

CHAPTER 1

Getting Started with Teams

Communicating, collaborating, and meeting in Microsoft Teams represents a paradigm shift from having to bounce between multiple apps to get work done and attaching files that quickly become outdated to email threads that find themselves almost unreadably ugly and complex as they branch off into side conversations. Teams is a new way to do work. Getting started in Teams is easy. Just make sure to have your work or school account email address and password. Some actions in this chapter may require an IT admin to perform, so don't sweat it if you can't do it yourself.



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Log into Teams

Almost anything you want to do in Teams you can do through the browser version of Teams (known as the *web app*). There are some upsides to using the web app: It's quicker and uses less memory on your computer; you can have multiple Teams, files, and guest accounts open at once; and you can log into it from pretty much any computer, which is helpful when you're on the go. That said, there are key features you will not get in the web app, especially during online meetings. The desktop app is generally a better, more full experience. However, when you need it, the web app is there for you.

The Teams *desktop app* provides the richest experience of all the options when it comes to using Teams. You'll get all the features in your online meetings, native notifications in Windows and macOS, as well as some other key benefits. That said, and to be candid, the Teams desktop app can be a resource hog. If you find that your computer is overheating or slowing down, try closing the Teams app and using the web app instead. Otherwise, enjoy everything that comes with the desktop app. If you do not have the app installed, see the next section, "Install the Desktop App."

One of the best aspects of Teams is the ability to hop between the desktop and mobile version with ease. Most of the features you use regularly on the desktop are available in some way on your favorite iOS, iPadOS, and Android devices. Bring chat, files, teams, meetings, and more on the go with the full-featured mobile app. In this section, we are using iOS as the example, but the setup should be similar on iPadOS and Android.

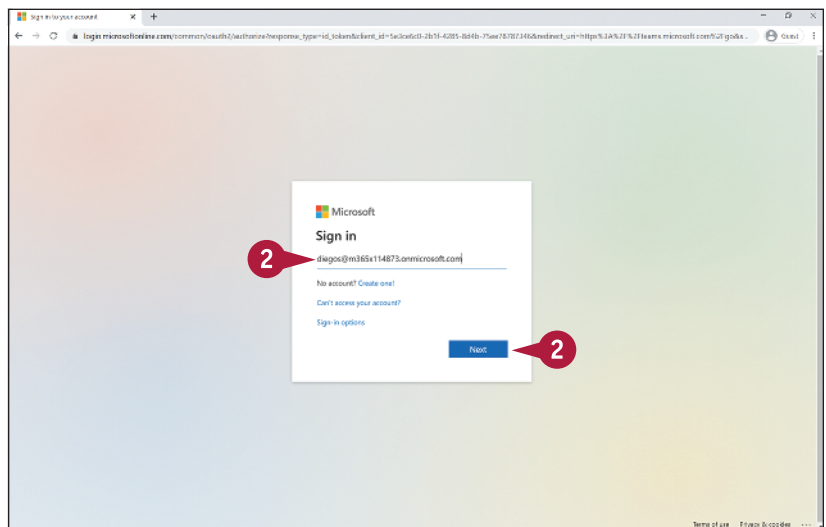
Log into the Web App

Log into the Web App

- 1 Open your favorite web browser and browse to <https://teams.microsoft.com>.

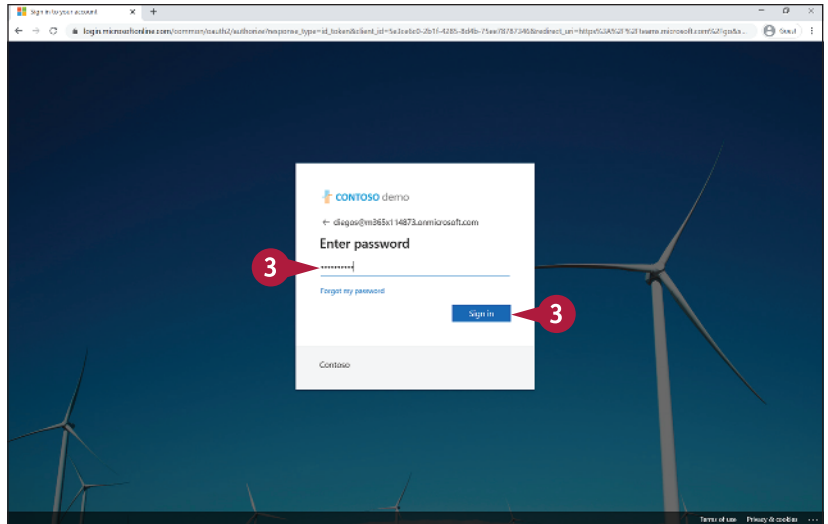
Note: While other browsers are supported, you will have the best experience in Microsoft Edge or Google Chrome.

- 2 Enter your work or school email address and click **Next**.

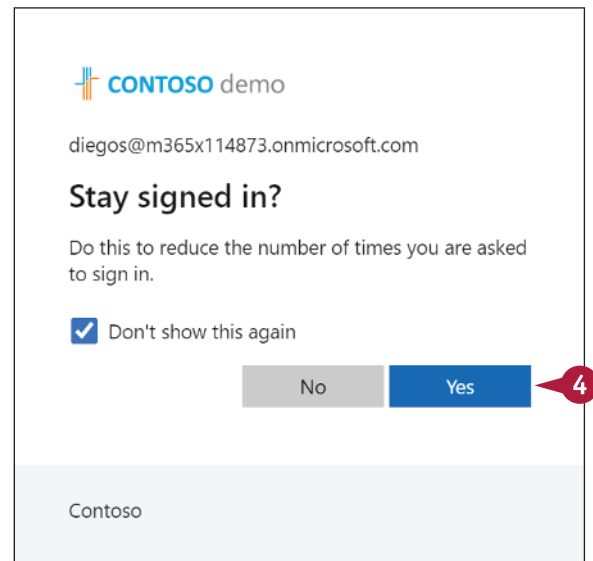


- 3 Enter your password and click **Sign in**.

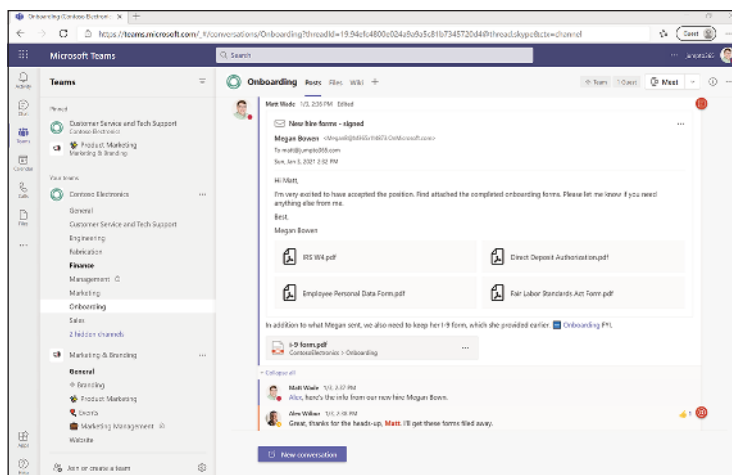
Note: Once the system recognizes your email address, a logo and background image representing the organization you are connecting to should appear, letting you know that you are logging into the right place.



