MICROSOFT TEAMS GUIDELINE DOCUMENT

Teams lets you quickly pull together a team with people inside and outside your organization, chat with others to drive fast and inclusive conversations, securely share and coauthor documents, and iterate on projects. **Customize Teams by** adding fingertip access to shared notes, webpages, and apps. Use meetings and calling to collaborate in real time from wherever users are. Teams will simplify your access to Office 365 services and third-party apps to be the new center of gravity for your collaboration and communication needs.

There are 3 different types of Teams that can be created:
Class Teams help teachers easily manage class workflow while engaging every student's voice. Using Class Teams, teachers can move quickly and easily from conversations to content creation. Teachers can create, share, and grade assignments while students can collaborate on projects, provide feedback to peers, and engage in conversations about the content they are learning.

Staff Teams can be used for whole school initiatives or for smaller departmental projects. The uses are only limited by the vision of administrators. Uses include:

- **School improvement plans**
- **Incident response plans**
- **Disciplinary reports**
- **Social and emotional learning programs**
- **Teacher evaluations**
- **Technology support and instruction**
- **Bus incident reports**
- **Curriculum planning**

In short, you can create Staff Teams for different projects, activities, committees, and processes. All administrative tasks can be managed within Teams.

Professional Learning Communities Overview

A professional learning community (PLC) is an extended learning opportunity to foster collaborative learning among colleagues within a particular work environment or field. It is often used in schools as a way to organize teachers into working groups. Teachers and students can also create a Team for clubs, sports teams, or any other common interest they have.

Before you get started

Step 1
To get ready for your Teams rollout, here's what you need to do, whether Teams is your first workload (**"Teams First"**) or the next workload in an **existing Office 365** deployment:
Prepare your organization's network for Teams
This includes **configuring your Office 365 domain, SharePoint Online, Exchange Online, and OneDrive for Business.**

Get Teams licenses for everybody. Check out Teams plans and Office 365 licensing for Teams.

MICROSOFT TEAMS GUIDELINE DOCUMENT

Step 2

On board your teachers and students in Teams

To download:

Teams for Windows
The easiest way to install the Windows desktop client is to:
Download the Windows desktop client from https://teams.microsoft.com/downloads.
Run the installer (doesn't require admin permissions).
Start Teams after installation completes.

Teams for Mac
The easiest way to install the Mac desktop client is to:
Download the Mac desktop client from https://teams.microsoft.com/downloads.
Run the installer (requires admin permissions).
Start Teams after installation completes.

Web client
Teams provides a feature-rich web client, **https://teams.microsoft.com**, that supports a variety of browsers.
Teams fully supports the following Internet browsers, with noted exceptions for calling and meetings.

Mobile client
The Teams mobile clients for iOS and Android keep users connected and productive when on-the-go. To learn more, see Get clients for Teams (Mobile clients).

Teams for iOS
Users running iOS 10.0 or later can download the Teams mobile app from the Apple App Store and get started right away.

Teams for Android
Users running Android 4.4 or later can download the Teams mobile app from the Google Play Store and get started right away.

Step 3

Throughout your Teams rollout, be sure to take advantage of these resources to help drive Teams adoption.

Krupali Sanghvi (National ICT Awardee, MIEE Master Trainer, Udgam School for Children)
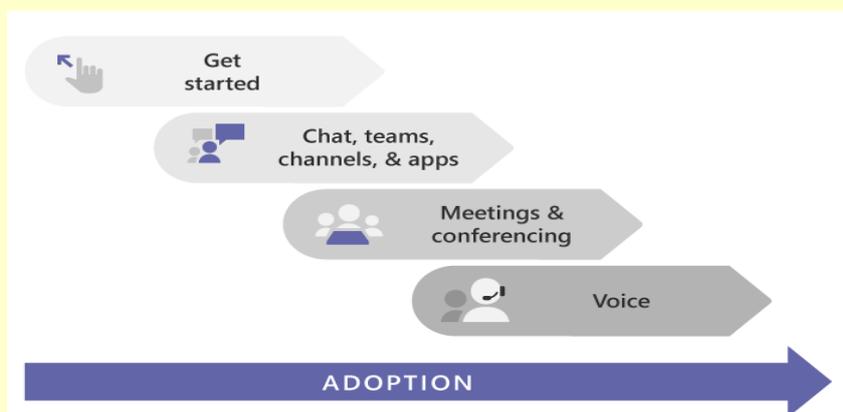
Step 4
Create your first teams and channels in Microsoft Teams

