**Teams – Functions and Tools**

Real-time communication and sharing platform that allows groups to efficiently collaborate and plan.

[**^**](#TeamsPath) = Select **Teams** from sidebar >Select a *Team* from main panel.

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| **#** | **Category** | **Task** | **Description** | **Steps** |
| 01 | Team | Switch View | How to switch between Grid and List video. \*Recommend Grid | Select **Team** from sidebar >Find **Join or create team** button (either at bottom-left or top-right of page >Select **… More** button >Select **Switch View** button >Select an option and OK button. |
| 02 | Team | Create Team | How to create a private team for your group. | Select **Teams** from sidebar >Select **Join or create team** button at top-right of page >Select **Create team** button from main panel >Choose a team type from options >Fill in information >Add Members.  **Name**: Name the team. Recommend using a group name rather than a project name (ex. Admissions Office - Planning).  **Description**: Enter the team’s goal or mission (optional).  **Privacy**: Default is Private. Changing to public allows others to join team on their own.  \*Members from outside SUNY Potsdam can be added – See *Add a Guest team member* below. |
| 03 | Team | Add Team Member | How to add a member to an existing team. | [**^**](#TeamsPath)Select  **More** button >Select **Add members**. >Enter Name/Email of campus members.  \*Members from outside SUNY Potsdam can be add – See Adding Guests to Teams below. |
| 04 | Team | Add Team Member - Guest | How to add a non-SUNY Potsdam member to an existing team. | [**^**](#TeamsPath)Select  **More** button >Select **Add members** >Enter an email address >Select the “guests” email >Select **Add** button.  \*Guest members will be sent an email and will be prompted to create a FREE Microsoft Account (if they don’t already have one) in order to join the team. |
| 05 | Team | Create Team  from O365 group | How to create a private team for your group from a pre-existing O365 group. | Select **Teams** from sidebar >Select **Join or create team** button >**Create a team** button from main panel >Choose a team type from options >Select *Create a team using an existing team* link >Select a team/group from options. |
| 06 | Team | Invite Team Member | How to invite someone to join an existing Team. | [**^**](#TeamsPath)Select  **More** button >Select **Get link to team** >Email link to invitee.  \*Team owner will need to Approve request to join when invitee uses. See *Manage Team*. |
| 07 | Team | Add Channel | A *Channel* is an area within a team for specific work on a task or topic. | [**^**](#TeamsPath)Select  **More** button >Select **Add channel** >Name the channel.  \*All Teams start with a *General* channel. |
| 08 | Conversation | Add Message - Normal | Team “conversations” are created as separate posts within a channel.  \*Always reply to a post unless you’re starting a completely new conversation. | [**^**](#TeamsPath)Select a Channel >Select *Conversations* tab at top >Select  **Reply** button below a conversation [OR use *Start a new conversation* window >Select  **Format** button >Enter a Subject Line] >Enter message >Select  **Send** button.  \*Team members will see post when they check Teams. See @Mention below for more important postings. |
| 09 | Conversation | Add Message - @Mention | Use the *@Mention* feature to immediately alert a member or team of a new conversations or reply. | Enter ***@the-person’s-name*** or ***@the-Team’s-name*** at the start of a message or reply.  \*ONLY use @Mention if the person needs to be notified of the post.  \*Notifications display in the channel and in **Activity** on left-pane. |
| 10 | Conversation | Team Conversation (Tools) | Tools available when posting or replying to a conversation within a team channel. | When posting/replying:  **Format**: Select  button for options.   * **Subject Line:** Always enter a subject line on a new post. * **Format**: Use bold, italics, underline, highlighter, font size, numbered list, etc. * **New Conversation**: Use to limit who can reply. * **More Options**: Use  button for even more formatting options.   **Attach**: Use  button to add files.  **Community**: Use  buttons for team building and fun.  **Meet Now**: Use  button to voice or video conference Team members.  **Messaging Extensions**: Use  button for access add-on apps. |
| 11 | Messaging | Line Breaks | Currently, ENTER will send a message. Use one of two options to create a line break. | Select the **Format** button and use ENTER normally.  OR  Press **Shift+Enter** to create a line break. |
