

Softlanding

Microsoft Teams Overview



Lesson 2

USING OTHER COMMUNICATION TOOLS

Lesson 2: Using Other Communication Tools

In this lesson, you will learn how to:

- Use chat
- Manage meetings and files

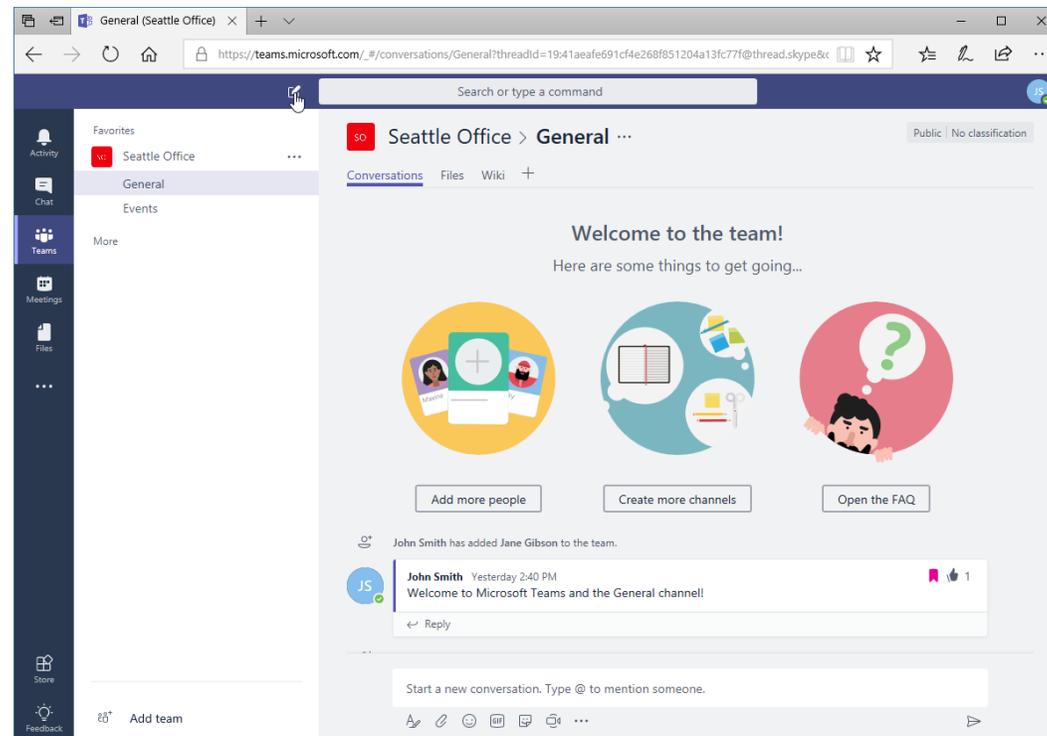
Topic A: Using Chat (Part 1)

In this topic, you will learn how to:

- Start a chat
- Reply to and continue a chat
- Add other users to a chat
- Use chat message features

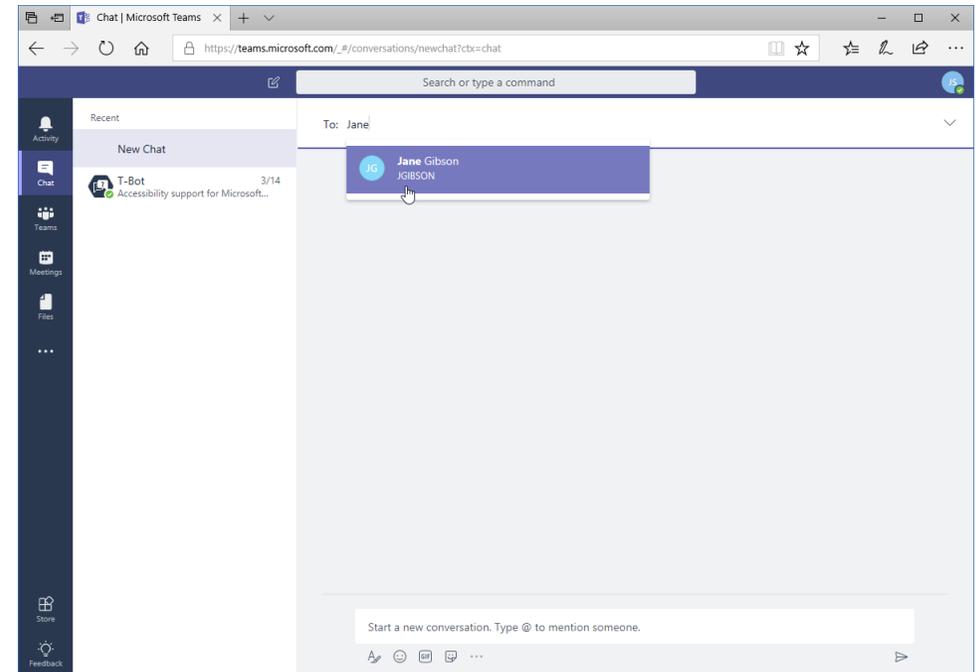
Starting a Chat

To start a chat, click the New Chat icon from anywhere in Teams:



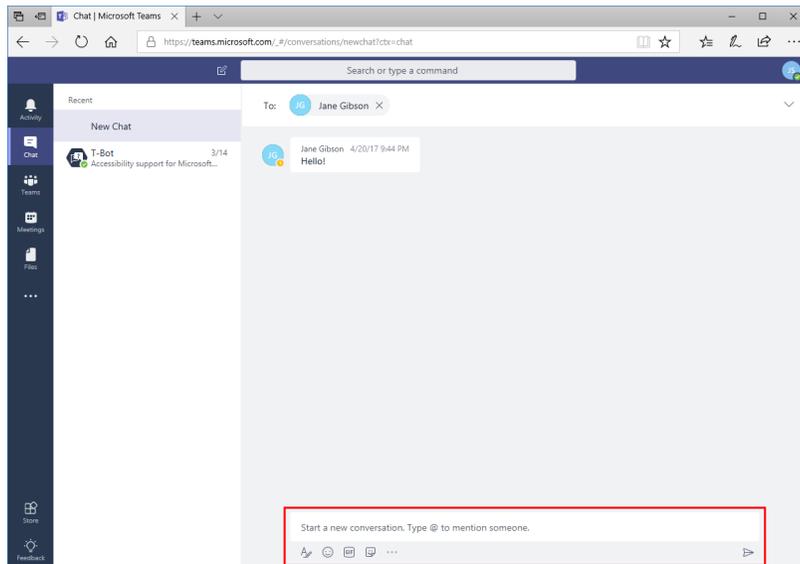
Starting a Chat

- The Chat icon from the sidebar will be selected
- Enter a name or group in the To field
- You will see a menu with suggestions to complete this field
- Click the correct suggestion



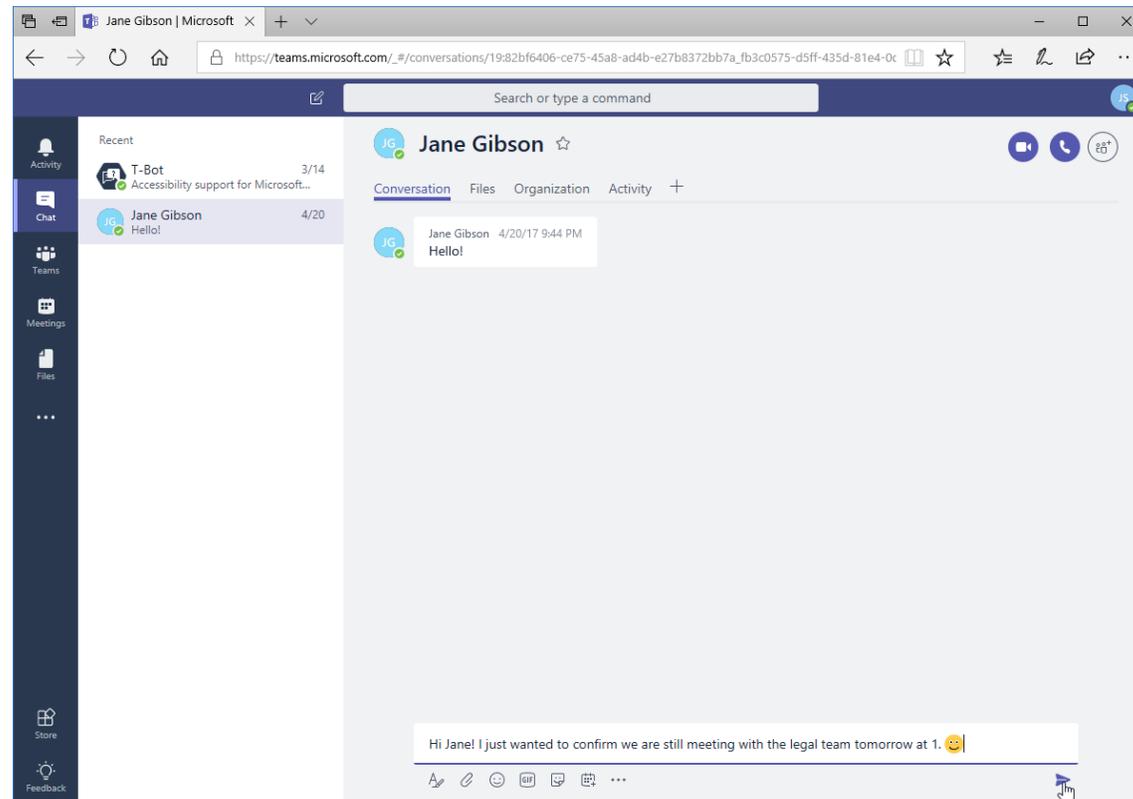
Starting a Chat

- Any message history will appear in the main window
- Type your message in the compose box
- Notice the icon in the corner of the user's profile icon



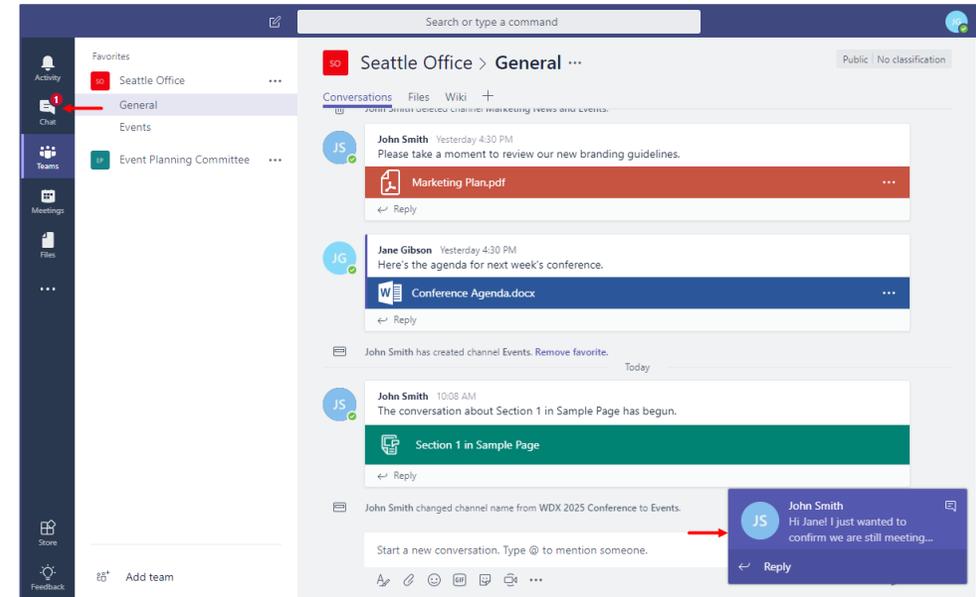
Starting a Chat

Once your message is complete, press “Enter” or click the arrow to send it:



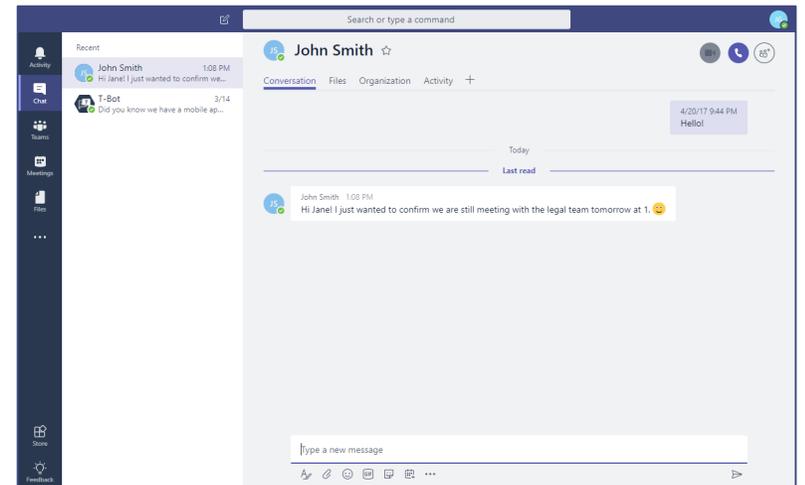
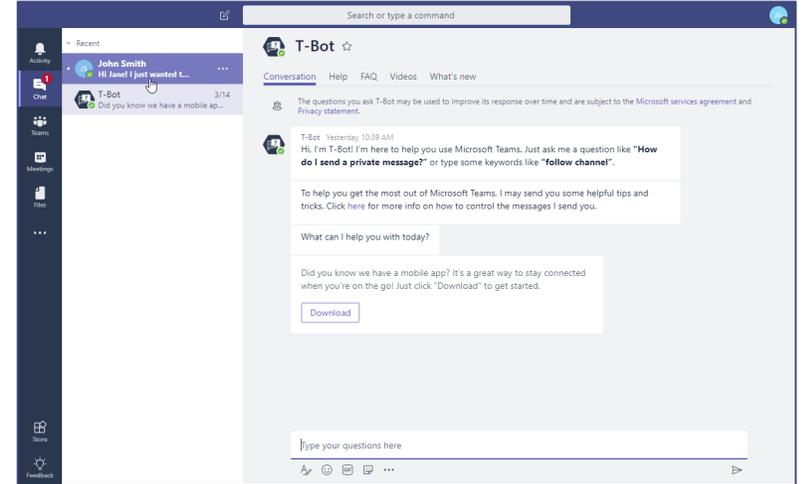
Replying to a Chat Message

- When you receive a chat message, you will see a pop-up notification and a badge next to the Chat icon on the sidebar
- Click the notification to go right to the message



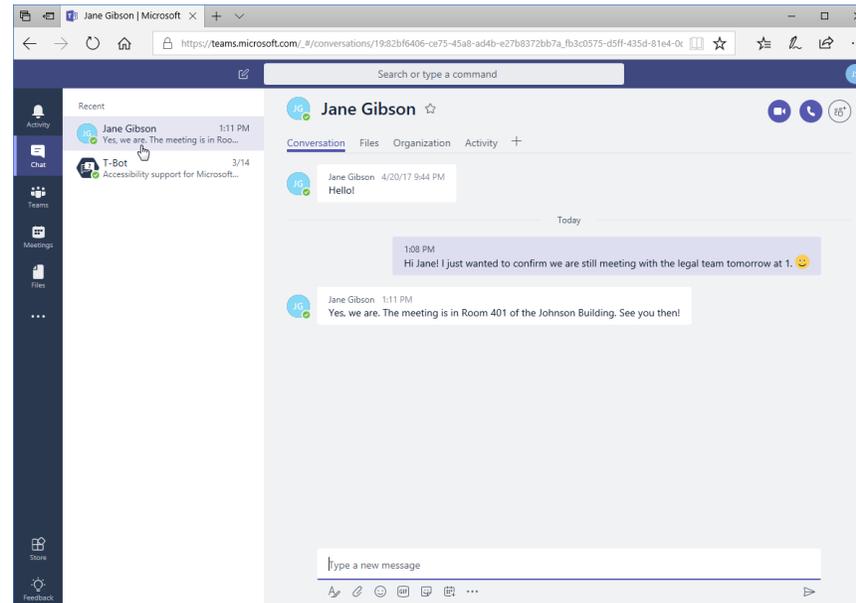
Replying to a Chat Message

- If the message disappears before you can click on it, open Chat and click the **bolded item** (which indicates it is new)
- You can now view the message and reply using the compose box



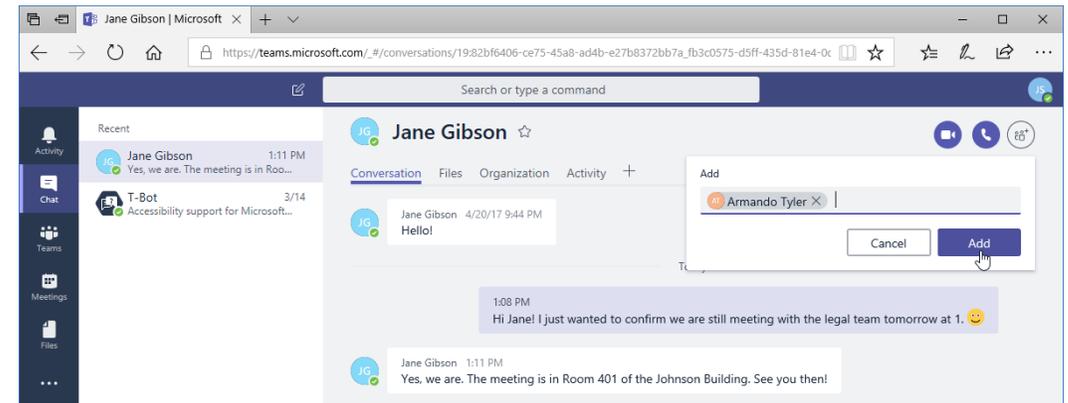
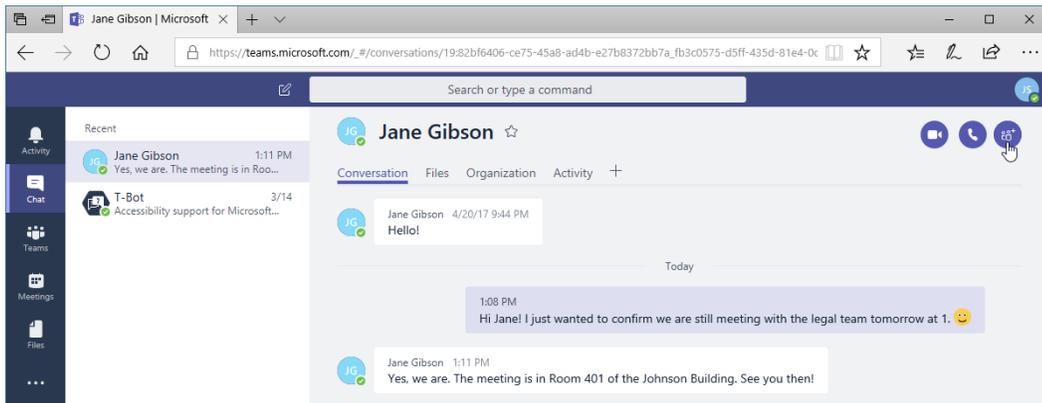
Continuing a Chat

- To continue a chat, click the Chat icon from the sidebar and click the user's name
- You will see your chat history and can create a new message



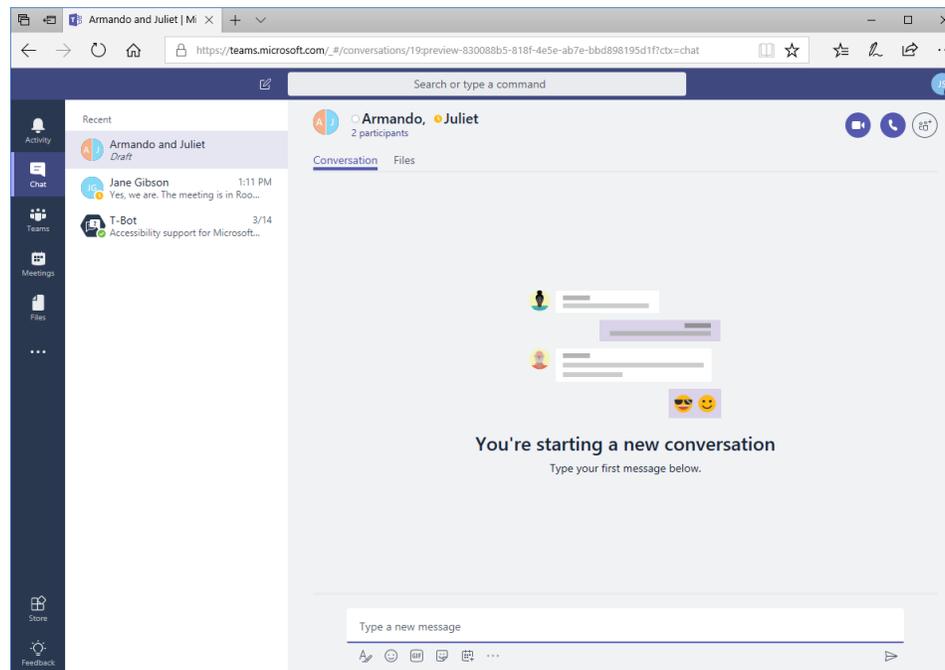
Adding Other Users to the Chat

- Click the “Add people” icon in the top right corner of the chat window
- Enter the user’s name and click “Add”



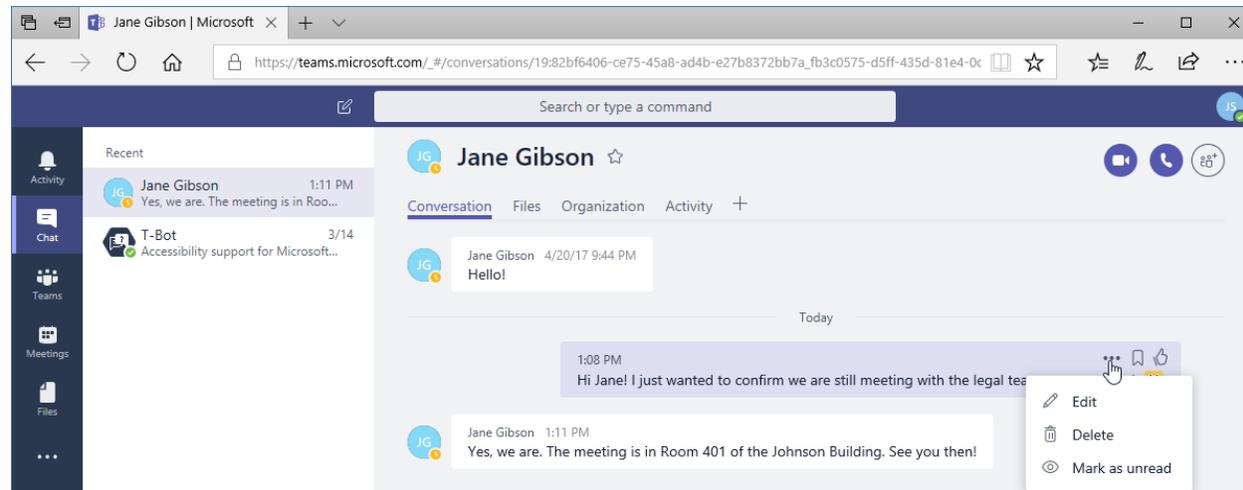
Adding Other Users to the Chat

- A new message window will be created
- You can now create and send your message as usual



