



A Guide to Using the Advanced Features of Microsoft Teams

Prepared by MXOtech

MXOtech is a women-owned Chicago-based IT consulting company that provides the mid-size market with managed services and customer software development. MXOtech has been named one of America's Fastest Growing Companies, one of North America's top providers of emerging technologies, among the country's most thriving industry leaders, and one of the World's Best Managed Service Providers.



Microsoft Teams 201

Hosted by: Will Orellana

Following an introduction from MXOtech's CEO, Joanna Sobran: Will Orellana briefly reviewed topics first covered during MXOtech's Teams 101 webinar.

Teams 101 Topics:

- Simple chat features
 - Sending and receiving messages
 - How to digitally react to content (via emojis or GIFs)
- Teams vs. channels
- Direct chat vs. video calls
- Threading vs. sharing
- Outlook calendar integration
 - Creating invites
 - Checking for availability
- Simple file sharing

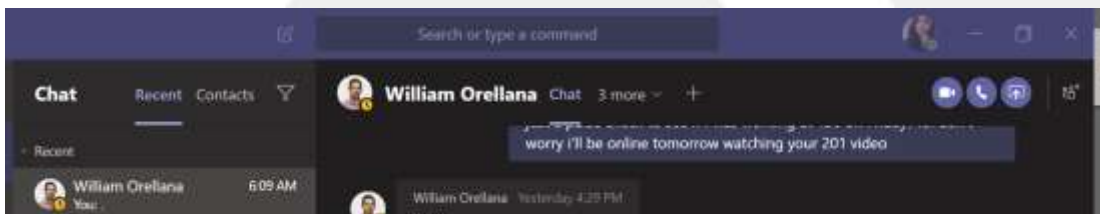
[Click here to watch the Teams 101 webinar.](#)

[Click here to download a copy of MXOtech's Teams 101 guide.](#)

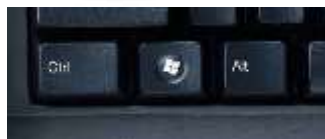
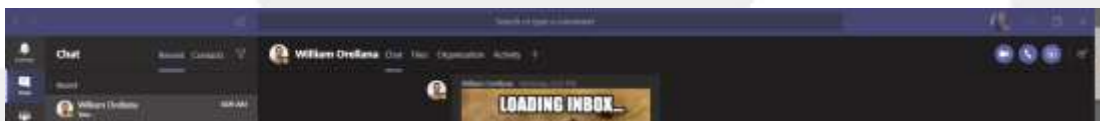
Changing your view of Teams: Increase or decrease of text size

As this will also work for web browsers: ensure your last click was in Teams.

Press "Ctrl" and "+" at the same time to increase the size. (Example is size 100%)

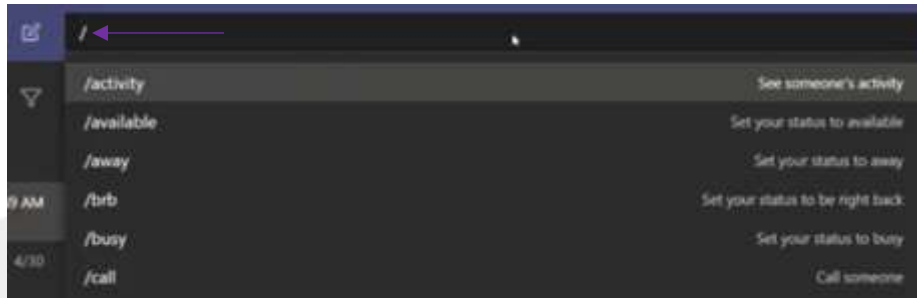


Press "Ctrl" and "-" at the same time to decrease the size. (Example is size 70%)



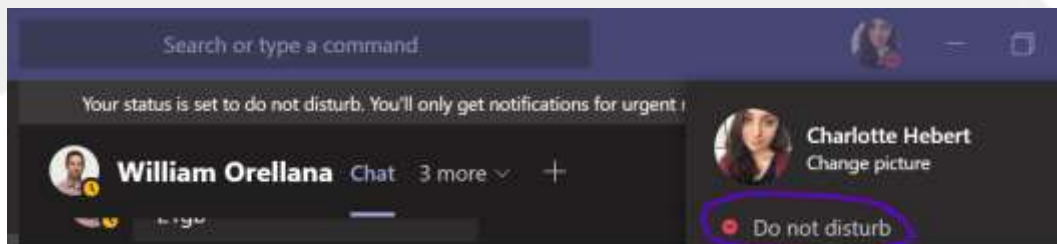
Search Bar:

Option 1: Start by typing “/” in the top search bar to review a list of shortcuts.



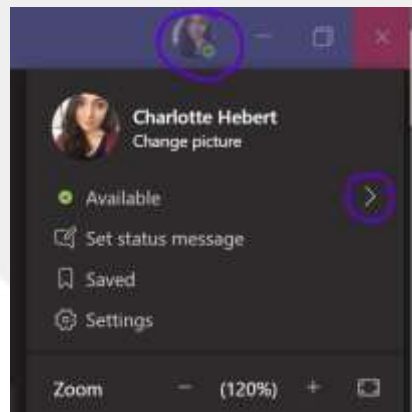
Option 2: Start by typing “@” to review additional shortcuts to team members or web searches.

For example: If you need to change your status: type into the search bar “/dnd” and press the ‘Enter’ key to enable a ‘do not disturb’ mode.



Changing your status:

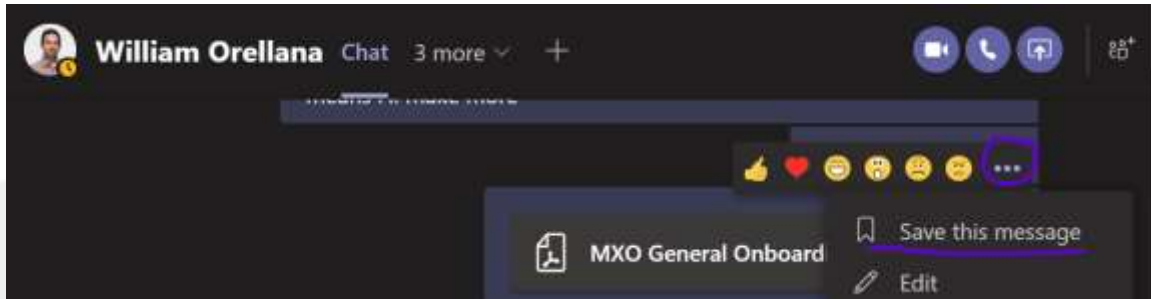
1. Click on your image in the top right corner.
2. Hover over the arrow beside your status and click on your choice.



Saving Message:

If you have message that you want to save:

1. Hover over the message and click on the three dots in the top right.
2. Click "Save this message"



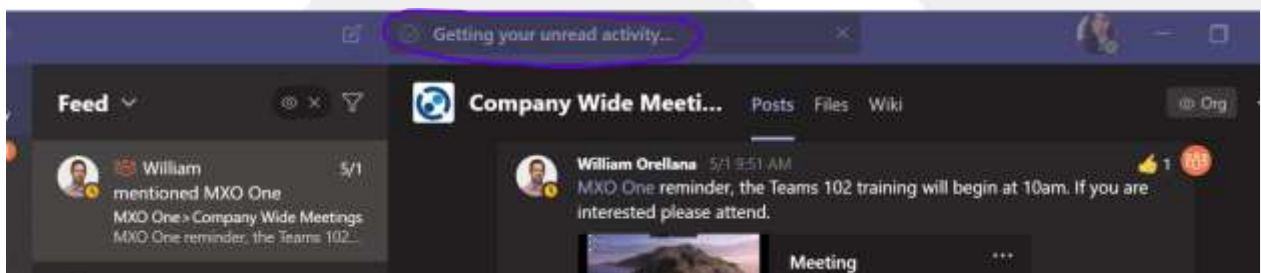
Review Saved Messages:

Go up to the search bar and type "/saved" to review all saved messages.



