>](#)

[Assign](#)

[Copy task](#)

[Copy link to task](#)

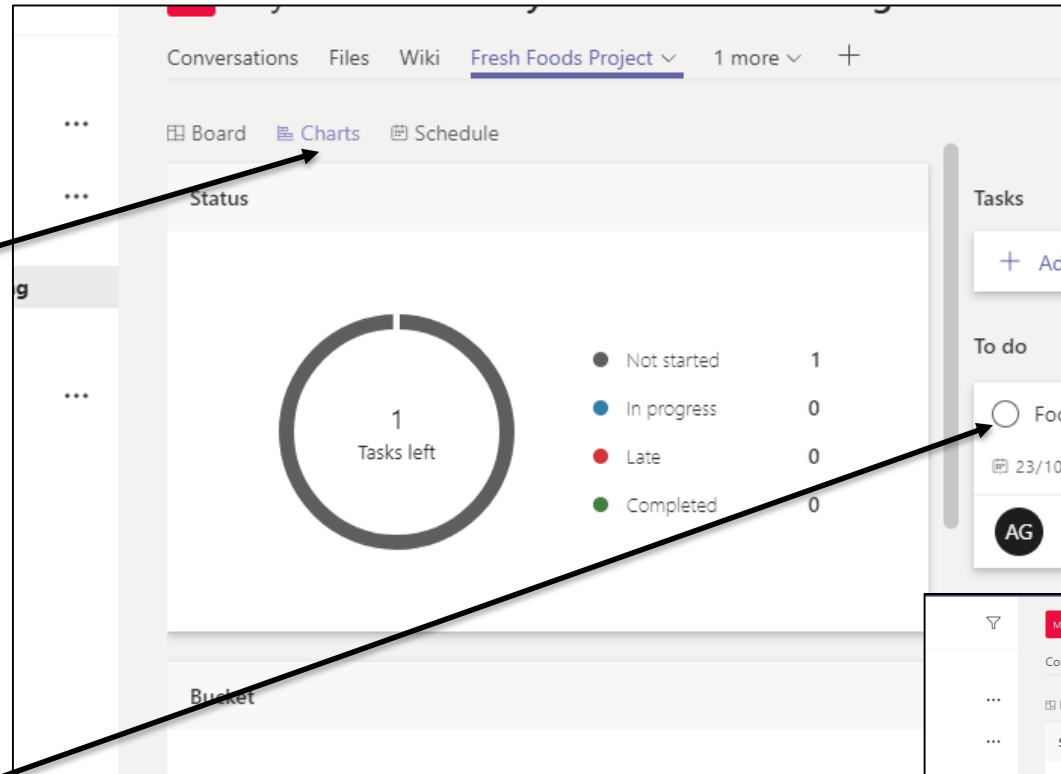
[Delete](#)

Creating a **plan** is easy

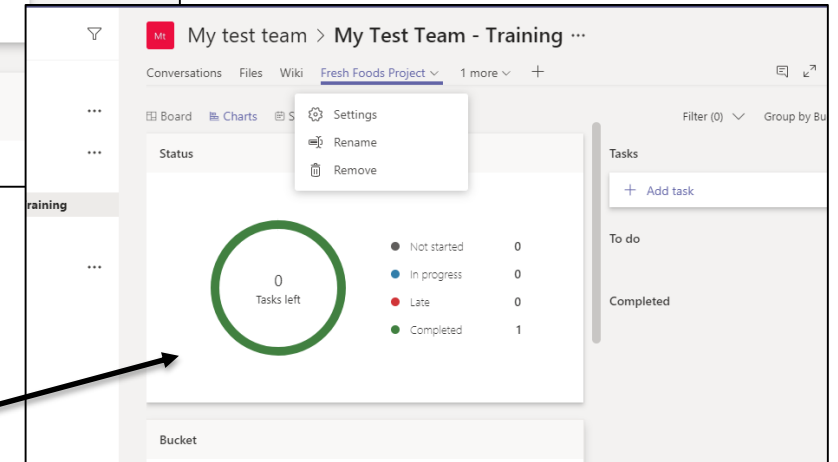
Once created, you can allocate due dates & assign owners for various tasks within the **plan** (or project)

