Teams Training Guide

A step by step guide on how to use NHS Teams with hints and tips along the way

New to Teams?

Have a go at sending messages and calling colleagues

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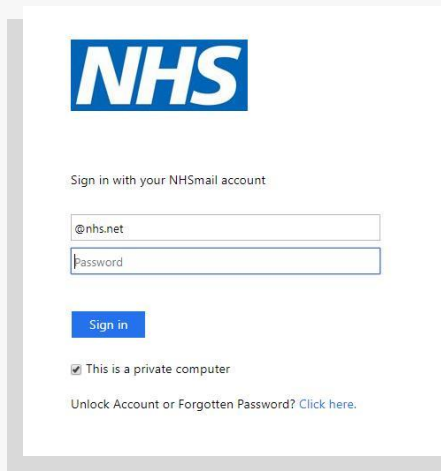Send quick updates from your mobile with voice notes

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Tips to make the most of Teams collaboration
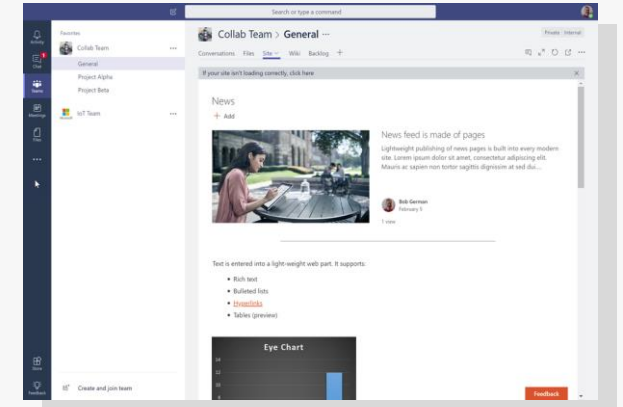
1

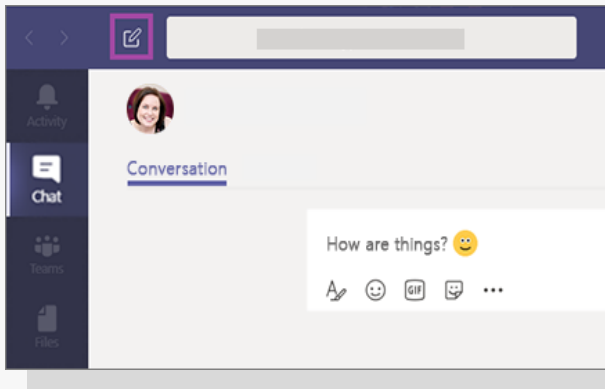Sign in by clicking the 'Sign in' button on support.nhs.net or visit Microsoft.teams

2

Use your NHS.net account details to log into Teams.
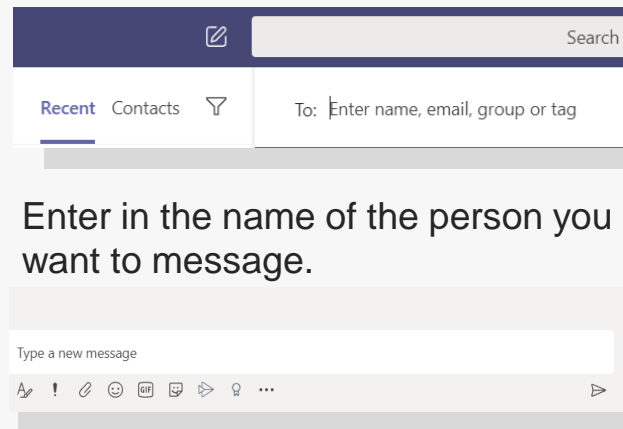
3

Once logged in, you should see the Teams home screen.

