



APPLICATION HANDBOOK

APPLICATION: MICROSOFT TEAMS

Document Release Date: August 27, 2021

Reviewed Date: <Reviewed Date> August 27, 2021

Approved Date: <Approved Date> August 27, 2021

Version: V1.0

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Application Details and Ownership

Application Manager: Director Information Technology

Vendor: Microsoft

License Type: Per User

Subject matter expert(S): Donny Friday, Valerie Lindner

Current Release of Software: 1.4.00.16575

Application Location: Desktop Icon

User Guide

Introduction

Microsoft Teams is a proprietary business communication platform developed by Microsoft, as part of the Microsoft 365 family of products. Teams offers workspace chat and videoconferencing, file storage, and application integration.

Microsoft Teams is a collaboration app that helps your team stay organized and have conversations—all in one place. Here's a quick look at the left-hand side of Teams.

- **Teams** - Find channels to belong to or create your own. Inside channels you can hold on-the-spot meetings, have conversations, and share files.
- **Meetings** - See everything you've got lined up for the day or week. Or schedule a meeting. This calendar syncs with your Outlook calendar.
- **Calls** - In some cases, if your organization has it set up, you can call anyone from Teams, even if they're not using Teams.
- **Activity** - Catch up on all your unread messages, @mentions, replies, and more.

Use the command box at the top to search for specific items or people, take quick actions, and launch apps.

Integrations

with other Sun Health Applications:

Inputs: Outlook, SharePoint, InformaCast

Outputs: Outlook, SharePoint

Reports: TBD


Dashboards: TBD

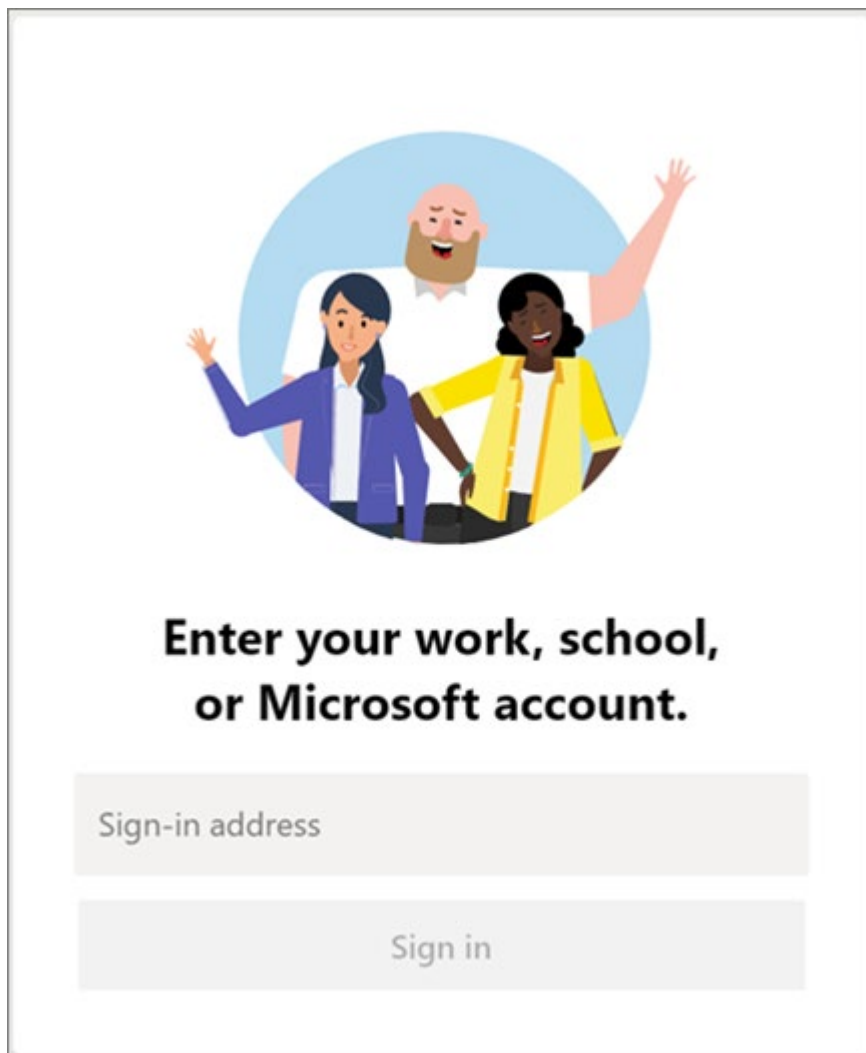
Application Known Issues / Limitations

No known issues or limitations at this time.

Sign In

Signing into Teams

1. 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.
2. Sign in requires **Sign-in Address** (Sun Health email) and **Password** (Is users personal computer password).



[Changing your Password](#)

Passwords are changed only when the users work personal computer password has changed. Microsoft Teams will then require the user to enter the newly created personal computer password to synchronize with the users personal computer.

Teams

[How to create a Team](#)

A helpdesk ticket has to be submitted to have a a team created.

IT Service Desk phone # (623)-975-8007

Add members

1. In the teams list, go to the team name and select **More options** *** > **Add members**.
2. Type in the name or email address of someone you want to add.

Note: If the person is outside of your organization, type in their email address. Select the pencil icon to add a display name everyone will recognize. The guest will receive an email inviting them to join the team.

3. Select **Add**.

Remove members

1. In the teams list, go to the team name and select **More options** *** > **Manage team**.
2. Under **Members**, select the **X** to the far right of the name of the person you'd like to remove.