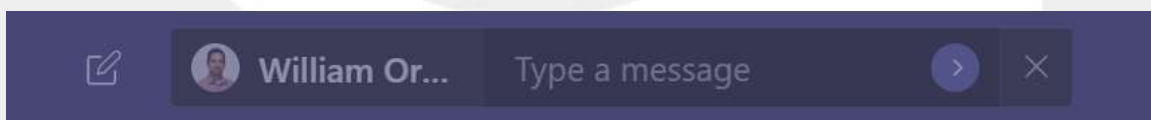
Search for unread messages:

Go up to the search bar and type "/unread" to review all unread messages.



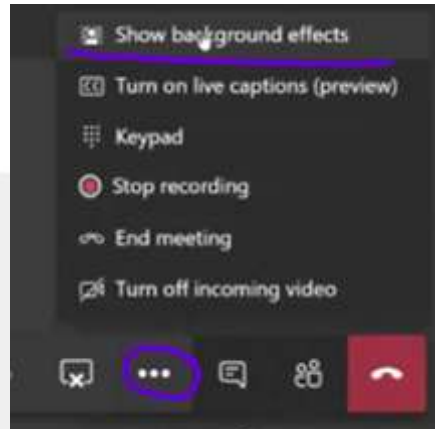
Type a message in for chat, channel, or meeting: Timesaver tip

Go up to the search bar and type "@PersonName" to type a quick message.

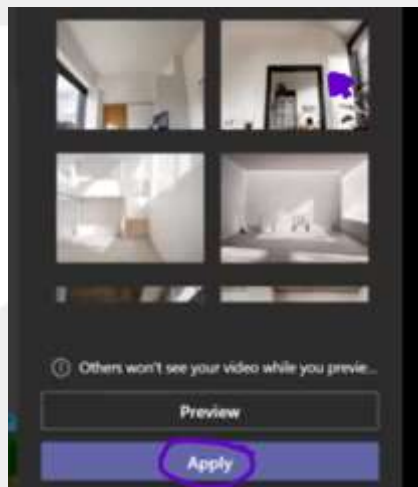


Changing your background on a video call:

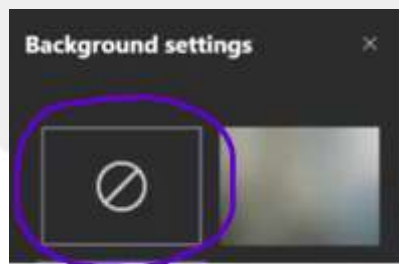
After you have joined a video call in Teams: click on the three dots to the right of the screenshare button to change background effects:



Once you have selected your preference: click Apply and the background will change.



To remove background effects: click on the three dots to the right of the screenshare button to change background effects back to no effect.



For the best results: ensure the camera is facing you directly.

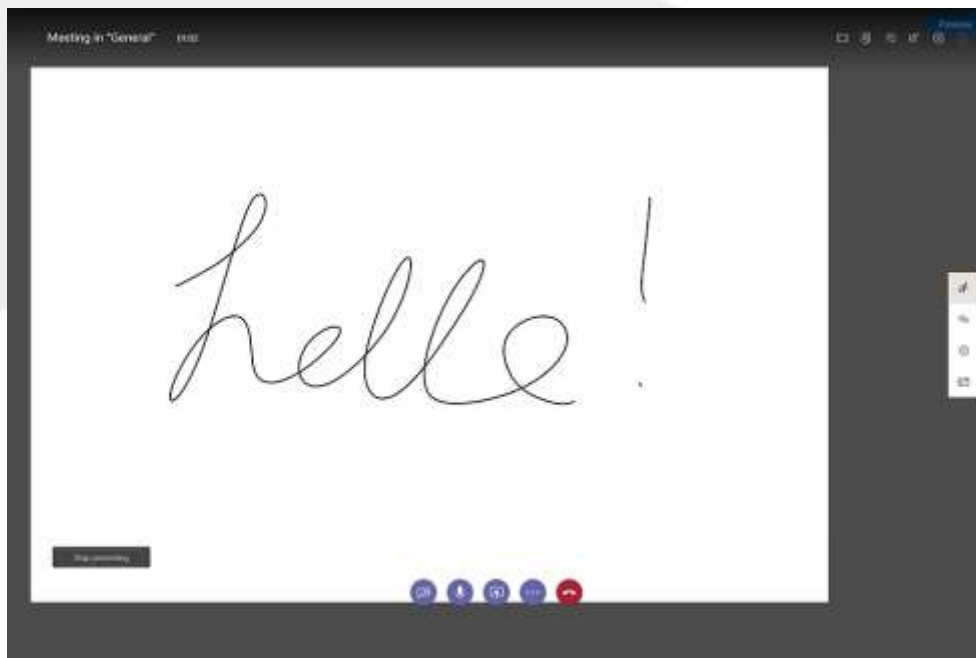
Whiteboard during meetings:

Ensure this feature is enabled under your meeting settings by your administrator if you do not see this as an option during an open group chat.

This feature is found under: [Meeting policies > Allow whiteboard](#)

Select the three dots during a video call to enable whiteboard. This feature may also be available under the share screen option.

Whiteboard will allow you to draw and interact with team members during your discussion.



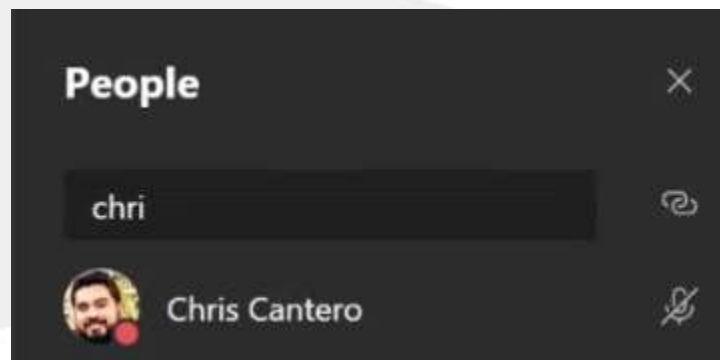
If you share a whiteboard during a Teams meeting that is being recorded, it will not be part of the recording. Microsoft will advise when this technology is available.

Adding participants during a call:

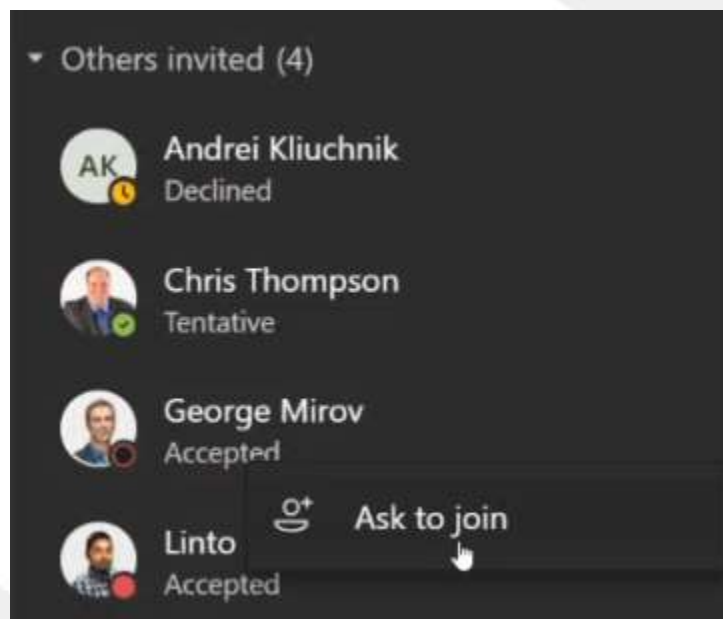
Click on the people button:



Type the person's name, click, and they will immediately be invited to the discussion.