1

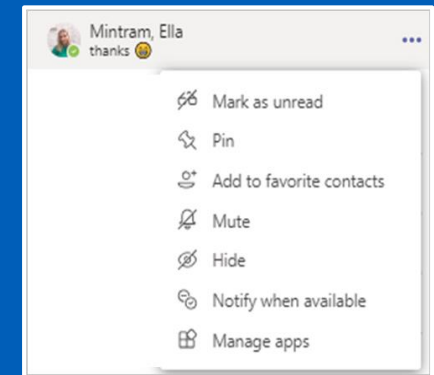Select New chat ✏️ at the top of the page

2

Enter in the name of the person you want to message.

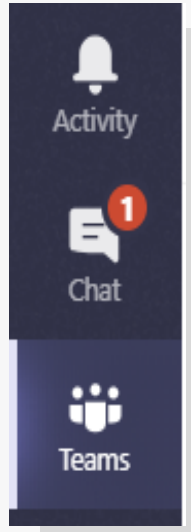Type your message into the chat box and select Send.

Quick Tips 💡

Set notifications to see when a colleague is available on Teams. Click the three dots next to a person's name and select 'Notify when available'.
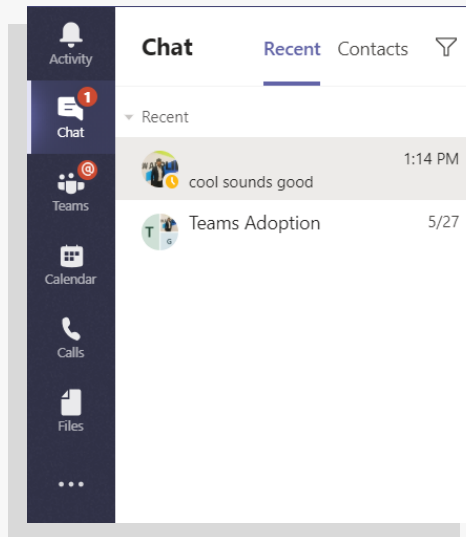
Mintram, Ella
thanks 😊

- ✂️ Mark as unread
- 📌 Pin
- 👤 Add to favorite contacts
- 🔕 Mute
- ⊘ Hide
- 🔔 Notify when available
- 🗄 Manage apps

1

You'll be notified of new messages by a red circle on the 'chat' icon. The number in the circle indicates how many new messages you have.
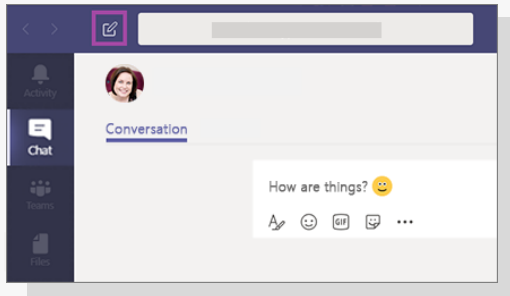
2

When clicking on the chat icon, the most recent messages will appear at the top and unread messages will be displayed in bold letters.
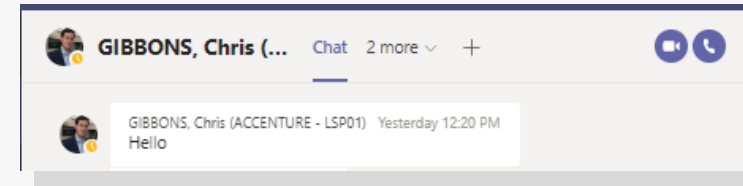
3
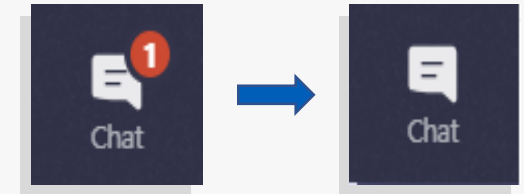
Once all messages are viewed, the chat icon will revert back to it's original state and the red circle will disappear.
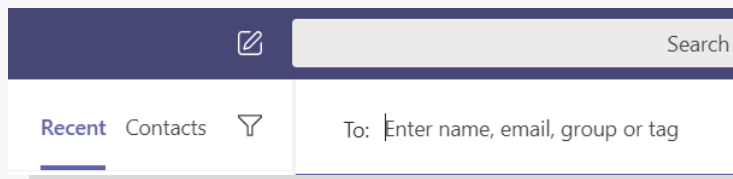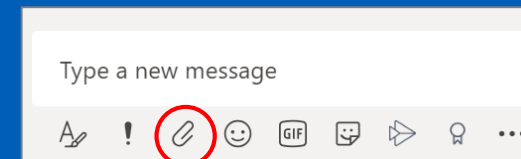
1 Select New chat ✎ at the top of the page