Add team owners

1. In the teams list, go to the team name and select **More options** *** > **Manage team**.
2. In the **Members** tab, under **Role**, select the down arrow and change **Member** to **Owner**.

Manage channels

1. Go to the team name and select **More options** *** > **Manage team**.
2. In the **Channels** tab, select **Auto-favorite** for any channels you want to make sure show up in everyone's channel list.

Note: You can favorite up to 10 channels for your team.

Change team settings

Go to the team name and select **More options** *** > **Manage team**. From there, you can access your team **Settings** tab, which lets you:

- Change the team picture.
- Set member permissions (like allowing them to create, update, or delete channels and tabs).
- Enable @team or @[team name] mentions in a channel.
- Set permissions for guests.
- Enable team members to send GIFs, emoji, and stickers.

Pick a team and channel

A *team* is a collection of people, conversations, files, and tools — all in one place. A *channel* is a discussion in a team, dedicated to a department, project, or topic.

The best way to get familiar with teams and channels is to pick a team and channel and start exploring!

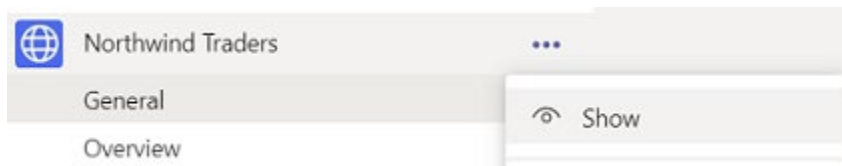
1. Select **Teams**  on the left side of the app and then pick a team.

If you're not on a team and want to create one, see Onboard your teams.

2. Select a channel and explore the **Conversations**, **Files**, and other tabs.

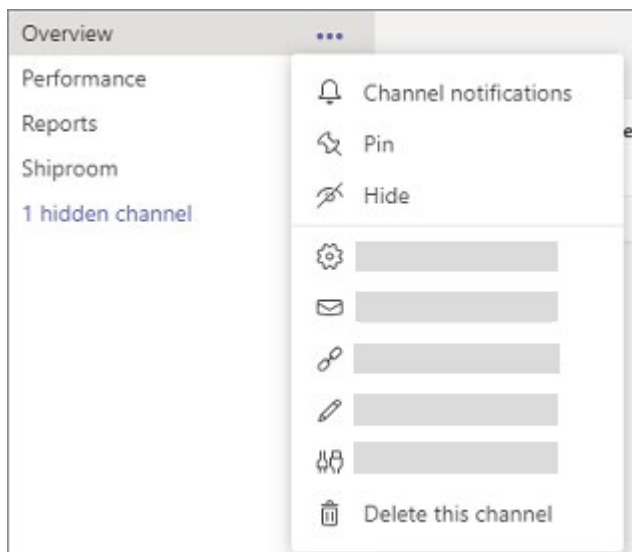
Show a team or channel

When you join a new team, it's automatically shown in your teams list. If you know you're a member of a team but don't see it, scroll to the bottom of your teams list and select **Hidden teams**, find the team you're looking for select **More options** ******* > **Show**.



Hide a team or channel

If you don't want a team or channel to show in your teams list, hide it. Go to a team or channel name and select **More options** ******* > **Hide**. This is a great way to clean up your list and focus on the teams and channels you're active in.



You can also show channels from the **hidden channels** menu beneath the channels list of a team. Select **More options** *** > **Show**.

Note: To help get you up and running, Teams automatically shows the five most popular channels in every new team you join.

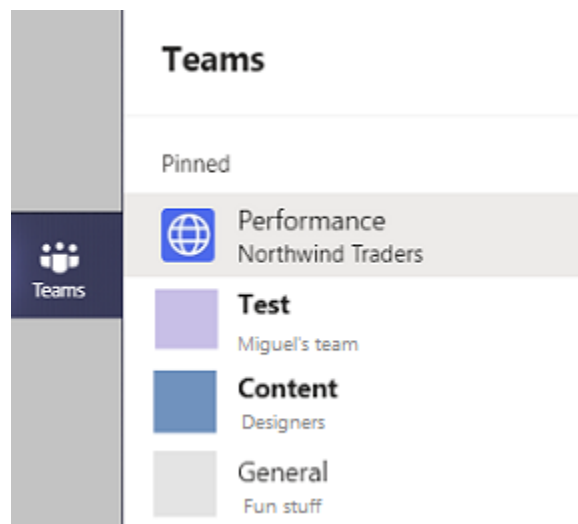
Pin or unpin a channel

Stay productive with pinned channels!

Pinned channels stay at the top of the list so you don't have to hunt them down.

To pin a channel, go to a channel name and select **More options** *** > **Pin**. This ensures that the channel stays at the top of your list. If you change your mind, just select it again and unpin it.

Once you pin a channel, drag it into the order you want. Do this for several channels and you'll have all pinned channels within easy reach.