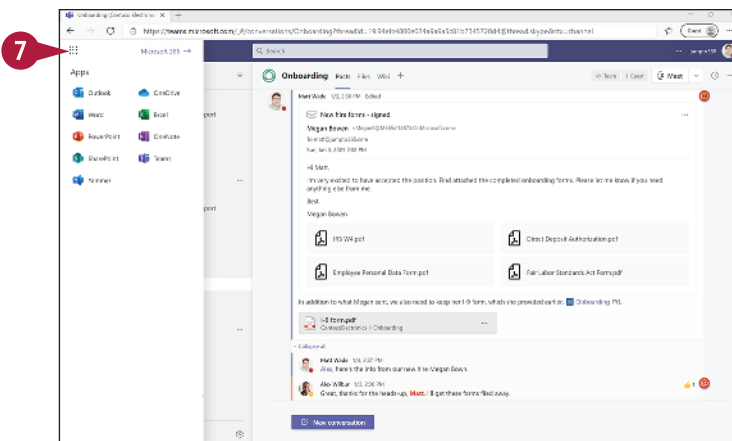
- 4 You may be asked whether you want to stay signed in. Select the appropriate response. If you are on a public computer (e.g., at a hotel or library), always say no.
- 5 Your browser may ask if you want to save your username and password. Select the appropriate response. If you are on a public computer (e.g., at a hotel or library), always say no.



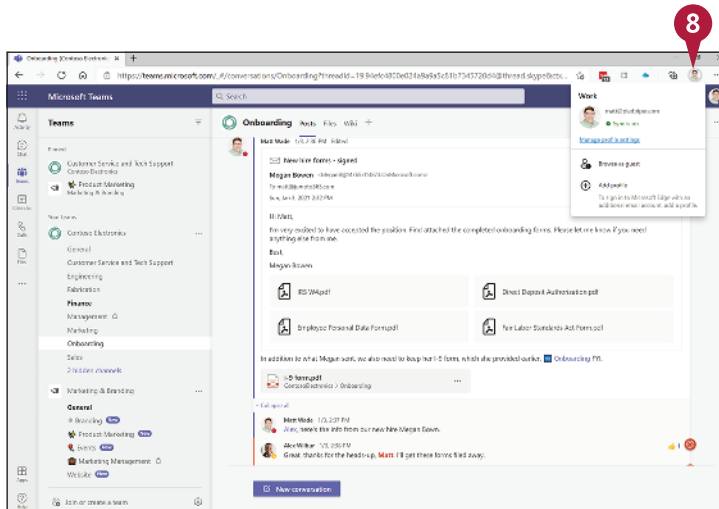
6 The Teams app should load.



7 You can jump to other Microsoft 365 apps by clicking the app launcher (:::) or "waffle" in the top-left corner.



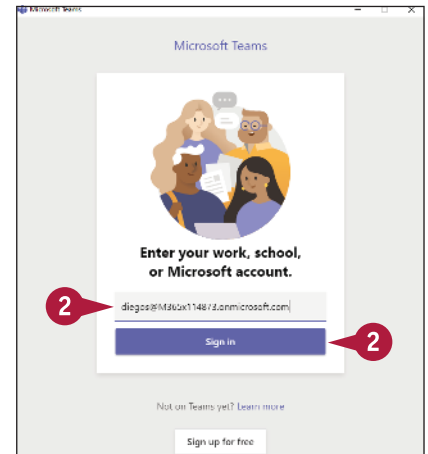
8 If you are using Microsoft Edge, you can sign into the browser with your email address and password, and it will automatically sign you in to Microsoft apps and services.



Log into the Desktop App

Log into the Desktop App

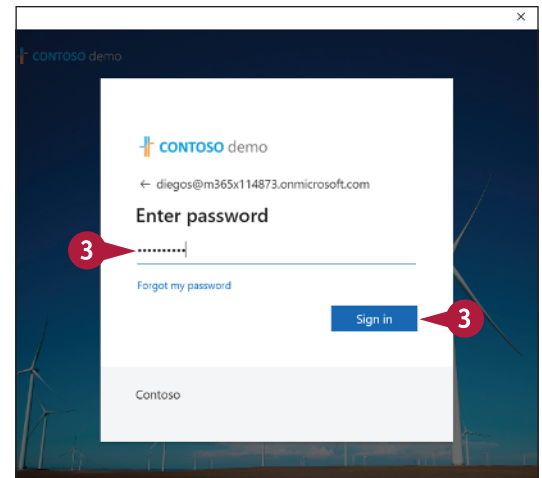
- 1 Open the Teams desktop app. On Windows, open the **Start menu** and search **Teams**. On macOS, open the **Applications** folder and open **Microsoft Teams**.
- 2 In the sign-in window, select an existing account or enter a new email address to use, and then click **Sign in**.



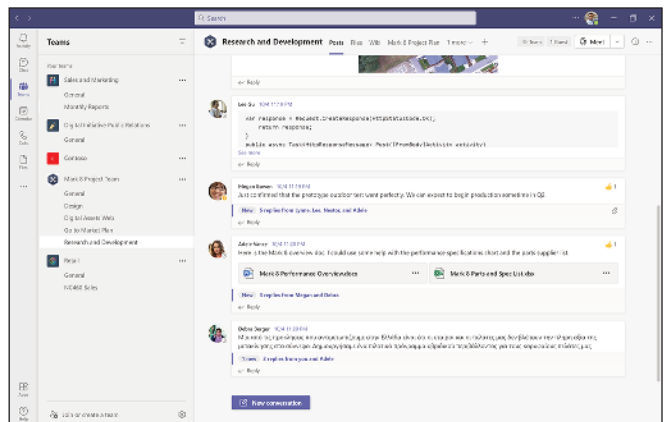
- 3 Enter your password and click **Sign in**.

Note: Once the system recognizes your email address, a logo and background image representing your organization should appear, letting you know that you are logging into the right place.

Note: You may be asked whether you want to stay signed in. Select the appropriate response.



- 4 The Teams app should load.