Create a team
On the left side of **Teams**, click **Teams**, at the bottom of the teams list, click **Join or create a team**, and then click **Create a new team**.

Once you've created the team, **invite people** to join it. You can **add** individual users, groups, and even **entire contact groups** (formerly known as "distribution lists").

Screen shot of an example team, showing the team name and description

Add a team owner
Find the team that you created, **click More options ··· > Manage team**. Then go to the **Members** tab. Find the people you want to designate as team owners. Under **Role**, click **Owner**.

Create a channel in a team
Find the team that you created, click **More options ... > Add channel**. You can also click **Manage team** and **add a channel** in the **Channels** tab.
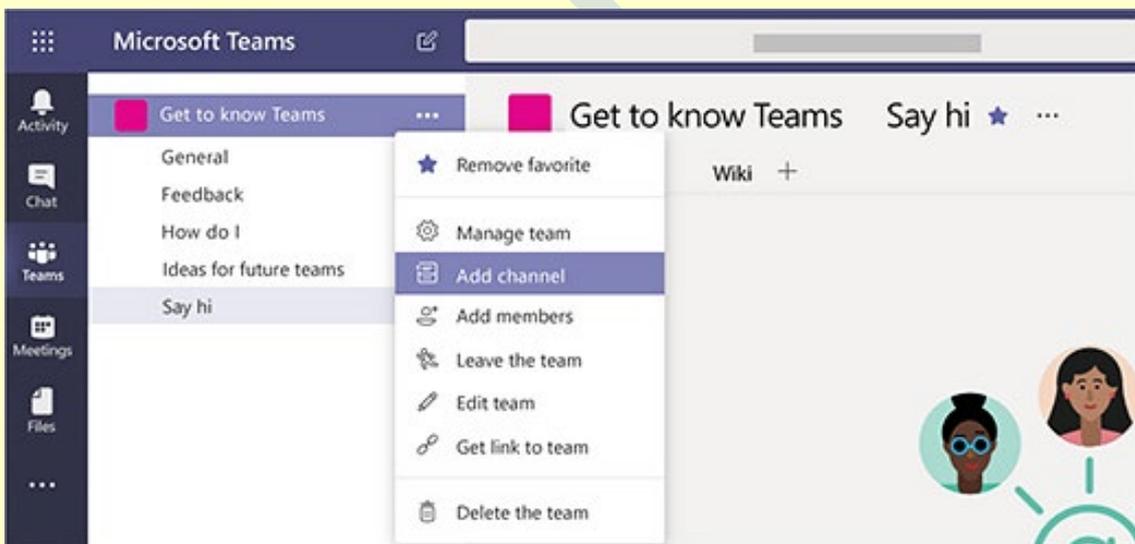
Screen shot of the options available when you click **More options**
Give the channel a **descriptive name** to make it easier for users to understand the **purpose** of the channel.

MICROSOFT TEAMS GUIDELINE DOCUMENT

As a team owner, you can automatically favorite channels for the whole team, making the channels more visible for everyone on the team. You can also **pin tabs** to the channel to add tools, such as OneNote, links to webpages, and other content to make it easy for users to find what they need and share their thoughts.

