



# BRAINSTORM QUICK START CARD

## Microsoft Teams

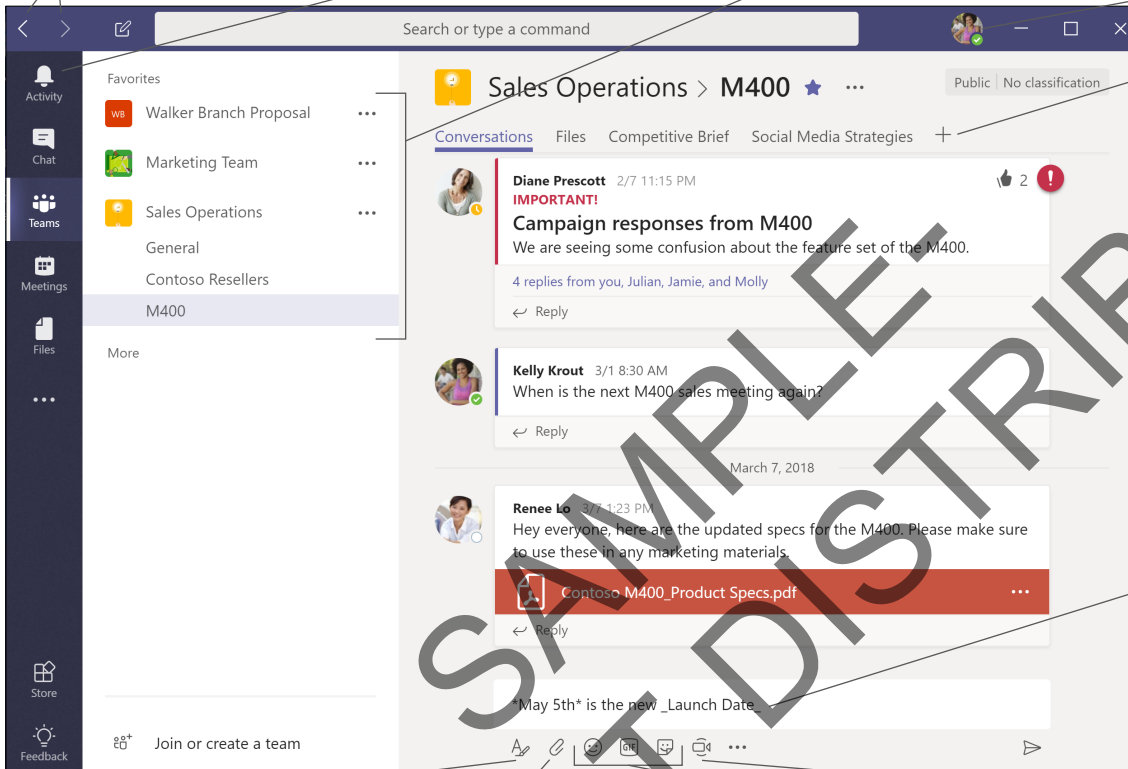
**Stepping back:** Click forward or backward through your navigation history in the desktop version of Microsoft Teams.

**Navigation bar:** Switch to your activity feed, chat, team pages, meetings, and Microsoft Teams files.

**Team options:** Mark a team as a favorite to display it on the Teams list, or at the bottom of the list, click **Add team** to create a new team or map an existing Microsoft Office 365® group onto a team.

**Settings:** Click your profile picture to adjust your availability and make a slew of other personalizations.

**Tool tabs:** Click the **add a tab** icon **+** to add your team's go-to resources.



### TAKE SHORTCUTS

New chat . . . . . **Alt+N**  
Open Help . . . . . **Alt+H**  
Open Settings. . . . **Alt+G**  
Accept call . . . . . **Ctrl+Shift+A**  
Start video call . . . **Ctrl+Shift+U**  
Attach file . . . . . **Alt+A**  
Open Activity . . . . **Alt+1**  
Open Chat. . . . . **Alt+2**  
Open Teams . . . . . **Alt+3**  
Open Meetings. . . . **Alt+4**

### FORMAT TEXT

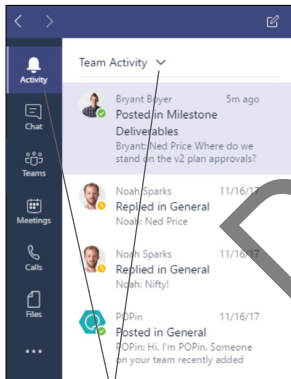
Bold . . . . . **\*asterisks\***  
Italic . . . . . *\_underscore\_*  
Strikethrough . . . ~~-tildes-~~  
Header . . . . . **## before text**  
Block quote. . . . **> before text**