To remind attendees: select the three dots beside their name under "Others invited"



"Ask to join" will call the invited participant immediately.

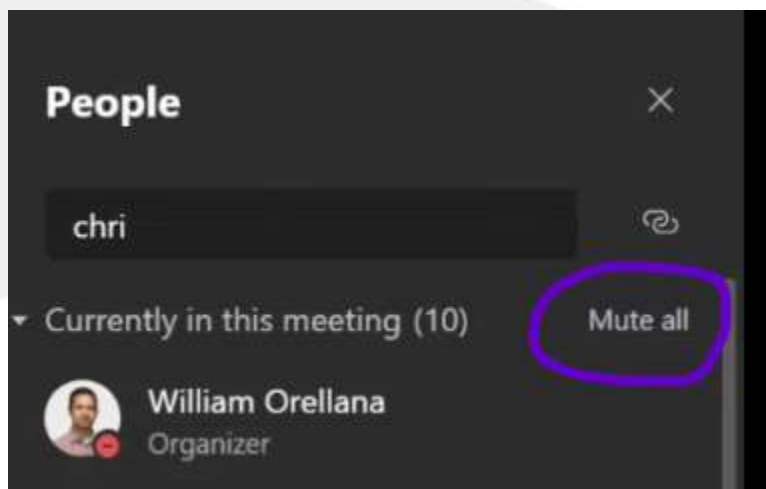
Muting participants:

During an open meeting, you have the option to mute all participants as the organizer.

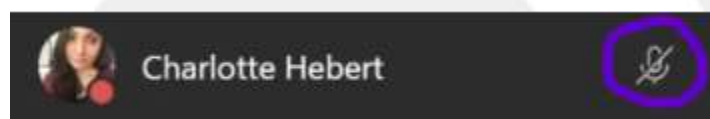
Click on the People button:



Select "Mute all" in the top right corner of "Currently in this meeting"



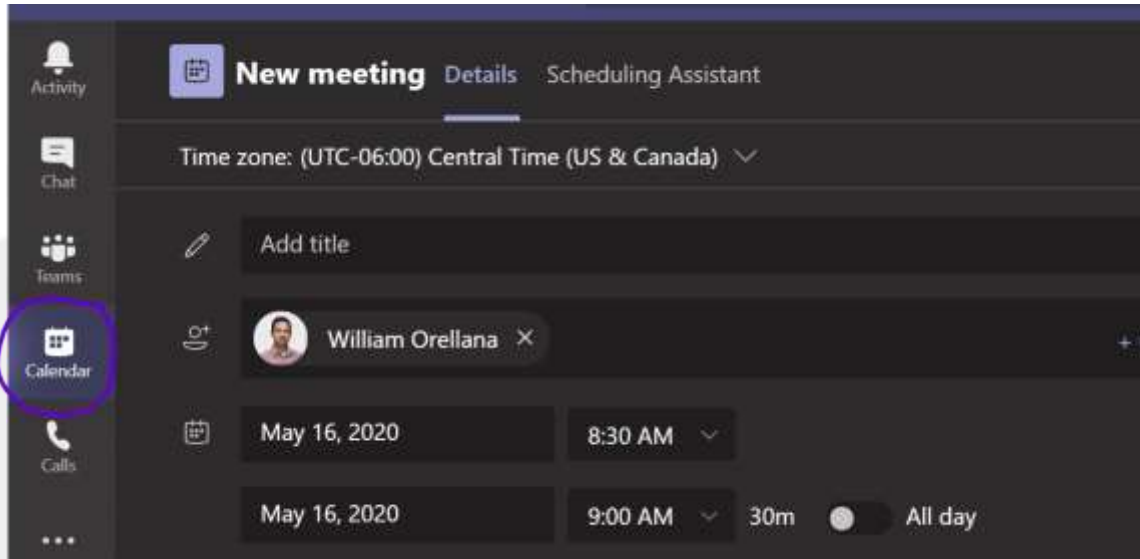
You can also mute individuals by selecting their name and clicking the microphone to mute.



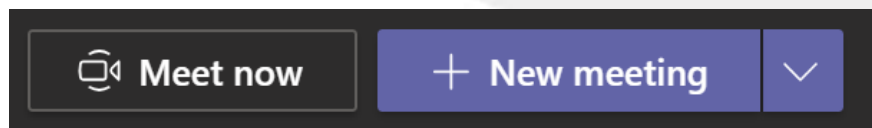
Unlike Zoom, Microsoft Teams allows participants to un-mute themselves as needed.

Advanced Calendaring:

Select Calendar from the column on the right side of your screen to add participants:



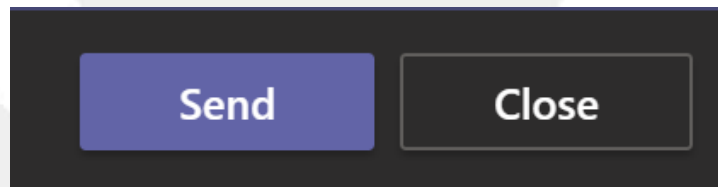
Note: Under Calendar view you can click on either “+ New Meeting” or “Meet now”



- Teams will automatically populate availability from your participant(s) Outlook calendar(s) based on the date and timeframe selected.
- Clicking on the time will automatically update the request.

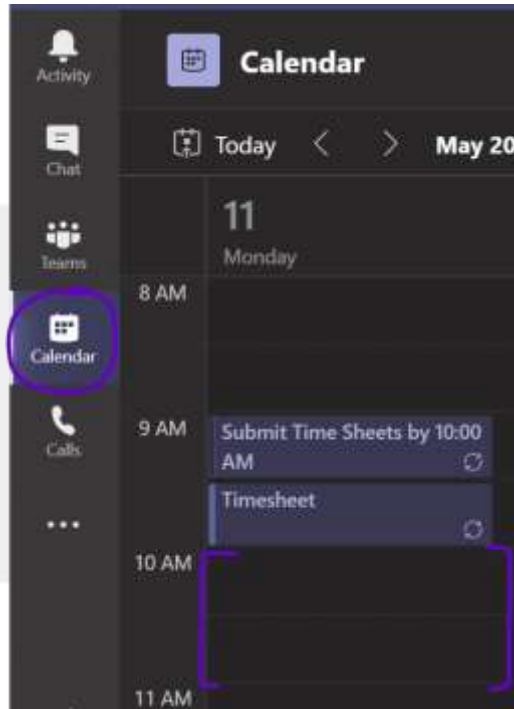
Once you are ready to schedule:

Click send in the top right-hand corner of the invite and the meeting will appear automatically on your outlook calendar.

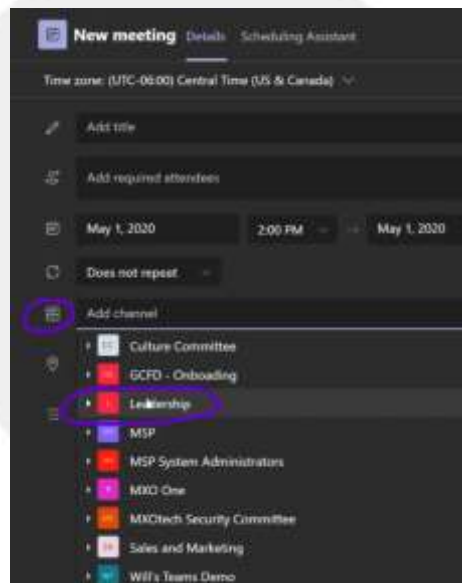


Scheduling recurring channel meetings:

Go to Calendar > Go to Date > Select your time

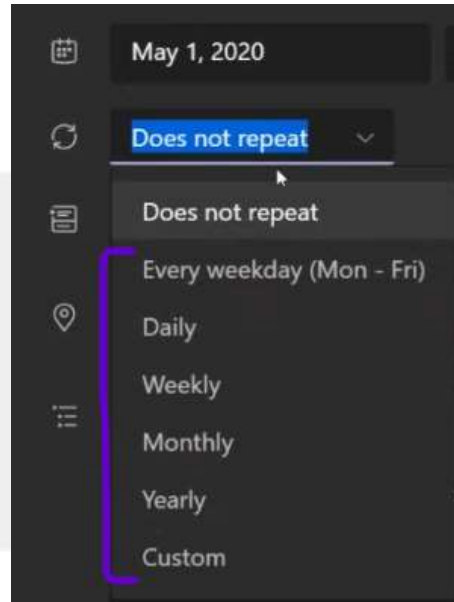


Select the Channel via the Teams channel dropdown. This action will invite all team members included on this channel.