2 Enter in the name of the person you want to call

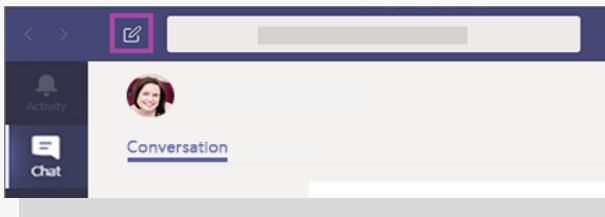**3** Click on the phone icon on the top right of the page
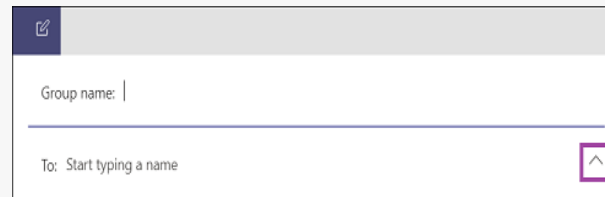
Quick Tip 💡

Share content by selecting the paperclip icon below the text box
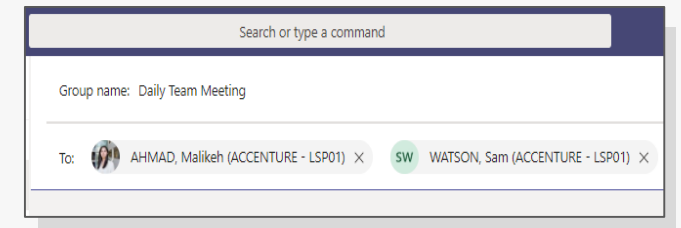
1

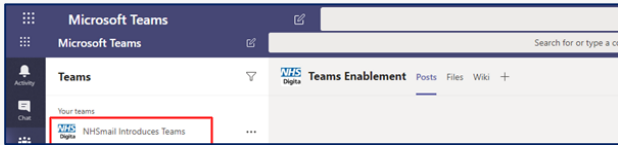Select New chat at the top of the page

2

Select the down arrow to the far right of the **To** field and add a group name
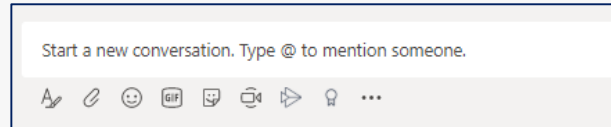
3

Type in the names of the people you want to add in the **To** field. You can then send a message to your new group conversation!
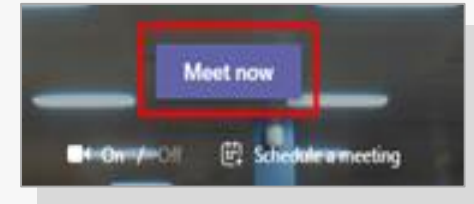
1

Select the Team's channel you want to start a meeting in.
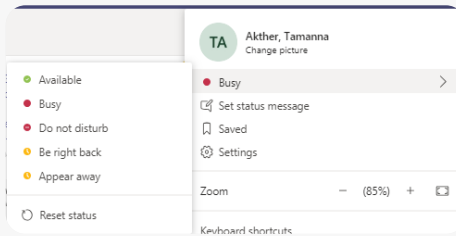
2

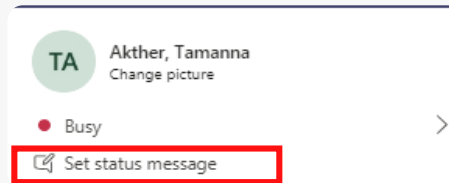Select the 'Meet now' icon at the bottom of the page to start your call.