**Rich text:** Add emphasis to your post with rich text editing tools. Add **bold**, *italic*, or underlining.

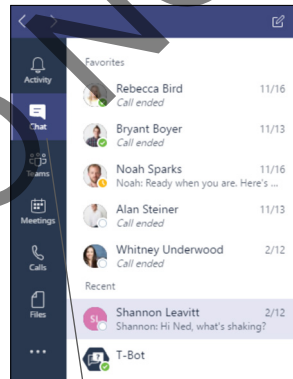
**Attachments:** Upload a file to the chat.

**Reactions:** Insert an emoji, GIF, or sticker into the conversation.

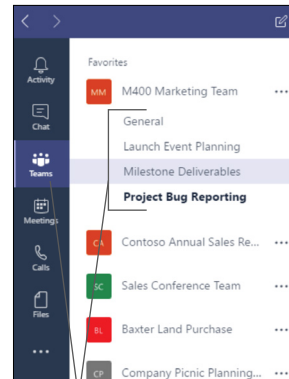
**Meetings:** Start an impromptu meeting. Every member of the channel will get an invitation to the meeting.



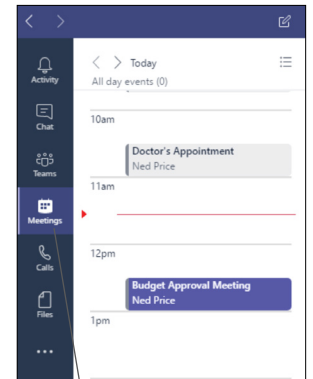
**Activity feed:** On the navigation bar, click **Activity** to see recent changes. Click **Team Activity** to categorize activity by Feed or My Activity.



**Private chats:** On the Skype® for Business framework, Microsoft Teams brings private, persistent chats to your team workspace.



**Teams and channels:** Find your teams and their channels. Think of teams as work groups and channels as discussion topics or projects.



**Calendar:** Your Microsoft Outlook® calendar syncs to Teams to ease appointment management. Plus, join any Skype for Business meeting right from Teams.

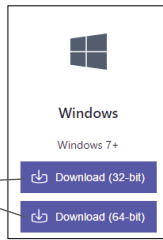
*This Quick Start Card is for use by COMPANY employees only. Do not distribute.*

## DOWNLOAD THE TEAMS DESKTOP APP

Download the Microsoft Teams desktop app to use all of the online features as well as video calling.

To download the Teams desktop app:

1. In your web browser, navigate to <https://teams.microsoft.com/downloads>.
2. Select the 32-bit or 64-bit version.
3. Follow the prompts to complete the installation.

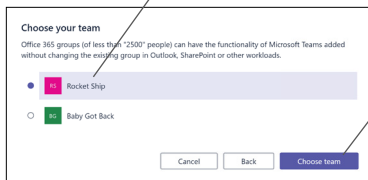


## WORK WITH OFFICE 365 GROUPS

Invite your Office 365 groups to the Microsoft Teams party to facilitate collaboration without reinventing the wheel. Additionally, each team you create in Microsoft Teams will create a corresponding Office 365 group.

To create a team from an Office 365 group:

1. On the Teams navigation bar, select **Teams**.
2. At the bottom of your team list, click **Join or create a team**.
3. On the Suggested Teams page, click **Create team**.
4. At the bottom of the Create Your Team window, select **Create a team from an existing Office 365 group**. A new window displays the Office 365 groups that you administer.
5. Select the group you want to create a team from.



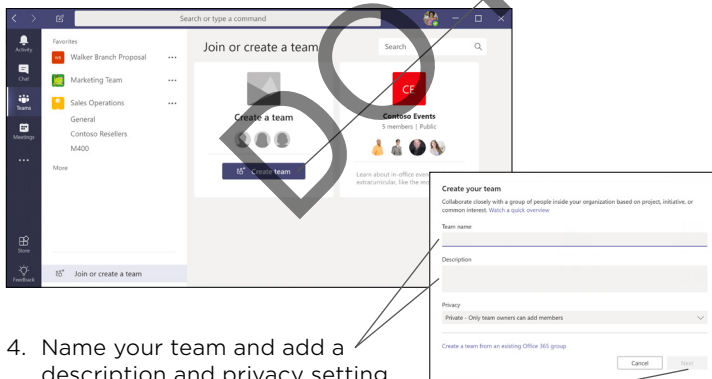
6. Click **Choose team**. The new team appears in your teams list in Microsoft Teams.