Here's an example of the "How do I" channel in the "Get to know Teams" team, showing pinned tabs that link to Teams webpages – Teams video training, Teams help center, and Teams download links.
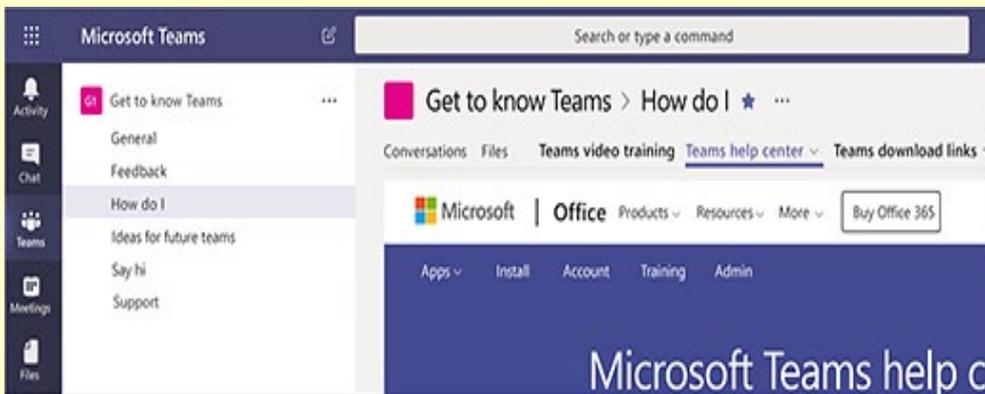
Managing Your Team Members and Their Permissions

Once a Team is created, you can modify a member's role within the Team or delete a member.
To change a member's role, select the **ellipsis** by the name of the Team and choose **"Manage Team."**
Find the name of the person, select the down arrow by "**Member**," and select "**Owner**." If you need to delete a member of the Team, select the "X" by their name.

Conversations in Teams is a great way to start discussions with students and educators. Using **Conversations** in Class Teams offers a hands-on opportunity to create classroom conversation, set ground rules, and foster digital citizenship. Sometimes, however, you will need to take action to ensure that student conversations are respectful, productive, and focused on classroom goals. With the **Manage Team** feature, you can **mute** one, several, or **all** students, which will revoke their posting privileges. Inside the **Manage Team** feature, you can also set the Team theme, modify member permissions, and further control conversations.

To modify these options within Teams, select "**Settings**." Within the **Member permissions** section of settings, you can decide whether members can create and delete channels, tabs, connectors, and/or messages. The **@mentions** section allows you to choose who can use **@team and @channel** mentions. Additionally, in the **Fun stuff** section, you can decide whether students are permitted to use stickers and memes.

Make a Big Impact with Announcements

The **Announcements** feature is an exciting way to make a visually impactful statement within the Conversations tab of a Teams channel.

When you want to draw attention to an upcoming event, announce a due date or deadline, highlight an important resource, or send a powerful reminder, you might consider using the Announcements feature to make your message stand out.

MICROSOFT TEAMS GUIDELINE DOCUMENT

When you select "**New Conversation**," you'll have the option to choose a **standard conversation or an announcement**. Choosing announcement will not only make your heading stand out as a bolded title, but it will also allow you to add a colorful background image. By doing this, your announcement will be showcased in the Conversation stream, ensuring your entire Team knows there is something especially important for them to know.

Share and Collaborate with Files

Teams makes it easy to share files with students and colleagues. Every Team, (and every channel within a Team) has its own file folder where you can share files with members of the Team. If the shared files are Word, Excel, or PowerPoint files, your colleagues or students can view, edit, and collaborate on the files directly in the Teams app. They can even see each other's changes in real time.

You can either **upload** existing files or **create new files directly in the file folder:**

To upload existing files into your library, go to the **Files** tab in your Team, and select the "**Upload**" button. A File Explorer dialog box will open, allowing you to **select** the file (or files) you would like to **upload**. Select the file (or files) you want to share and then select "**Open**." Any files you upload will be accessible by any member of your Team.

To create a new Word, PowerPoint, or Excel document in your files folder, select the "**New**" button and then select the kind of file you would like to create. **Name the file** and select "**Create**." The new file will open in Teams and you can begin editing it. If you prefer to work in the desktop version of the app, select the "**Open in…**" button on the ribbon and the file will open in your preferred desktop app. As soon as it is created, your new file will be available for members of your Team to edit as well.