| 12 | Conversation | Conversation (More Tools) | Special “…” tools available for a previously posted conversation or rely. | Hover over post >Select  icon >Select from options.  **Save this message**: Message will be bookmarked and available in *Saved* section of your account [select your user icon on top-right to open account].  **Edit**: Use to modify your post [Teams will display that a change has been made].  **Delete**: Use to delete a post [Teams will display that a post has been deleted].  **Mark as unread**: Post will show as unread.  **Copy link**: Link can be pasted into another message or email.  **Translate**: Language text translator.  **Immersive Reader**: Can read text to you and/or enlarge the size of text.  **Turn Off notifications**: For the specific post, turn on/off notifications. However, you will still be notified if @mentioned. |
| 13 | Messaging | “Like” Message | Button used to call attention/praise to a conversation or chat message. | Hover over post >Select *Thumbs-Up* icon. |
| 14 | Messaging | Bookmark Message | Button used to save a conversation or chat message for further action. | Hover over post >Select  icon >Select **Save this message**.  \*Message will be bookmarked and available in *Saved* section of your account. Select your user icon on top-right to open account. |
| 15 | Team | Team (More Tools) | Tools available to manage or modify a Team. | [**^**](#TeamsPath)Select  **More** button >Select from options.  **Manage team**: Add/remove members, change members to owners, mange requests to join team, and manage team settings.  **Add Channel**: Add a channel to the team.  **Add member**: Add members window.  **Leave the team**: Remove yourself from a team.  **Edit team**: Change the team name and description.  **Get link to team**: Send a team link to potential members.  **Delete team**: Completely delete the team and all conversations.  [**Hide**: Move a team to a sub-category called *Hidden Teams*. Hide is only available from All-Teams window.] |
| 16 | Channel | Channel (More Tools) | Tools available to manage or modify a specific channel. | [**^**](#TeamsPath)Hover over channel >Select  **More** icon >Select from options.  **Channel Notifications**: Customize how you want to be notified.  **Hide**: Move the channel to a sub-category called *Hidden Channels* located just below featured channels.  **Manage Channel**: Limit who can post in a channel.  **Get email address**: Get an address that can be uses to forward email directly to the channel. Forwarded emails will be posted as messages in the conversation tab.  **Get link to channel**: Send a link just for the channel to potential members.  **Edit this channel**: Change the channel name and description.  **Connectors**: Add apps or links to apps directly into the channel.  **Delete channel**: Completely delete the channel and all conversations.  \*WARNING: Members CAN delete channels by default. Go to **Manage team** and turn off this option in the *Settings* tab. |
| 17 | Channel | Restore Deleted Channel | You can restore a Channel that has been deleted. | Select  **More** icon next to a Team name >Select **Manage Team** >Select **Channels** tab >Expand *Deleted* section > Select  **Restore** button. |
| 18 | Channel | Channel (Features) | Working areas of a selected Channel. | When a Channel is selected (main area).  **Team Name**: Select Team Name to link to the *Manage Team* area.  **More**: Select  **More** icon to get the *Channel (More Tools)* tools. And, an *Open in SharePoint* option.  **Conversations Tab**: Contains channel conversations (default tab).  **Files Tab**: Area to upload and share, search, and co-edit team files.  **Staff Notebook Tab**: A OneNote notebook for the team that (provides robust note taking options).  **Meeting Notes Tab**: Quick notes you can use during a audio/video meeting that link to the meeting.  **+ Tab**: The *Add a Tab* button allows you to add Apps to the channel. |
| 19 | Chat | Chat (Features) | Working areas of Chat when a contact is selected. | When a contact is selected (main area).  **Contact Name**: Hovering over name opens window with quick access to contact info, chat tab, send email, organization tab, conference call, and chat (for multiple contacts, hover over *participants* link).  **Edit Group**: Use the  **Edit** button to give the chat group a name.  **Meeting Buttons**: Start a conference call quickly using the  buttons. [\*\*First, send a “Can you talk?” chat message to confirm a contact is available].  **Conversations Tab**: Chat conversations with that contact (default tab).  **Files Tab**: Area to upload and share files with contact.  **Organization Tab**: Organization Chart for contact (supervisor; colleagues).  **Activity Tab**: List of team activity you have in common with contact.  **+ Tab**: The *Add a Tab* button allows you to add Apps to the chat area for collaboration with the contact. |