3

Enter in a subject line for the meeting and click 'Meet now'. You are now in the group call!
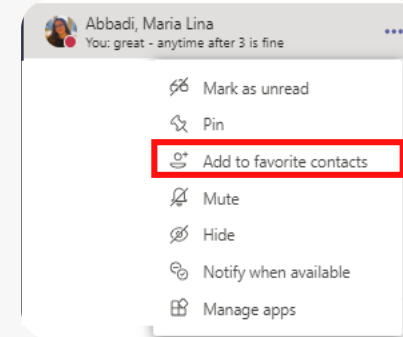
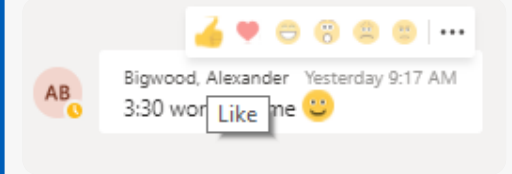**Select your status appropriately (e.g. *Busy* when in meetings)**

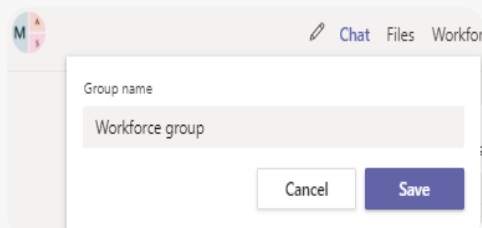**Update your status to reflect a frequently asked question (i.e. working hours, locations etc.)**

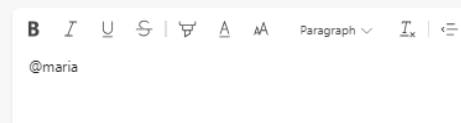

Favourite a contact to find chats quickly

Use the "Like" button to acknowledge a message quickly
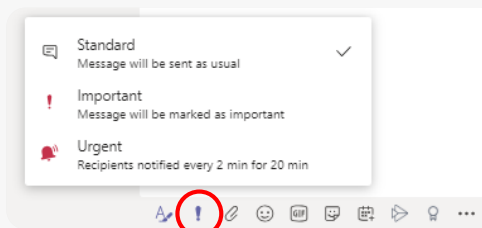

Name a group chat to reflects it's purpose and remove confusion
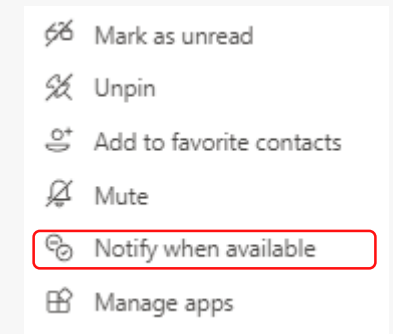

In group chats, use the @ to directly address someone

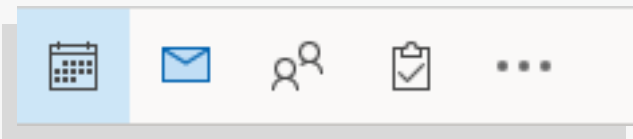**Use the "!" button to flag an important message**