Pro Tip: Within the Files tab of a Class Team, you will find a Class Materials folder. Anything added to the Class Materials folder will be read-only for your students.
**If you add a document to Files, but not to the Class Materials folder, any member of the Team can edit the document.**

Step 5

See all your meetings in Teams:

Schedule a meeting in Teams

There are several ways to schedule a meeting in Teams:

1. Select **Schedule a meeting** button in a chat (below the box where you type a new message) to book a meeting with the people in the chat.
2. Go to **Calendar Meetings** button on the left side of the app and select **New meeting** in the top right corner.
3. Select a **range of time** in the calendar. A scheduling form will pop open.

4. The scheduling form is where you'll give your meeting a **title**, **invite people**, and add **meeting details**. Use the **Scheduling Assistant** to find a time that works for everyone.
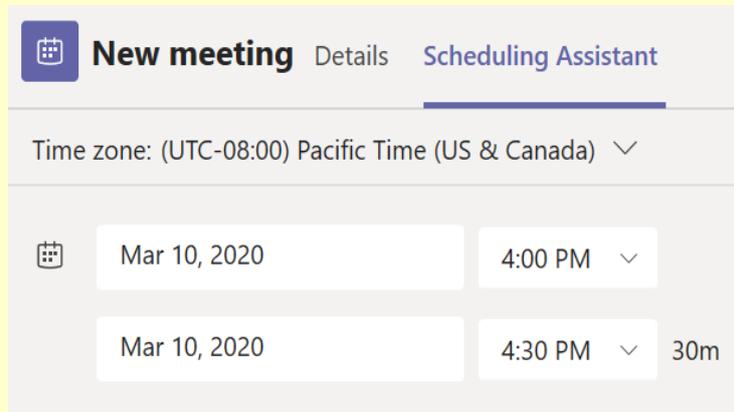
5. Scheduling Assistant tab in the Teams new meeting scheduling form.
6. Once you're done filling out the details, select **Save**. This will close the scheduling form and **send an invite** to everyone's Outlook inbox.

Invite people outside your organization

Teams lets you invite people outside your organization, including those who don't have a Teams license.
You'll need their full **email address** to invite them.
Go to where it says **Add required attendees**. If anyone is an **optional attendee**, select Optional instead.
Type the person's full **email address** (ex: Joe@example.com).
Select **Invite**. They'll receive an email with a link to the meeting.

Make it a channel meeting

1. Select **New meeting**.
2. Type the name of one or more channels where it says **Add channel** (under the time and date fields). **Add channel** to a Teams meeting.

Note. Channels can't be edited or added once the invite is sent.
You'll need to send a new invite with the updated channels.
Note: When you have a meeting in a channel, everyone in the team will be able to see it and join it in that channel.

Once you've added the people you want, select **Scheduling Assistant to** find the best time.
If it's a **recurring meeting**, open the dropdown menu next to **Does not repeat (just below the date).**
Choose how often you want it to occur from the default options, or select Custom to create your own cadence.

MICROSOFT TEAMS GUIDELINE DOCUMENT

Change participant settings for a Teams meeting

Although default participant settings are determined by an org's IT admin, a meeting organizer may want to change them for a specific meeting.
You can make changes to your **meeting settings** before a meeting by going to **Meeting options.** There are two ways to get there:

- In **Teams**, go to **Calendar Meetings** button , **select a meeting**, and then **Meeting options**.
- In a meeting invitation, select **Meeting options.**

This will take you to a **web page**, where you'll see a few options for changing **participant settings.**
Choose who can bypass the lobby
As the meeting organizer, you get to decide who gets into your meetings directly, and who should wait in the lobby for someone to them in.
If you choose to have people wait, you (and anyone else allowed to admit people from the lobby) will see a list of people in the lobby. From there you can choose whether to admit or deny them.

Who can bypass the lobby?

People in my organization:
Only people in your org, including colleagues and guests who have different email domains than you do, can get into your meetings directly. When you want all external guests to wait in the lobby so you can approve them one by one.

