Getting Started

MS Teams

- Share ideas and expertise in private, chat-based conversations
- Create and collaborate using online documents
- Leverage automatic processes for daily activities and project tasks
- Integrates with Office 365 (calendar, chat, OneNote, etc.)

Contents

Accessing Teams

There are multiple ways to access Teams:

- In Windows, click **Start** > Start typing in **'Teams' and open** (Teams is already installed)
- On Mac, go to the **Applications** folder and click **Microsoft Teams**.
- In any browser, visit https://teams.microsoft.com
- Teams is also available as an app on mobile devices.

Sign in with your PSD email credentials.

Teams Quick Navigation

Every team has channels
Click one to see the files and conversations about that topic, department, or project.

Start a new chat
Launch a one-on-one or small group conversation.

Add tabs
Highlight apps, services, and files at the top of a channel.

Use the command box
Search for specific items or people, take quick actions, and launch apps.

Manage profile settings
Change app settings, change your pic, or download the mobile app.

Move around Teams
Use these buttons to switch between Activity Feed, Chat, your Teams, Meetings & Files.

View and organize teams
Click to see your teams. In the teams list, drag a team name to reorder it.

Find personal apps
Click to find and manage your personal apps.

Add apps
Launch the Store to browse or search apps you can add to Teams.

Manage your team
Add or remove members, create a new channel, or get a link to the team.

Add files
Let people view a file or work on it together.

Reply
Your message is attached to a specific conversation.

Join or create a team
Find the team you're looking for, join with a code, or make one of your own.

Compose a message
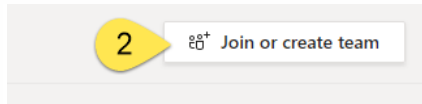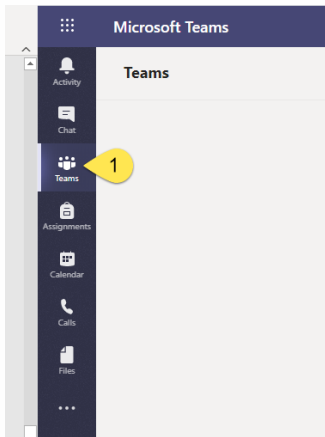Type and format it here. Add a file, emoji, GIF, or sticker to liven it up!

Creating a Team

A *team* is a collection of people, conversations, files, and tools—all in one place.
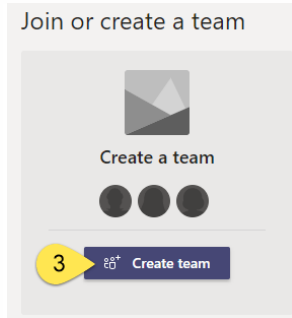
When starting your Team:

- Consider your name as it will affect your:
  - Sharepoint site
  - Outlook email address
- Have more than one owner to help manage memberships
- Talk Business Rules for organization
  - How to handle files
  - Use @mentions?
  - Notifications setups
  - Conversation Rules

Once you have signed in to Teams, Select the **Teams (1)** icon on the left navigation. Select **Join or create team(2)** in upper right corner.

Click on **Create team (3)**

Select a team type:

Enter **Name** and **Description** of Team. Keep **Private** as your option for Privacy. Click **Next**, you can start adding members to your team or Skip to finish to go to your Team page.

Creating a Channel

A *channel* is a discussion in a team, dedicated to a department, project, or topic.