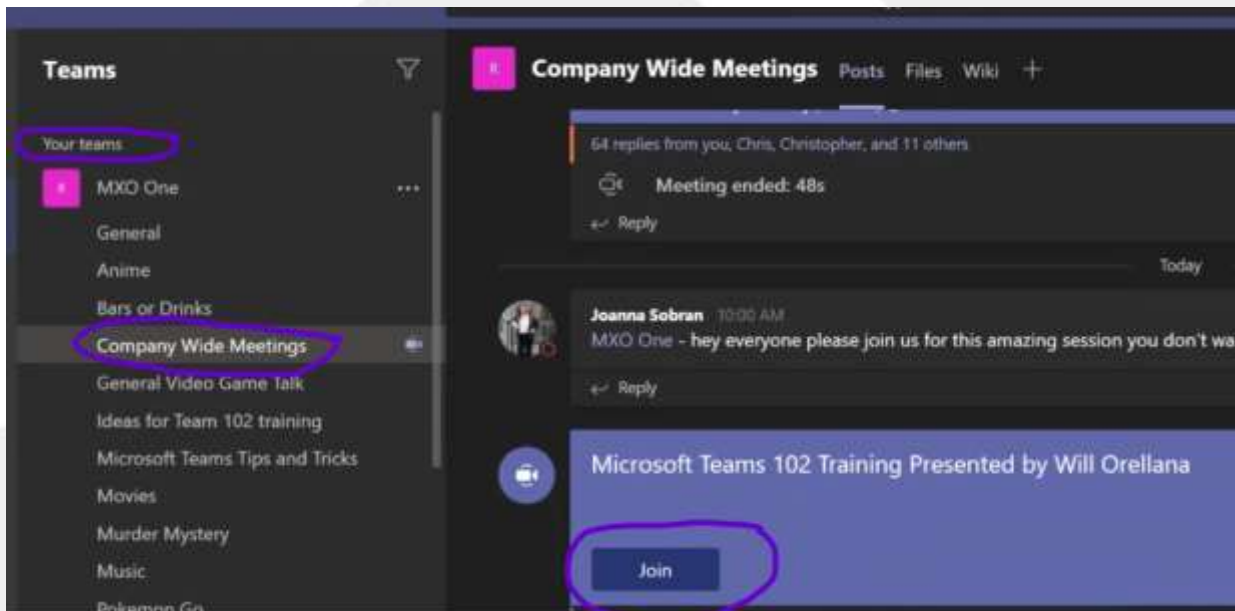
(Scheduling recurring meeting continued)

Select the preferred recurrence via the dropdown under date. Note, you can also customize the time via the custom selection below.



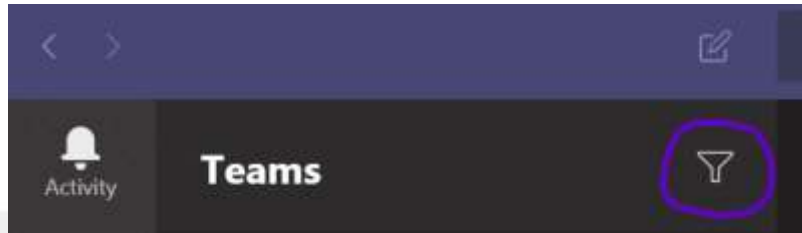
Teams will automatically populate availability from your participant(s) Outlook calendar(s) based on the date and timeframe selected.

After sending this meeting invite, the meeting will appear for availability in the Teams channel:

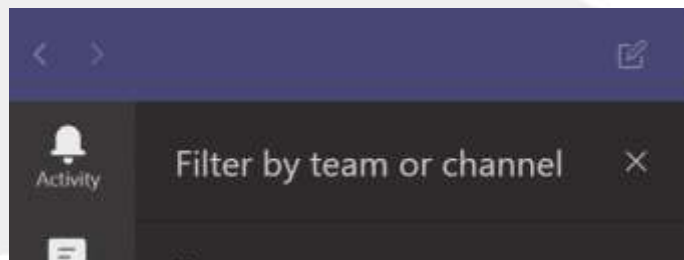


Filtering:

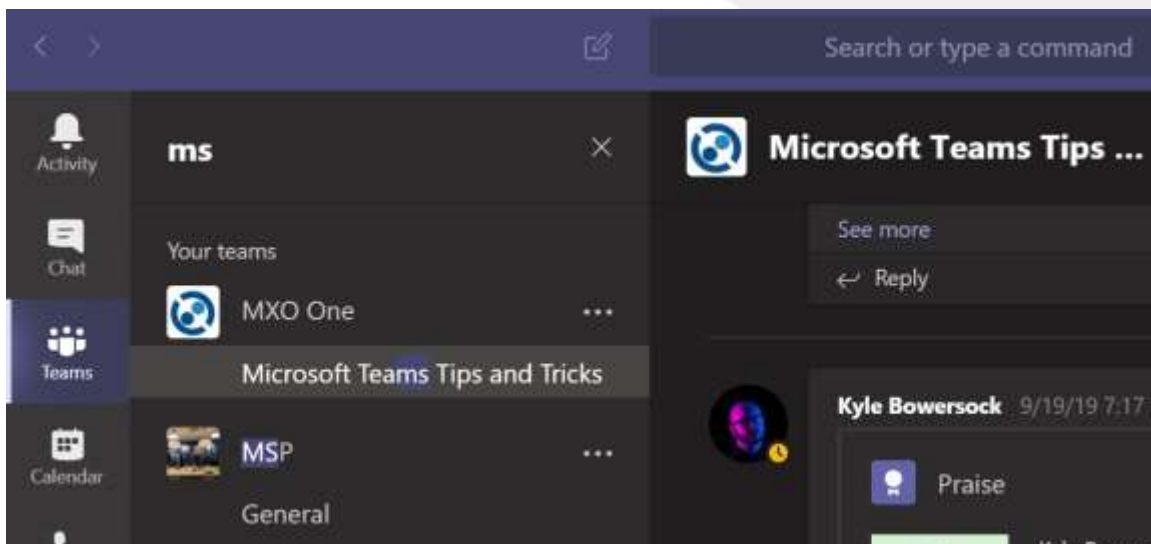
The top left corner of Teams will allow you to filter channels.