Using Chat Message Features

- You can work with chat messages in the same way as channel messages
- You can like a message, save it, or click the ellipses for more options



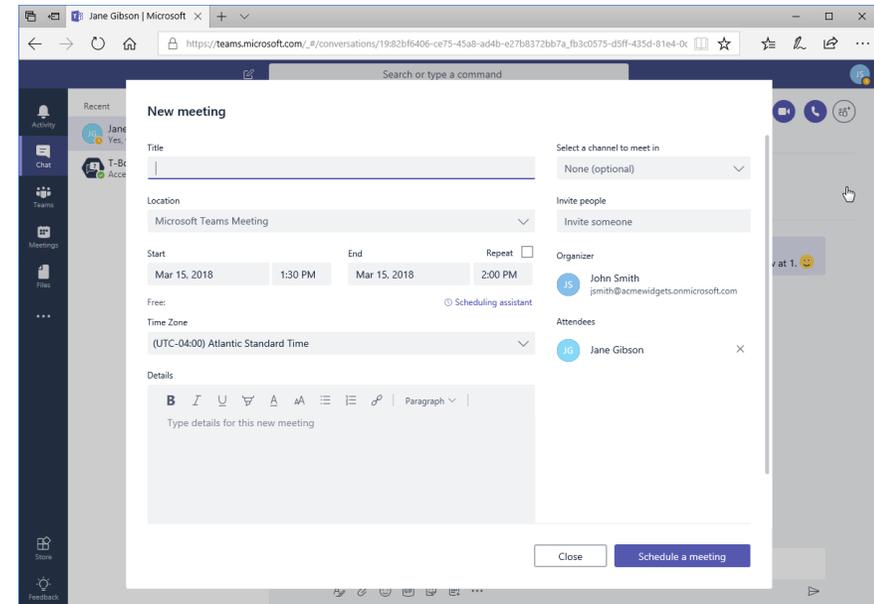
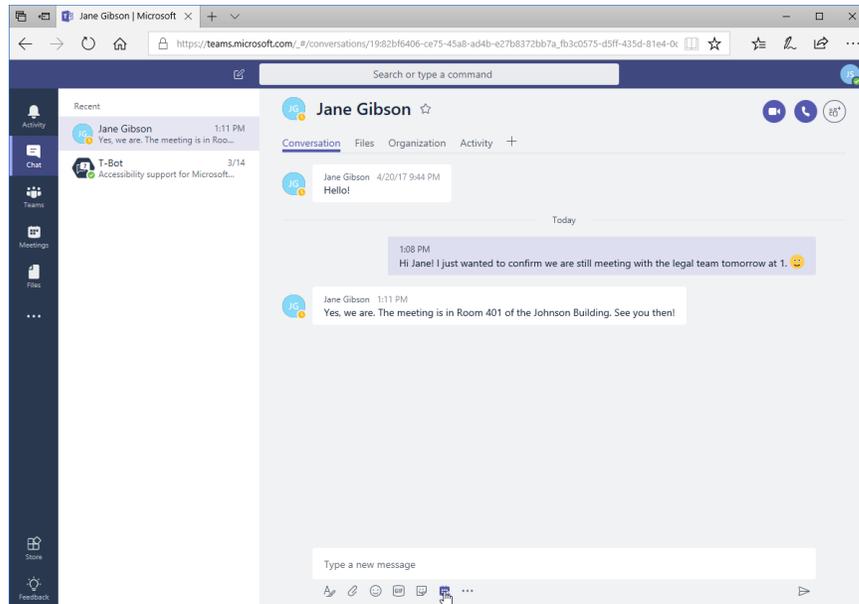
Topic B: Using Chat (Part 2)

In this topic, you will learn how to:

- Schedule a meeting from a chat message
- Start video and audio calls
- Use the tabs in the Chat window
- Manage chats

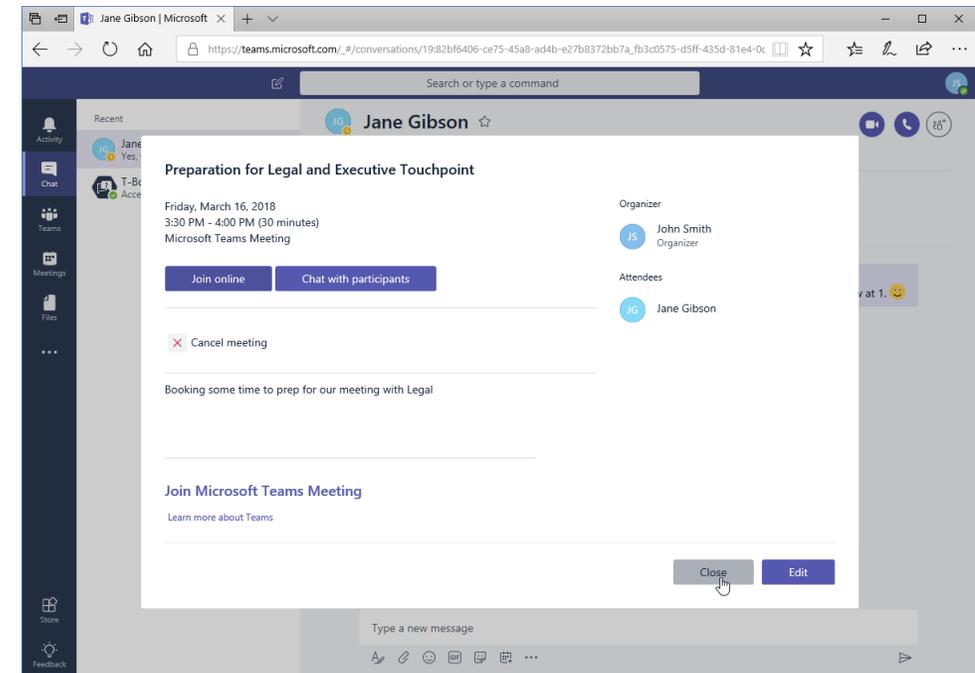
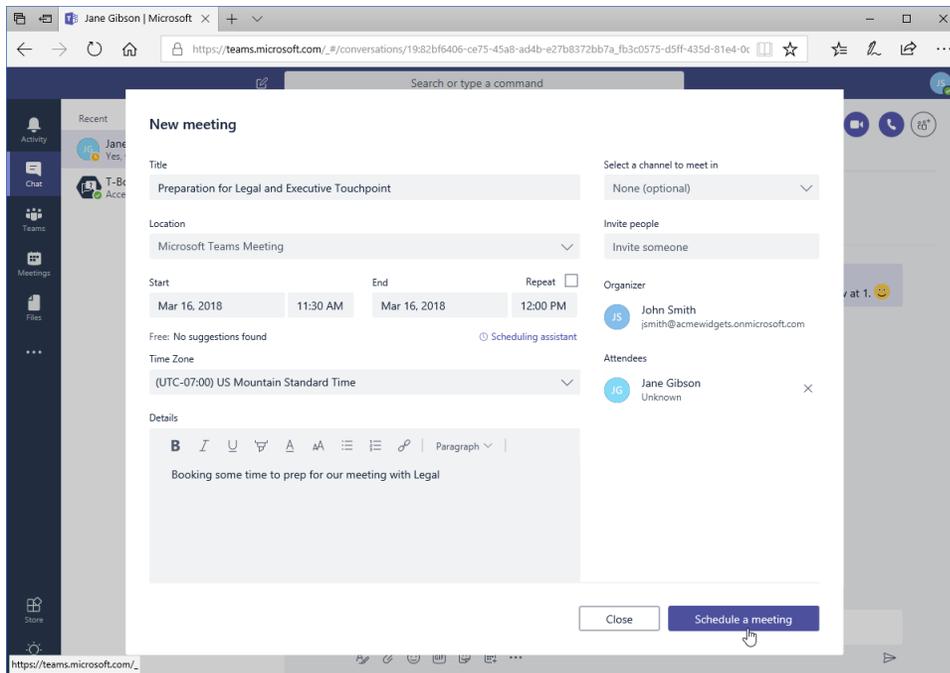
Scheduling a Meeting from a Chat Message

- To schedule a meeting from within a chat message, click the “Schedule meeting” icon
- The “New meeting” window will open



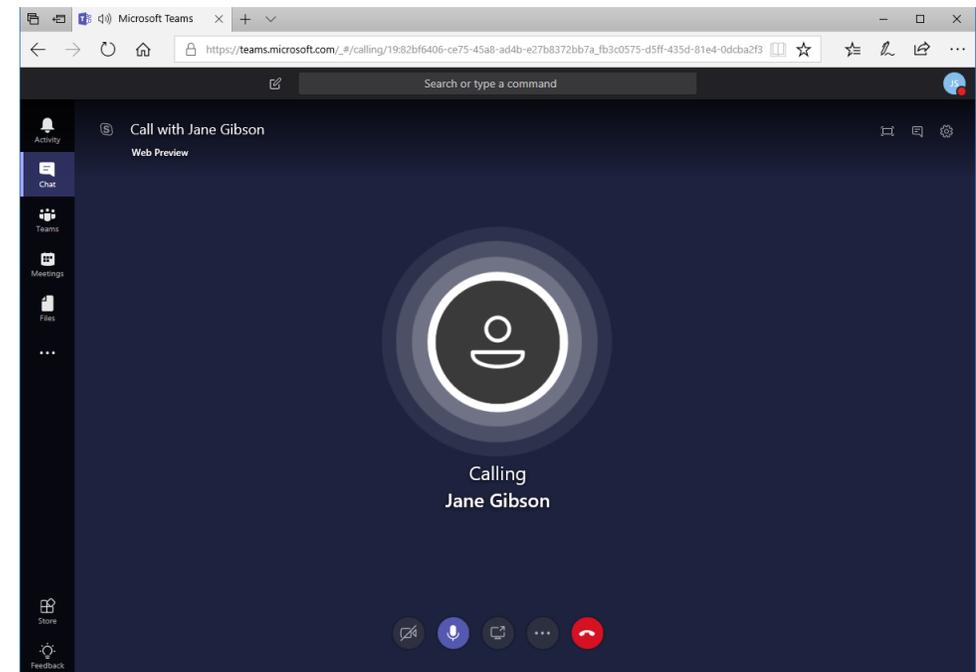
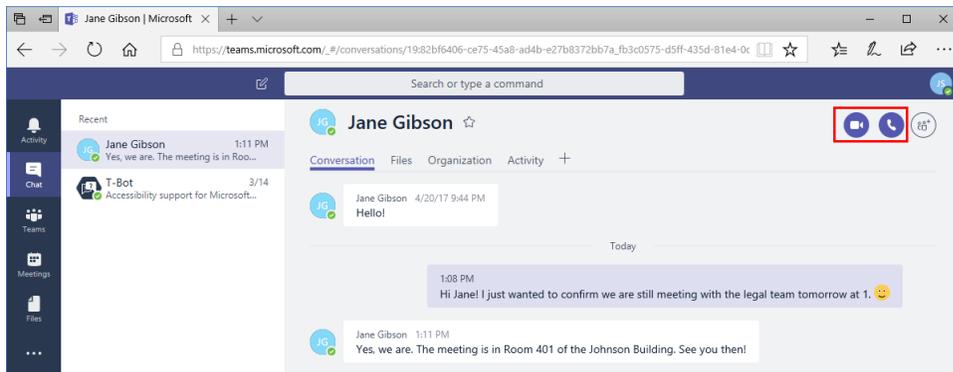
Scheduling a Meeting from a Chat Message