Hide teams you don't use

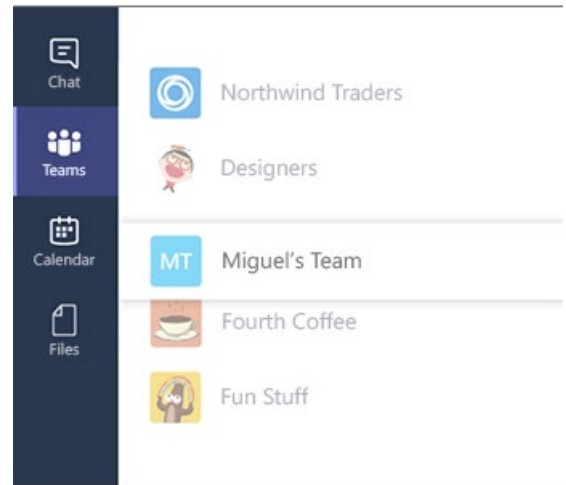
Focus on the teams you're most active in, and hide the ones where you're not. Keep you organized, we'll automatically move teams you haven't visited in several weeks to the **Hidden** menu at the bottom of your teams list. They'll still update with any new activity and you can visit them at any time, they just won't clutter your teams list.

You'll be informed whenever a team gets bumped down to the **Hidden** menu and given the option to either accept the move or undo it. Move a team back at any time by selecting **More options...> Show** to move it back up with the rest of the teams in your **Show**.


Reorder the teams list

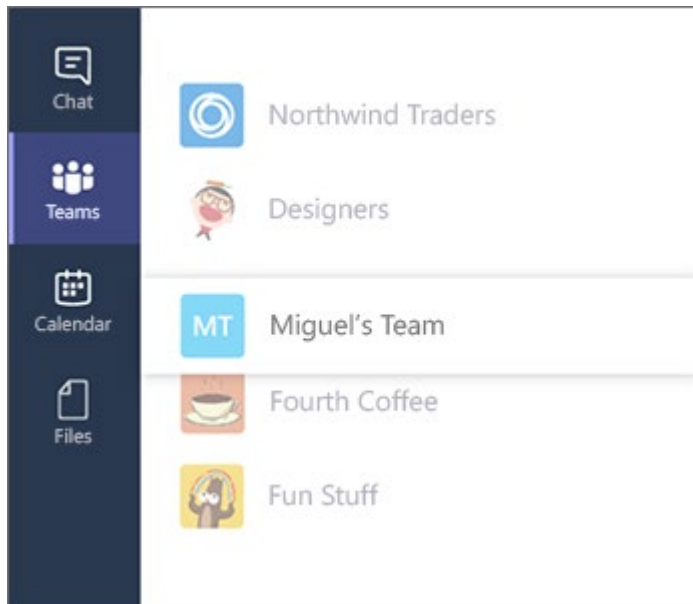
To reorder your teams, select **Teams** , then click and drag the team name anywhere in your teams list.

Note: Every team you belong to shows up in your teams list, either in Your teams or inside Hidden at the bottom of your list.



Reorder the teams list on Desktop/Mobile



To reorder your teams, select **Teams** , then click and drag the team name anywhere in your teams list.





Note: Every team you belong to shows up in your teams list, either in Your teams or inside Hidden at the bottom of your list.

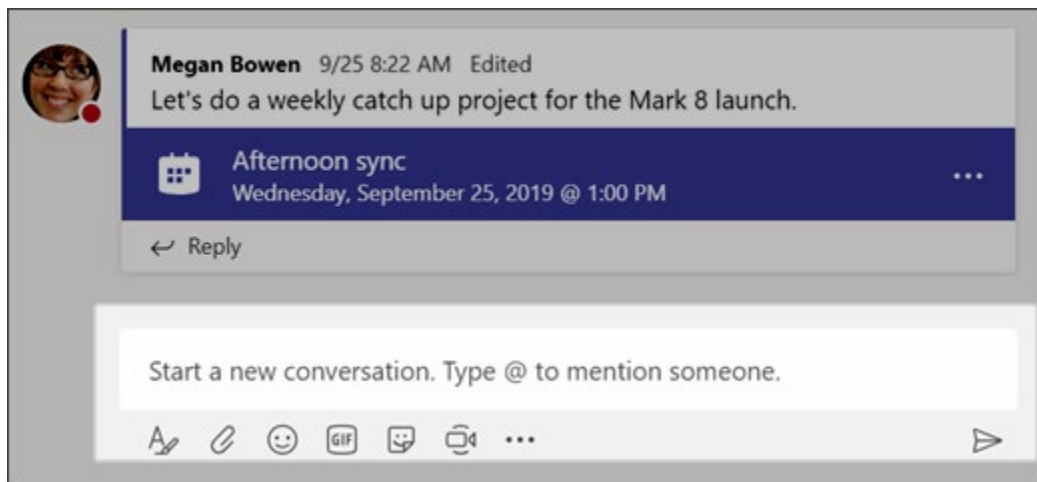
Conversations

Conversation with the whole team

1. Click **Teams** , then pick a team and a channel.
2. In the box where you type your message, say what's on your mind and click **Send**  .