Selecting the small funnel/filter will allow you to type:

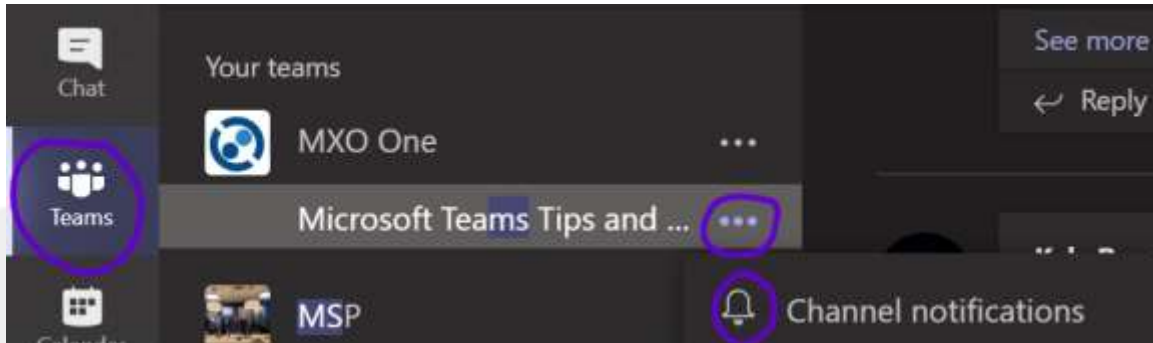


For example: Filter by channels

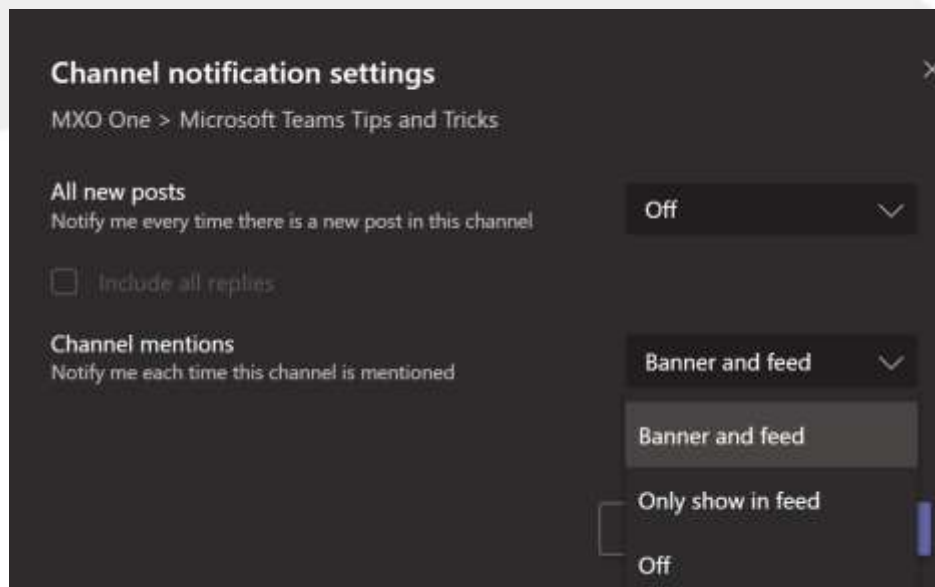


Channel notification settings:

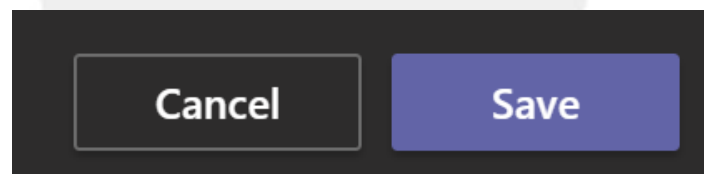
Three dots will appear when you hover over the name of the channel. Click on the three dots on the right side of your channel name to modify notifications.



Modify your notification settings to your individual viewing preferences:



Click on Save when complete:

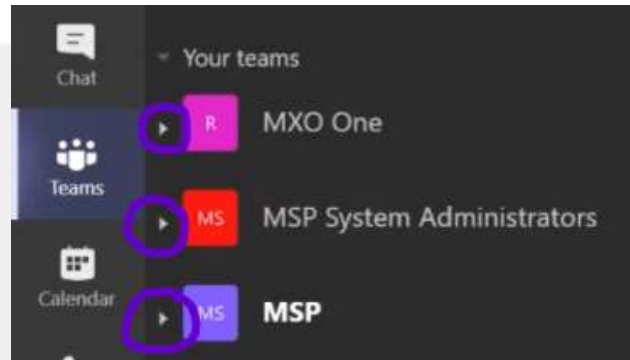


- Banner: A small window will pop up on the bottom right side when someone posts.

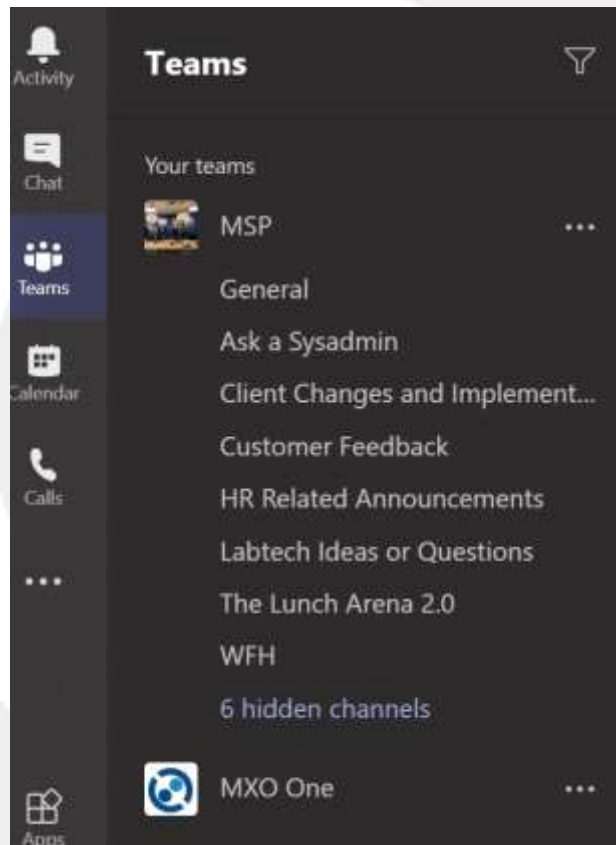
- Feed: Messages will appear as bold during on the left side column when someone posts.

Organize your Teams:

Minimize your discussions using the small arrow on the left side of each team name to expand or condense. Items can be clicked and dragged up and down for priority.

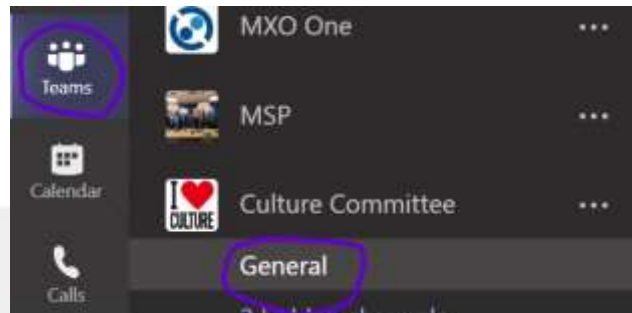


Dragging and dropping teams will allow you to see teams you need to focus more attention on at the top of your page without compromising notification settings.



Pin shortcuts to channels:

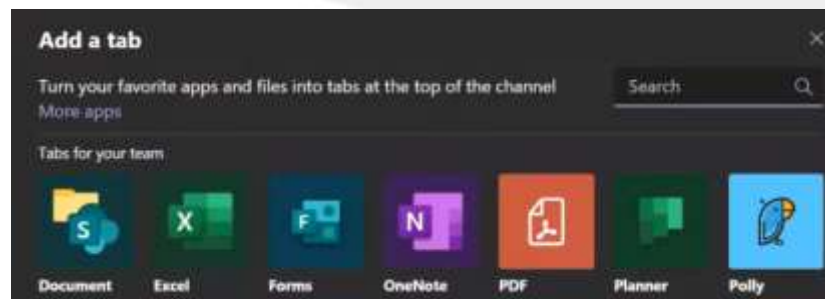
Enter the channel under your selected team:



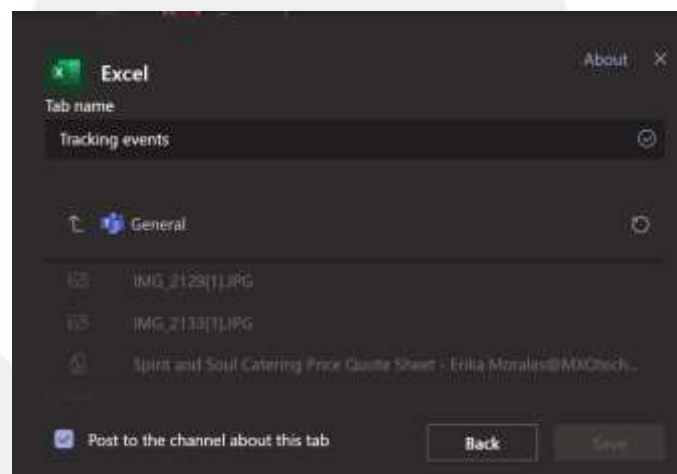
Add a Tab by selecting the “+”



Select the application you would like to pin as this will be shared in the channel:

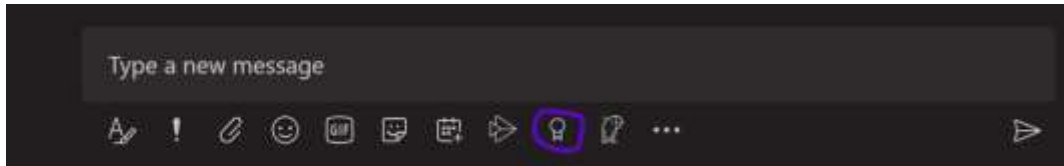


Excel as an example:

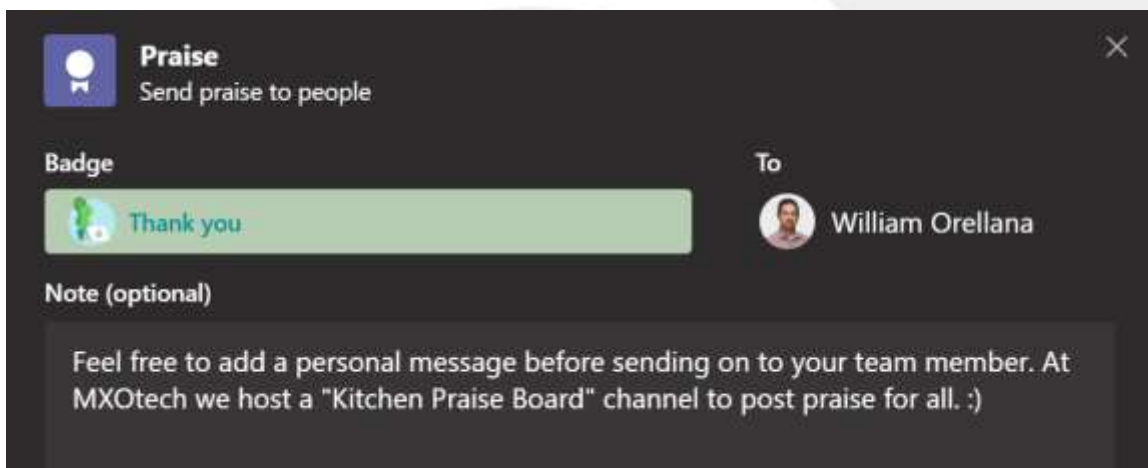
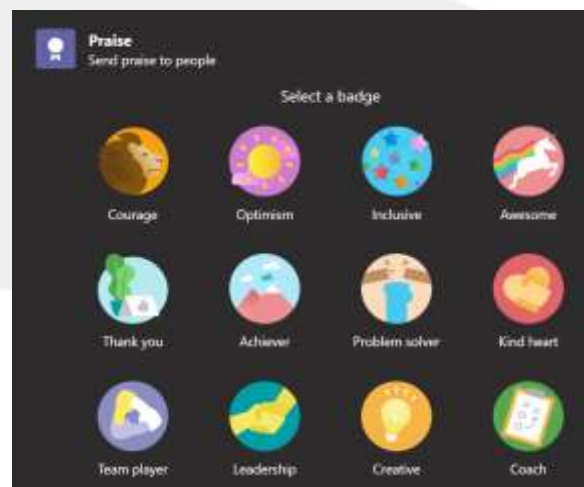


Sending Praise:

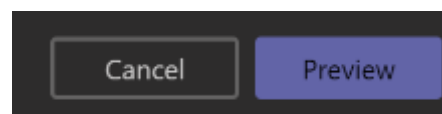
In the chat portion of your message with a team member group, you now have the option to send praise:



You will be able to select badges:

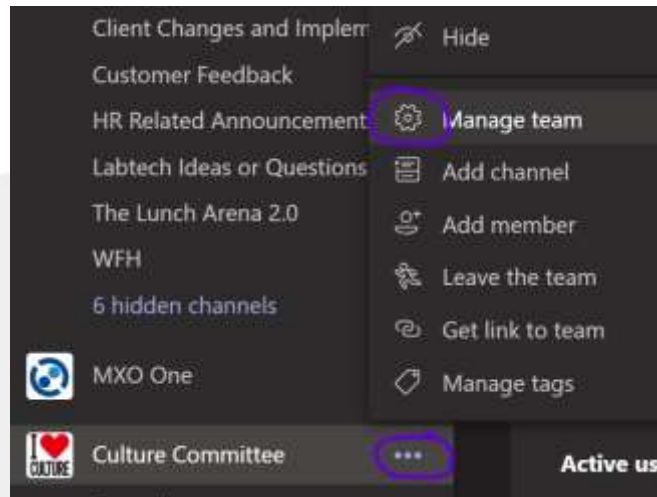


You can select preview in the bottom right to see how this will appear before sending on to the individual.



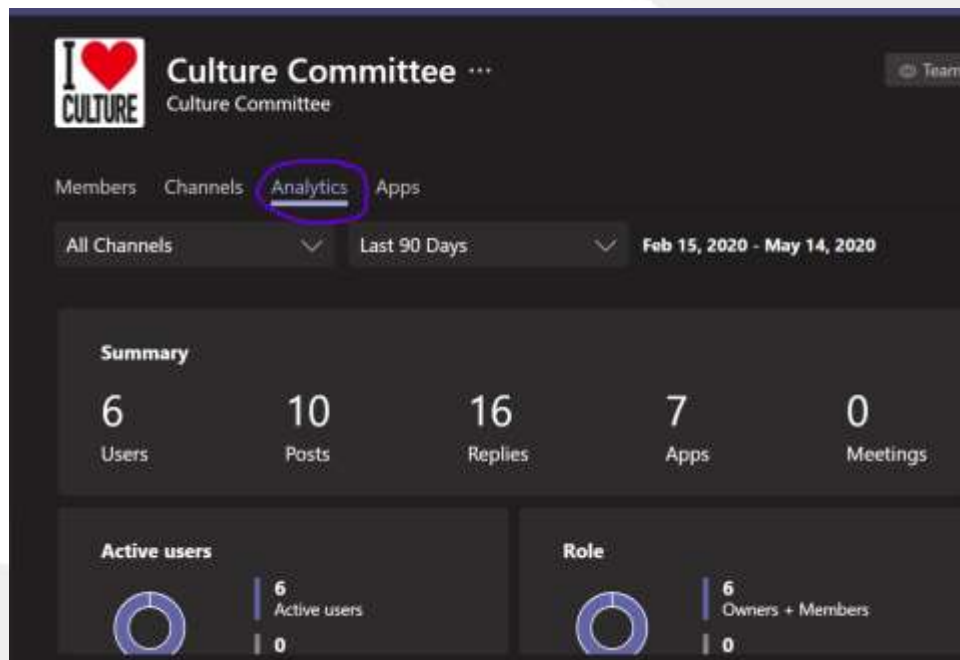
Create and manage your team:

To create a channel, go to your selected team and hover over to the name to click on the three dots.