Create focus by Creating Channels:

- Use General Channel for purpose, high level communication
- Create Channels to separate conversations or collaborative projects
- Be descriptive in naming of channels, projects, etc.
- Hide channels that are not in use or are not frequently used
- Email directly to a channel form Outlook

To create a channel, browse to your Team by selecting the Teams icon on the left and opening your Team. Browse to the three dots ⋯ to the right of your team name, select **Add channel**:
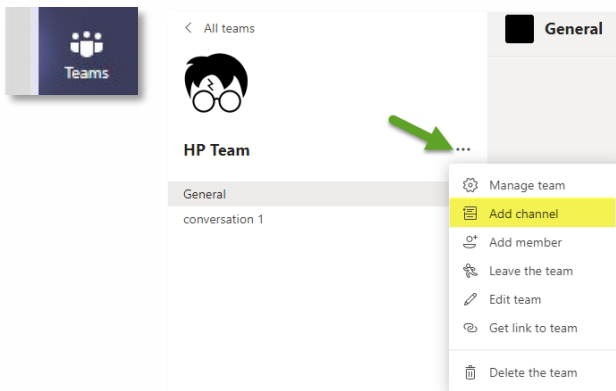
Complete the **Channel Name, Description**, and adjust **privacy** as needed. Click **Add** to complete adding the channel.
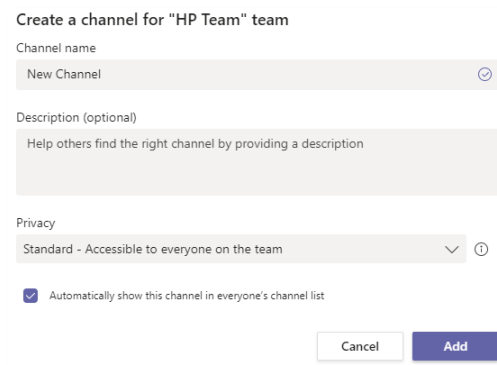
Team & Channel Management

To make changes browse to your Team or a Channel. Browse to the three dots ⋯ to the right of your team or channel name.

Options are as follows for Teams:	Options are as follows for Channels:
Hide	Channel notifications
Manage team (pending requests, channels, settings, Analytics, Apps)	Hide
Add Channel	Manage channel (moderation, who can start a post)
Add member	Get email address
Leave the team	Get link to channel
Edit team (Change privacy and photo)	Edit this channel (change name)
Get link to team	Connectors (configure apps linked to channel)
Delete the team	Delete this channel

If you have any questions about these directions please contact the PSD IT Support Center at 970-490-3456

Start a Conversation

- *With the whole team...* Click **Team** 👥, pick a team and channel, write your message, and click **Send** .
- *With a person or group...* (in lieu of Skype) Click **New Chat** ✎ **(top)**, type the name of the person or group in the **To** field, write your message, and click **Send** ▷.
- To add a Title (use for easier searching) or add formatting options, click on the format button ✎ .


Start a Meeting

Click **Meet now** 📷 under the area where you type a message to start a meeting in a channel. (If you click **Reply**, then **Meet now the** meeting 📷 is based on that conversation.) Enter a subject for the meeting, then start inviting people.
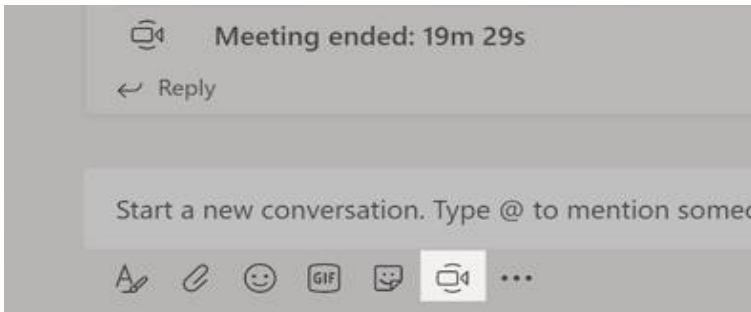
May need to call x3456 if admin access is needed to allow microphone/camera

Stay on top of what's happening

Click **Activity** 🔔 on the left. The **Feed** shows you all your notifications and everything that's happened lately in the channels you follow.
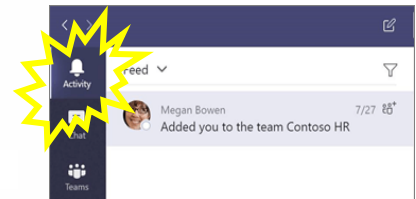
Share a file

Click **Attach** 📎 under the box where you type messages, select the file location and then the file you want. Depending on the location of the file, you'll get options for uploading a copy, sharing a link, or other ways to share.