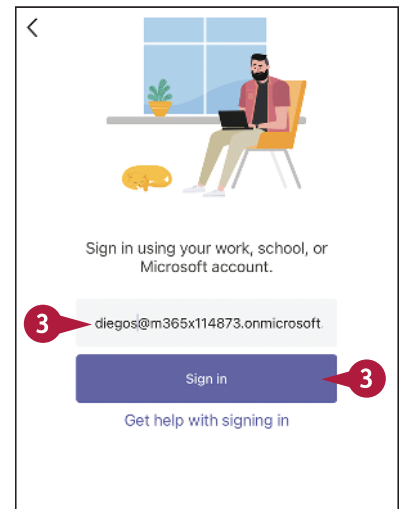
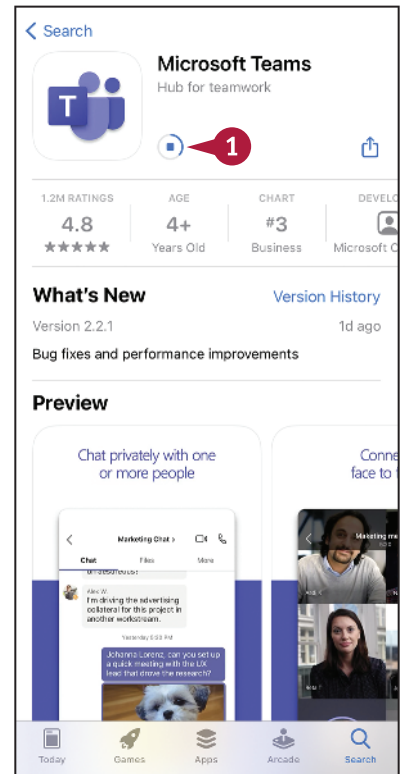
Log into the Mobile App

- 1 If you have not installed Teams on your mobile device, make sure to do so. On Android, install Teams from the Google Play Store; on iOS and iPadOS, install Teams from the App Store.

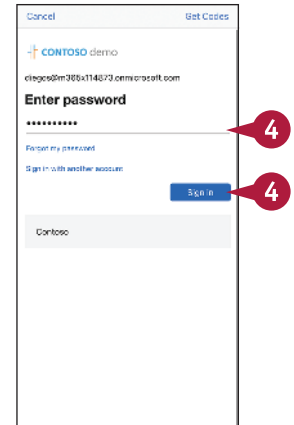
Note: You may need the Microsoft Authenticator app to gain access to Teams on mobile devices. You can download it from either the Google Play Store (Android) or the App Store (iOS and iPadOS).

- 2 Tap the **Teams** icon (👤) to open the app.

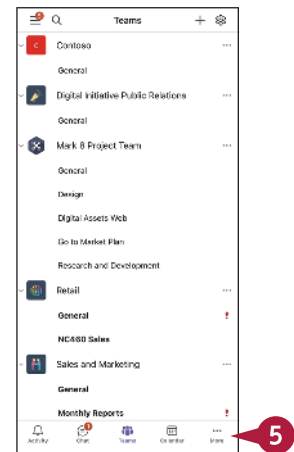
- 3 Provide your work or school email address and tap **Sign in**.



- 4 You may be brought to the Microsoft Authenticator app. If so, provide your password and tap **Sign in**.



- 5 You should be returned to the Teams app. Tap any of the apps in the app bar at the bottom to show your content.



TIP

Can I open and edit files from Teams on my mobile device?

Definitely. However, editing files does not take place in the Teams app itself. In addition to installing Teams, you should consider installing Word, Excel, PowerPoint, OneNote, Office, OneDrive, SharePoint, and Stream so that you can open (and edit, when applicable) various files in their native apps. Do this when you are connected to Wi-Fi and before you actually need the apps to use them. Setting up apps on the fly is no fun.

TIP

Can I log into multiple Teams accounts?

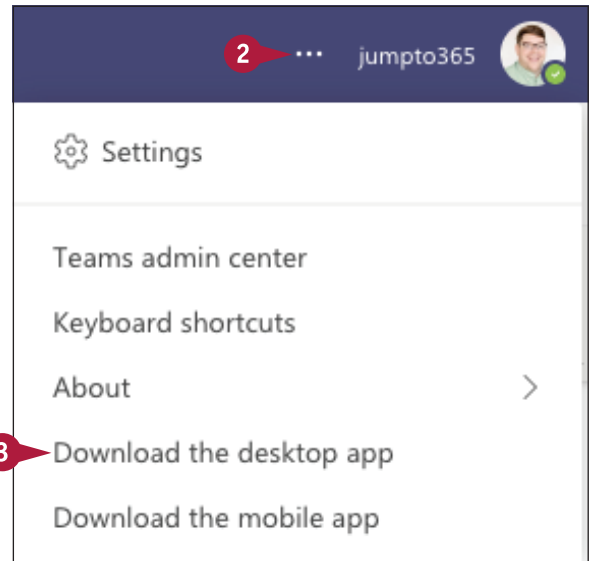
Not at once, no. At least not in the desktop app. You can sign into additional accounts and be a guest in multiple other organizations; however, you can access only one account or guest organization at a time. One way around this is to have the Teams desktop app open to your primary account and open the other accounts or guest orgs in the web app, using browser profiles.

Install the Desktop App

You will get the most out of Teams by using the desktop app. If you do not already have Teams installed on your computer, you can download a native app for either Windows or macOS. Keep in mind that most work and school devices will likely already have Teams installed, so check the app listing on your computer before downloading and installing. Installing also may require an admin to approve, so be prepared to reach out to your IT team if necessary. There are a few ways to do this; this option will always work.

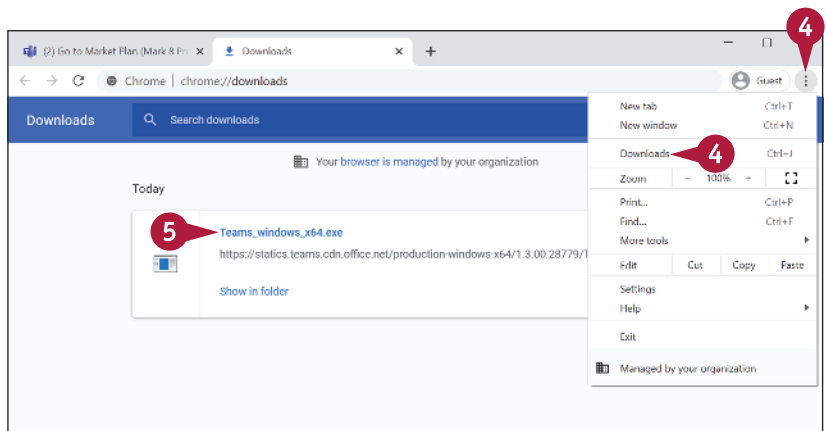
Install the Desktop App

- 1 Open the Teams web app (see the previous section “Log into the Web App”).
- 2 Click **Settings and more** (⋮) in the top-right corner.
- 3 Click **Download the desktop app**.



- 4 In the top-right of your browser, click ⋮ or : to open the menu, and then click **Downloads**.
- 5 Click the downloaded Teams installation file.
- 6 Follow the prompts until the file has been installed and Teams is available on your device.

Note: Step 6 may require an admin password to complete. Be sure to reach out to your IT team for support if you need it.