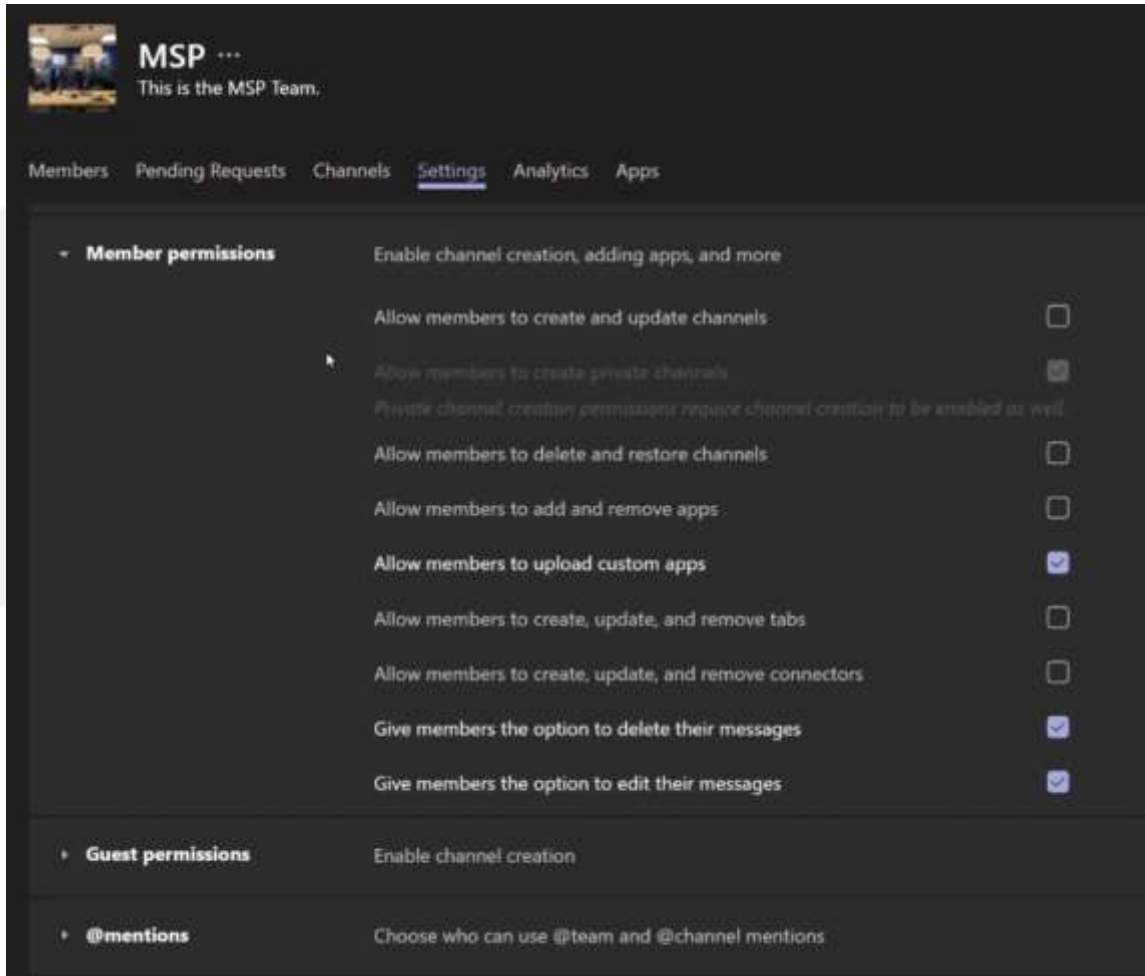
From this view you can also change the image with administrator abilities under settings under “Change Picture”.

You can also review analytics under “Manage Team”:



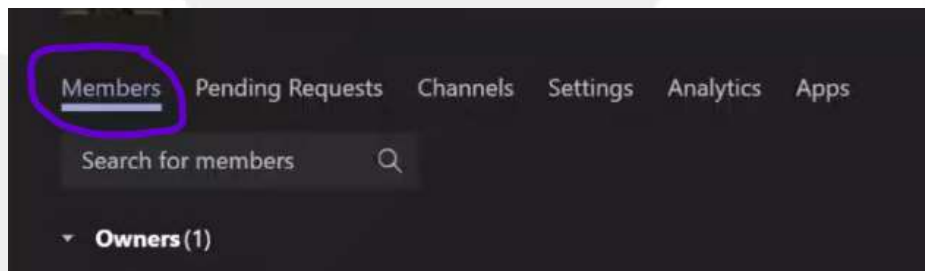
Administer Access to Teams:

As applicable, all possible changes and permissions exist under settings with administrator level access:



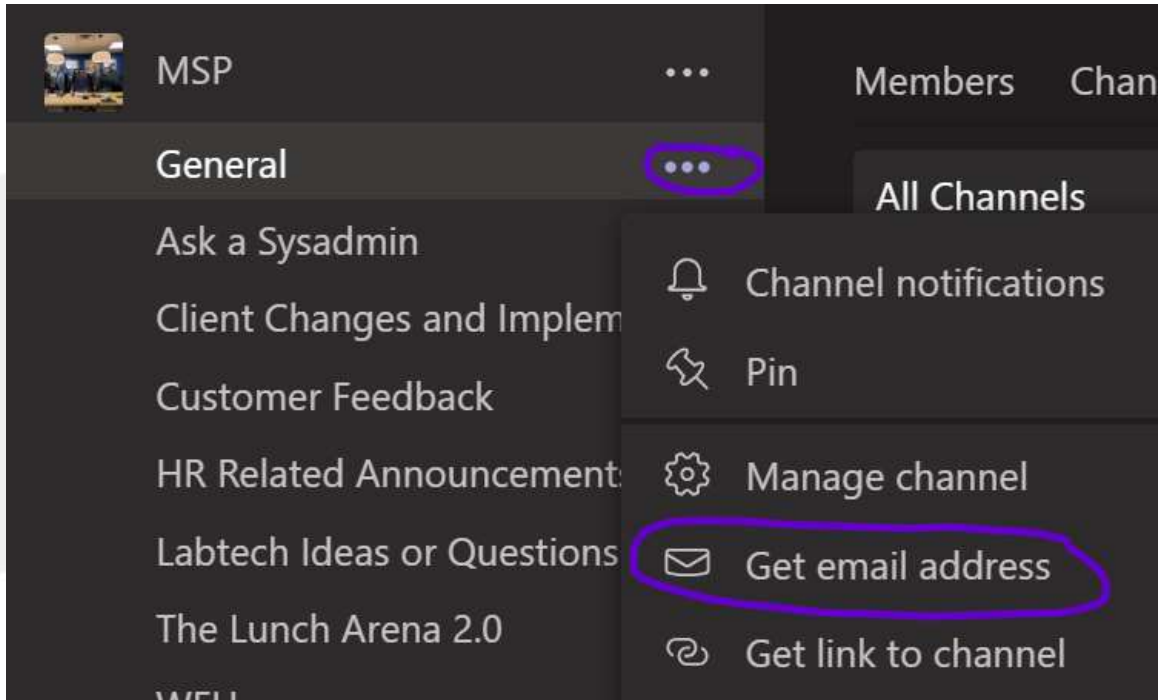
This includes the ability to add/delete messages, invite external guests, add/delete apps, clean up membership, etc.