Conversation with a person or group

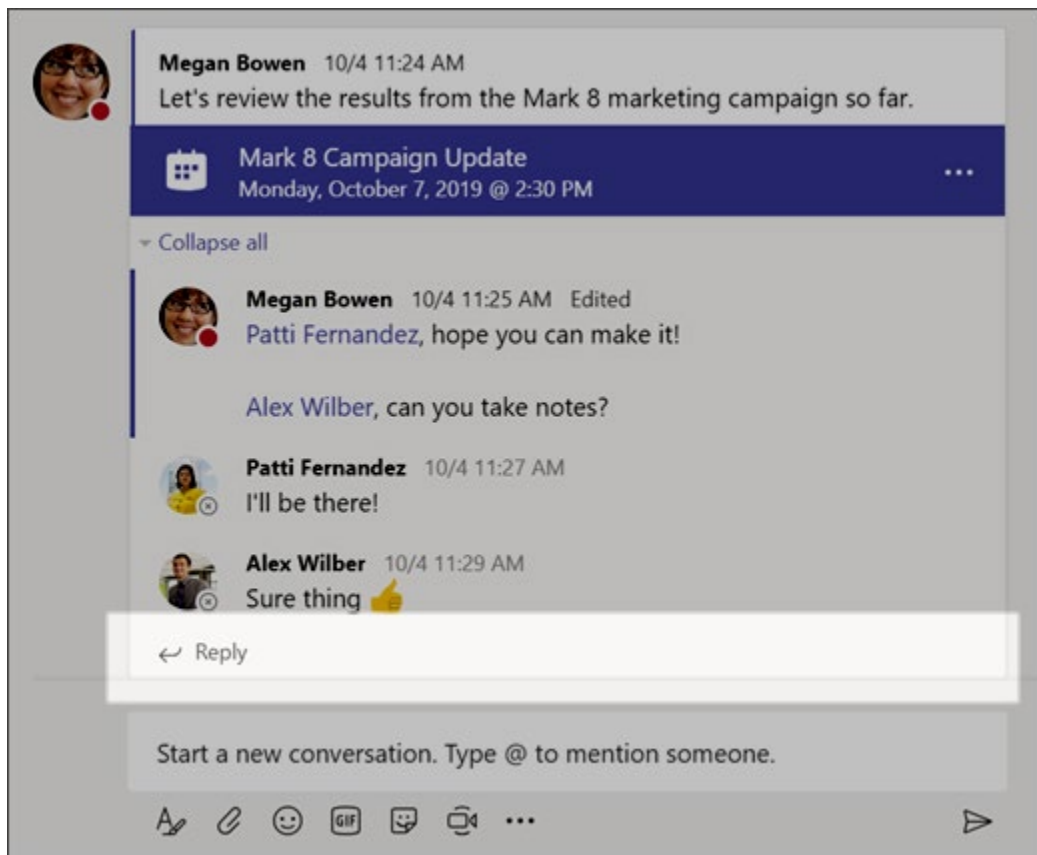
1. At the top of the app, click **New chat** .
2. In the **To** field, type the name of the person or people you want to chat with.
3. In the box where you type your message, say what's on your mind and click **Send** .



Reply to a conversation


Channel conversations are organized by date and then threaded. The replies in threads are organized under the initial post so it's easier to follow multiple conversations.




1. Find the conversation thread you want to reply to.
2. Click **Reply**, add your message, and click **Send** .

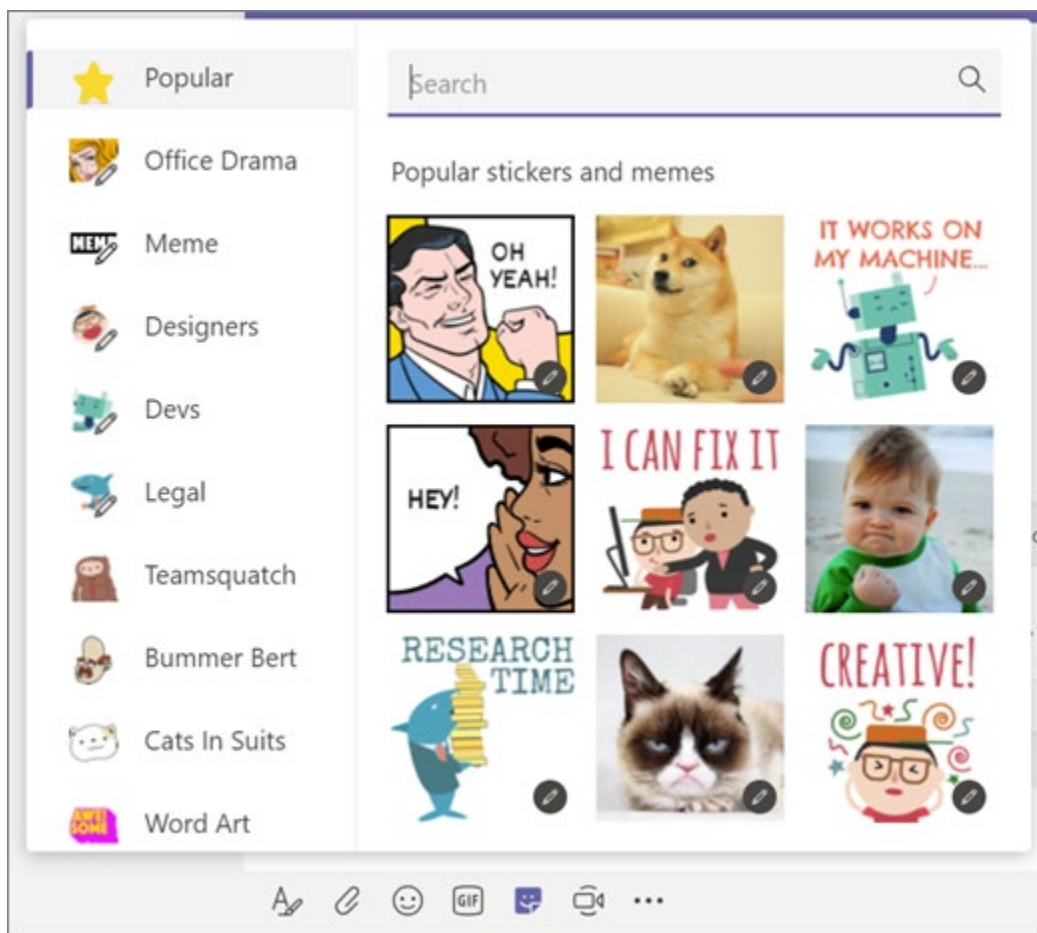


Emoji, memes, and GIFs

Express yourself and impress your coworkers!