- Enter the details and click “Schedule a meeting”
- Meeting will created
- Click “Close” in the confirmation dialog



Starting Audio or Video Calls

- Click either Call button at the top of the chat window
- The call will be placed



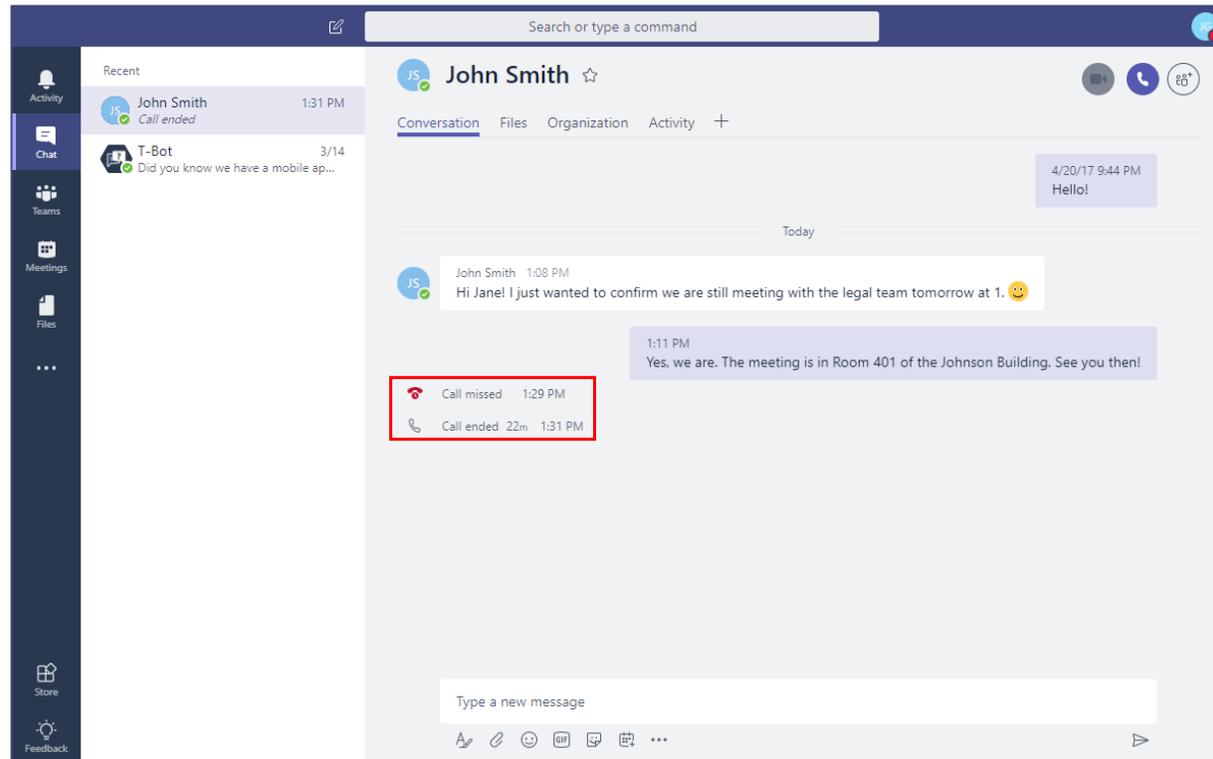
Starting Audio or Video Calls

- The recipient will see a notification
- They can accept the call as video or audio
- When the call is complete, either user can click the red icon to hang up.



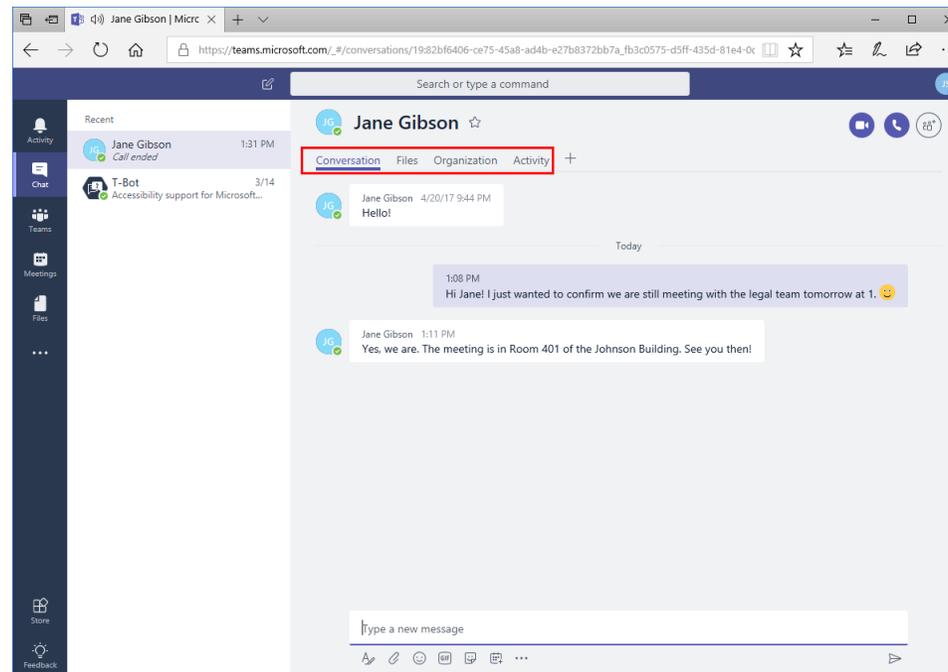
Starting Audio or Video Calls

Call history will be shown in the message window:



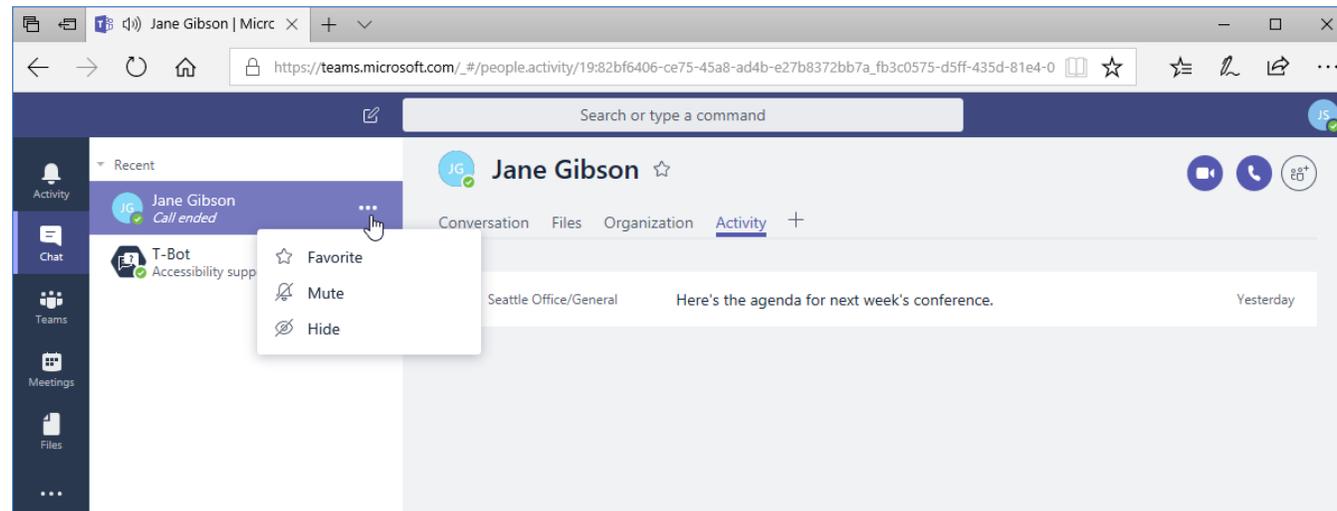
Overview of Chat Tabs

As in channels, use the Conversation tab to send and view chat messages:



Managing Chats

To manage your chat history, move your mouse over the appropriate entry in the contextual task pane (while the Chat icon is selected from the sidebar) and click the ellipses:



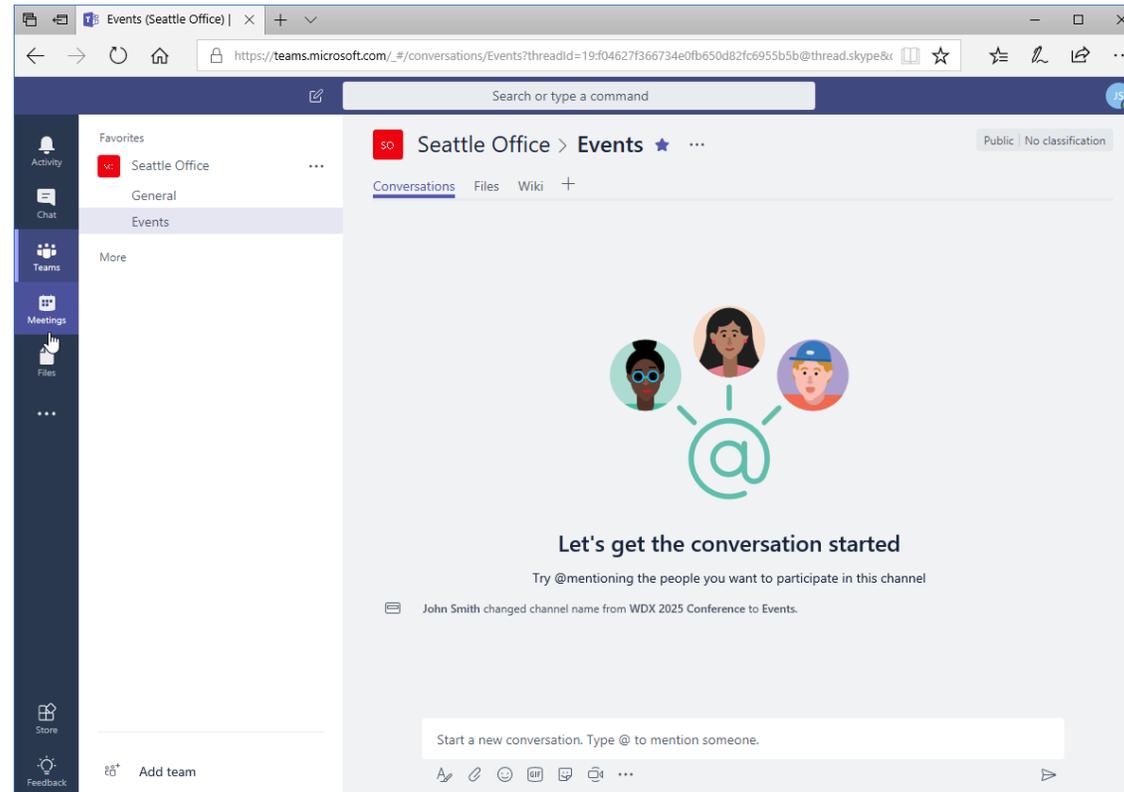
Topic C: Managing Meetings

In this topic, you will learn how to:

- Use the Calendar tab
- Use Agenda View
- Schedule, edit, join, and cancel meetings