You can set notifications to see when someone is available on Teams
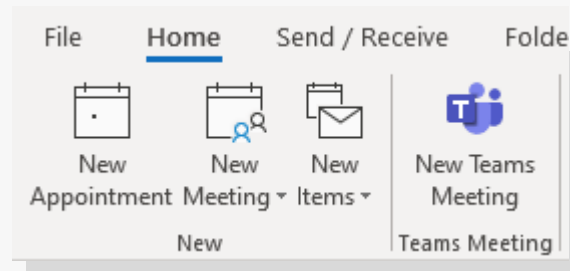
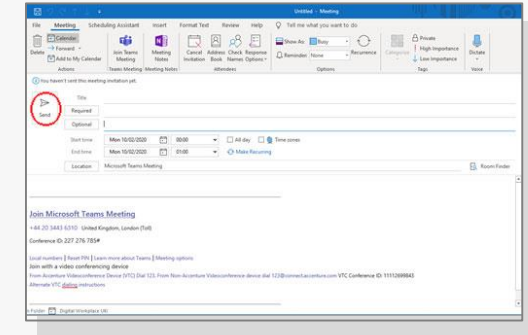# Ready for more?

1

Open the Outlook desktop app and select the calendar icon

2

Select 'New Teams Meeting' on the top of the page
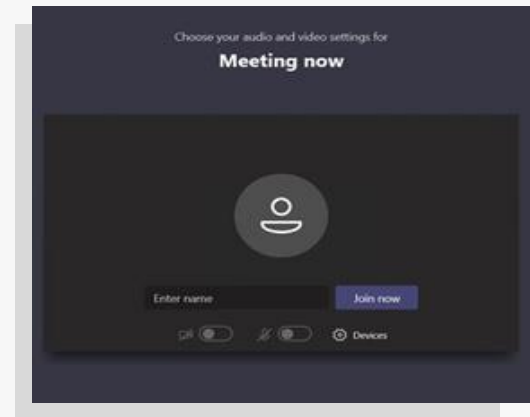
3

Type in the names of the people you want to add in the **To** field

1

Find your Teams meeting invite in the Outlook desktop application and select 'Join Microsoft Teams Meeting'
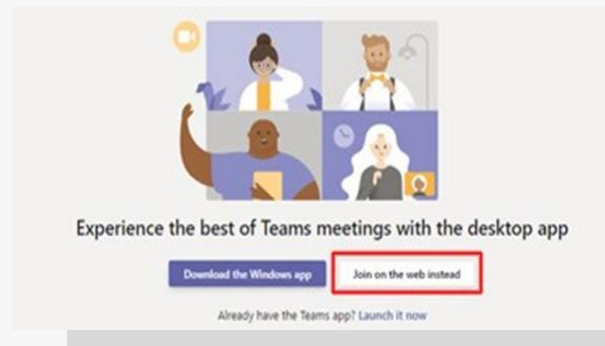
2

You will be directed to the meeting. Here, select 'Join now' and which will take you into the meeting

1

Find your Teams meeting invite in the Outlook web or desktop application and select 'Join Microsoft Teams Meeting'

2

You will be directed to a web page which will then open up the meeting in your desktop Teams application.

3

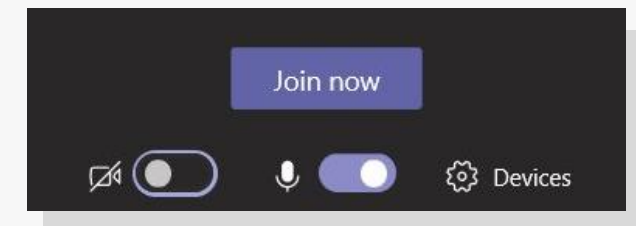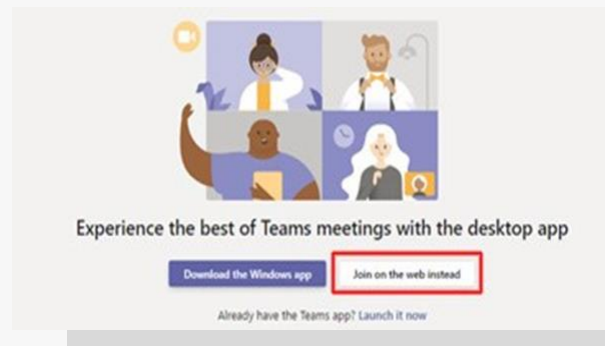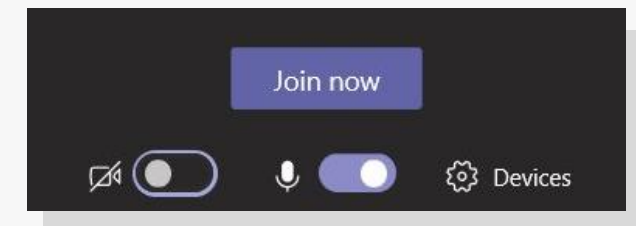Click 'Join now' to enter the meeting.