As the **plan** (or project) develops you can add more tasks, assign same or new owners or edit or delete the **plan** when it's concluded

By selecting **charts** you can check the status of your **plan** at any time



Anyone you assign to a task will have visibility of the **plan** & they can keep you updated of their progress. For example they can flag their task up as 'in progress' or 'completed'

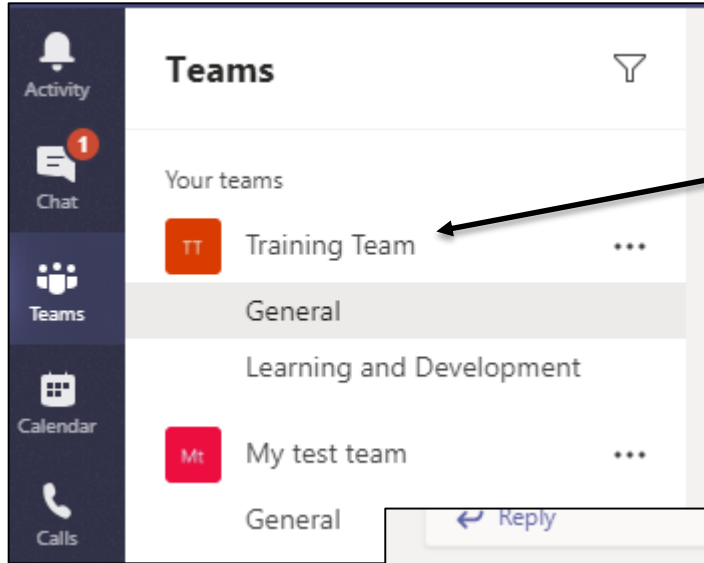


This will immediately change the status of your **plan**



Uploading & Sharing Files



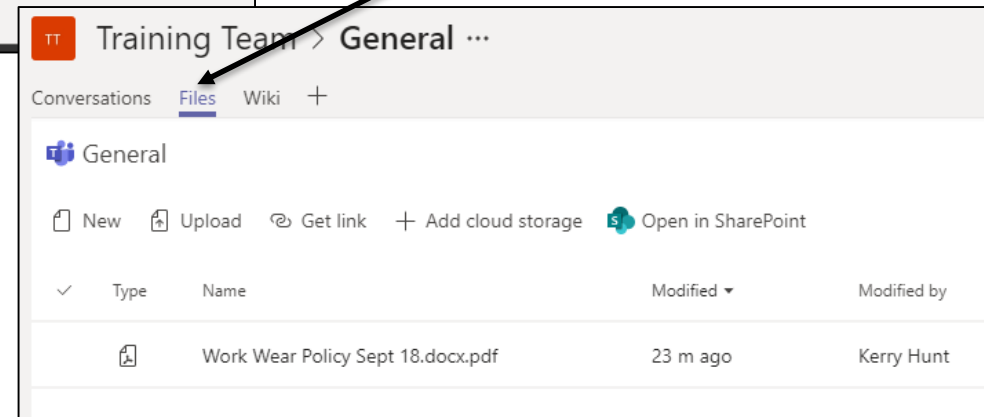
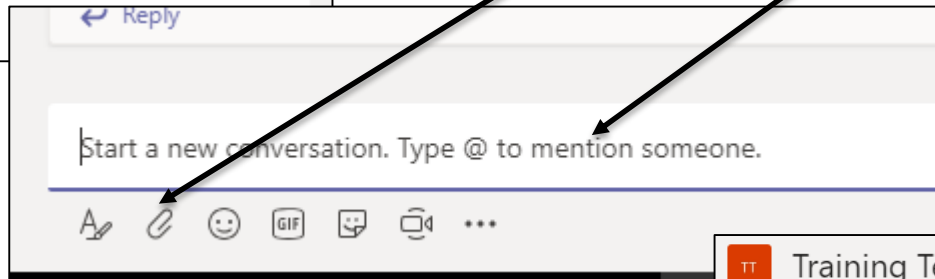


Select the Team you wish to share your file with

Attach the file you wish to share using the 'paperclip' icon

Type in your Team message e.g. *'Can you all review the att & update your own work-streams please'*