- Click **Sticker**  under the box where you type your message, then pick a meme or sticker from one of the categories.


The **Sticker**  catalog contains a wide variety of customizable stickers and memes — you can even upload your own! Check out **Emoji**  for smiley faces and **Giphy**  for animated GIFs.



Share a file

Sometimes words aren't enough, and you need to post a file to a channel conversation.

Tip: Teams works particularly well with Microsoft Office documents.

1. In your channel conversation, click **Attach**  under the box where you type your message.
2. Select from these options:
 - Recent
 - Browse Teams and Channels
 - OneDrive
 - Upload from my computer

3. Select a file > **Share a link**.

If you're uploading a file from your computer, select a file, click **Open**, and then **Send** .

You can always see all the files you post to a channel by going to the **Files** tab.

Find and filter files

Filter files to find recent documents, ones that have been created or edited in your channels, or downloaded to your computer.

1. Select **Files** and choose a filter:
 - **Recent:** Recent files you've viewed or edited.
 - **Microsoft Teams:** Files created or edited across your channels.
 - **Downloads:** Files you've downloaded from Teams. Select Open Downloads Folder to find them.
2. OneDrive is connected by default. If you'd like, choose another cloud storage provider to use in Teams.


Chats

Start and pin chats

Start 1:1 or group chats to collaborate with a smaller group or to talk privately, and pin chats for quick access.

Start a chat

In **Chats**, you can have 1:1 or group chats with people.

1. Select **New chat** .
2. Type the name of the person or people you want to contact.
3. Select the down arrow to add a name to your chat group.

Make video and audio calls from a chat

- Select **Video call**  or **Audio call**  to call someone directly from a chat.

Pin a chat

1. To pin a chat, select **More options** > **Pin**. The chat appears in the **Pinned** list.

Note: You can pin up to 15 chats.

2. To unpin a chat, select **More options > Unpin**.

How to start and pop out a chat

Channels are great for sharing information with your entire team, but for quick questions to colleagues, chats are the better option. They're private, easy to keep organized, and much more likely to get a response than a channel post!

How to start a Microsoft Teams chat:

1. Open the **Chat tab** on the left-hand side.
2. Click **New Chat** at the top of the screen.
3. Enter the **person's name** and write your **message**.
4. Hit the **send arrow**.

The steps for creating a group chat are virtually identical. Just click the small arrow on the right-hand side to give the group a name, then enter all participants in the **To** field. You can also add more people to a one-to-one or group chat by clicking the **Add People** button. You can even choose whether or not to include the chat history.

There are a few other things you can do to make chats even more convenient. The first is pinning them by mousing over the chat, clicking the **more options icon**, then **Pin**. This will make sure it's always at the top of the list.

Another useful thing to learn is how to pop out a chat in Microsoft Teams. This gives that chat its own window, so you can have more than one chat open at a time. Like above, just click the **more options icon**, then **Pop-out chat**.

How to delete a chat

Whether you want to clean up your Chats tab or get rid of mistaken messages, there will come a time when you need to learn how to delete Microsoft Teams chats. Here you have two options: delete specific messages (only your own) or hide the entire chat.

To delete a specific post in a chat or channel, mouse over it and click the **more options** icon, then click **Delete**. If you do this by mistake, you can undo the deletion as well. Again, you can only delete your own posts, and any nested replies from your colleagues will still appear.

Unfortunately, there's no way to delete an entire chat in Microsoft Teams, but you can do the next best thing: hide it. Just mouse over the chat, click the **more options** icon, then **Hide**. It will now disappear from your list, cleaning up visual clutter. This works for channels as well, but they'll all be tucked away in a hidden channels list.

Making Calls

Start 1:1 or group calls with anyone in your organization — no matter where you are in Microsoft Teams.

Start calls

- Select **Audio call** or **Video call** to start a call from a chat.
- In the command box, type `"/call"` and choose the person you'd like to reach.
- Hover over someone's profile photo anywhere in Teams and select **Audio call** from their contact card.

View history and listen to voicemails

- Select **History** to view missed calls.
- Select **Voicemail** to listen to a voicemail, and then select **More actions** > **Call back** to return someone's call.

Set up a delegate to take your calls

Add a delegate to answer or make calls on your behalf in Microsoft Teams.

1. Select your profile photo.
2. Select **Settings** > **General**, and then select **Manage delegates**.
3. Select **Your delegates** and type the person's name.
4. Choose which permissions to give them, and then select **Add**.

Your delegate gets notified about their new status.


5. Under **Calls**, select **Forward my Calls** > **My delegates** to manage your permissions and make sure your calls go to all your delegates.

