

The Basics of Microsoft Teams in Office 365

Introduction

With Microsoft Teams, you can manage projects, documents, conferences, or anything else involving collaboration. It enables you not only to run and participate in meetings, but also to organize the material needed for them and store the artifacts that they generate.

When you use Teams to organize your collaboration tasks and materials, you never have to worry about losing a document or email. The software is integrated with Office 365 and OneDrive, giving you a secure, customizable hub from which to run your teams and projects. You can:

- Communicate in real time with your colleagues while saving the resulting information.
- Access multiple collaboration tools, such as Chat and Calendar.
- Participate in meetings, accessing additional tools and content as needed.

For more information about using Microsoft Teams, see the rest of this guide.

In This Document

You will find:

- <u>Accessing Microsoft Teams</u>
- <u>Navigating the system</u>
- <u>Testing your audio</u>
- Hosting meetings
- Joining a meeting
- Participating in meetings
- Using Chat
- <u>Signing out of Microsoft Teams</u>
- <u>Appendices:</u>
 - ► Joining a team
 - ► Using the Notes function
 - Where to get more information about Microsoft Teams

Accessing Microsoft Teams

In its typical configuration, Microsoft Teams launches the login window when you start your computer. If the application does not launch or if you have closed it and need to access it again, perform the following steps:

1. Type **teams** in the Windows "search" bar, and then select the **Microsoft Teams** app from the resulting matches.



Gulotta, Kenneth (T

enneth.Gulotta@

Welcome to Teams

Pick an account to continue

Create or use another account

Join a meeting

2. If necessary, click the listing for your OPM email address at the "Welcome to Teams" login window.

Note: If the "Welcome to Teams" login window presents a different PIV card address for your sign-in account, click the **Create or use another account** link at the bottom of the window. Then, type your OPM email address in the "Email, phone, or Skype" field and click the **Next** button.

3. If the system presents a "Stay signed in to all your apps" prompt, click the **No, sign in to this app only** link.

Navigating the System

Using the Navigation Column

The left-hand navigation column provides an easy way to access Teams resources. You can choose tools such as:

- Activity. Check for replies and other notifications.
- *Chat*. Contact colleagues and communicate with them through instant messaging.
- *Teams*. Join and participate in any teams to which you have been added by management.
- *Calendar*. Work with Teams and Outlook scheduling and Calendar items.
- *Calls*. Manage contacts and make calls through the Teams phone system.
- OneDrive. Access OneDrive to manage files for your projects.
- *View more apps*. Access currently available applications to use in Teams, such as the Stream tools.
- App management. Explore and manage all apps available through Microsoft Teams.

Note: If you are in a meeting, you stay in it when you select another function. The meeting continues in a minimized window. To expand a minimized meeting, click its window.



Using the "Search" Field

The Teams **Search** field provides a powerful way to access different types of information and functions. Just click the **Search** field and choose one of the following options:

• Search for a colleague to contact. To do so, type the first few letters of the colleague's name and select a listing from the resulting drop-down menu.

Note: If the colleague you want to contact does not appear in the drop-down menu, press the **ENTER** key to display all possible matches.

- Locate messages, files, and other items. To do so, perform the following tasks:
 - A. Type a keyword and press the ENTER key.
 - B. Select an item from the resulting list.
- Access commands that enable you to manage numerous Teams functions. To do so, type a / (forward slash) and select an option from the resulting list.

Testing Your Audio in Microsoft Teams

You can test your audio settings in Microsoft Teams to ensure that you and your colleagues hear each other clearly during meetings and calls. To do so, perform the following steps:

- 1. In the Microsoft Teams interface, perform the following tasks:
 - A. Click the **Settings and more** icon (the one shaped like an ellipsis) in the upper-right corner.
 - B. Select the **Settings** option in the resulting drop-down menu.



Group Chats Teams and Channels



Connecting to the Agency Network with

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- 2. In the "Settings" window, perform the following tasks:
 - A. Select the **Devices** option in the left-hand column.
 - B. Select the **Make a test call** button in the devices pane. Then, respond to the prompts to record and play back your voice.

Hosting Meetings

Help Desk

To schedule a meeting in Microsoft Teams, perform the following steps:

1. Select the **Calendar** option in the left-hand column of the Microsoft Teams interface.

Note: You can also also schedule a Teams meeting from Microsoft Outlook. To do so, access the Outlook Calendar, and then click the **Teams Meeting** button on the "Home" ribbon.

2. Click the + New Meeting button in the upper-right corner.

Note: To create a meeting at a particular time, you can also click the time slot in the calendar.





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- 3. In the "New Meeting" window, perform the following tasks:
 - A. Type a name for the meeting in the "Add title" field.
 - B. Type the email addresses of the participants in the "Add required attendees" field.

Note: The system presents a menu of matching addresses based on the characters you enter. You can select the correct email address from the drop-

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Add an agenda	

down menu. If you want to add optional attendees, click the + Optional button.