## CREATE A TEAM

Starting a project? Create a new team page to simplify collaboration and make sure everyone stays in the know.

To create a new team:

1. On the navigation bar, select **Teams**.
2. At the bottom of the teams list, click **Add team**.
3. On the Suggested Teams pane, click **Create team**.

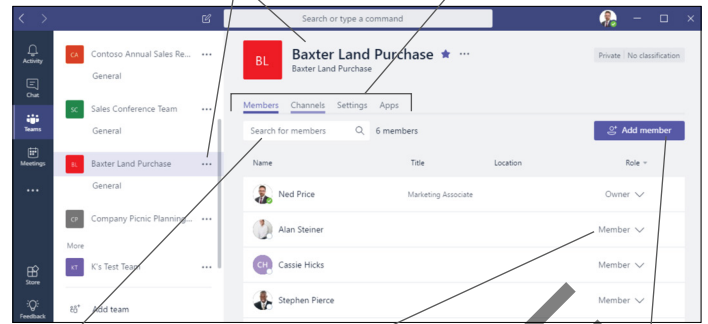


4. Name your team and add a description and privacy setting.
5. Click **Next**.
6. Invite individuals, groups, and distribution lists.

## GET TO KNOW YOUR TEAMS PAGE

Access the main team page from any channel by clicking the title or clicking the **More** icon ... and selecting **Manage team**.

Find the team's members, channels, and apps. If you have administrator permissions, you will have access to the team settings.



Search for a specific member.

Assign member or administrator permissions.

Add team members from inside or outside your organization.

## Change Team Settings

If you're a team administrator, you can change the team's settings to fit your fancy.

To change settings:

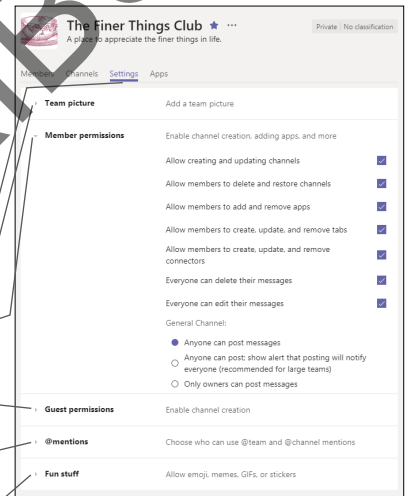
1. Go to the main page of the team you want to edit by clicking the **More** icon ... next to the team name and selecting **Manage team**.
2. Select the **Settings** tab.

Add or change the team picture.

Decide how much control to give your team members.

Select the level of access given to guests.

Configure @mentions of teams and channels.



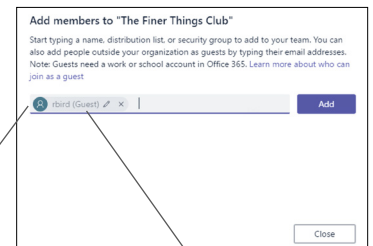
Set up how emojis, GIFs, stickers, and memes can be used.

## Add Team Members

When your project needs a wider perspective, invite more team members from inside and outside your organization. Guests from outside your organization need only an Office 365 account to join in the fun.

To add team members:

1. On your team page, next to the team name, click the **More** icon ... and select **Add members**.
2. Type the member's contact name or email address.
3. Click **Add**. If you don't have the necessary permissions, work with your IT department to finish adding the guest and setting access permissions.
4. When you finish adding team members, click **Close**.



Members outside your organization are labeled as guests wherever their names appear in Teams, and your team page indicates that guests are included in the team. Guests can access teams and channels, participate in conversations, and post on the channel.

## CHOOSE A CHANNEL

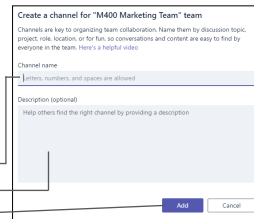
Each new team includes a general channel by default. Add more channels for specific topics, projects, or interests. All channels are public, so every member of the team has access.