People in my organization and trusted organizations
Only people in your Teams org and external guests from trusted organizations can get into your meetings directly. When you want some external guests to wait in the lobby so you can approve them one by one.

Everyone
Anyone who has access to the meeting link gets into the meeting directly, including people who call in. You don't want anyone to wait in the lobby. When you want everyone to be able to join your meetings without specific approval.

Get notified when callers join or leave
You may want to receive an alert when someone calling in by phone joins or leaves your meeting. (Your admin might have enabled these alerts by default) To change this setting, select the toggle next to **Announce when callers join or leave..**

Choose who can present
See **Roles** in a Teams meeting for details about selecting **presenters** and changing someone's role before and during a meeting.
To avoid students taking controls in between select **Only Me** in Who can Present?
 Note: Meeting options isn't yet supported on Safari.

MICROSOFT TEAMS GUIDELINE DOCUMENT

Change the calendar view

By default, you'll be shown your **work week** and can be changed from the dropdown menu at the top right of your calendar. Here are your current view options:

- **Day** gives you an agenda view focused on one day at a time.
- **Work** week shows you Monday through Friday.
- **Week** shows you the entire week.

In the top left corner, you'll find the **month** and **year**. Select the month to change your calendar view to any date— past or future. Select the arrows next to the month to scroll by day or week depending on your calendar view.
Select **Today** to get back to the current date.
(Note: The calendar shows you everything that was scheduled in Teams, Exchange, or Outlook)

Right-click for **more options**
Right-click an event in your calendar to RSVP, remove it if it's canceled, or open the invitation to view the meeting details. If the event is a Teams meeting, you'll also get options to Join online and **Chat with participants**.
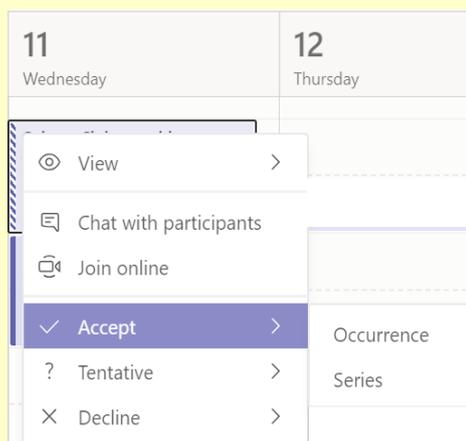
Context menu of a calendar event in Teams.

Teams meetings will show a **join** button on an event in your calendar five minutes before the start of a meeting. Once someone joins the meeting, the event will change colors to let you know they're online. Select **Join** to open the meeting settings window to confirm your preferred **camera** and **mic** settings before joining the online meeting.

Note: If you have overlapping meetings in your calendar, the join button won't be available. But you can still right-click the event and select Join online.

View all upcoming meetings and appointments by selecting **Calendar Meetings** button on the left side of the app. What used to be an agenda list is now a full calendar. Switch between a day, work week, or full week view—the menu is located on the top right corner of the app below the New meeting button.
In the top left corner you'll find the month and year, select that to change your c alendar view to any date, past or future. Select **Today** to get back to the current day/week.

MICROSOFT TEAMS GUIDELINE DOCUMENT

The calendar shows you everything that was scheduled in Teams, Exchange, or Outlook.
Select a specific meeting to get details about it. From there you can:

- Join the meeting.
- View calling details.
- View and chat with participants.
- Respond to the meeting invitation.
- Cancel the meeting if you're the organizer.L

During a meeting

- Share your screen
- Take meeting notes
- Blur your background
- Adjust your view in a Teams meeting
- Multitasking in a meeting
- Manage audio settings
- Change participant settings
- Whiteboard
- Share system audio
- Keyboard shortcuts for Teams meetings
- End a meeting for everyone in attendance

To share your screen in a meeting, select **Share** ---**Share screen** button in your meeting controls. Then, choose to present your entire **desktop, a window, a PowerPoint file, or a whiteboard**.