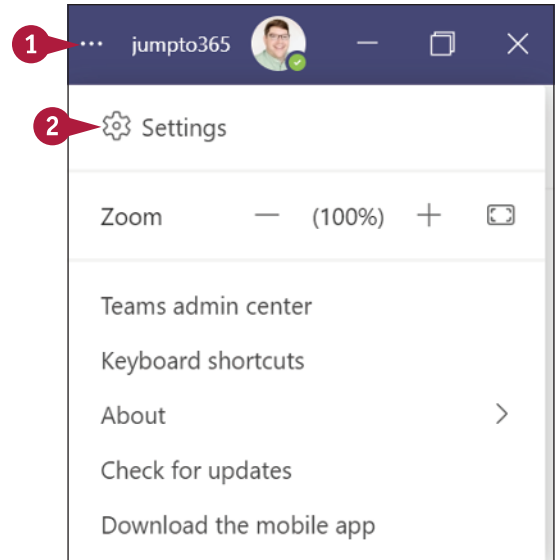


Modify Your Personal Settings

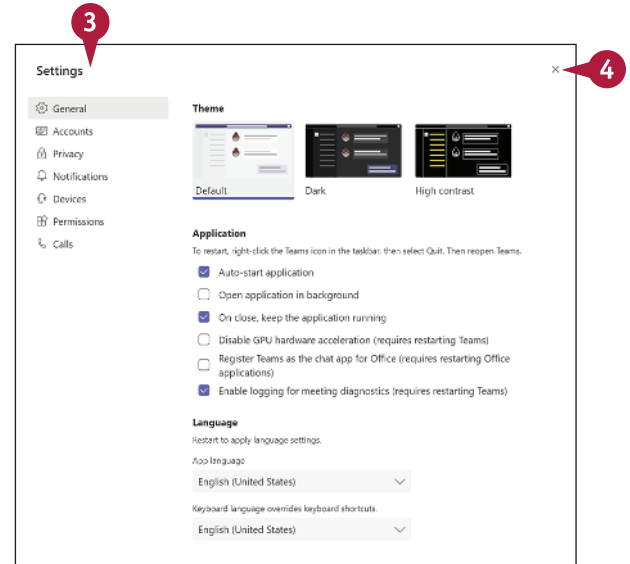
Teams offers a ton of ways to customize your experience, including dark mode, notification preferences, device settings, privacy settings, read receipts, who can contact you even when you are in *do not disturb* mode, quiet hours, and more.

Modify Your Personal Settings

- 1 Click **Settings and more (...)** in the top-right corner.
- 2 Click  **Settings**.



- 3 Thumb through the options you have here, especially the **Notifications** settings. Your Teams experience can be highly personal and specific to you if you put a little time and research into it.
- 4 Click  to close the Settings pane.

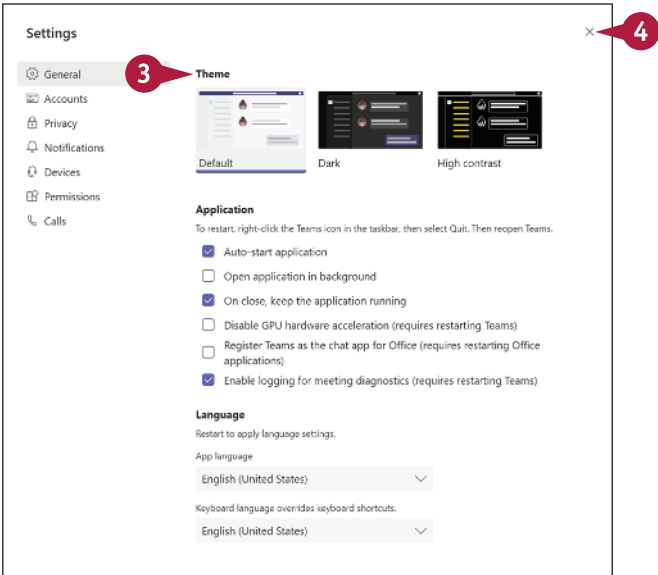
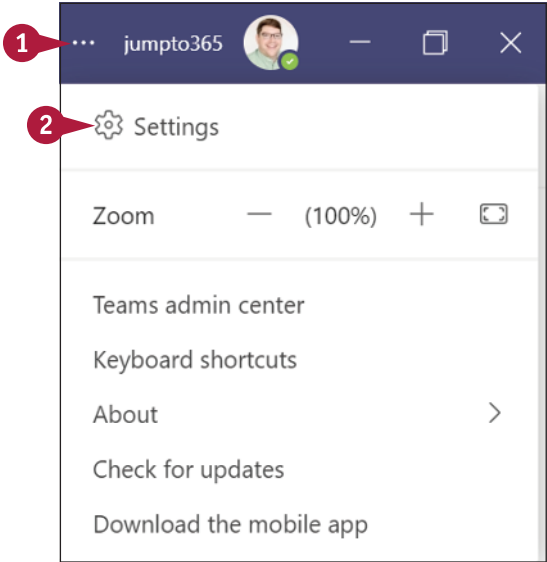


Switch Between Dark Mode and Light Mode

With dark mode being as popular as it is, Teams naturally offers a more muted and less-offensive-to-the-eye-during-later-hours view of the app. You can also enable high-contrast mode if you require that for better visibility. Toggle between these modes as the need suits you.

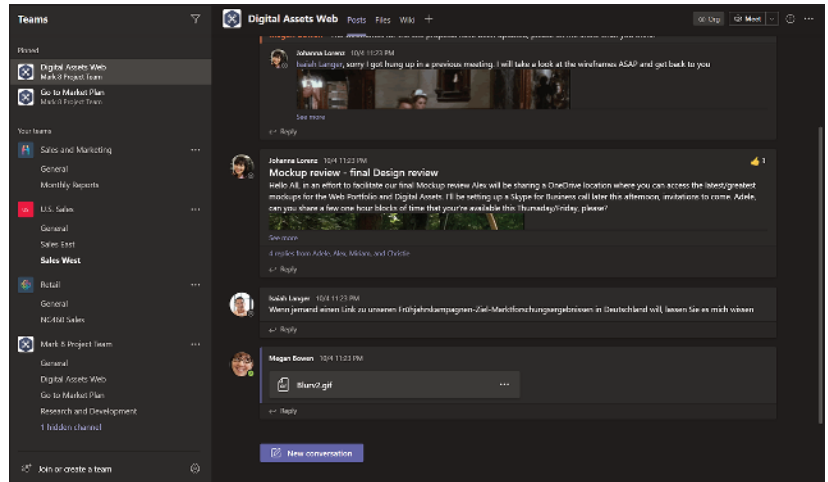
Switch Between Dark Mode and Light Mode

- 1 Click **Settings and more (...)** in the top-right corner.
- 2 Click  **Settings**.
- 3 Under **Theme**, select **Default**, **Dark**, or **High contrast**.
- 4 Click  to close the Settings pane.



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Note: Teams is now in the mode of your choice. (Dark mode is shown here.)



Add or Update Your Profile Photo

Your profile photo is an opportunity to represent yourself to all your colleagues. Without it, you just show up as two letters, which doesn't give anybody much information. And frankly, your colleagues have the right to know who they're working with, so you should not go without a profile photo ever.

When uploading a photo, make sure it's a clear headshot of you, cropped tightly, lit well, and where your face stands out from the background. Never use a photo of you with someone else (including a spouse or child), your pet, or a favorite character. Again, your colleagues deserve to know who they are working with; your profile photo is actually serious business.

Add or Update Your Profile Photo

1 Click your profile photo or initials in the top-right corner.

2 Click your photo or initials.

Note: Some IT admins disable the ability to change your own photo. Reach out to your IT team for help if you cannot complete this step.