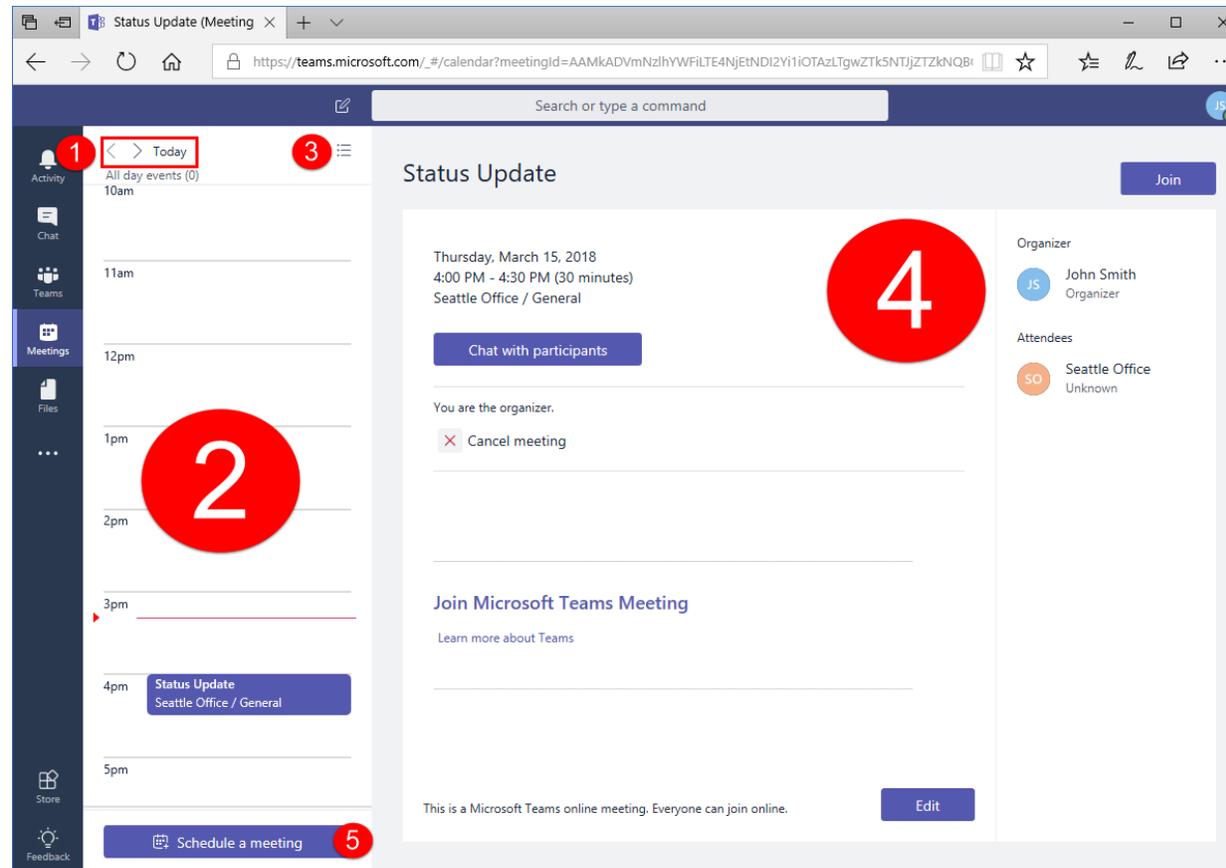
Using the Calendar Tab

Click the Calendar icon in the sidebar:



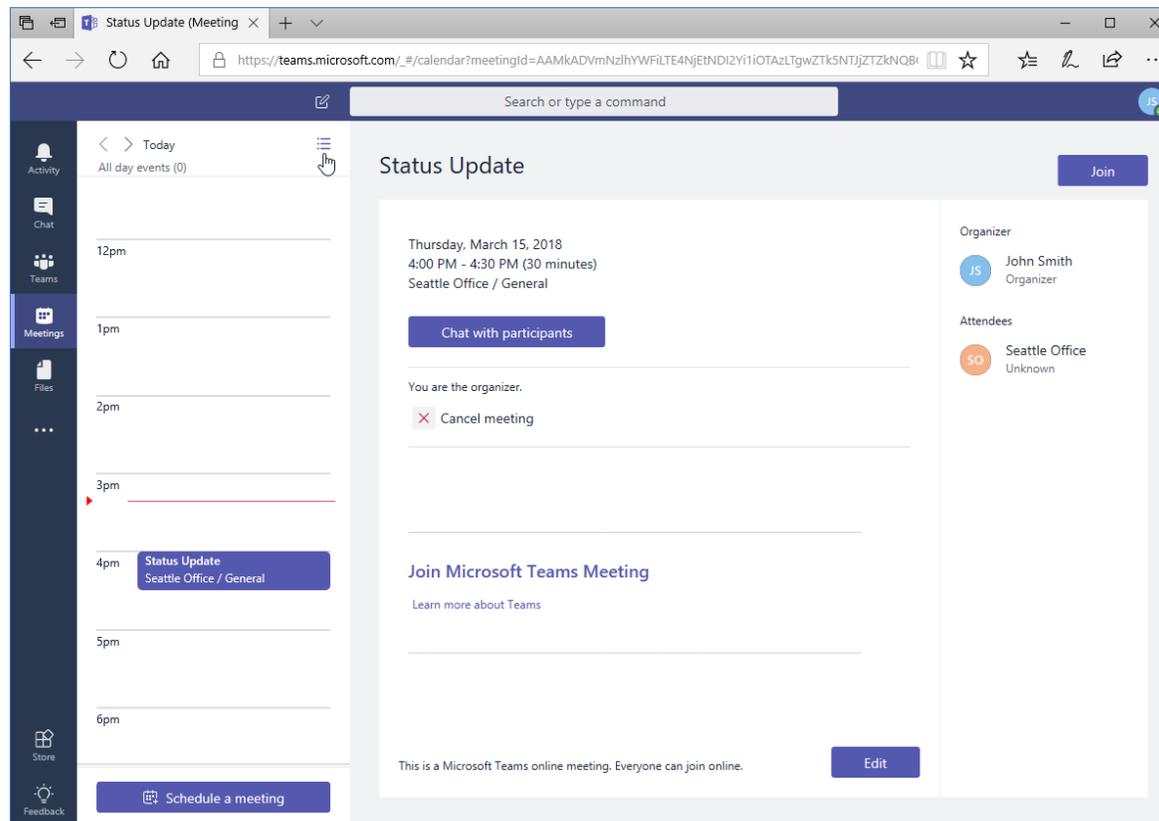
Using the Calendar Tab

You will see the Calendar window:



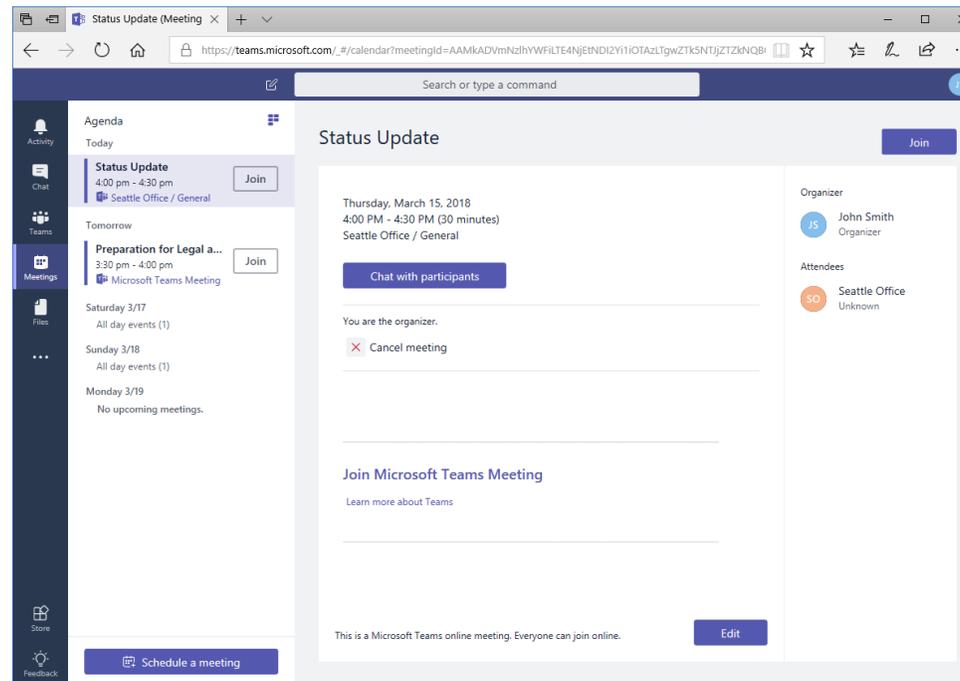
Using Agenda View

Agenda View can be accessed using the icon in the top right of the Meetings task pane:



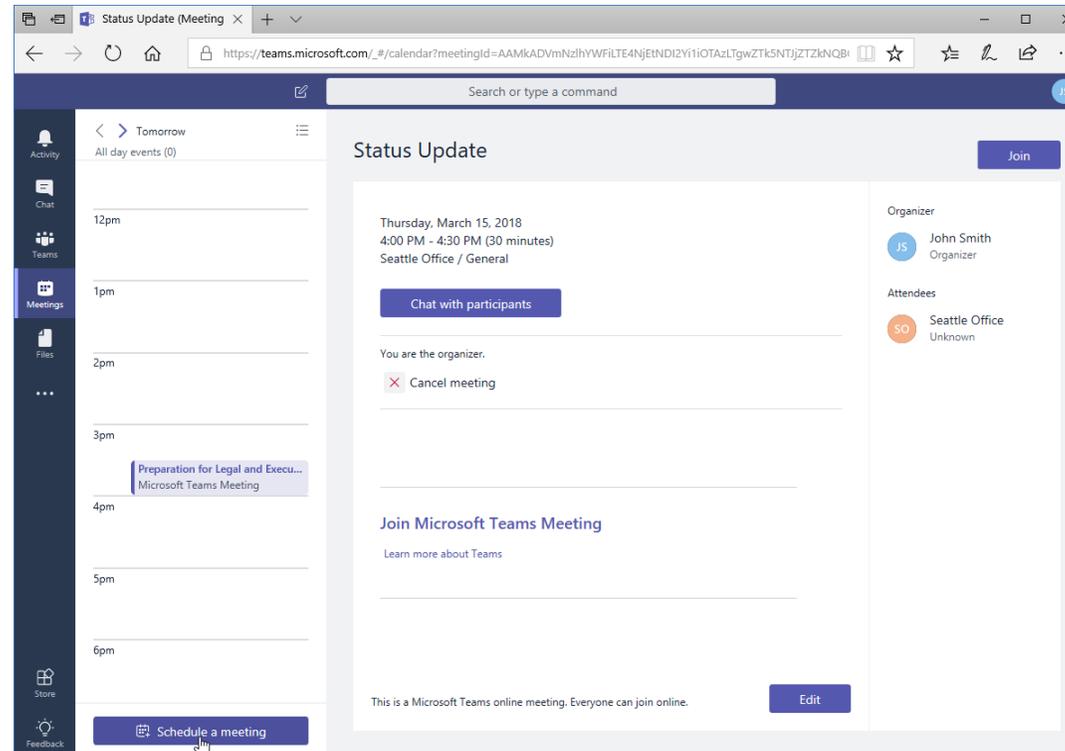
Using Agenda View

- This view focuses on upcoming meetings
- Click the Day View icon in the top right to toggle back to the default view