Search

Type a phrase in the command box at the top of the app and press Enter. Then select the **Messages**, **People**, or **Files** tab. Select an item or click **Filter** ▽ to refine your search results.

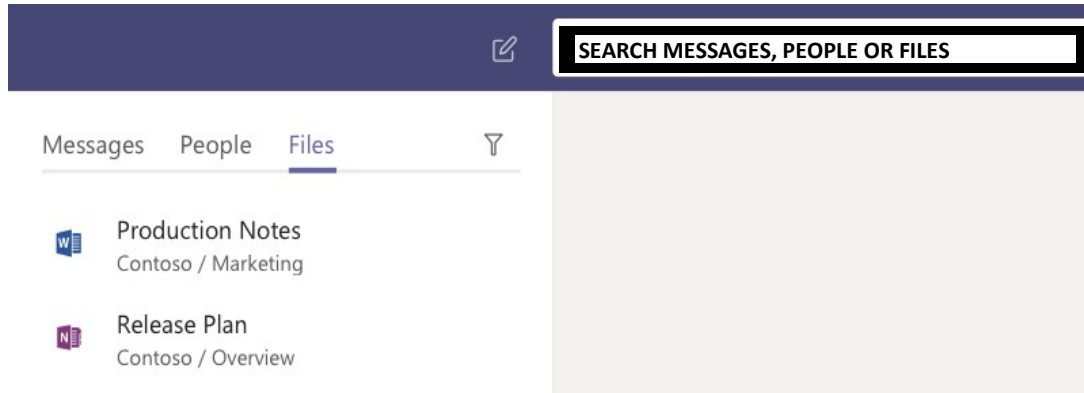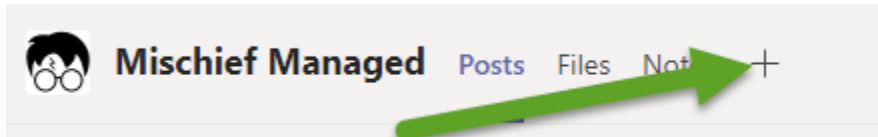SEARCH MESSAGES, PEOPLE OR FILES

Messages People **Files** ▽

W Production Notes
Contoso / Marketing

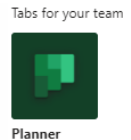N Release Plan
Contoso / Overview

Using Planner to create To-Do Lists / Tasks for Projects

Browse to your channel that you would like to create your project. Click on **+** to add a new tab.

Mischief Managed Posts Files Not +

Browse or search '**Planner**', select **Planner**. You can create a **new plan** or add an existing plan as desired.

Tabs for your team

Planner

Name your plan and **save.**

You will now see your plan or project in your channel tabs.

Mischief Managed Posts Files Notes Hogsmeade™ or Bust ∨

Board Charts Schedule

To do 1   Add new bucket

+ Add task 2

1. Click on **To do** –change name of task title (referred to as bucket)
2. Click on **+Add a task**
3. Enter the **Task Name**
4. Set a **due date**
5. **Assign** member(s) to task
6. **Add Task**

○ Enter a task name 3

📅 Set due date 4

o⁺ Assign 5

To set priority, set progress, add notes, checklists, attachments or comments, click on the task once it is created.

Add Task 6

○ Distract Filch
Last changed moments ago by you

Bucket   Progress   Priority
To do   ○ Not started   ! Important

Start date   Due date
Start anytime 01/03/2020

Notes
Type a description or add notes here

Checklist 0 / 1   ☑ Show on card
○ Grab catnip for Mrs Norris
○ Add an item

Attachments
Add attachment

Comments
Type your message here