3 Click  **Upload picture.**

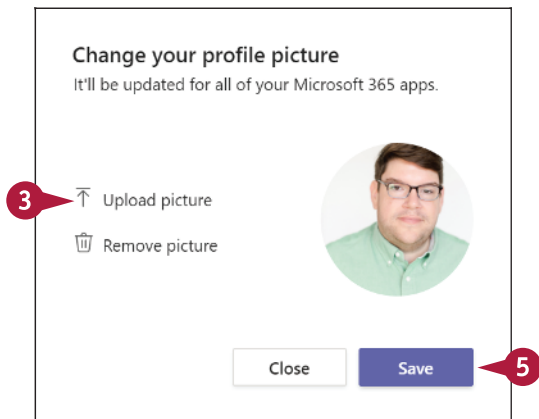
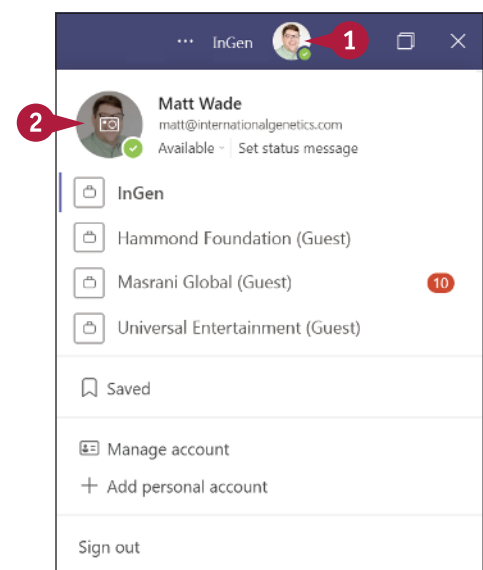
Note: Your photo must be smaller than 4 MB.

4 Select the photo you want to use from your computer.

Note: Your photo should be cropped square (or as close to square as possible) before you upload.

5 Confirm that you are happy with the look, and then click **Save**.

Note: This changes your profile photo throughout Microsoft 365 and may take some time to work its way into all apps.

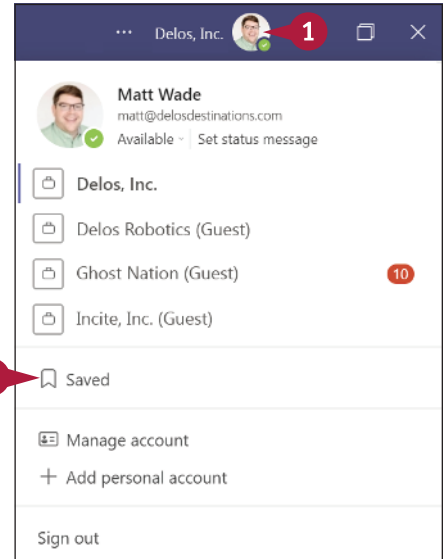


Access and Manage Your Saved Messages

If you are a fan of flagging emails, then you will love saving messages in Teams. Saved messages—either in private chat or in a channel conversation—are kept in a central spot for you so that you can view and manage them later at your convenience.

Access and Manage Your Saved Messages

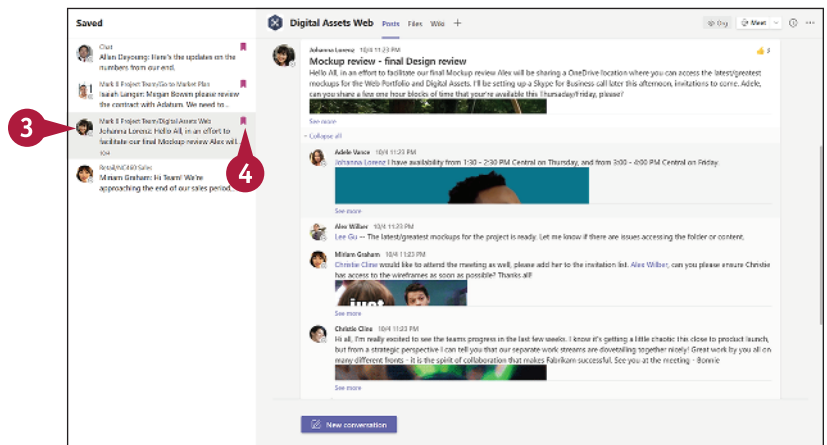
- 1 Click your profile photo or initials in the top-right corner.
- 2 Click  **Saved**.



- 3 From the rail, select the message you want to view. It will load in the main area.

Note: Saved messages are listed chronologically, newest on top. You cannot reorder them.

- 4 To remove a saved message from your list, click **Unsave this message** ().



Access a List of Keyboard Shortcuts

Plenty of people live on keyboard shortcuts, such as Ctrl+C and ⌘+V. Teams has a slew of keyboard shortcuts, some of which align with the standard ones in Windows and macOS and others that are specific to Teams itself.

Access a List of Keyboard Shortcuts

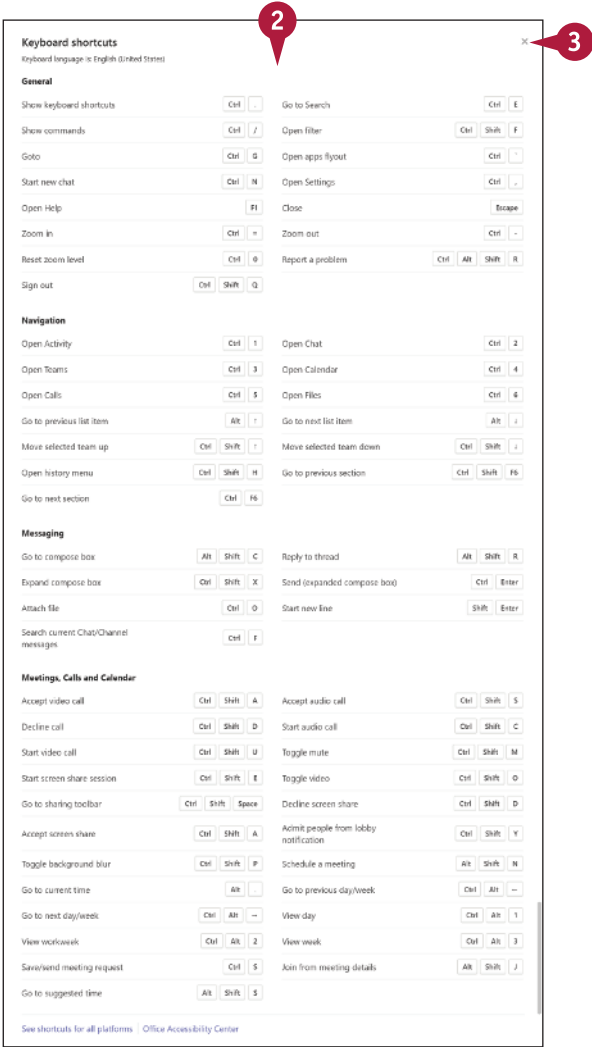
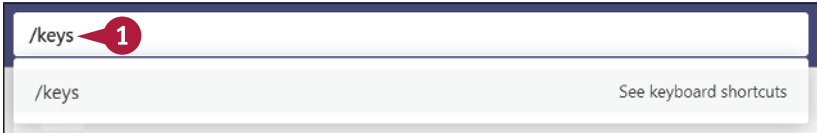
- 1 In the Teams search box, type the slash command **/keys**.