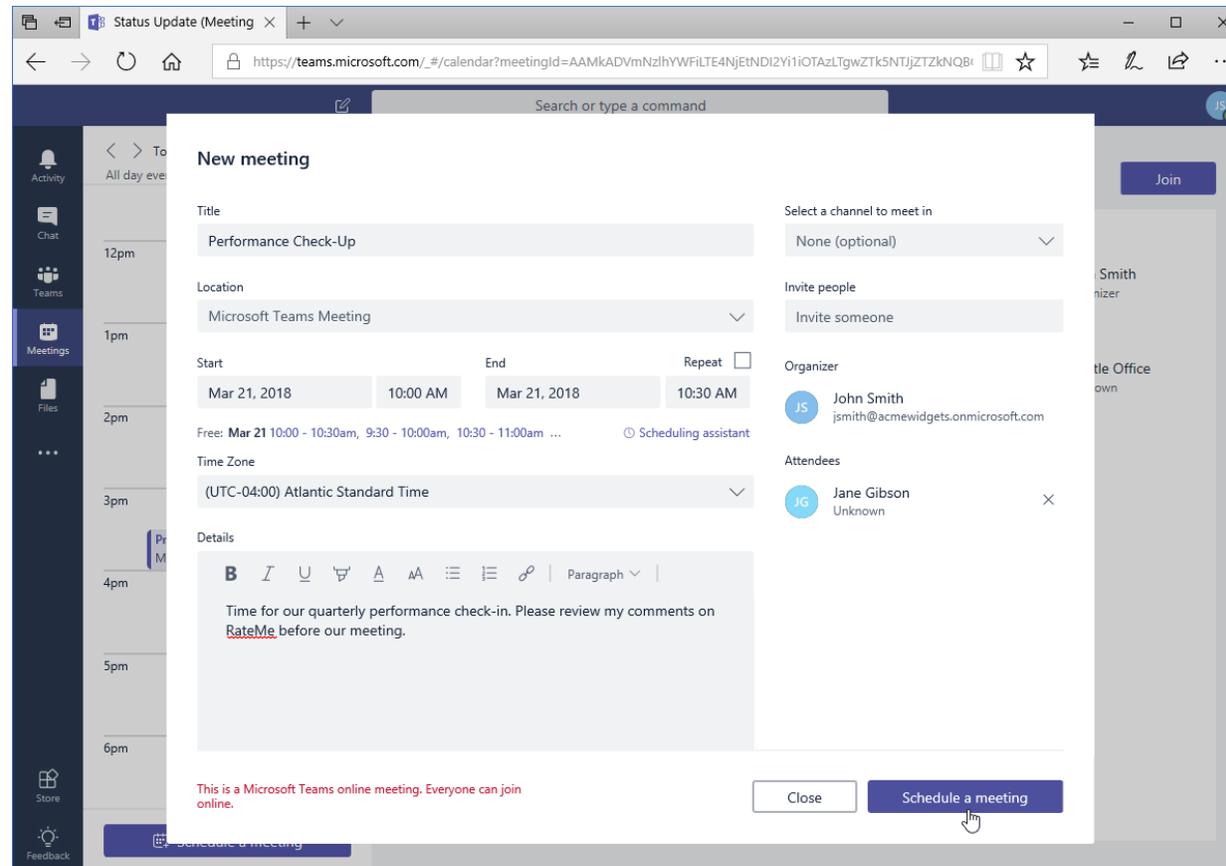
Scheduling a Meeting

To schedule a new meeting from the Calendar tab, click the “Schedule a meeting” button in the task pane:



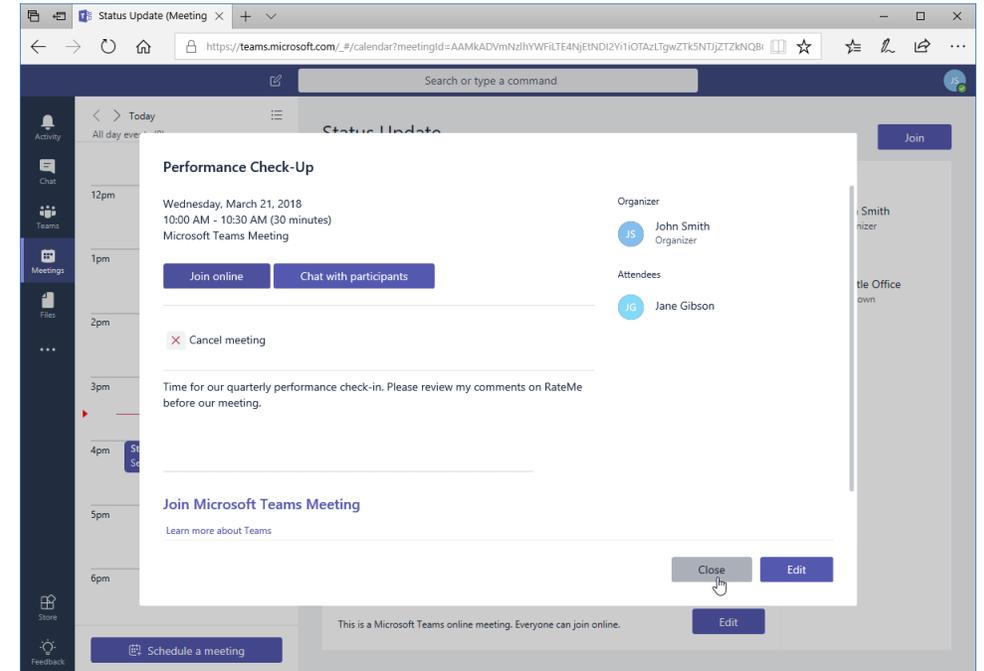
Scheduling a Meeting

Here is a sample dialog:



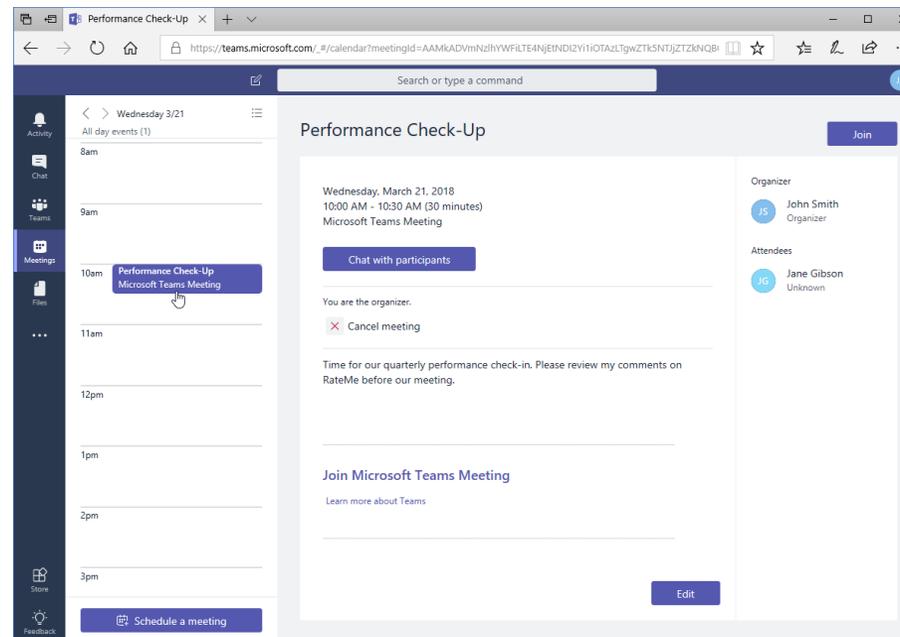
Scheduling a Meeting

- Click “Close” to continue
- The meeting will be added to the calendar of everyone attending it



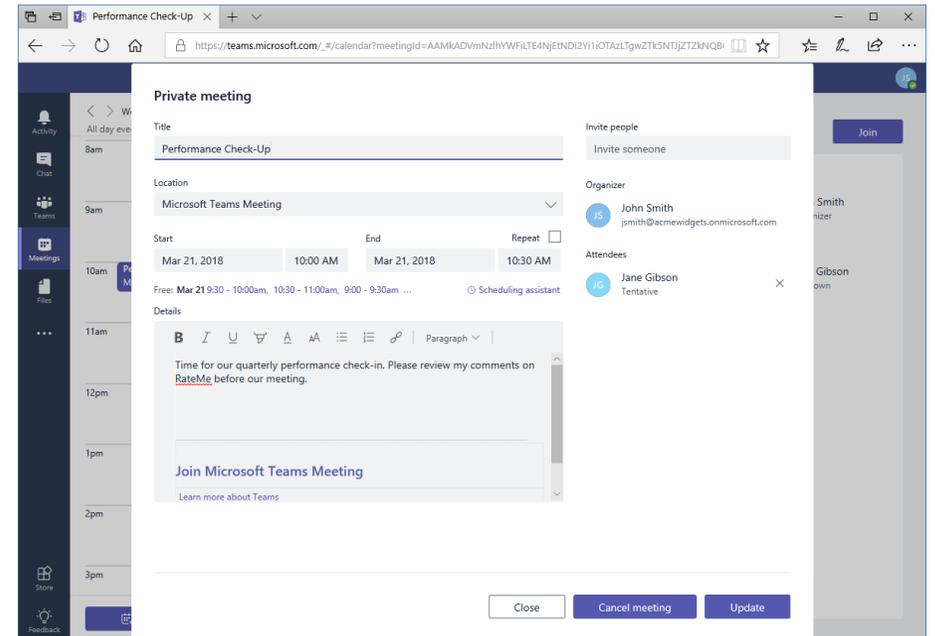
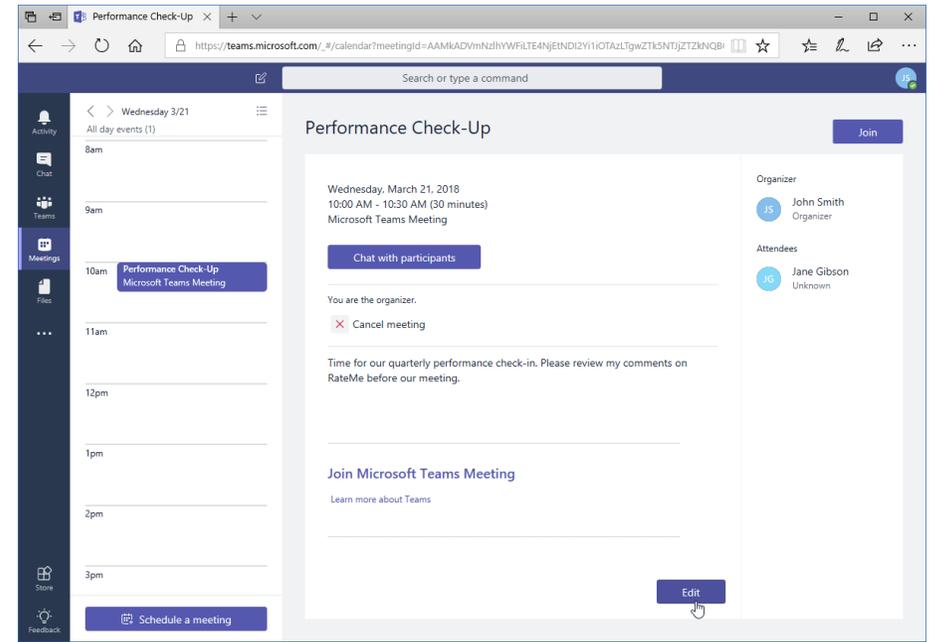
Editing a Meeting

To edit a meeting, locate it in the calendar and click on it. This will display its details in the window on the right:



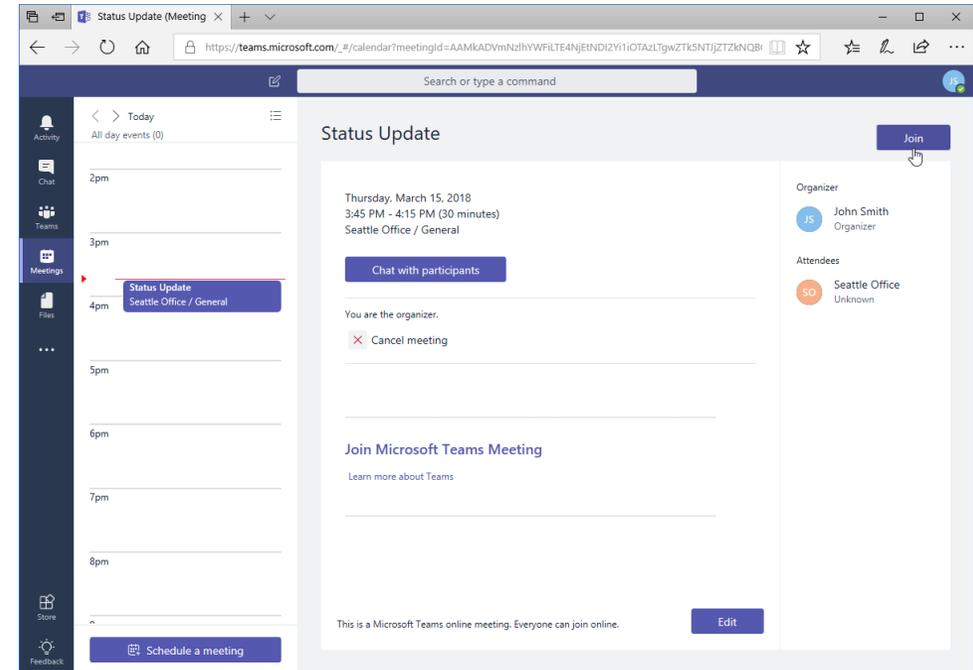
Editing a Meeting

- Click “Edit” in the window on the right
- The meeting dialog box will open
- Make your changes and click Update, or, click “Close” to cancel the process



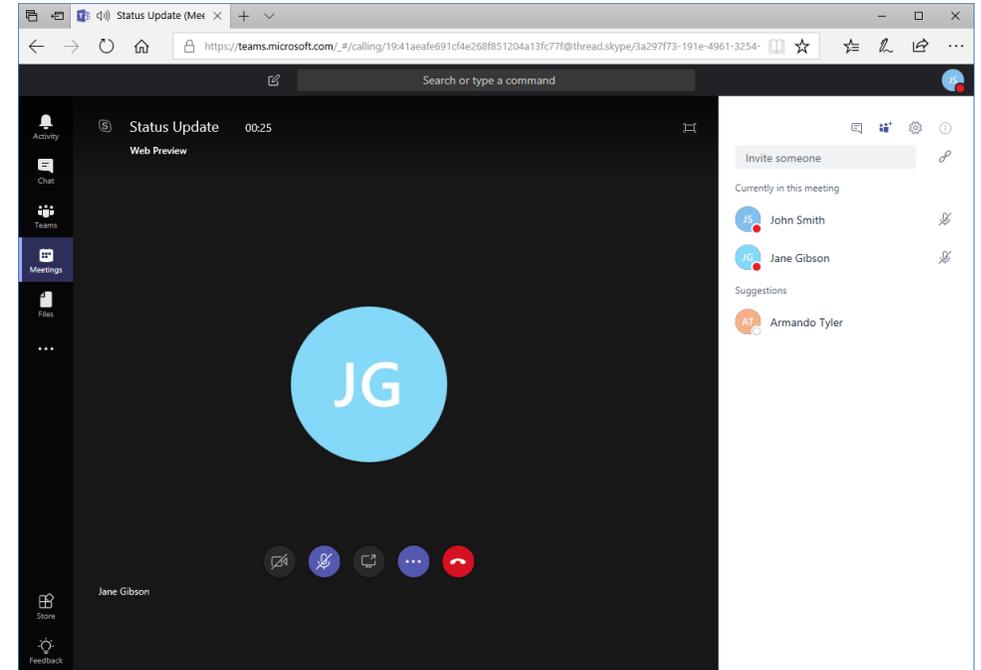
Joining a Meeting

- When it is time to join the meeting, it should be automatically displayed in the left side of the Meetings window
- Ensure your webcam or microphone is connected and configured, and click Join



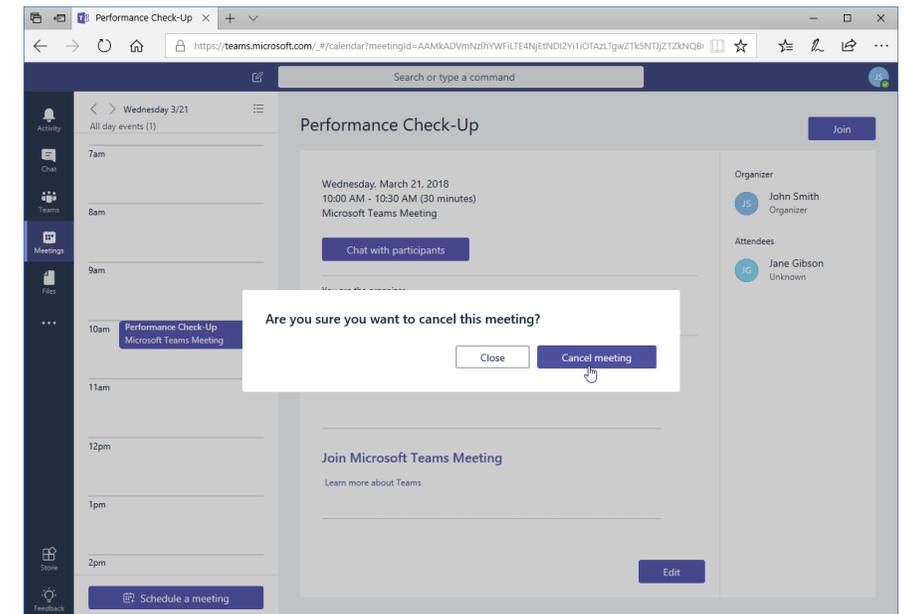
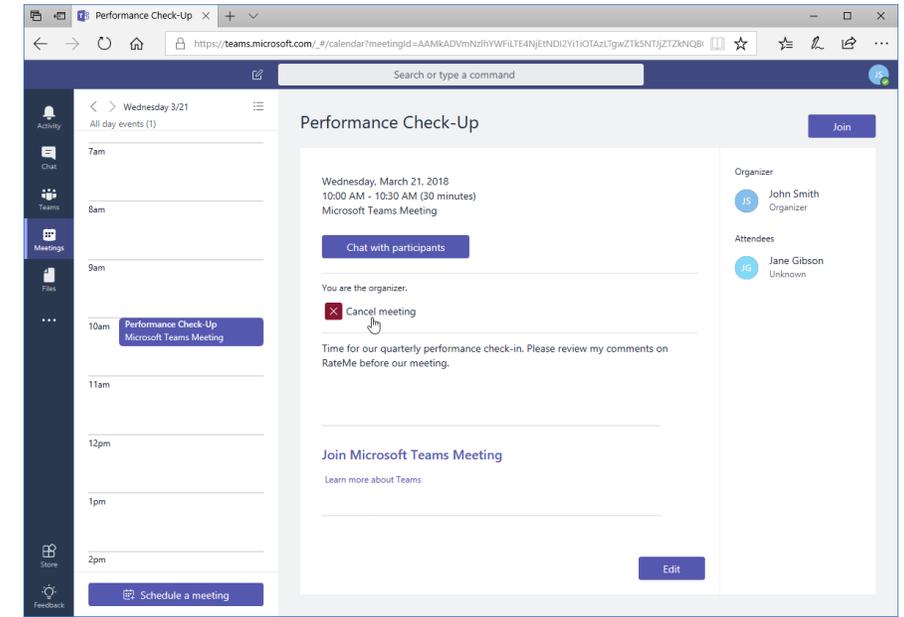
Joining a Meeting

- You will then be placed in the meeting
- When the meeting is finished, click the red icon to hang up and leave



Cancelling a Meeting

- Locate the meeting in the calendar and click it to display its details
- Click “Cancel meeting”
- Click “Cancel meeting” to confirm the process



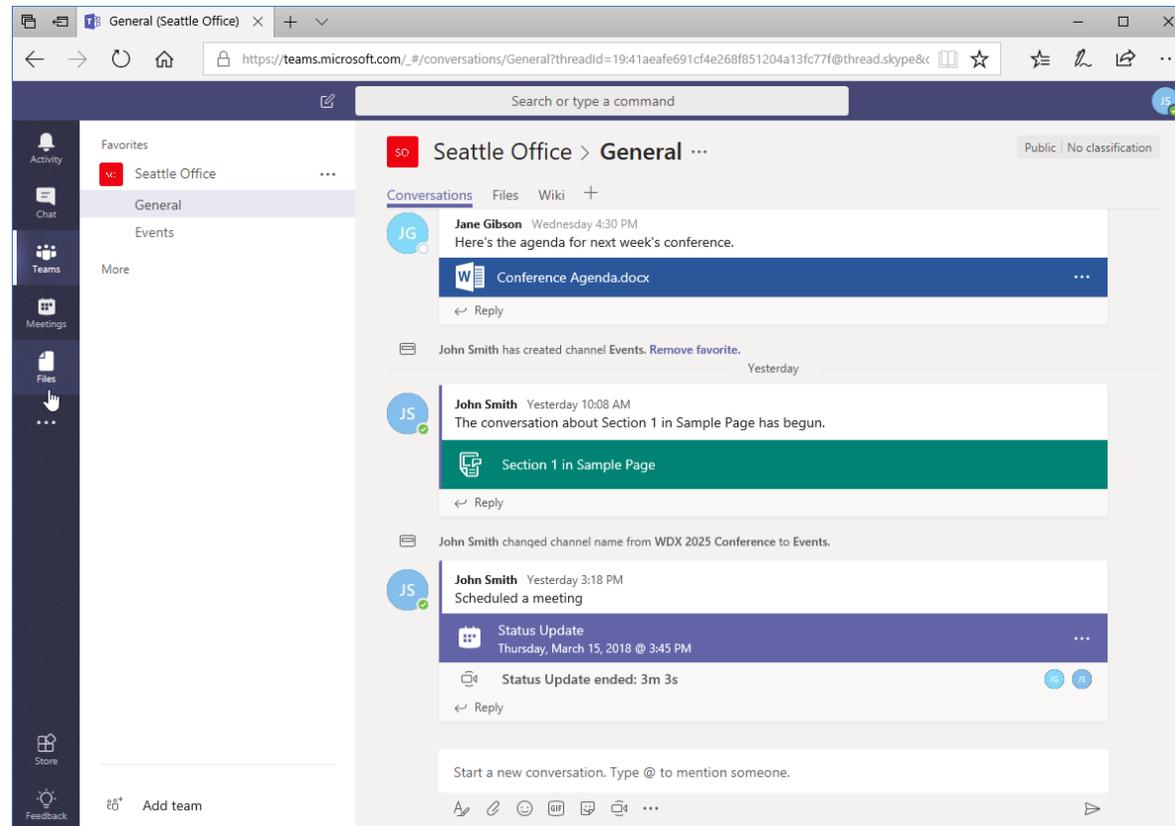
Topic D: Managing Files in Teams

In this topic, you will learn how to:

- Use the Files tab in Teams
- View and manage files from different sources
- Add and manage cloud storage