Note: If you're using Teams on the web, you'll only be able to share your screen if you're using Google Chrome or the latest version of Microsoft Edge.

Share tray in a Teams meeting

Share your Desktop
Show your entire screen, including notifications and other desktop activity You need to seamlessly share multiple windows

Window
Show just one window, and no notifications or other desktop activity
You only need to show one thing and want to keep the rest of your screen to yourself

PowerPoint
Present a PowerPoint file others can interact with.You need to share a presentation and want others to be able to move through it at their own pace.

Whiteboard
Collaborate with others in real time
You want to sketch with others and have your notes attached to the meeting When you're done sharing, go to your meeting controls and select Stop sharing.
Note: If you're using a Mac, you'll be prompted to change your privacy settings before you're able to share your screen. Also, window sharing isn't available for Linux users.

MICROSOFT TEAMS GUIDELINE DOCUMENT

Include system audio
Sharing your system audio lets you stream your computer audio to meeting participants through Teams. You can use it to play a video or audio clip as part of a presentation.

To share your system audio, select **Share -> Share screen** button in your **meeting controls** and then **Include system audio**. When you share, all your system audio, including notifications, will be included in the meeting. For more on sharing system audio, check out Share system audio in a Teams meeting.

Share PowerPoint slides in a meeting
If you choose to share a **PowerPoint** file in a meeting, participants will get some special capabilities:
1. They'll be able to move around to different slides without interrupting the main presentation.
2. They can sync their view back to the presenter's view with one click.

Note: If you don't want people to be able to independently navigate through a PowerPoint file you're sharing, select -> **Prevent participants** from independently navigating a shared PowerPoint file (it's next to Stop presenting) to prevent it.
Select **Share Share screen** button in your **meeting controls.**
In the **PowerPoint** section, select the file you want. Select **Browse** to find a different file.

Notes:
The PowerPoint section lists the most recent files you've opened or edited in your team SharePoint site or your OneDrive. If you select one of these files to present, all meeting participants will be able to view the slides during the meeting. Their access permissions to the file outside of the meeting won't change.

If you select **Browse** and choose to present a PowerPoint file that hasn't been uploaded to Teams before, it will get uploaded as part of the meeting. If you're presenting in a channel meeting, the file is uploaded to the **Files** tab in the channel, where all team members will have access to it. If you're presenting in a private meeting, the file is uploaded to your OneDrive, where only the meeting participants will be able to access it.

Give and take control of shared content
Give control
If you want another meeting participant to change a file, help you present, or demonstrate something, you can give control to that person. You will both be in control of the sharing, and you can take back control anytime.

On the **sharing** toolbar, select **Give control.**
Select the name of the person you want to give control to.
Teams sends a notification to that person to let them know you're sharing control. While you're sharing control, they can make selections, edits, and other modifications to the shared screen.

To **take control** back, select **Take back control.**

Take control
To take control while another person is sharing, select Request control. Then, the person sharing will approve or deny your request.
While you have control, you can make selections, edits, and other modifications to the shared screen.
When you're done, select Release control to stop sharing control.

MICROSOFT TEAMS GUIDELINE DOCUMENT

Maximise or Zoom in to shared content

Want to get a better look at shared content?
Click and drag to see different areas.
And to zoom in or out, try the following:
Pinch in or out on your trackpad
Use the keyboard shortcuts **Control + Plus** sign and **Control + Minus** sign
Hold the **Control** key and scroll with your mouse

Collaboration using Onenote notebooks
Your OneNote Notebook is a digital notebook for your entire Team to store text, images, handwritten notes, documents, links, voice, video, and more. Your Team's OneNote Notebook keeps everything organized and accessible.