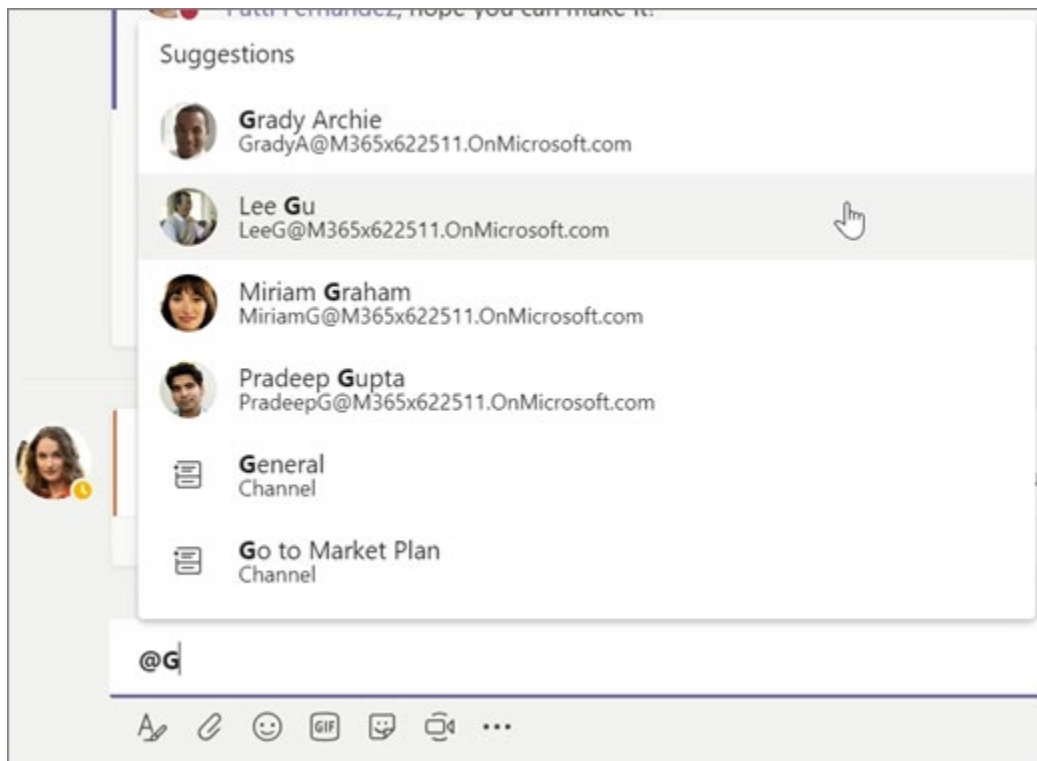
Collaborate in Teams

@mention someone

An @mention is like a tap on the shoulder — a way to get someone's attention in a channel conversation or a chat.



1. In the box where you type your message, type **@**, then type the first few letters of the person's name. You can also @mention entire teams and channels.
2. Select the person. Repeat for as many people as you want to @mention.

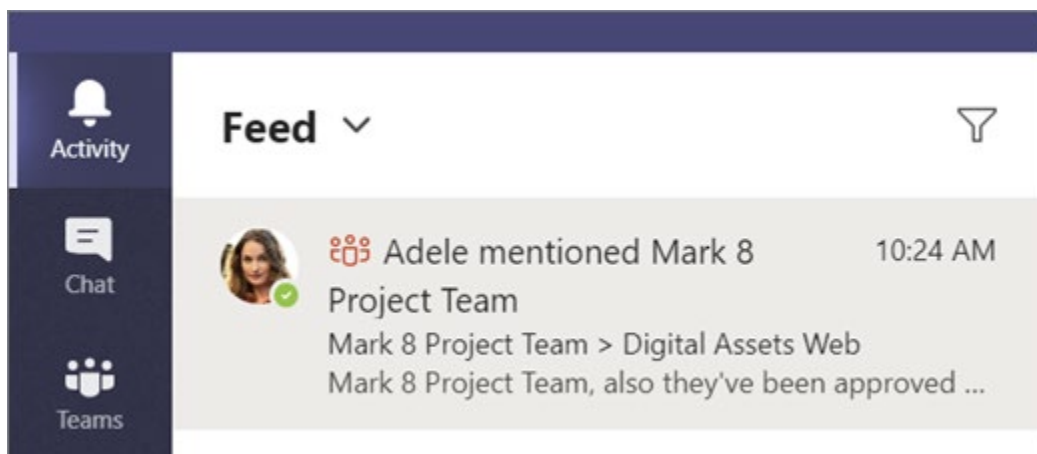
Each person you @mention gets a notification in their **Activity** feed. Check for a red circle next to **Activity**  right now to see if someone has @mentioned you!



Notifications and Alerts

Notifications let you know when someone @mentions you, likes something you've posted, or replies to a thread you started. The Activity feed helps you stay on top of all your notifications.

1. Click **Activity** .
2. **Feed** shows you a summary of everything that's happened in the channels you follow.
 - Click **Filter**  to show only certain types of notifications such as @mentions or reactions.
 - Select **Feed > My Activity** to see a list of everything you've been up to lately in Teams.



Search for messages, people, or files

Searches cover your entire organization — all the teams and channels that you're part of.

1. Type a phrase in the command box at the top of the app and press Enter.
2. Select the **Messages**, **People**, or **Files** tab.
3. Select an item in the search results. Alternatively, you can select **More filters** to further refine your search results.

Note: Team owners can create private channels and allow members to create them. Whoever creates a private channel can add people to it.

Create a private channel

Private Channels must be initially created as a Private Channel as they cannot be converted after a channel has been created.

1. Go to a team you want to create a channel for, select **More options** > **Add channel**.
2. Type a name and description.
3. Under **Privacy**, select the down arrow and choose **Private - Accessible only to a specific group of people within the team**.
4. Select **Next**.
5. Type in the names of who you'd like to invite including guests.
6. Select **Add**.