Note: For more information about slash commands in Teams, see the section “Slash Commands” in Chapter 4.

- 2 A lengthy list of shortcuts will appear. Check on this every so often; new shortcuts pop up from time to time.

Note: Shortcuts are generally the same between Windows and macOS. Just use the Ctrl or ⌘ key, respectively.

- 3 Click **X** to close the pane.



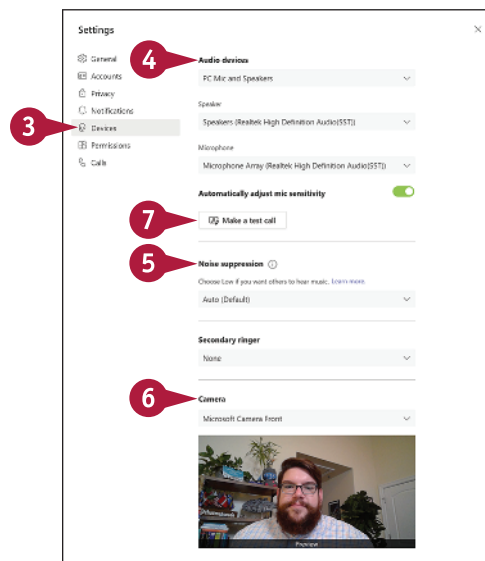
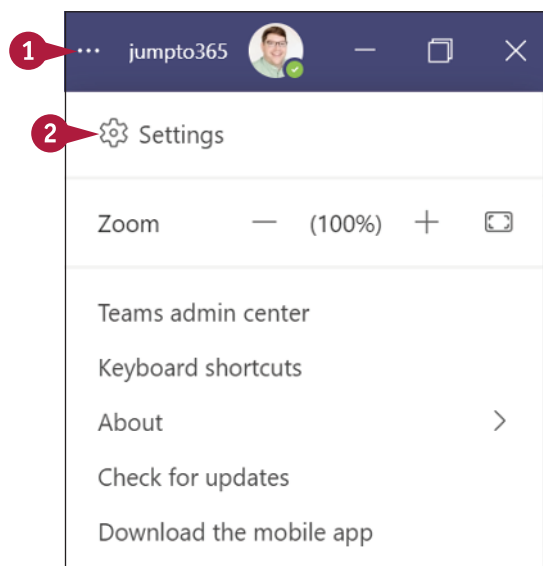
Set Up and Manage Your Video and Audio Devices

Before you start taking part in meetings for the first time—or any time you plan to use a new audio or video device—you should make sure your devices are set up properly. It is an easy step to avoid anxiety or embarrassment the first time you hop into a meeting and find something is not working properly. As with most things, a little time spent early on can save time and frustration later.

Set Up and Manage Your Video and Audio Devices

- 1 Click **Settings and more (...)** in the top-right corner.
- 2 Click  **Settings**.
- 3 Click  **Devices**.
- 4 Under **Audio devices**, select the speaker and microphone you want to use.
- 5 Under **Noise suppression**, select how aggressively you want background noise to be removed. **Auto (Default)** is likely best to start with.
- 6 Under **Camera**, select which webcam you want to use (if you have multiple).
- 7 Click **Make a test call** and run through the steps to confirm your audio and video devices are working as expected.

Note: Teams will remember these settings for your next call or meeting. You can always change your device settings when joining or during a meeting.

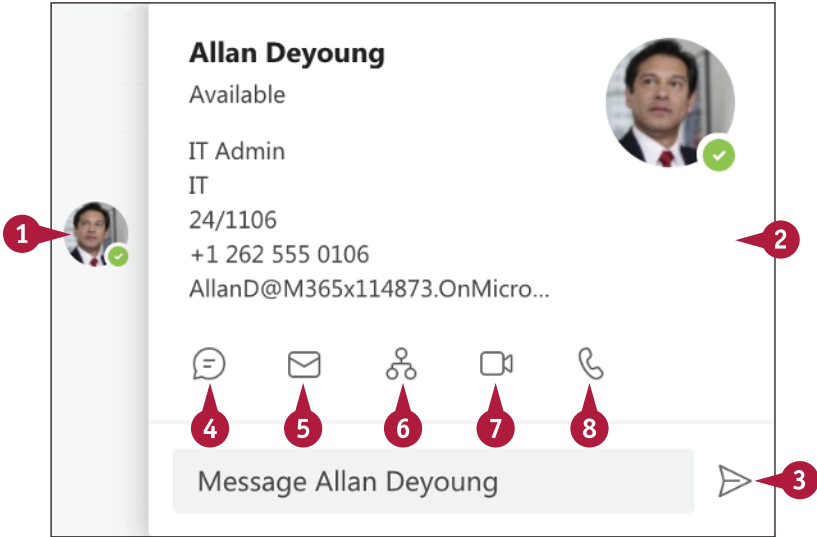


View a Person's Contact Card

Every person in Teams has a list of contact information that is easily accessible to you so you can find their job title, office location, phone number, and more personal details.

View a Person's Contact Card

- 1 Hover over the profile photo or initials of a colleague.
 - 2 The contact card lists photo, name, title, email address, phone number, department, and sometimes additional content from your organization.
 - 3 To send a quick private chat, enter a message in the text box and click **Send** (➤).
 - 4 To start a new private chat or open the ongoing chat with this person, click **Chat** (💬).
 - 5 To start a new email to this person, click **Email** (✉).
 - 6 To see this person in the organization chart, click **View organization** (🏢).
- Note:** See the next section in this chapter for further details on the organization chart.
- 7 To start a video call with this person, click **Video call** (📺).
 - 8 To start an audio call with this person, click **Audio call** (📞).

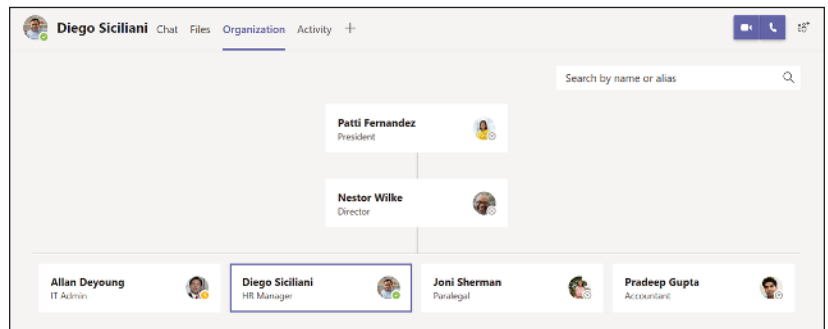
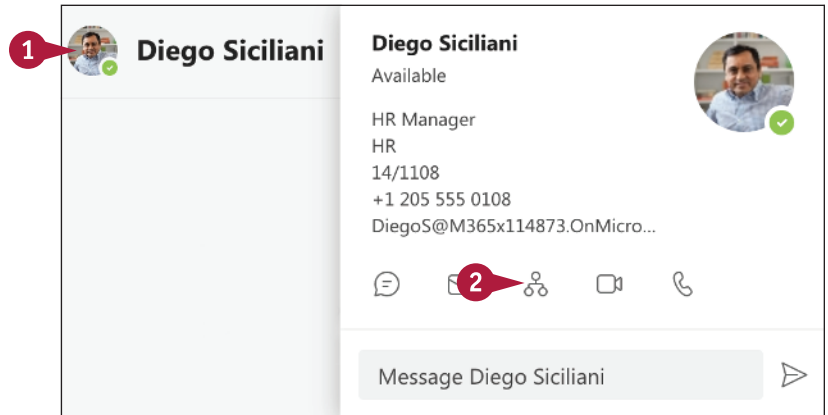