Under the member section you may add, remove, or change management access for individuals via a dropdown beside the member's name. (Member or Owner access)

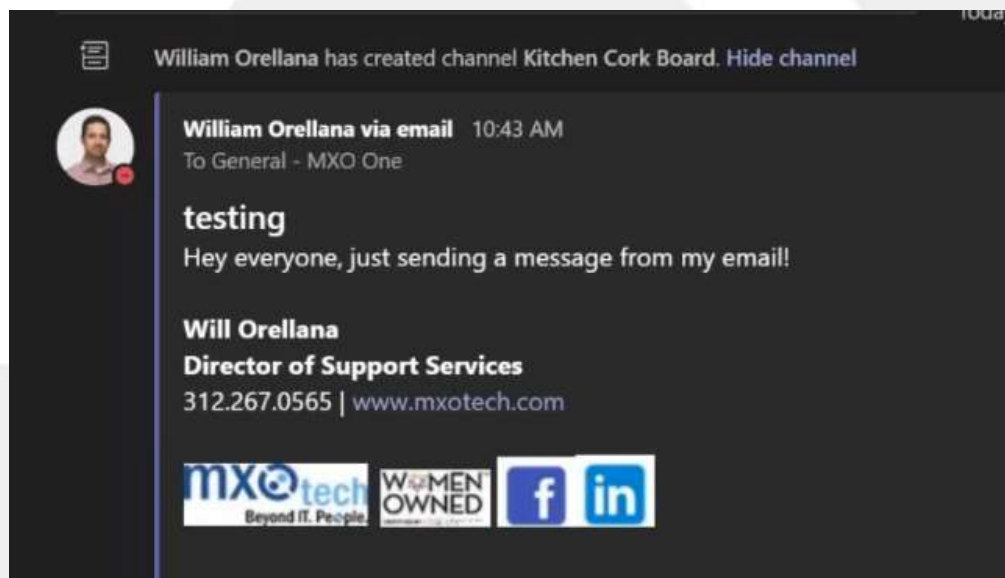


Emailing a channel:

If you need to email all members of a Teams channel, hover over the channel name and select the three dots on the right side. This will offer you the option to obtain the email address for this group with administrative access to Teams.



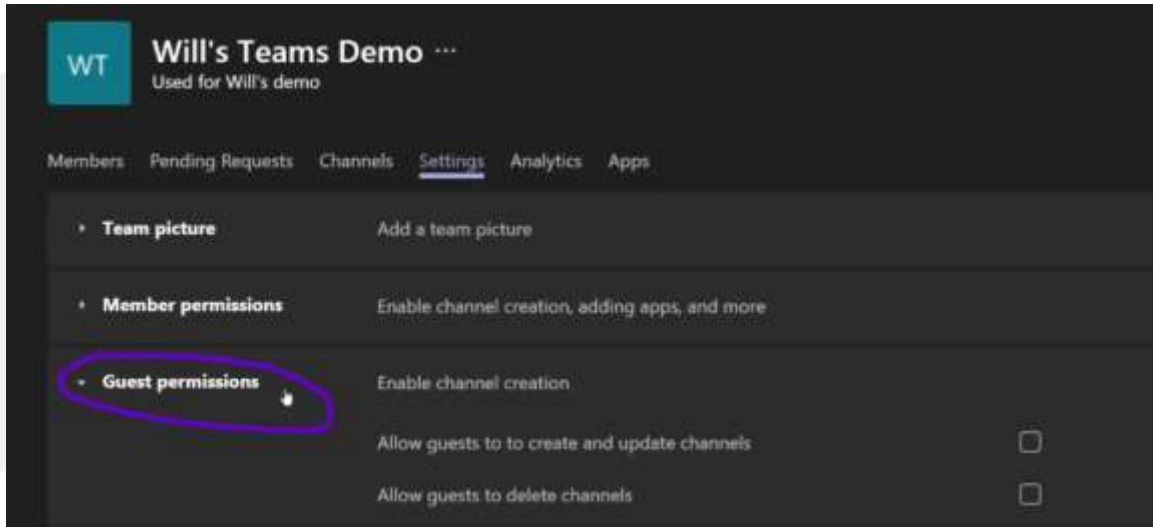
Emailing this group send to all members via Teams and Outlook:



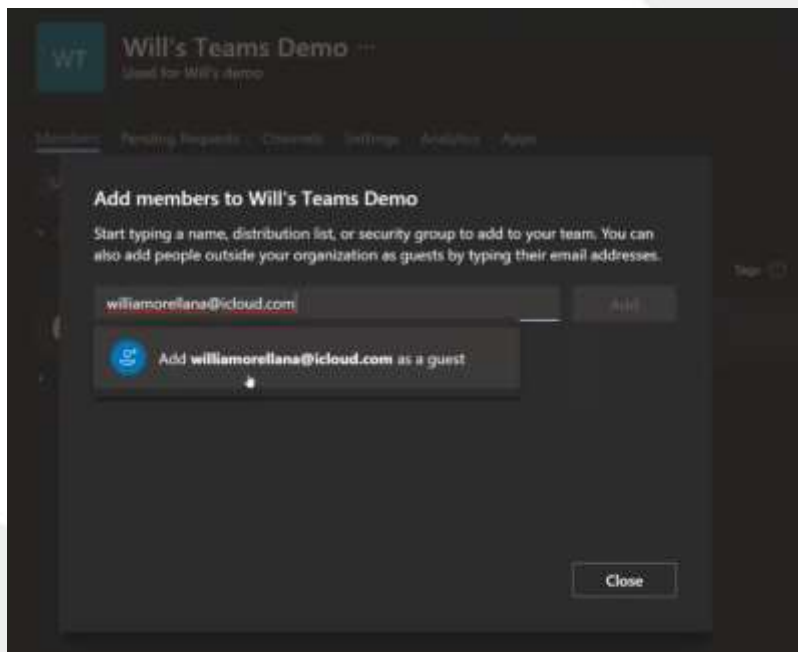
Inviting external members:

By default, this feature is disabled in 365. If you would like this feature enabled for your team, there is a setting in 365 to allow members to invite external guests. Please keep security in mind.

Once enabled, the administrator will customize team member(s)' settings to allow for channel and feature access under "Guest permissions"



Type in the external member's email address as a guess under the Members tab.



This individual will be sent a virtual invite to be added to Teams.

Frequently Asked Questions:

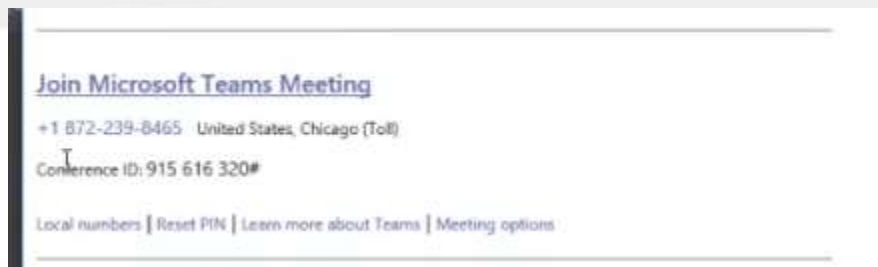
Q: Can we customize our videocall background?

A: *Some organizations have tried to change backgrounds to match their business logo or brand. MXOtech would not currently recommend any product or application enabling this change that is not directly supported by Microsoft.*

Q: If I pay for the Teams conference bridge license, how do I access it and what number applies?

A: *This service (\$4 per user per month) is a plug-in for Outlook that will automatically populate a conference number upon Teams meeting creation. To see more about how to create a Teams meeting in Outlook, check out our Teams 101 webinar or documentation. This may not be for everyone but is beneficial for sales team members with external and internal calls. MXOtech or the administrator of your Office 365 needs to purchase the license. Some of our customers have replaced Zoom and GoToMeeting with this plugin.*

Appearance in Outlook:



Q: How does SharePoint integration work in Teams?

A: *SharePoint can be added as a tab or as a link on Teams channel. As a tab, you may not have the same level of access for all members.*

Q: How do you get your profile picture to show in Teams?

A: *Adding your profile picture to 365 will synchronize the image across Microsoft accounts including Teams.*

[Click here to watch the Teams 201 webinar.](#)

For additional information about MXOtech or our technology support services, please contact Joanna Sobran or Karen Burmeister at 312.554.5699 or at sales@mxotech.com.