- C. If necessary, choose the beginning and ending dates and times in the date and time fields.
- D. Specify whether the meeting should repeat or should occur only once using the meeting occurrence drop-down menu.
- E. If necessary, specify a location for the meeting in the "Add location" field.
- F. Provide any necessary information about the meeting in the "Type details for this new meeting" field.
- G. Add an agenda for the meeting.
- H. Click the Save button.

Joining a Meeting

Overview

To join a meeting, you can:

- <u>Click the link in an invitation.</u>
- Select a meeting listing in Teams Calendar.
- <u>Select a meeting listing in Teams Chat.</u>

Joining a Meeting Using an Invitation Link

To join a meeting using a link in an invitation that you have received, perform the following steps:

- 1. If necessary, open the message containing the meeting invitation.
- 2. Click the **Click here to join the meeting** link in the message.
- 3. If necessary, click the **Open** button in the "This site is trying to open Microsoft Teams" pop-up window.

Microsoft 7	Feams meeting
Join on your com Click here to join t	puter or mobile app

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http	s://teams.microsoft.com wants to open this application.
	Always allow teams.microsoft.com to open links of this type in the associated app
	Open

- 4. At the video and audio options window, perform the following tasks:
 - A. If necessary, use the left-hand pane to turn your camera on and activate your video feed.
 - B. Use the right-hand pane to choose your audio options.
 - C. Click the Join now button.

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Joining a Meeting from the Teams Calendar Screen

To join a meeting from the Teams Calendar, perform the following steps:

- 1. At the "Microsoft Teams" interface, perform the following tasks:
 - A. If necessary, click the **Calendar** icon in the left-hand column.
 - B. Choose one of the following options:
 - If the listing for the meeting you want to join has a **Join** button next to it, click it. Then, go to Step 3.
 - Click the listing for the meeting that you want to join. Then, continue to the next step.

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- My calendar

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 Wednesday, May 29, 5:00 PM 5:30 PM

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 (a) Microsoft Teams Meeting

 (c) https://teams.microsoft.com/l/meetup-join/1

 (c) Chat with participants

 (b) Organizer
- 2. In the meeting information window, click either the **Join** button or the link to the meeting.

- 3. At the video and audio options window, perform the following tasks:
 - A. If necessary, use the left-hand pane to turn your camera on and activate your video feed.
 - B. Use the right-hand pane to choose your audio options.
 - C. Click the Join now button.

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Joining a Meeting from the Teams Chat Interface

To join a meeting from Teams Chat, perform the following steps:

- 1. At the "Microsoft Teams" interface, perform the following tasks:
 - A. If necessary, click the **Chat** icon in the left-hand column.
 - B. Select the "Chat" listing for the meeting that you want to join.
 - C. Click the Join button.

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- 2. At the video and audio options window, perform the following tasks:
 - A. If necessary, use the left-hand pane to turn your camera on and activate your video feed.
 - B. Use the right-hand pane to choose your audio options.
 - C. Click the **Join now** button.

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Participating in Meetings

Using the Actions Bar

After joining a meeting, you can use the actions bar that appears at the top of the window to participate in the meeting and control the interface. You can choose to:

- Open the chat line associated with the meeting.
- Display the list of meeting participants.
- Raise your "virtual" hand to get the attention of the host and other participants.
- Access emojis to send to the other participants.
- Configure how your meeting interface is displayed.



- Access applications supported by Teams.
- Access additional actions.
- Turn your camera on or off, controlling whether you will be seen by other attendees.
- Mute or unmute your microphone.
- Share your screen or other content.
- Hang up and leave the meeting.

Using Mute

When you are not speaking to the other participants in a meeting, use the **Mute** function to keep any other noises in your environment from distracting them. You can mute yourself before joining a meeting or after you have joined it.

When you are joining a meeting, you can mute yourself ahead of time by setting the microphone toggle switch to the "off" position.

Note: You can also use the camera toggle switch to turn your camera off before joining a meeting.

Computer audio	0
PC Mic and Speakers	
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After you have joined a meeting, you can use the microphone button in the actions bar to turn your microphone off and on.

Sharing Your Screen or Content with Colleagues

Whether you are hosting a meeting or participating in one, it may be useful at times to share your screen, specific windows, or other content with the other participants. To do so, perform the following steps:

1. In the meeting interface, click the **Share** button in the actions bar.



Access add	ditional actions
Display meeting participants Access Notes tools	Share your screen Mute or unmute your microphone Hang up
Raise your hand Configure your meeting layout	cess Is apps On or off

2. Select one of the sharing options in the resulting window.

3. Respond to any prompts to select content for sharing.

Using Chat

Using Basic Chat

The basic chat functions in Microsoft Teams work much like other familiar chat systems. To chat with someone, perform the following steps:

- 1. Locate the colleague. To do so, perform the following tasks:
 - A. Type the first few letters of the colleague's name in the "Search" field.
 - B. Select a listing from the resulting drop-down menu.
- 2. Type your message in the "Type a message" field at the bottom of the Chat interface, and then press the **ENTER** key.

Using Chat in Meetings

Each Microsoft Teams meeting has a Chat thread associated with it.

When you are in a meeting, you can access the chats associated with it by clicking the **Chat** icon in the actions bar. The meeting interface will move to a minimized window, and the chat interface will appear.