You can review progress & status on file by selecting 'files'

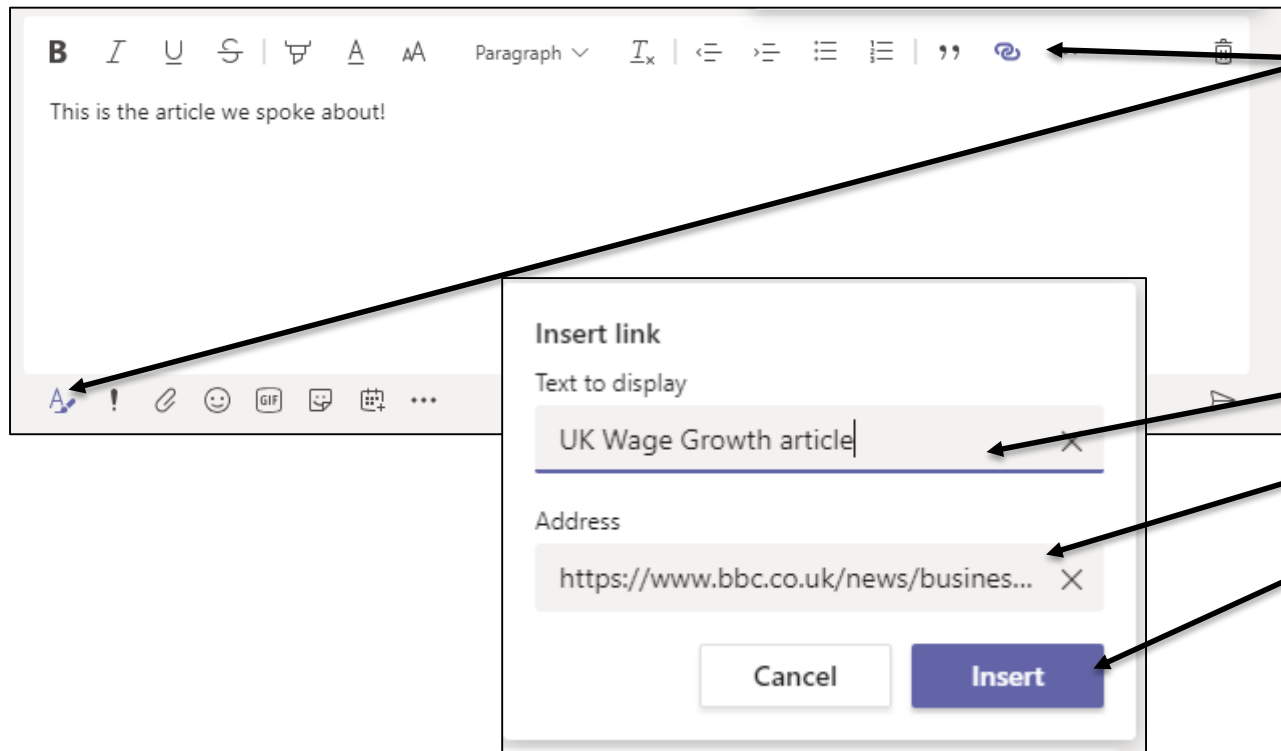




Website Linking



From **Chat** you can share websites



Select 'A'

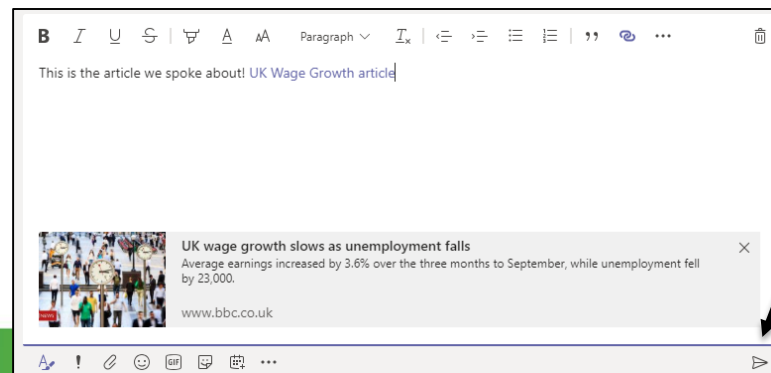
Select the 'link' icon

You can rename the link to make it more meaningful. To do this:

- Insert the name you want to call it here
- Insert the actual link here
- Then select 'insert'
- Then select 'send'

So in this case, the link is shown as 'UK Wage Growth' article instead of

<https://www.bbc.co.uk/news/business-50388220>





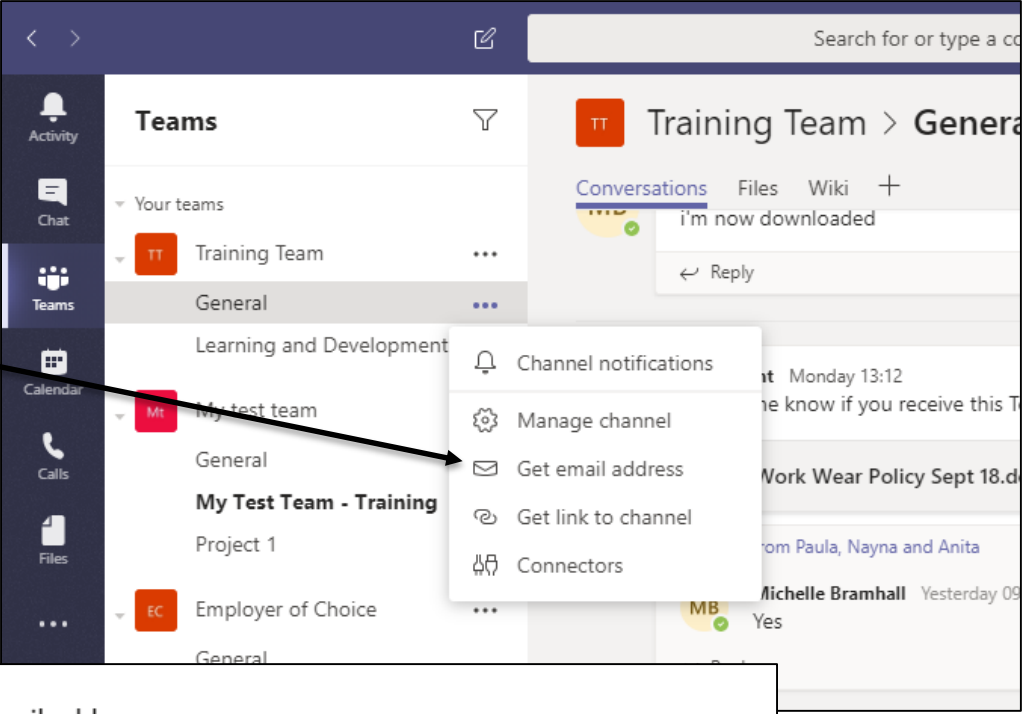
An email Address for Your Team or Channel



Your **Team** or **Channel** also has its own e-mail address

You can access this by selecting 'get email address' from the 'general' option

Then simply paste it into your outlook email account



The screenshot shows the Microsoft Teams interface. On the left, the 'Teams' list includes 'Training Team' and 'My Test Team - Training'. The 'General' channel of the 'Training Team' is selected. A context menu is open for the 'General' channel, showing options: 'Channel notifications', 'Manage channel', 'Get email address', 'Get link to channel', and 'Connectors'. An arrow points from the 'Get email address' option to a dialog box.

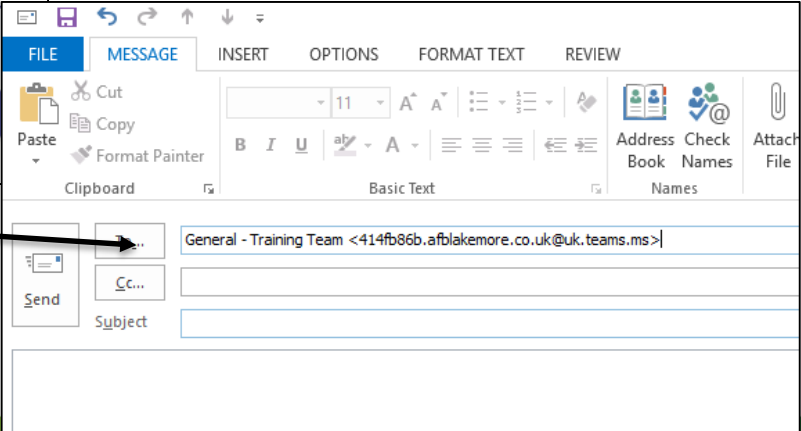
Get email address

See [advanced settings](#) for more options.