### Create a Channel

Add channels to your team to create a dedicated space where you and your coworkers can chat about specific projects or topics.

To create a channel:

1. On the navigation bar, select **Teams**.
2. To the right of the team name, click the **More** icon  $\cdots$ .
3. From the menu, select **Add channel**.
4. In the new window, name your channel and add a description if desired. Click **Add**.

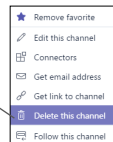


### Delete a Channel

When your project is over and your channel is no longer relevant, clean up the clutter by deleting the channel.

To delete a channel:

1. From your team channel list, right-click the channel you want to remove.
2. Select **Delete this channel**, and then click **Delete** again to remove the channel from your team.



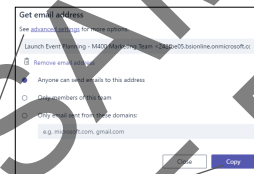
**Note:** Team channels can be deleted only by the team administrator.

### Email a Channel

Want to share an important update with the entire team? With Teams, you can email a message to a channel. Team members can then view and respond to that message within Teams.

To get a channel email address:

1. Right-click the channel you want to retrieve an email address for.
2. From the menu, select **Get email address**. Choose **advanced settings** to change the permissions for the address.
3. Click **Copy**. The link is saved, ready to paste.

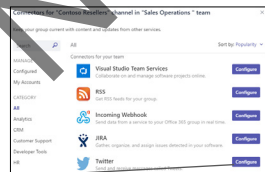


### Add Connectors

Connectors are broadcast-only feeds, like RSS feeds, that you can display on your channels. Add the ones your team checks regularly, and never miss an update.

To add a connector to a channel:

1. Next to the channel name, click the **More** icon  $\cdots$ .
2. From the menu, select **Connectors**.
3. Find the desired connector, and click **Configure**.
4. Follow the prompts to add the connector.

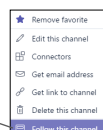


### Follow a Channel

If you don't want to miss out on any updates, you can follow a channel to receive a notification whenever there's any new activity.

To follow a channel:

1. Next to the channel name, click the **More** icon  $\cdots$ .
2. From the menu, select **Follow this channel**.

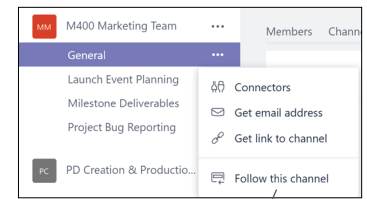


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1. Next to the channel name, click the **More** icon  $\cdots$ .
2. From the menu, select **Follow this channel**.



### Get a Link

Get new eyes on your conversation by sharing a link to your team or channel.

To get a link:

1. In your team list, right-click the team or channel to share.
2. From the menu, select **Get link to team** or **Get link to channel**.
3. Click **Copy**. The link is saved to your Clipboard, ready to paste.

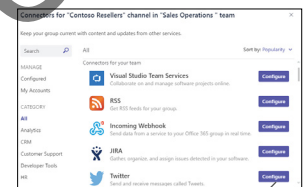


### Add Connectors

Connectors are broadcast-only feeds, like RSS feeds, that you can display on your channels. Add the ones that your team checks regularly, and never miss an update.

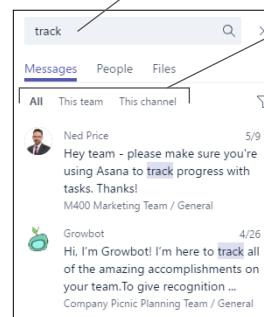
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1. Next to the channel name, click the **More** icon  $\cdots$ .
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## SEARCH

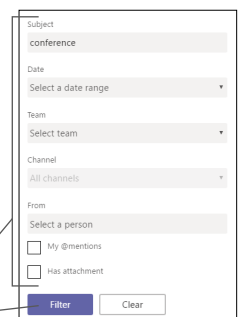
Make a global search to find teams, channels, people, and more. Use the search field to the right of the navigation bar.



Sort messages and files by **All**, **This team**, or **This channel**.

Narrow the search results by using a filter.

Enter the filter parameters and click **Filter**.