Microsoft Teams saves all the chats associated with the meeting in one thread. You can access this thread at any time after the meeting is over. You can also add messages to the thread associated with a meeting after it is over. This can be useful for keeping messages organized. Rather than having to search through separate chat threads, the meeting attendees can find all the information in one place.









To access the chat messages associated with a specific meeting, perform the following tasks:

- A. If necessary, click the **Chat** icon in the lefthand navigation column.
- B. Select the chat listing for the meeting.
- C. If necessary, note any previous activity associated with the meeting.
- D. Type your new message in the "Type a message" field and press the **ENTER** key.

Note: If you want to ensure that a particular colleague sees a post that needs a response from him or her, use the "mention" function. To do so, just type **@** (the "at" symbol), type part of the colleague's name, and select his or her listing from the resulting pop-up. The system then tags the colleague in the post.

Signing Out of Microsoft Teams

To sign out of Microsoft Teams, perform the following steps:

- 1. In the Microsoft Teams interface, perform the following tasks:
 - A. Click your account icon (the circle with your initials or personalized picture in it) in the upper-right corner.
 - B. Select the Sign out option in the resulting drop-down menu.

- 2. At the confirmation prompt, click the **Sign out** button.
- 3. Click the **X** button in the upper-right corner of the sign-in window to close it.









February 2025 1.8

Help Desk

Appendices

Joining a Team

Agency management sometimes creates specific teams to facilitate projects or meet needs. If you have been added to a team, it will appear in your Microsoft Teams interface. You may also receive an invitation with a code to enter when joining the team.

Note: If you want to join a specific team, but you have not been added to it, your manager must request that the owner grant you membership to it.

To join a team after management has added you to it, perform the following steps:

- 1. Perform the following tasks:
 - A. If necessary, click the **Teams** icon in the left-hand column of the Microsoft Teams interface.
 - B. Click the **Create and join teams and channels** icon (the one that looks like a plus sign) in the upper-right corner of the navigation column.
 - C. Select the Join team option from the resulting drop-down menu.
- 2. Choose one of the following options:
 - If you received a code to join, perform the following tasks:
 - A. Type the code that you received in the "Join a team with a code" field.
 - B. Click the Add team button.

• If you are joining a team that does not require an invitation code, hover over the team listing and then click the resulting **Join Team** button.

The system adds you to the team and lists it under the "Your teams" heading in the "Teams" column. Management may set up channels—that is, categories to organize the team's work. Channels appear under the specific team listing. You can select them to view the activity within them.







If you are on a team that is not available to everyone and you know an employee who needs to be added to it, you can submit an "add member" request to the team owner. To do so, perform the following steps:

- 1. In the Microsoft Teams interface, perform the following tasks:
 - A. If necessary, click the **Teams** icon in the left-hand column.
 - B. Click the **More options** button (the one that looks like a "three period" ellipsis symbol) next to the team.
 - C. Select the **Add member** option from the resulting drop-down menu.



- 2. In the "Send a request to add people" interface, perform the following tasks:
 - A. Type part of the employee's name in the search field.
 - B. Select the listing for the employee from the resulting drop-down menu.
 - C. Click the Send request button.

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	Cancel Send request

Using the Notes Function

The Notes tool (also known as Loop) enables you to add agenda items, notes, and follow-up tasks on the fly, while participating in meetings. To use it, you must either be the creator of the meeting or an OPM employee who has been invited to it. External attendees do not have access to the Notes tool.

To access Notes functions, click the **Notes** icon in the action bar of an active meeting.



Then, choose from the following options:.

- To add an agenda item, click a **Topic**, **@name**, **time allotted** listing between the "Agenda" heading and enter your text.
- To add general notes about information that arises during the meeting, click an **Add meeting notes** listing beneath the "Meeting notes" heading and enter your text.
- To add a task for someone to complete, click an **Add task** listing beneath the "Follow-up tasks" heading and respond to the information prompts.

Note: To add an item to an existing list, hover over the spot where you want to add the item and click the **Click to insert below** icon (the one shaped like a plus sign).

All changes are automatically saved. After the meeting, you can edit the items or add additional ones.

Wednesday

To access the notes from a meeting that has ended, select the meeting in your Teams Calendar and click the "expand" icon (the one shaped like a double-headed arrow in the upper-right corner of the pop-up window).

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Notes Discussion Microsoft Teams Meeting	Join Edit
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	e Gulotta, Kenneth (CTR) _{Organizer}

Select the **Recap** tab to display the meeting information. You can then view and edit the information as necessary.

Wrapping Up—Where to Find More Information

Now that you have learned the basics of Microsoft Teams, you are ready to use it. Just jump right in. If you want more information about the application, see the following website:

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Notes

https://support.microsoft.com/en-us/teams

Wednesday, February 12, 2025 5:00 PM - 5:30 PM

If you experience any issues with your system, contact the OPM Help Desk using the following information:

- By phone at 202-606-4927 (local) or 866-631-3019 (toll-free).
- By email at <u>HelpDesk@opm.gov</u>.

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