| 20 | Team | Team Program (Features) | Teams program features located on the top and left menu bars (not within the *Teams* tab). | Left Menu:  **Activity Tab**: Provides a “feed” on all messages and activities throughout all of your teams and provides a way to filter the feed.  **Chat Tab**: Area to collaborate and communicate with contact(s) that is private and NOT connected to a Team.  **Teams Tab**: Area containing access to all of your Teams.  **Assignments Tab**: If you have “class” Teams, displays assignments you have created. Also, allows you to create new assignments/quizzes.  **Calendar Tab**: Sync’s with and displays your Outlook main calendar. Also, allows you to create new meetings and appointments. [\*Meetings created in Teams are web-conference capable by default. So, users should specify in *Location* if they are meeting in a physical room].  **Calls Tab**: Displays recent contacts and team members allowing you to quickly make a call (Video/audio) and leave a voicemail.  **Files Tab**: Access to your recent files including Teams and OneDrive.  **… Tab**: Area to add apps for you and/or your teams.  **Get app Tab**: QR code to download Teams app.  **Apps Tab**: Area to add apps for you and/or your teams  **Help Tab**: Training links and report problems and/or feedback.  Top Menu:  **< > Buttons**: Use the back (and forward) buttons to return to a previous page in Teams.  **New Chat Button**: Select  icon to start a new chat conversation with a contact. Use the drop-down arrow to give the chat group a name.  **Command Window**: Once you know commands, this window is the fastest way to do many things within Teams [advanced – ex. /call].  **Account Icon**: Select to gain access to your account (including settings, Saved messages; availability). |
| 21 | Chat | Chat Conversation (Tools) | Tools available when posting or replying to a chat message. | When posting/replying:  **Format**: Select  button for options.   * **Format**: Use bold, italics, underline, highlighter, font size, numbered list, etc. * **More Options**: Use  button for even more formatting options.   **Delivery Options**: Use **!** button to make message Important (red exclamation mark added) or Urgent (recipient notified every 2 min for 20 mins).  **Attach**: Use  button to add files.  **Community**: Use  buttons for team building and fun.  **Schedule**: Use  button to schedule a meeting.  **Messaging Extensions**: Use  button for access add-on apps. |
| 22 | Chat | Add Chat Message | Send a private message to selected team members, a group, or anyone in your organization.  \*This conversation is private and will NOT display in a Team or Channel. | Select **Chat** from sidebar >Select a chat contact from left-pane OR >Select  **New Chat** icon at top of screen >Search for contact(s) using **To** window >Use *Type a new message* window.  \*Chat works like a cell phone text string.  \*Recipients receive a pop-up notifications and a RED numbers appears next to the *Chat* menu. |
| 23 | Call | Start Chat Call- Audio/Video | Make an audio or video call to selected team members, a group, or anyone in your organization.  \*This conversation is private and will NOT display in a Team or Channel. | Select **Chat** from sidebar >Select a chat contact (contact group) from left-pane OR >Select  **New Chat** icon at top-left of screen >Search for contact(s) using **To** window >Use *Type a new message* window >Send a “Can you talk?” message to confirm contact(s) is available >Select the  *Phone* icon or *Camera* icon to start a call if contact is free [See ***Online Call*** below for more info].  \*The Camera option will allow call participants to share video if they have a webcam. |
| 24 | Chat | Chat Contact (More Tools) | Tools available to manage or modify a Chat contact. | Select **Chat** from sidebar >Hover over a chat >Select  **More** icon >Select from options.  **Mark as unread**: Display chat as if you still need to read it.  **Pin**: Pins the chat contact to the *Chat* pane (left-pane) for easy access. Also, prevents the chat to auto-hide do to inactivity.  **Add to favorite contacts**: Adds chat to the *Contacts* section of the *Chat* pane for easy access.  **Mute**: Turns off pop-up notifications for this chat.  **Hide**: Removes chat contact from *Recent* section.  **Notify when available**: When a Contact’s status changes to *Available*, Teams will send you a pop-up notification.  **Manage apps**: Add/delete Apps to a chat conversation that can be used for collaboration. |