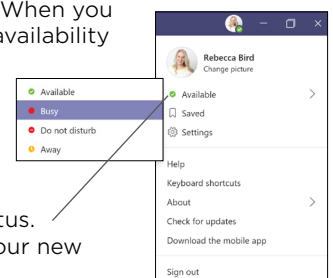


## SET YOUR AVAILABILITY

You can't be available all the time. When you really need to focus, change your availability status to busy to let your team members know you're occupied.

To change your availability status:

1. Click your profile picture at the top of the window.
2. From the menu, select your status.
3. From the status menu, select your new availability status.



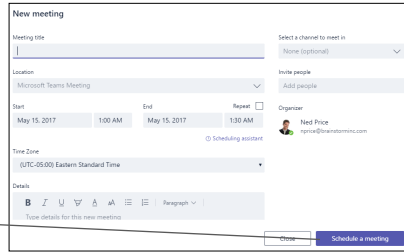
## MEET IN TEAMS

Hold meetings right in Teams. Schedule them from your calendar or start a meeting from a private chat. If meeting times are tricky for your group, use the scheduling assistant to find the best time. Join a meeting from Teams or Outlook—there's one destination but many roads.

### Start a Meeting from the Meetings Tab

To start a meeting from the Meetings tab:

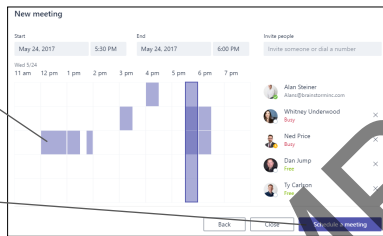
1. On the navigation bar, select **Meetings**.
2. At the bottom of the middle pane, click **Schedule a meeting**.
3. In the New Meeting box, fill in the required information and click **Schedule a meeting**.



### Use the Scheduling Assistant

To use the scheduling assistant:

1. In the New Meeting box, click the **Scheduling assistant** link.
2. Select a date and time for your meeting. Any conflicts will appear on the calendar.
3. Click **Schedule a meeting**.

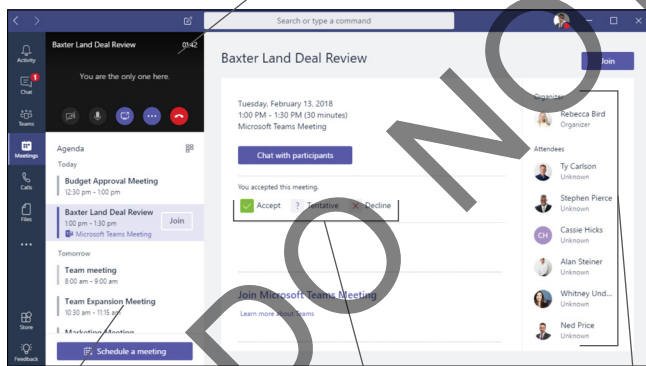


### Join a Meeting

Join a meeting from a chat, a notification, your meetings area, or even Outlook. To join a meeting from Teams:

1. On the navigation bar, click **Meetings** and then select the meeting you want to join.
2. Click **Join**. Follow the prompts to join the meeting.

Click outside the meeting window to minimize it so you can multitask when necessary. To expand the window again, just click it.



Click a meeting to view details, chat with participants, cancel, or join the meeting.

Respond to the meeting request.

See who organized the meeting and view the list of attendees.

### Share Your Screen

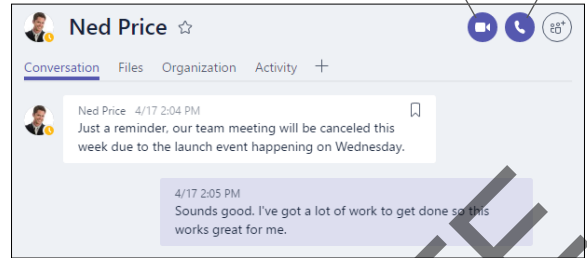
Show what you mean by sharing your screen with everyone in the meeting. To get started, click the **Share desktop** icon. To stop sharing your screen, click the similar icon, located in the lower-right corner of your screen.

## MEET NOW

Need to have a meeting that can't wait? No problem. Just open your channel and click the **Meet now** icon.

### Start a Meeting from a Private Chat

When you and your colleague need input from other team members, start a video or audio call from your private conversation. To start a call, click the **Video call** or **Audio call** icon.