1

Find your Teams meeting invite in the Outlook web or desktop application and select 'Join Microsoft Teams Meeting'

2

You will be directed to a web page which will then open up the meeting in your desktop Teams application.

3

Click 'Join now' to enter the meeting.

1

To create a Teams group for you and your colleagues, you will need to contact your Local Administrator, sending them the details of the Team you would like created.
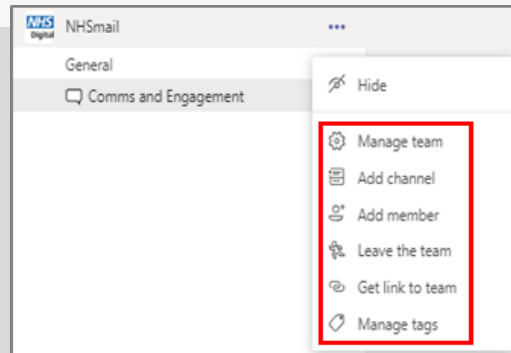
2

Send your LA:
- Names and emails of people you would like to add to the group
- The name of the person who will own the group
- The group name
- A short description of the group

3

You will be notified by email once your group has been set up. An owner can then add or remove members, change the group name and add more owners to the group.

In a Team, only owners can add/remove members

1

Add a channel by selecting the three dots next to the name of the Teams group and select 'Add channel'.

2

On the next screen you can add a name and description for the channel

3

Select "Automatically favourite this channel for the whole team" to make it automatically visible in everyone's channel list. Select 'add' to complete the steps and create the channel
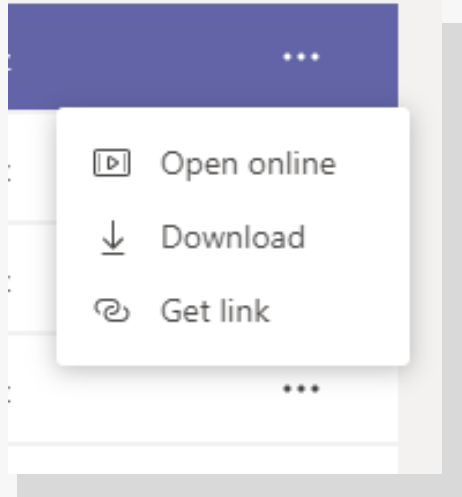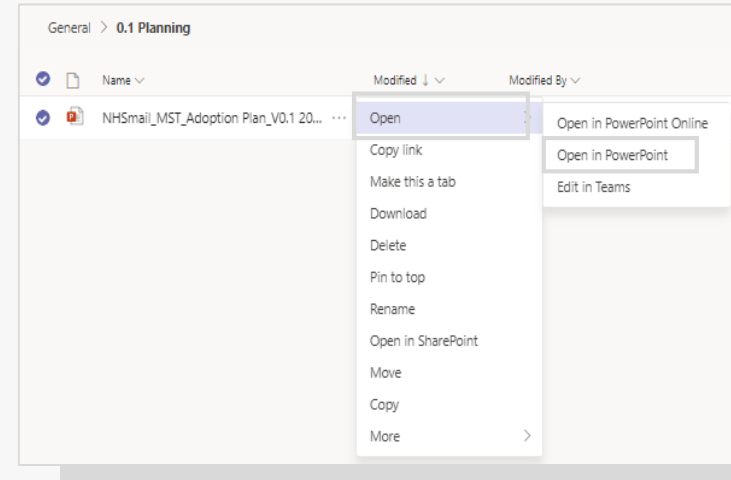
Steps for editing in your browser