Note: People must already be members or guests of a team to be added to a private channel.


7. People you've added will see it appear in their channel list with a lock next to the name. And to see everyone that's been added to a private channel, select the **Open people** pane.

Share a file and Meet Now



1. When you share a file in a private channel, it's viewable and accessible only to people with access to the channel. These shared files live in a separate SharePoint site away from the standard channels. This ensure access only to members of the private channel.
2. To meet with just the people in a private channel, select **Meet now**.

Work in Channels

Reply to a message

- Select  **Reply**, add your response, and press Enter.


Like or save a message

- Select  next to a message to show you liked it.
- Select  to save a message for later. Select your picture to see your saved messages.

Start a new conversation in a channel

- Enter your message in the **Start a new conversation** box, and press Enter.


Get someone's attention in the channel

- Type  in front of a team member's name while you're creating a message to include them in the conversation. The person will receive an @mention notice. You can @mention a team or channel, if your admin enables it.

See where you've been mentioned

- Look for the circle on the left next to **Teams** and **Activity** to see the number of times your name has been mentioned in a conversation.

Co-edit a file

1. If a document has been uploaded to a conversation or Files, select the file to open it.
2. Select **Edit**, and then select where to edit the file in the app or online.
3. Select  to continue the conversation while viewing or co-editing the file.

Work in file together

Working in Microsoft Teams lets you work on files together at the same time. Also, messages about the document stay with it and will show up in your team conversations.

1. In a team conversation or in the **Files** tab, select **More options** **⋮** next to the file.
2. Choose if you want to edit the file in Teams, on your desktop, or online.
3. Edit the file. Colored flags show who else is working on it with you.
4. Select **Start conversation** to add a message about the file.
5. Type your message or @mention someone and select **Send**.

Note: Linux users won't be able to open files in the Office desktop app.

Send email to a channel

If you need to communicate by email, send it to everyone in a channel.

Get and copy a channel's email

1. Select **More options** **⋮** > **Get email address**.
2. Select **Copy**.
3. Paste the copied email address into a new email.
4. Select **Send**.

Forward an email to a channel

1. Open the email you'd like to forward.
2. Paste the copied email address into the To line of your email.
3. Select **Send**.

Create a Plan with Planner

Create a board with Planner to keep you and your team organized in Microsoft Teams.

1. In a channel, select **Add a tab**.
2. Select **Planner**.
3. Select **Create a new plan** or **Use an existing one**, and then select **Save**.
4. With a Planner board, you can:

- Create buckets
- Add and assign tasks
- Update tasks
- Chart progress

Create and format a post

Create and format a post or announcement to start a conversation in a channel.

1. Type a message.
2. Select **Format**.
3. To create an announcement, select a post type > **Announcement**.
4. Type a headline, and then add a color scheme or your own background image.
5. Format your post with the following options:
 - **Add a subject**
 - **Bold**
 - **Bulleted list**
 - **Insert link**
6. Select **Send**.


Post a message to multiple channels

Cross-post an announcement or information to share it across multiple channels at once.

1. In a channel, start a message and select **Format**.
2. Choose the message type you want: **New conversation** or **Announcement**.
3. Select **Post in multiple channels** > **Select channels**.
4. Choose which channels to cross-post to.
You can share wherever you're a member.
5. Select **Update**, and your selected channels appear in the post.
6. Select **Everyone can reply** to let anyone respond to your post, or select **You and moderators can reply** to restrict responses to just you and the moderators.
7. Type a message and select **Send**.

Your posts appears in the selected channels.

Save a post message

- To save a message or post, select **Save 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.

Upload and share files

Anywhere in Teams, look for the paperclip icon  to **Attach** a file. Alternately:

- Go to the **Files** tab.
- Select **Upload**.
- Select single or multiple files from device computer or OneDrive for Business account.
- Select **Open**.

Set up your Teams mobile apps

Get to your files from anywhere - at work, at home, or on the go.

Set up the Office apps on your mobile device.



Choices for your mobile devices



How to create a meeting



Schedule your next meeting

Meet with anyone, anywhere with high quality video and audio.



Meet now

Start a meeting right away.



Schedule a meeting

Share the link to meet later.

Chatting is great for quick messages, but sometimes a face-to-face conversation is a better option. Thankfully, it just takes a moment to learn how to create a meeting in Microsoft Teams, whether it's with one person or 20!

There are two ways to set up a meeting: starting one instantly or scheduling one for a later time. The easiest way for quick calls is to open a chat and click the **Schedule a meeting** button (it looks like a calendar with a plus sign). This automatically invites the other party and works in group chats as well.

For everything else, the process of setting up a meeting in Teams is similar to what you're used to from Outlook:

1. Open the **Calendar tab** on the left-hand side.
2. Click **New Meeting** in the top right corner.
3. Enter the **details** of your meeting.
4. Click **Save**.

Note that you can also create a meeting from a channel, which will automatically invite all members of that channel. If you're having trouble finding a suitable time, you can check the scheduling assistant tab at the upper part of the screen to see invitees' schedules.

How to join a meeting

Joining a meeting is even easier, and again works just like you'd expect if you've used Outlook:

1. Open the **Calendar tab** on the left-hand side.
2. Select the meeting and click **Join**.
3. Adjust your **video** and **audio settings**.
4. Click **Join Now**.

You can also click the **Join Microsoft Teams Meeting** link in the email invite. Depending on the meeting settings, you'll either join the meeting right away or enter a waiting room until someone lets you in.