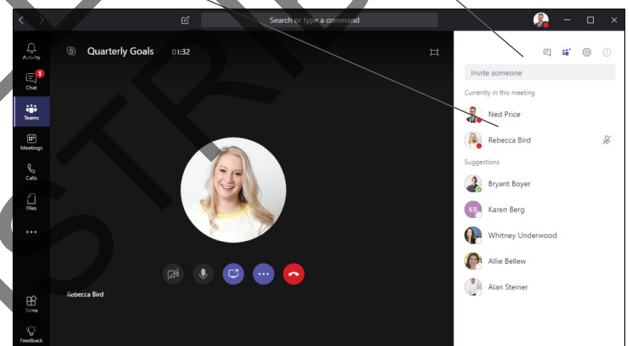


### Add Participants

Add participants to your meeting before or even after you begin.

From the team roster, select who you want to invite.

If your team list is long, save time by using the Search field to find invitees.

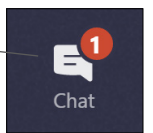


**Note:** When you start a meeting in a channel, anyone who has marked the channel as a favorite can see that a meeting is in progress and can join at any time.

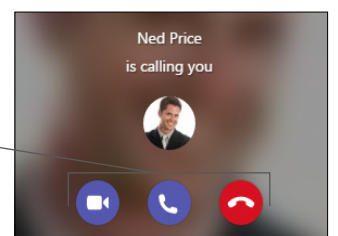
### Join a "Meet Now" Meeting

When a meeting has started, you can be notified in several ways. Join the meeting from an open conversation, a notification, or even Outlook or the Teams mobile app.

If you are currently working in Teams, you will see a notification on the navigation bar. Click **Chat** to view the notification and accept or decline it.



If you are already in a conversation with the caller, you will see a notification in the corner of your window.





## WORK WITH TABS

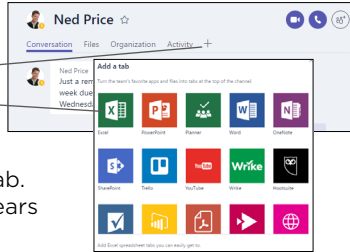
In Microsoft Teams channels, you can add quick-access reference tabs for files in Microsoft SharePoint®, Power BI®, Excel®, YouTube, and more. Create conversation tabs for specific topics and even add a tab for a critical website.

### Add a Tab

Add a tab from a range of services. Or use Microsoft PowerApps® to build your own app tab.

To add a tab to a channel:

1. In your channel, click the **Add a tab** icon +.
2. Select the desired app or service.
3. Follow any required prompts, and then title the tab.
4. Click **Save**. The new tab appears in your channel.

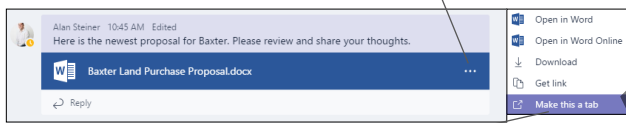


### Add a Tab for Microsoft Office Files

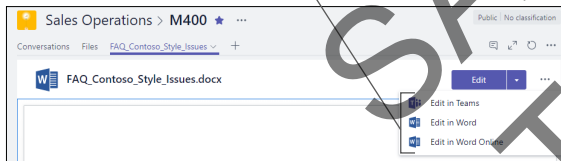
Create a channel tab for a Microsoft Office file so you can view and edit it right from Teams.

To add a tab for a Microsoft Office file:

1. Upload a new document to your Conversations tab or private chat.
2. Click the **More** icon ... next to the file name.



3. Select **Make this a tab**.
4. On the new tab, click the **Edit** arrow. Choose to edit the document in Teams, in the desktop app, or in the online app.

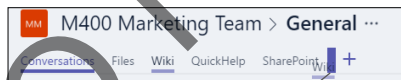


### Reorder Tabs

If you find yourself using some tabs more frequently than others, rearrange them in a way that's more convenient for you.

To reposition a tab:

1. In the channel you want to edit, click and hold the tab you want to move.
2. Drag the tab to the desired place. When the rectangle appears, release the mouse button.

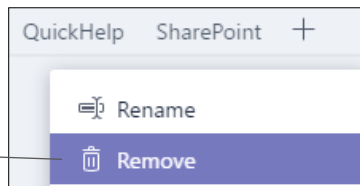


### Remove Tabs

Have a few tabs that are no longer relevant? Clear up the clutter by removing them.