In a **PLC Notebook**, every member in the team has the same rights, and the notebook comes with templates based on the Dufour model for PLCs.
In **Class and Staff Teams**, the OneNote Notebook has three distinct sections:
A **collaboration space** where everyone can work together and edit the content
A **content library** where the teacher or administrator can edit the content and the student or staff members can only view the content
Student or Staff sections where each student or staff member has a private space where students can submit homework, draft essays, and take notes and where staff members can create lesson plans, record professional development goals, and keep track of discipline

Integrate Microsoft Forms within Your Team

You can access Microsoft Forms directly from Teams in a variety of ways.One way to add a Form is by adding a Forms tab.
 When you add a **Forms** tab, you can create a new Form that everyone on your team can edit, add an existing Form where members can respond to your survey and you can collect their responses, or simply show the results of a Form.
With Microsoft Forms **quick poll**, you can create an **instant, real-time poll** in seconds. Simply start a conversation in the Chats tab with **@Forms** and type your question. Team members can respond to the poll and see results in real time.

Create, Track, and Review Assignments in Class Teams
Teams offers the efficiency of creating, tracking, and reviewing assignments directly within your Class Team.
In the **Assignments** tab, you can create an assignment, attach relevant files, and post the rubrics you will use to assess student work. Once students have submitted their work, you can review it, provide feedback for improvement, and grade it. Because everything is stored in your digital hub, students will no longer lose their assignments and teachers will free themselves from carrying around mounds of handouts and papers to grade. With Teams, teachers can manage all aspects of their courses in one location.

Create an assignment in Microsoft Teams

Create assignments for your students in Microsoft Teams.Manage assignment timelines, instructions, adding resources to turn in, and more.

MICROSOFT TEAMS GUIDELINE DOCUMENT

1. Navigate to the **General** channel in the desired classroom, then select **Assignments**.
2. Select **Create>Assignment**. Select Create, then Assignment.
3. Enter a **title** for this assignment—this is required. Provide more information for the assignment. **The following steps are optional:**
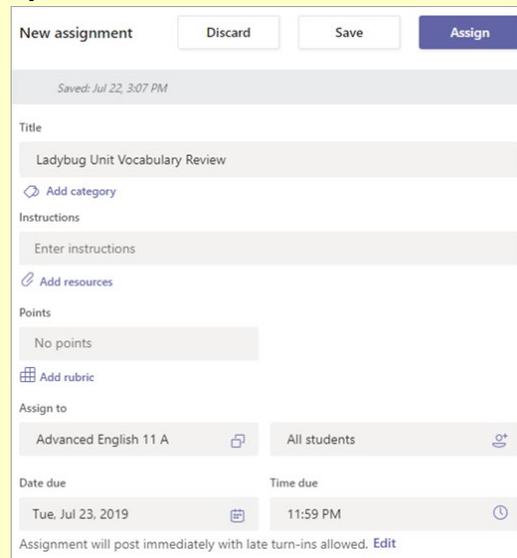
4. Assignment creator.
5. Choose **multiple classes or individual students in one class to assign to.** Add **additional instructions**
6. **Attach resources** to the assignment by selecting Add resources. During this step, add a document from your personal OneDrive, computer, or create a blank Word (.docx), Excel (.xlsx), or PowerPoint (.pptx) document to hand out to your students.
7. The default for the file will be **Students can't edit**, which means the document is read-only. This is a great option for reference materials.
8. .Select More options **More options** button >
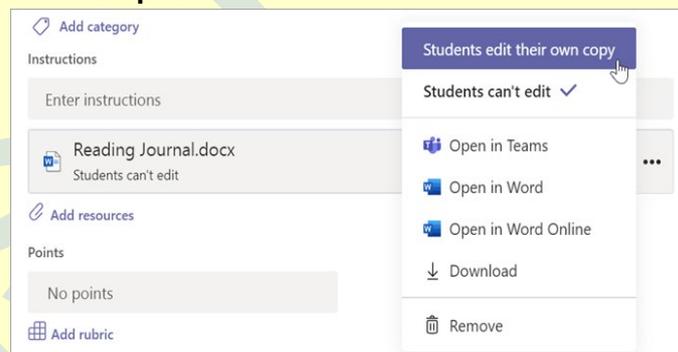
9. Students edit their own copy if you'd like each student to edit their own document and turn it in for a grade. Add **resources** to an assignment. If you have older documents with the file extension .doc, .xls, or .ppt, students won't be able to edit them. You can either attach them as read-only reference material or create a new file in Teams. Copy in the old content and save. Your new file will have the updated .docx, .xlsx, and .pptx file extension. All new files you create in Teams or other Office 365 apps will have the correct extension.