1. Find the file you would like to edit
2. Right click on the three dots
3. Select "Open online"
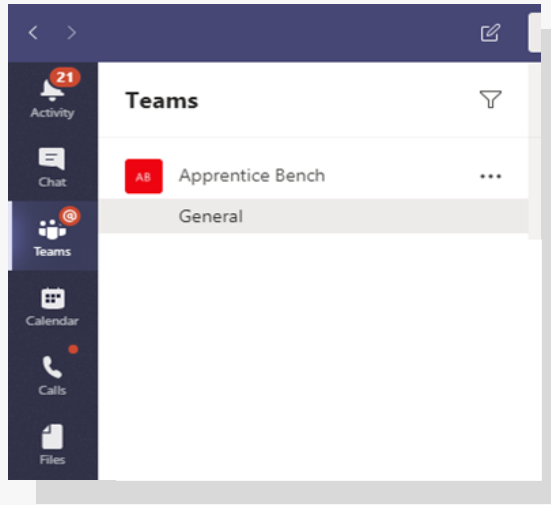4. File will open automatically in browser and you can edit

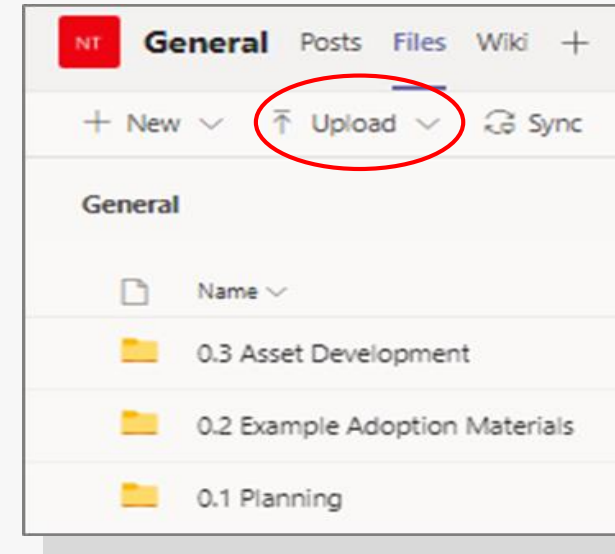**Steps for editing on your desktop**

1. Find the file you would like to edit
2. Click on the three dots next to the file
3. select "Open" and choose the Microsoft programme to work on the document
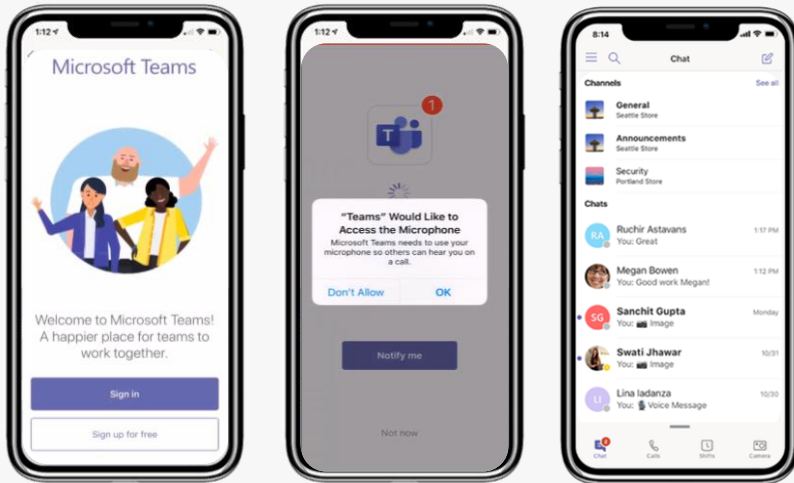
1

Select the channel in the Teams group you want to share a document.

2

Select "Upload" on the top of the page and find the file or folder on your computer you would like to share.