To remove a tab:

1. In the channel you want to edit, right-click the tab to open its menu.
2. Select **Remove**.



## MAKE CONVERSATION

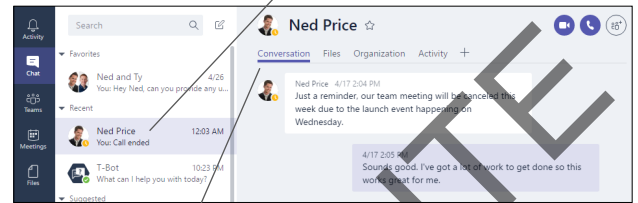
Control the conversation by learning how to access your chat history, save messages, and share files. Teams saves both private and group conversations, so jogging your memory won't raise a sweat.

### View Chat History

Microsoft Teams saves all of your conversations so you don't need to worry about losing track of what was said, even if you leave the conversation.

To view chat history:

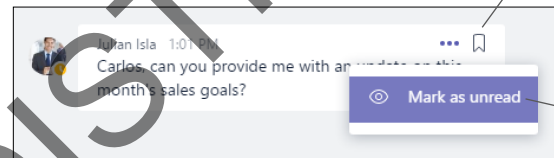
1. From the navigation bar, select **Chat**.
2. From Favorites or Recent, select the chat you want to see.



3. Click the **Conversation** tab to see a record of all of your conversations.

### Save Messages

Nobody likes to sift through old chats for critical bits of info. Avoid the hassle by saving your important messages for easy reference. To save a message, just click the bookmark icon next to the message.



Click the **More** icon ... to mark the message as unread.

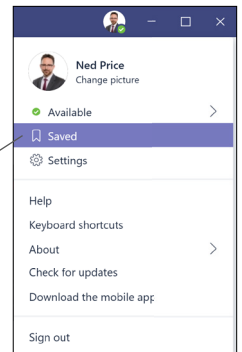
### Access Saved Messages

Find your saved messages in a snap.

To view saved messages:

1. At the top of the window, click your profile picture.
2. Select **Saved**. Microsoft Teams displays your list of saved messages.

**Note:** To remove a saved message, click to clear the bookmark icon.



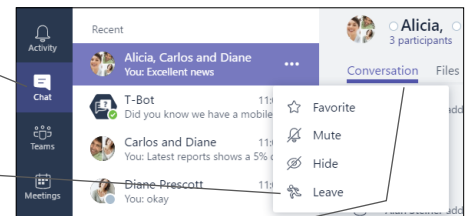
### Leave a Chat

Are you done contributing to a discussion? Leave a conversation and you will no longer receive notifications.

To leave a private chat:

1. On the navigation bar, select **Chat**.
2. Right-click the conversation you want to leave and select **Leave**.

**Note:** You will still have access to the chat history on the Conversation tab.



## COLLABORATE ON FILES

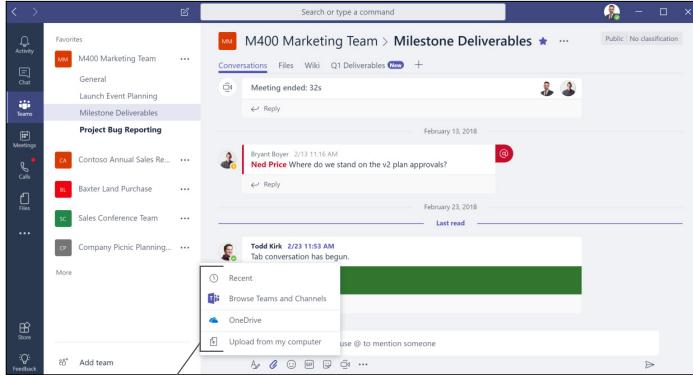
Upload a document to a team channel, and your team can comment in real time or edit the file in Microsoft Word.

### Attach Files to a Channel

Give everyone access to the latest draft of your proposal by uploading it to your team's channel.

To upload a file to a channel:

1. At the bottom of the channel, click the paper clip icon .



2. In the menu, choose recent files, files that have been posted to Microsoft Teams, files from OneDrive, or files from your computer.
3. Select the file you want to upload and click **Upload a copy**.

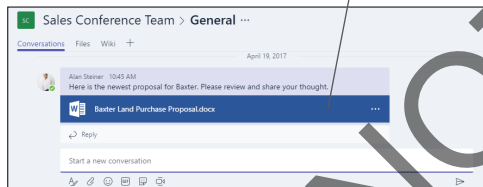
**Note:** To upload a file without posting it on the channel's Conversations tab, upload it to the channel's **Files** tab instead.