| 25 | Account | Account (Tools) | Tools and setting for your account. | Select **Account** icon (circle on top-right banner) >Select from options.  **Change picture**: Select *Change picture* by your name to add/change an image others will see as your account picture.  **Availability**: Use pull-down to manual set you current availability [Teams automatically sets availability using activity and calendar\* settings].  **Set Status Message**: Create a custom “availability” (aka Status) message.  **Saved**: Any message that has been *Bookmarked* can be found here.  **Settings**: Location to change *General*, *Privacy*, *Notification* and other settings for your account.  **Keyboard**: Find and/or change keyboard shortcuts for Teams.  **Updates**: Check for updates for Teams.  \*WARNING: Calendar events not found in the main Calendar (i.e. other calendars created in Outlook) will NOT change your Available/Busy status in Teams. \*\*Also, there is a lag in system.\*\* |
| 26 | Account | Account (Settings Tool) | Options in the *Settings* section of your account. | Select **Account** icon (circle on top-right banner) >Select **Settings** >Select from options.  **General**:   * **Theme:** Change how Teams looks (Dark, High contrast). * **Application**: Change when/how Teams starts when you login to your computer. * **Language**: Change the language used in Teams.   **Privacy**:   * **Do not disturb:** Manage a list of those that can contact you in teams even when your status is set to *Do not disturb*.   **Notifications**: Teams notifications can normally be set to banner, banner email, only in Activity feed, or off.   * **Mentions:** Set personal, channel, team notification. * **Messages**: Set notifications for Chat, Conversations (I started), Conversations (others started), and more. * **Other**: Set notification for changes to team membership and roles; Set notification sounds and frequency of email notification [email notification based on inactivity on computer/device]. * **Meetings**: Set if notified when meeting starts. * **Status**: Add/remove contacts from the *Notify when available* status available in Chat.   **Devices**: Set which devices are used when making calls (speakers, microphone; camera).  **Permissions**: Manage permissions for apps added to teams. |
| 27 | Call | Meeting – Meet Now | Start an impromptu audio/video meeting in a team channel. | From a team conversation:  >Select  **Meet Now** camera icon >Enter a *Subject* for the meeting >Scroll down >Select **Meet Now** button [See ***Online Call*** below].  \*All team members will be allowed to join the meeting. If you need a private meeting, see ***Schedule a Meeting*** below or see ***Start Chat Call*** above.  \*IMPORTANT: If the meeting is part of a conversation, select *Reply* to link the meeting to the conversation. Then, select the *Meet Now* icon. |
| 28 | Calendar | Meeting – Schedule a meeting | Schedule an audio/video meeting. | Select **Calendar** from sidebar >Select **New meeting** button >Enter a *Title* for meeting >Select a channel from the pull-down OR >Select individuals using the *Invite people* field.  \*If a channel is selected, all members will be able to participate in the meeting. Use Invite people option if you want a private meeting.  \*ERROR- Currently, when you select a channel the window does NOT close when you select the ***Schedule*** button. You must select the ***Discard changes*** button to close. |
| 29 | Call | Online Call (Tools) | Voice and video tools available during a conference call. | During a Video call (Meet Now, Scheduled Meeting, or Chat):  **Timer**: Clock displaying the duration of the meeting.  **Camera**: Use  button to turn camera on/off.  **Mic**: Use  button to turn microphone on/off.  **Share**: Use  button to share your computer screen or a specific window on your computer.  **More**: Use  button to use additional call features. **^**only available in *Meet Now* and **$**only available in *Chat*.   * **Show device settings:** Use to select/adjust camera and microphone settings and settings to allow participants to move through PowerPoint presentations on their own. * **Show meeting notes^**: Open a note taking area attached to meeting. * **Enter full screen**: Switch to full screen. * **Hold$**: Place call on hold. * **Transfer$**: Forward call to other Teams contact (currently, the call seems to go directly to voice mail). * **Consult then transfer$**: Send a chat message and forward call to other Teams contact (currently, the call seems to go directly to voice mail). * **Blur my background**: Obscures your background for privacy. * **Keypad**: \*\*Currently not activated. * **Start recording^**: Use to video record meeting. \*\*This feature NOT available in a Chat call. \*\*A message will warn members that the meeting is being recorded. \*\*The recording will auto-save once everyone leaves the meeting or when Stop is selected. * **Turn off incoming video**: Especially useful for travelers trying to save battery life on laptop or device.   **Chat**: Use  button to display a conversations window, which will attach to the meeting.  **Participants**: Use  button show/invite meeting participants. Also, provides a copy *Join Meeting* link button.  **Hang Up**: Use  button to leave a meeting. \*\*Even if you started the meeting and leave, the meeting will continue until all participants have left the meeting. |