View the Organization Chart

Teams offers one of the best visual organization charts in Microsoft 365, but it is not the most obvious feature to find. Presuming your system has been set up so that everyone has a manager listed in their contact card, the org chart should automatically populate who reports to whom so that you can get a clear overview of the hierarchy of your organization.

View the Organization Chart

- 1 Hover over the profile photo or initials of a colleague.
- 2 In the contact card, click **View organization** (👤).
- 3 The org chart showing the hierarchy above and below that person will display. Click any person's card to expand it and take action (e.g., send a chat or email or start a call).



Switch Between Organizations as a Guest

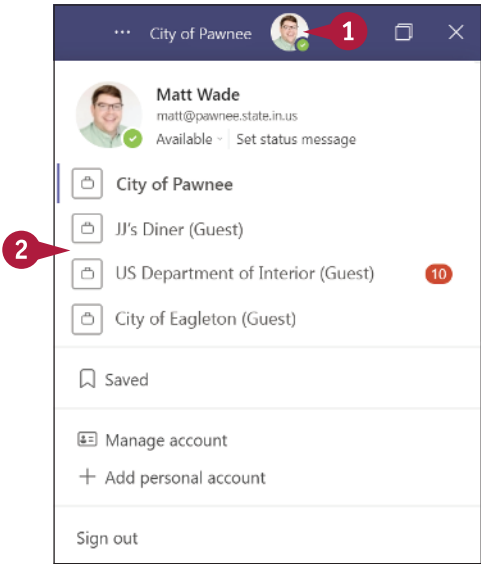
A major feature benefit of Teams is the ability to be a guest in someone else’s Teams system. Guests can take part in private chats and Teams in that system. However, you do have to switch between your guest accounts to check in on those orgs from time to time.

You will not be a guest in another system unless you have explicitly been invited by someone to a Team and you have accepted that invitation. After that, you can be included in conversations with people who are in any Team you are in, and other Team owners can add you to their Team as a guest.

Switch Between Organizations as a Guest

- 1 Click your profile photo or initials in the top-right corner.
- 2 Select the organization you want to switch to. The other org’s list of Teams should load.

Note: To switch back to your home account, follow steps 1 to 2 and select your organization.

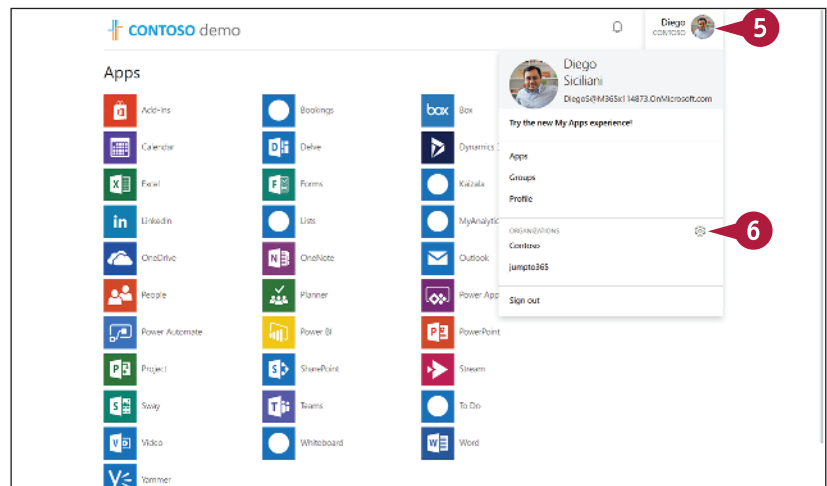
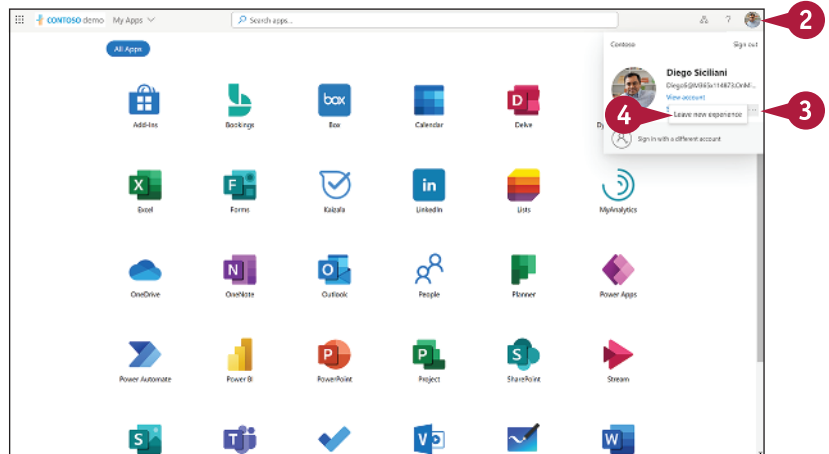


Leave an Organization as a Guest

Once you are done working as a guest in another organization's Team, you will likely want to remove that organization from your accounts and orgs list. This is a complex process for a simple goal, and Microsoft is working on a simplified process in the future. If these steps do not work for you, you should reach out to your IT team or do some research online for the current steps.

Leave an Organization as a Guest

- 1 In your favorite browser, browse to <https://myapps.microsoft.com> and log in with your work or school account.
- 2 Click your profile photo or initials in the top-right corner.
- 3 Click **More Options** (...).
- 4 Click **Leave new experience**.
- 5 Click your profile photo or initials in the top-right corner (again).
- 6 Next to **Organizations**, click **Settings** (⚙️).