How to share your screen in a meeting

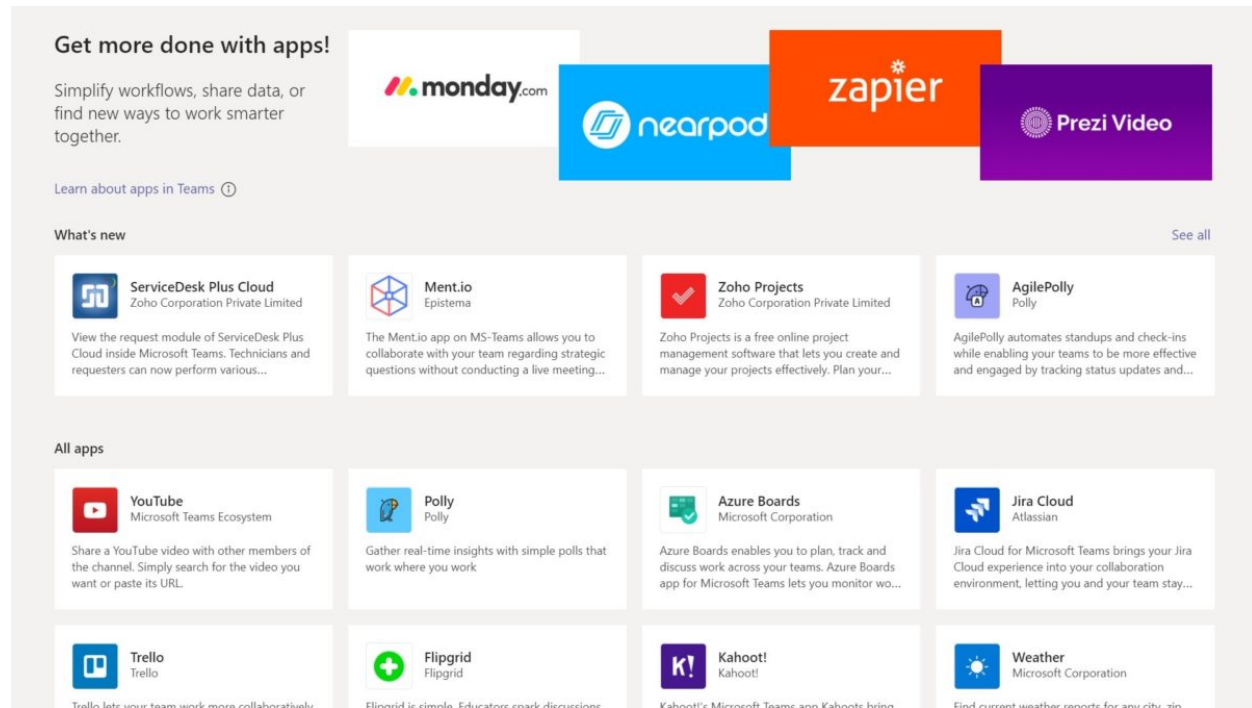
Sharing files in a Microsoft Teams channel is great, but if you want to run through it in person you need to share your screen in a meeting. Teams makes it easy to do this. It even has built-in integration with PowerPoint for easy business presentations.

Here's how to do it:

1. In a meeting, click **Share** in the center of the screen (you may need to move your mouse).
2. Select the **screen, window, or document** to share.
3. A red border appears around the content you're actively sharing.
4. When finished, click **Stop Sharing** in the bottom right.

If you don't have the document you want to share open, you can also click the **Browse** button in the sharing menu to find it. In general, it's better to share a specific window or document instead of your whole desktop.

How to install apps



Apps and connectors are a great way to add specific functions to Teams. They just take a second to install, and you can add them for just yourself or your entire team. There are three places to install apps, and each of them performs a different function.

The first is in the sidebar, which is customized just for you. If someone else in your organization adds the same app they may share information (with apps like Trello, for example), but others (like OneNote) will only show your files. You can add these by clicking the **apps** button in the bottom left of the screen.

The second place to add apps is as a tab, which shows up for everyone in a Team at the top of the page. There are a few default tabs like posts, files, and wiki, but just to the right of those is a **plus** icon, which is how you can add more. Apps may not look or work exactly the same depending on where they're added.

The final place is directly in the chat window, appearing next to options for formatting, emojis, attachments, and more. Just click the **more options** icon, then select the app to add. If you click **more apps**, teams will automatically pull up the list with the messaging filter applied.

Note: IT limits the applications that can be installed. Contact the IT Service Desk (623)975-8007 regarding the install of applications.

How to change your Teams meeting background

In the current era of telecommuting and working from home, it's likely that your home office isn't exactly the most professional environment. This is normally fine, but for client meetings or video conferences with your boss you might want something a bit more discreet. That's where Microsoft Teams virtual backgrounds come in.

There are two ways to change your Teams meeting background: One with a simple blur or one with a background image. Both take just a few seconds to set up. Note that not all hardware supports this, so if the option doesn't appear you may need to upgrade your camera first.

You can change your background before or after a meeting starts, but the steps are pretty much the same:

1. In the meeting controls menu, click the **more options icon**.
2. Select **Show background effects**.
3. Choose a **blurred background** or **virtual background image**.
4. (Optional) Click **Add new** at the top of the background settings window to add your own images.

If you do end up adding your own image, make sure it's sufficiently high quality or it may look too blurry. For business use, you should also avoid using copyrighted photos or imagery.