| 30 | Call | Spacebar during meeting | Muting your mic during a multi-person meeting is a best practice. Use the spacebar to mute/unmute. | During meeting >Press *Microphone* icon to mute >Press **Spacebar** to Mute/Unmute for rest of meeting. |
| 31 |  | Files- Sharing | Share a file within a chat or channel conversation. | Select a contact/channel >Start or Reply to a conversation >Select  **Attach** button >Select from options and locate file.  **Recent**: Displays a list of recently used files.  **Browse Teams**: Allows you to find files uploaded to a Team or Channel.  **OneDrive**: Allows you to find files uploaded to your OneDrive.  **Computer**: Allows you to find files on your computer’s hard drive. |
| 32 | Teams | All Team (Features) | Tools available to manage or modify the “All Teams” window and to manage all teams. | Select **Teams** from sidebar >Select  **More** button >Select from options.  **Your Teams**: Area listing all active teams.  **Hidden Teams**: Area that contains teams that you have hidden (aka teams you don’t use often).  **Achieved Teams**: Area only visible if you have archived a team.  **Filter**: Use the  **Filter** icon to sort through and find one of your teams.  **More**: Use  **More** button to manage a team or switch view.   * **Manage Teams:** In addition to everything you can do to manage a team using  **More** tool options, this is the ONLY place you can Archive/Restore a team. \*\*If desired, archived content can be set to “view only” for a team. * **Switch View**: Switch from Grid view (Teams are blocks) to List view.   **Join or create team**: Use this button to create a new team, join an existing public team, or join a team using a code. |
| 33 | Planner | Adding Planner to Teams | Planner allows you to create a set of organized tasks and assign them to members. It can be added to Teams. | [**^**](#TeamsPath)Select a channel >Select **+ Add** *a tab* button >Select **Planner** >Select *Create a new plan* [OR *Use an existing plan*] >Name plan >Uncheck *Post to channel* box >Select **Save** button.  \*Although full **Planner** functionally is not available in Teams, essential tasks are accessible.  \*Access full functionally by selecting the *Go to website* icon on the top-left menu. |
| 34 |  | Renaming Issue | SharePoint automatically creates a file folder for each new Channel. | However, once created it can’t be renamed. If channel is renamed, it will still point to originally name file folder. If folder is renamed, SharePoint will automatically create a new folder (with the original name) if content is added to the *Files* section of the Channel in Teams. |
| 35 |  | Google/Dropbox Files - Team | Teams allows you to share your Google Drive and Dropbox files within Teams.  Currently Disabled by Admin | Select **Team** from sidebar >Select a channel >Select **Files** tab >Select **Add cloud storage** button >Select an option from list >Sign-in to service.  \*Although this creates a link to your cloud storage, you will need to go to that cloud storage and SHARE access there with team members in order to give them access. |
| 36 |  | Google/Dropbox Files - Personal | Personally access your Google Drive (Dropbox, etc.) files within Teams.  Currently Disabled by Admin | Select **Files** from sidebar >Select **Add cloud storage** button from left-pane >Select an option from list >Sign-in to service.  \*Although you can view content, you will not be able to edit content in Teams. However, you can access content and easily uploaded to Teams to share. Once upload, you can edit Word docs, etc. |
| 37 | Calendar | Add a group Calendar | By default, Teams no longer creates a Group Calendar for a Team. However, you can add one as if the team really wants one. | Although I think it is still possible to add a “group calendar” to a team, Teams is making it difficult to do so. I think they don’t think it’s necessary and they are trying to minimize the use of the older SharePoint system. The instructions below are incomplete.  [**^**](#TeamsPath)Select **General** channel > Select **General**  from middle-top of screen >Select **Open in SharePoint** >Select **Conversations** tab from sidebar >Select  **Calendar** icon. |