Download the Teams mobile app

1. Find the Microsoft Teams app in the App/Play store and download
2. Sign in with your **NHS.net email address**
3. Enable your microphone when prompted by selecting 'OK'
4. You'll then be directed to your Teams home page

Send a voice note
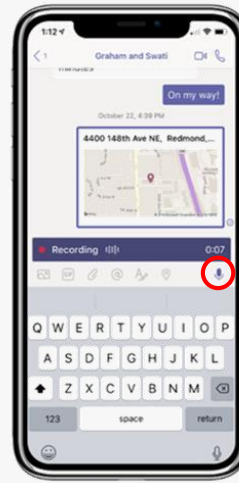
1. Select the person or group you want to message
2. Hold down the microphone icon on the keypad
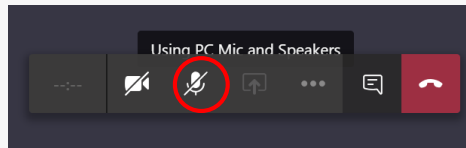3. Record your message
4. Release the mic and press send

Quick Tips

You can use voice notes to share actions from a team meeting or assign tasks to colleagues without having to type up meeting notes!
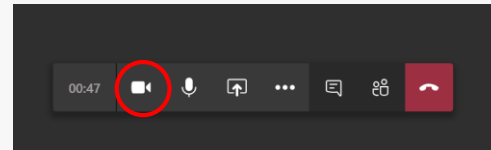
You can listen to voice notes sent from mobile on desktop and web versions of Teams.
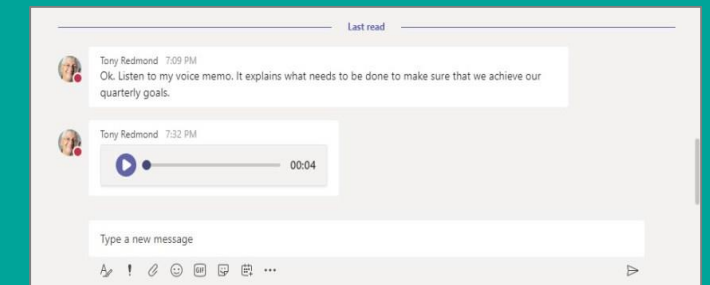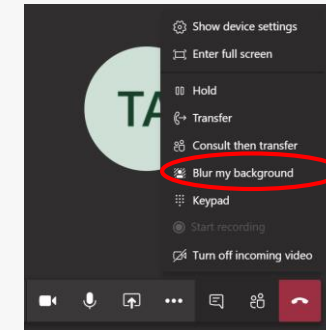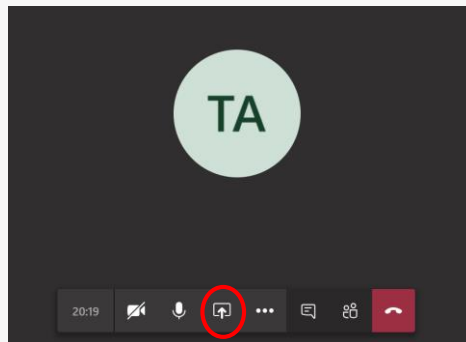
Mute yourself when on calls to minimise distractions

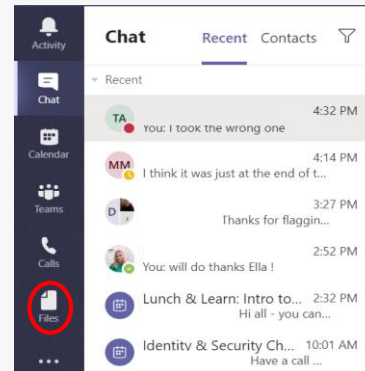**For proximity and engagement in a meeting, turn on the camera**

When using the camera, blur the background to increase focus and add privacy

Anybody on the call can share their screen, not just the organiser

Access all your shared files via the files folder easily

Collaborate live with colleagues by working online