   6. Select a **due date and time.**

   For **more assignment** timeline options, select **Edit**. Here, you can customize when your assignment will be posted to students and when it will close for turn-ins. By default, no close date will be selected, which allows students to turn in assignments late.

Krupali Sanghvi (National ICT Awardee, MIEE Master Trainer, Udgam School for Children)

Edit assignment timeline window.

Select the amount of **points** this assignment is worth, if any. You can use points on any number-based scale including whole numbers of 100 and set your own denominator. Examples: 88/100 or decimals 3.7/4.0.

Select Add rubric to add a grading rubric.

Add a category.

Select **Assign**. Your students will be notified of the new assignment on the day you specified.

Select **Discard** to discontinue work on this assignment or Save to return to the assignment and edit it later.

Note: Select Expand tab (diagonal, double sided arrow) to enter full-screen

Turn in an assignment in Microsoft Teams

Microsoft Teams for Education (For Students)

To turn in an assignment, select its assignment card. Depending on the status of your assignment, you may be turning your work in on time, late, or submitting revised work.

Navigate to the **General** channel in the desired classroom, then select **Assignments**. You can also use your search bar to search for an assignment by keyword.

Your upcoming assignments will show in order of when they're due. Select any assignment card to open it and view the assignment's details.

Select an **assignment** to open it.

Tip: Select the Expansion icon (diagonal, double sided arrow) to work in full-screen mode.

If your teacher specified a document for you to turn in or you have other files to attach to this assignment, select **+Add work** and upload your file. Note: You can attach a file up to 50 mb in size.

Tip: Work on Office files associated with this assignment right from here—no need to leave the app. Older files with .doc, .xls, and .ppt file extensions can only be edited in the desktop versions of those apps. You can copy content into a new file created in Teams to make them editable again.

MICROSOFT TEAMS GUIDELINE DOCUMENT
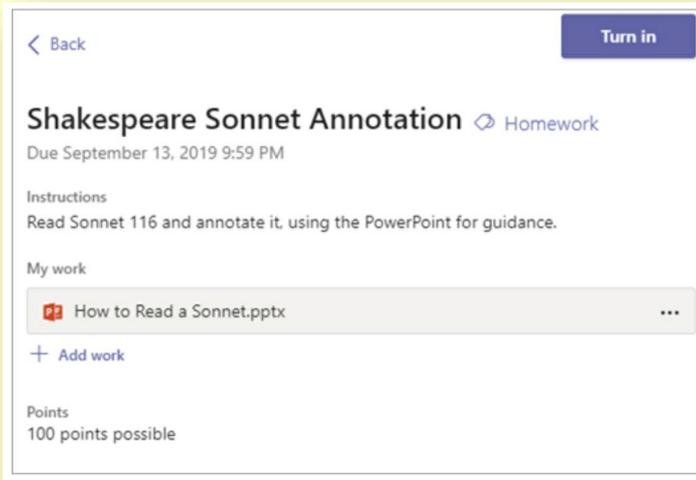
View your assignment and select **Turn in.**
Select the Turn in button to turn in an assignment before its deadline. The button will change depending on the status:

Turn in again if you're editing an assignment you've already turned in and need to submit work again.

Turn in late if you're turning in your assignment after the due date, but your teacher has allowed late turn-ins or asked for a revision.

Not turned in if the assignment is past due and your teacher is no longer accepting turn-ins. You cannot turn in work.

Undo turn in if you decide you want to edit your assignment before the due date. You'll need to turn it in again after you make your edits.

Credits:

Microsoft Support Documents
Microsoft Teams Support Documents
https://support.office.com/en-us/teams