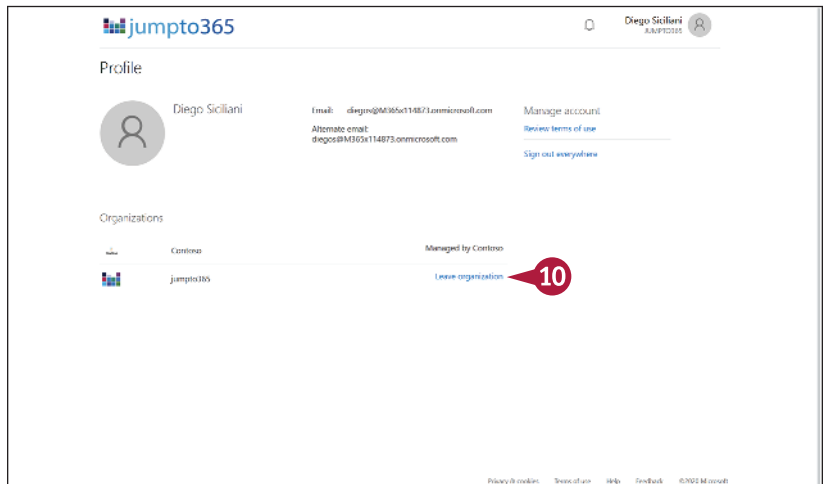
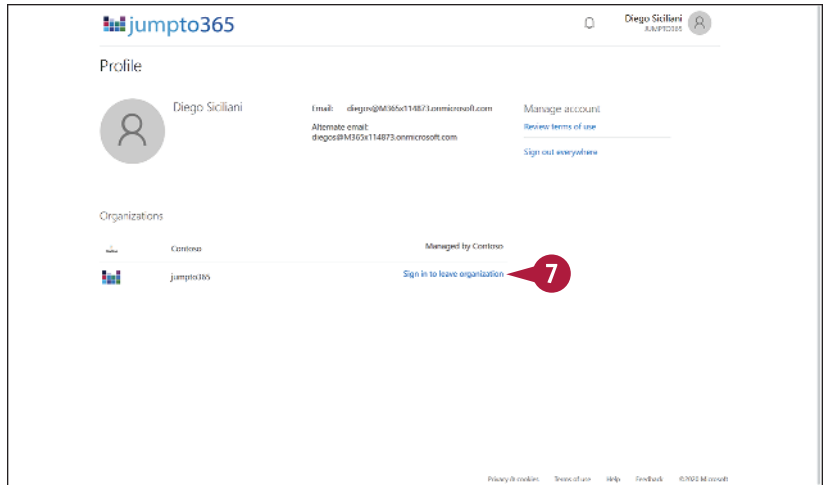


- 7 Next to the organization you want to leave, click **Sign in to leave organization**.

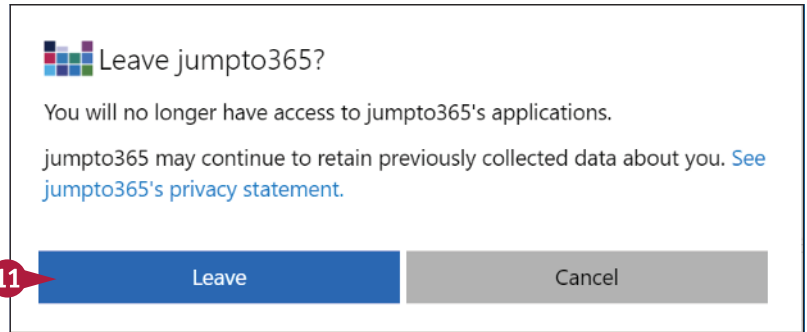
Note: If the link says **Leave organization**, skip to step 10.

- 8 Sign in with your work or school account if requested.
- 9 Click **Back** in your browser.

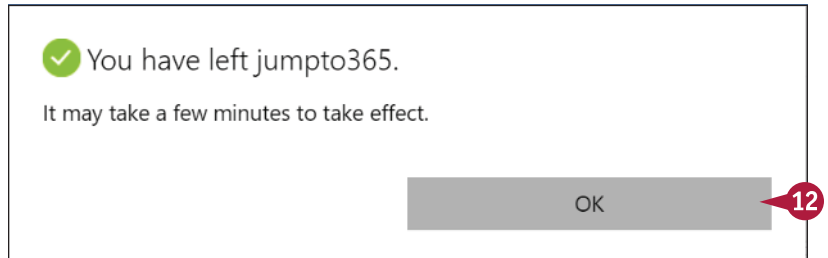
- 10 Next to the organization you just signed into, click **Leave organization**.



11 Click **Leave**.



12 In the confirmation pane, click **OK**. Close your browser tab or window.



TIP

Why do I still see the organization listed in my Accounts & orgs list?

Microsoft's confirmation page says your removal from that org will take "a few minutes to take effect." While that's accurate when it comes to permissions (you will not be able to access anything in that org after a few minutes), it does not mean you will not still see evidence of that org for a while. Empirical testing has shown the org will show in your Teams listing for upward of 48 hours. Additionally, the org will remain indefinitely if you do not sign out of the Teams app and sign back in. It apparently needs a refresh, which only logging out can accomplish. This applies to both the desktop and mobile apps.

Log Out of Teams

Once you are done with the Teams app on the desktop (either the desktop app or in the browser), you might want to log out to end your session and keep someone else from using it. This is especially useful when you are accessing Teams on a public computer (e.g., a hotel or library). Always make sure to log out when using public devices.

Once you have finished using Teams on your mobile device, you will want to log out of it. Logging out is also useful when you are getting a new phone or tablet or letting someone else use the device. In this section, we are using iOS as the example, but the experience should be similar on iPadOS and Android.

Log Out of the Web or Desktop App

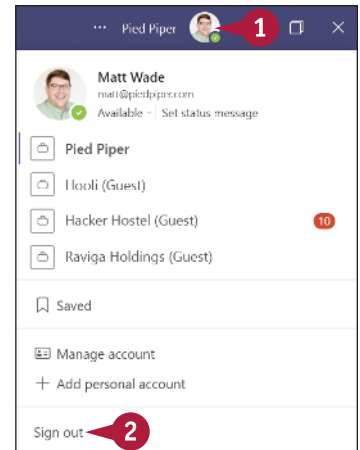
1 From the Teams web or desktop app, click your profile photo or initials in the top-right corner.

2 Click **Sign out**.

In the web app, if requested, confirm which account to sign out of. You should receive a confirmation you were signed out.

In the desktop app, the app will close and reopen to the sign-in screen.

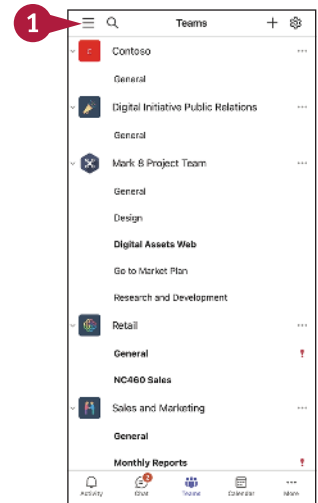
Note: Signing out of the web app also signs you out of Microsoft 365 entirely in that browser.



Log Out of the Mobile App

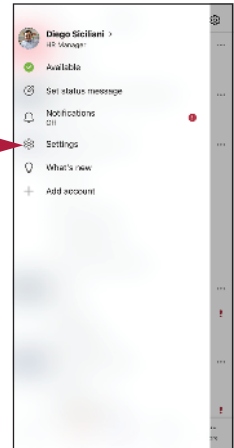
1 From the Teams mobile app, tap the **hamburger menu** (≡).

Note: Yep, that's what those three lines are called, a hamburger menu.



Getting Started with Teams

2 Tap  **Settings**.



3 Tap  **Sign out** [your email address].

4 Tap **Sign out** to confirm.

Note: You can now sign in with a different account or close the app.