### Collaborate on Files in Real Time

When you attach a file to a channel, your whole team can collaborate on the file simultaneously, right from Microsoft Teams. You can exchange feedback in real time, or you can open the file in its source program to edit it.

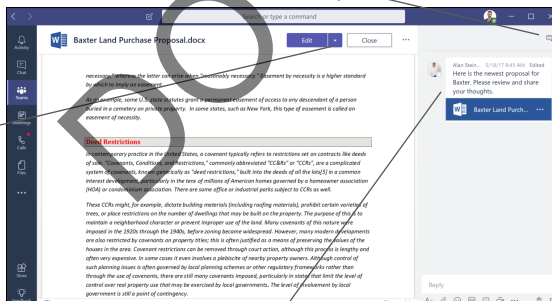
To comment on an attached file:

1. Click the file that you want to comment on. The document opens in the Teams window.



2. Click the **Show conversation** icon .

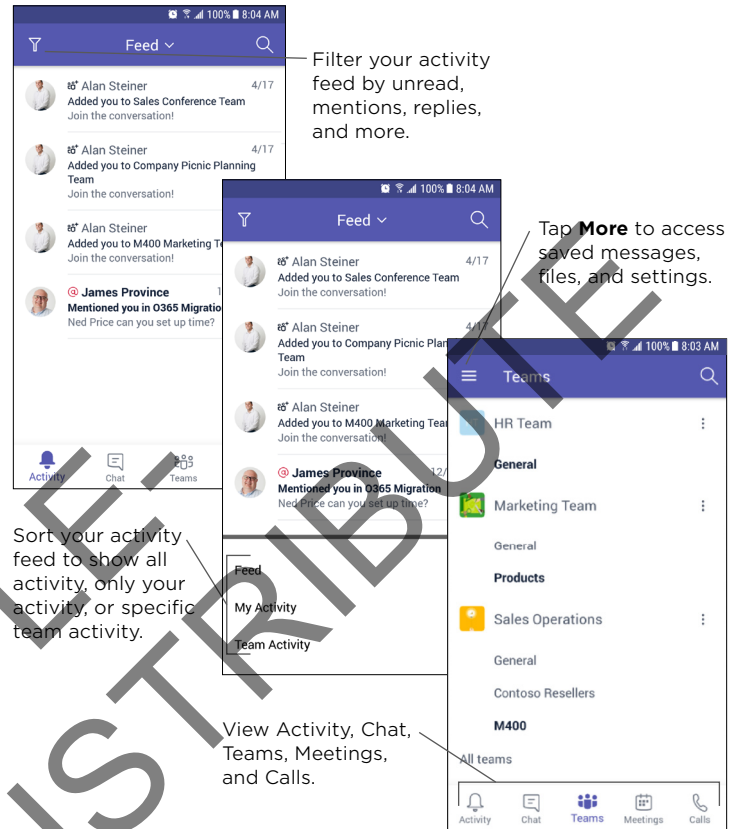
To modify the document, click the **Edit** arrow. Choose to edit the file online, in the desktop app, or in Teams.



3. Leave your feedback in the conversation pane.
4. When finished, click **Close**. The feedback is saved on the channel's Conversations tab.

## USE THE TEAMS MOBILE APP

Stay in the loop with the Microsoft Teams mobile app. Download the app for Android or iOS.



**ADDITIONAL RESOURCES:** Further your software skills with these resources from BrainStorm, Inc.

Since Windows 95, BrainStorm has been helping people do more with their software. BrainStorm offers personalized learning and solutions to increase productivity. Do what you do best—faster and smarter than ever before.



### BRAINSTORM QUICKHELP™

QuickHelp is a one-of-a-kind solution that offers customized content in an intelligent learning platform. QuickHelp provides users with a unique learning journey that includes:

- Thousands of searchable and shareable videos
- Live, productivity-focused webinar events
- PDF guides to support diverse learning styles
- Assessments to reinforce learning and gauge progress



### INSTRUCTOR-LED TRAINING

On-site and virtual training solutions give organizations practical, hands-on experience.



**BRAINSTORM**

For more information call **1.888.909.4244** or visit **BrainStormInc.com**.

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