General - Training Team <414fb86b.afblakemore.co.uk@uk.teams.ms>

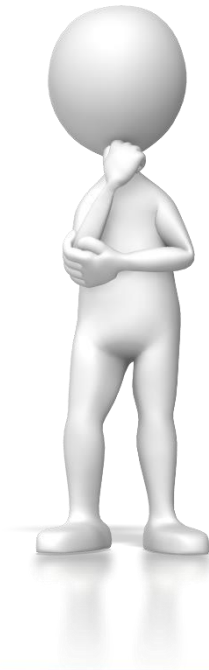
Remove email address

Close Copy



The screenshot shows the Microsoft Outlook interface. The 'To' field of a new email is highlighted, and the email address 'General - Training Team <414fb86b.afblakemore.co.uk@uk.teams.ms>' is pasted into it. An arrow points from the 'Copy' button in the 'Get email address' dialog box to the 'To' field.

Teams - A Few House Rules





House Rules? Who is Responsible?

- Everyone who participates in **Teams** in whatever capacity has a part to play in sticking to the house rules of **Teams**, however the buck stops with the **Teams** owners
- If you have created a team or channel, you are responsible for ensuring it is used sensibly and in line with the house rules
- Don't worry, it's not too challenging, it just requires a bit of maintenance & common sense!

Maintain Your Teams & Channels

- Check your **Team** & **Channel** groups at least once a quarter to make sure they are current & relevant
- Edit groups to reflect leavers, transferors or colleagues that are no longer involved in your team or project
- Delete teams or channels that are no longer required (for example if a project has come to a conclusion)



Teams & Channels – Who's In, Who's Out?



- Make sure invites to participate in your **Teams & Channels** are extended to all relevant stakeholders
- Don't alienate colleagues or miss an important contributor by leaving them out of the group, on the other hand, don't have colleagues in a team & waste their time if it's not necessary
- Before setting up a **Team & Channel**, owners should ask themselves what business justification there is for including or excluding members
- When you invite or add members to your **Team & Channel** take time to let them know beforehand what the purpose of it is & what you expect them to contribute

Strictly Business

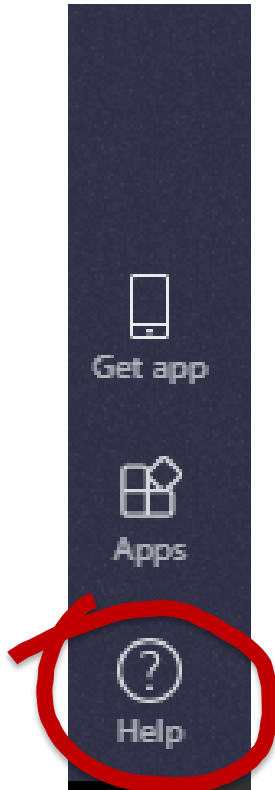
- It's fine to say hello or have a quick catch up with colleagues on **Teams** but you have been given this resource for business purposes only
- It's not social media & shouldn't be treated as such
- The language and respect you afford colleagues in your face-to-face interactions should be extended to teams





Sharing Data

- **Teams** is a brilliant tool for sharing information and helping you to work collaboratively, but please be mindful about what you share in your team or channel and if it is appropriate to share with everyone in your team or channel with respect to business sensitive data or GDPR rules
- Generally speaking, if you wouldn't share it on other platforms such as email or conference calls, don't share it on **Teams**



And finally...

This user guide is designed to provide a quick run through of the basics in order to get you up & running with **Teams**

By clicking the 'Help' icon & selecting 'Training' you can access a wide range of brief video tutorials

However if you need further initial support contact Richard Holmes, IT Services Manager, Blakemore Technical Services - 01443 235230 / 07785716034 rholmes@afblakemore.co.uk