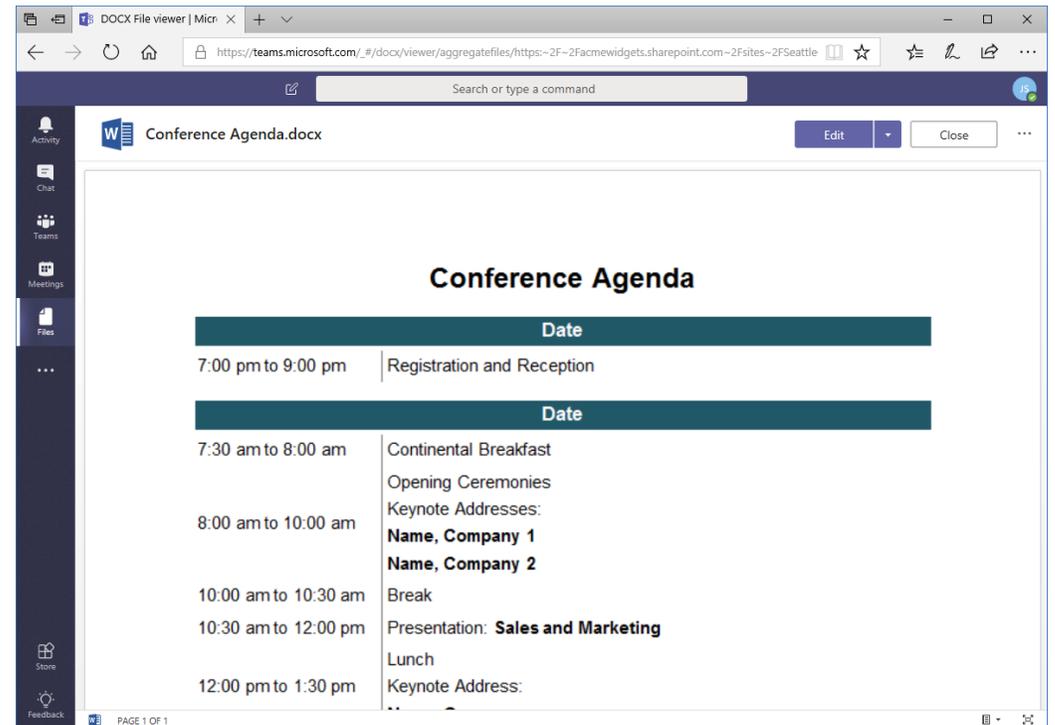
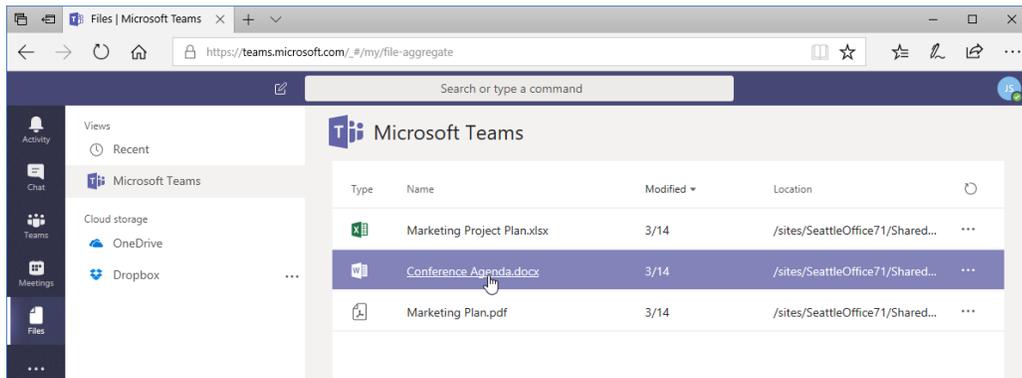
Using the Files Tab in Teams

Click the Files icon in the sidebar to begin:



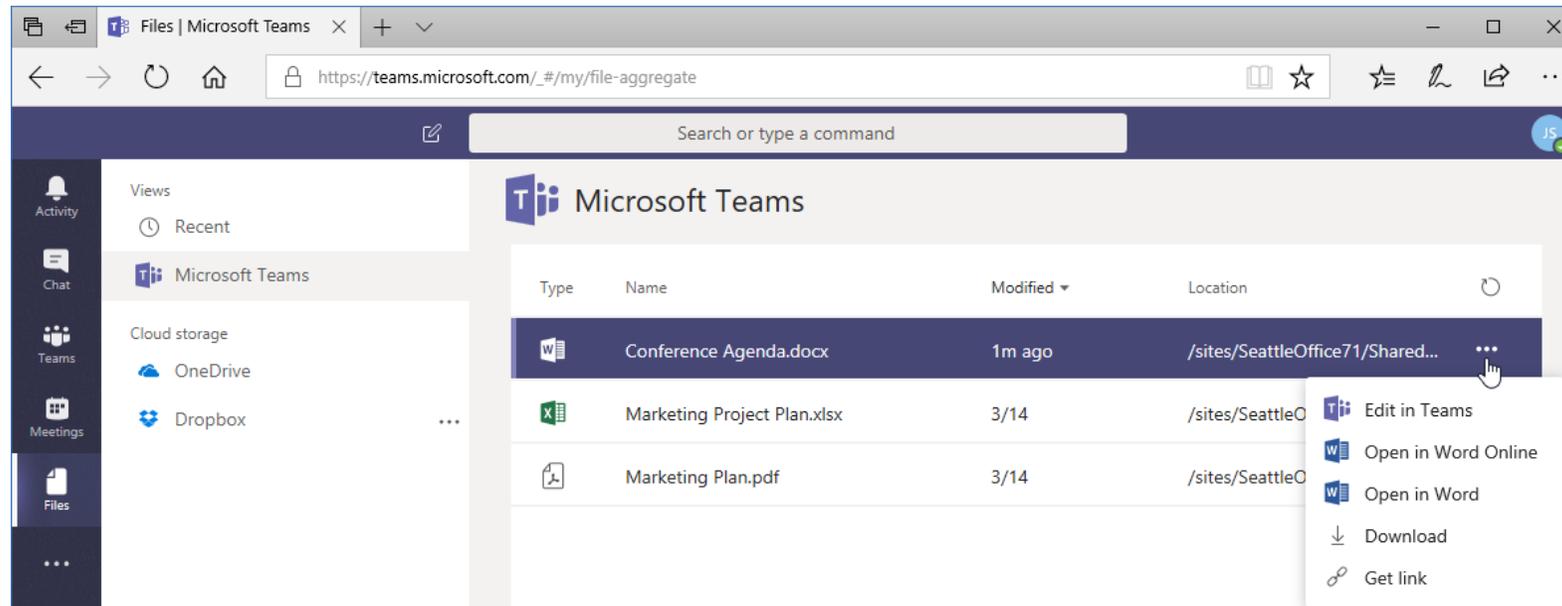
Viewing Files

- Click any file to view it
- It will then open in Teams



Managing Files

Click the ellipses next to a file's name to see options for managing it:

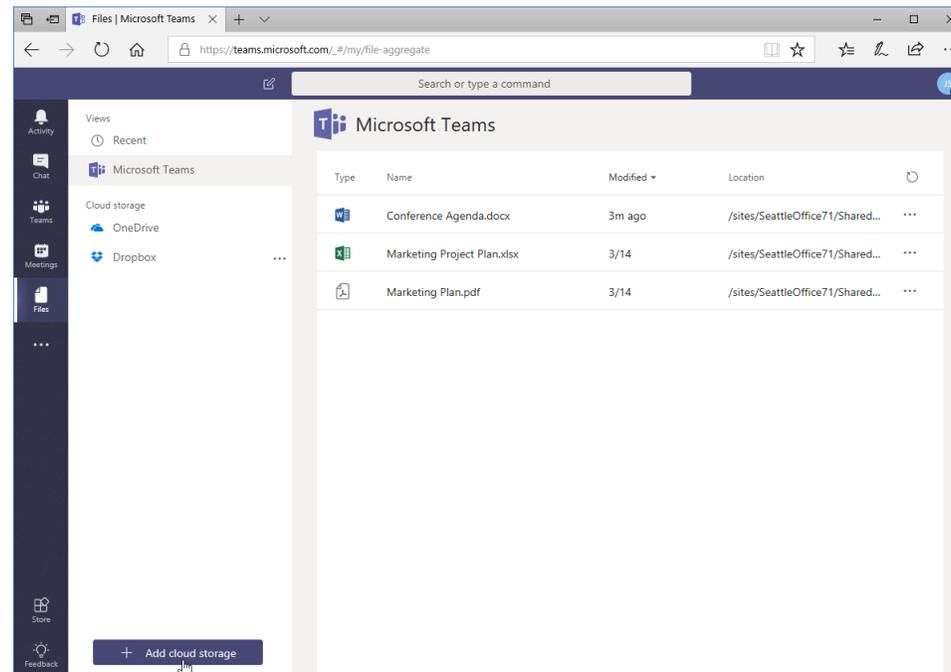


The screenshot shows the Microsoft Teams Files interface. The left sidebar contains navigation options: Activity, Chat, Teams, Meetings, and Files. The main area displays a list of files under the heading "Microsoft Teams". The files are listed in a table with columns for Type, Name, Modified, and Location. A context menu is open over the file "Conference Agenda.docx", showing options: Edit in Teams, Open in Word Online, Open in Word, Download, and Get link.

Type	Name	Modified	Location	
Word Document	Conference Agenda.docx	1m ago	/sites/SeattleOffice71/Shared...	⋮
Excel Spreadsheet	Marketing Project Plan.xlsx	3/14	/sites/SeattleO	
PDF Document	Marketing Plan.pdf	3/14	/sites/SeattleO	

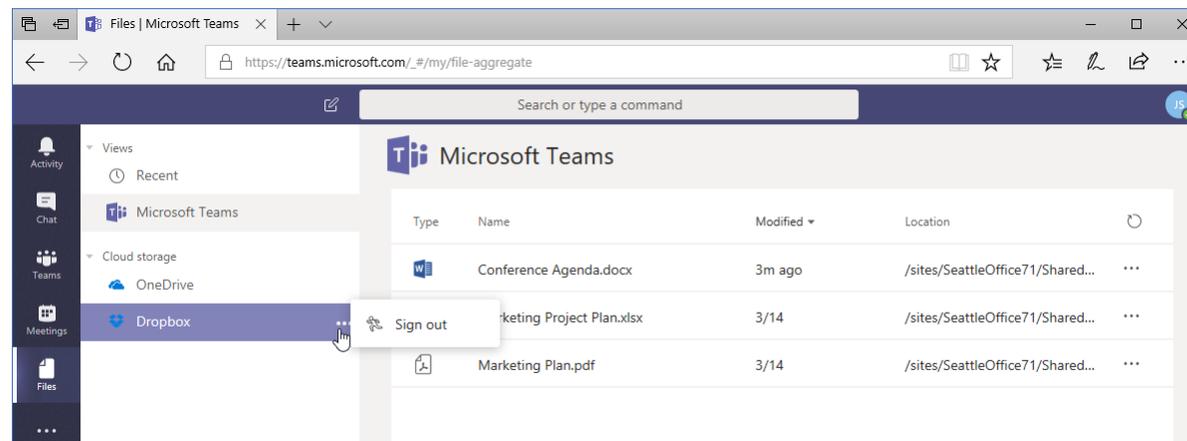
Adding and Managing Cloud Storage

We learned how to add cloud storage when working with the Files tab in a channel. The same command is available in the Files window:



Adding and Managing Cloud Storage

- To sign out of a connected service, move your mouse over the account name, click the ellipses, and click “Sign out
- It will be removed from the list, and will need to be reconnected to be used again



Summary

In this lesson, you learned about some of the communication tools in Teams outside of channels. You should now be comfortable using chat, managing meetings, and managing files.

Review Questions

1. What is required to start a video call?
2. What file sources are displayed in the Files tab of Teams?
3. What is the easiest way to start a new chat?
4. How do you cancel a meeting?
5. True or False: Chats are restricted to only two people.