

Teams essentials for better collaboration



superhighways
harnessing **technology** for **community** benefit

What does Superhighways do?

Superhighways helps small charities and community groups gain essential digital and data skills backed by the right tech to achieve their goals.

We are a programme of Kingston Voluntary Action



What we'll be covering

- ✓ Structuring & settings
- ✓ Posts
- ✓ Files
- ✓ Adding apps
- ✓ Chat
- ✓ Meetings
- ✓ Management

I'll be demoing then you can have a play!



What's your experience?

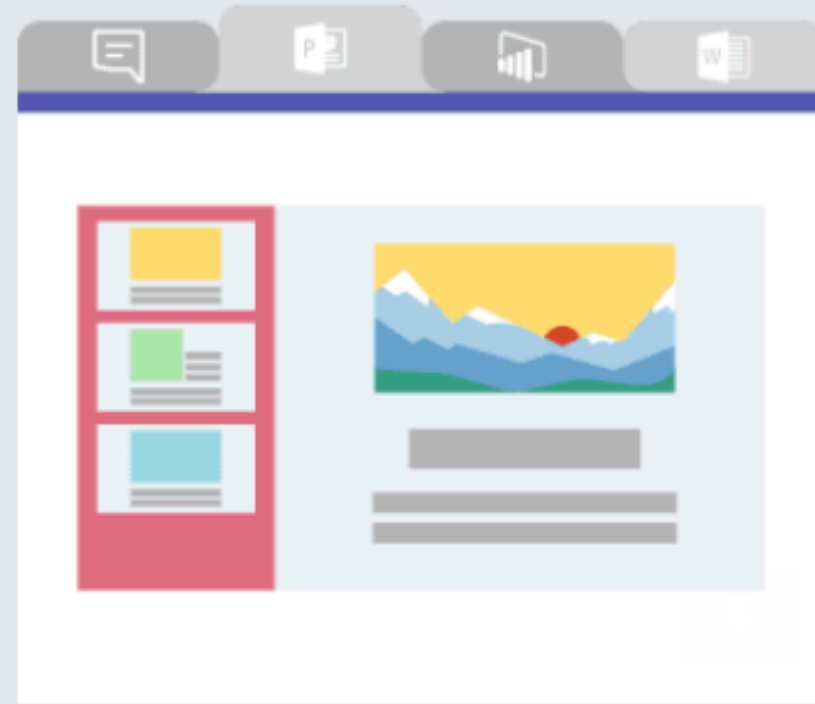
- ✓ Let's see how Polls in a Teams call work!





Make video calls and schedule online meetings

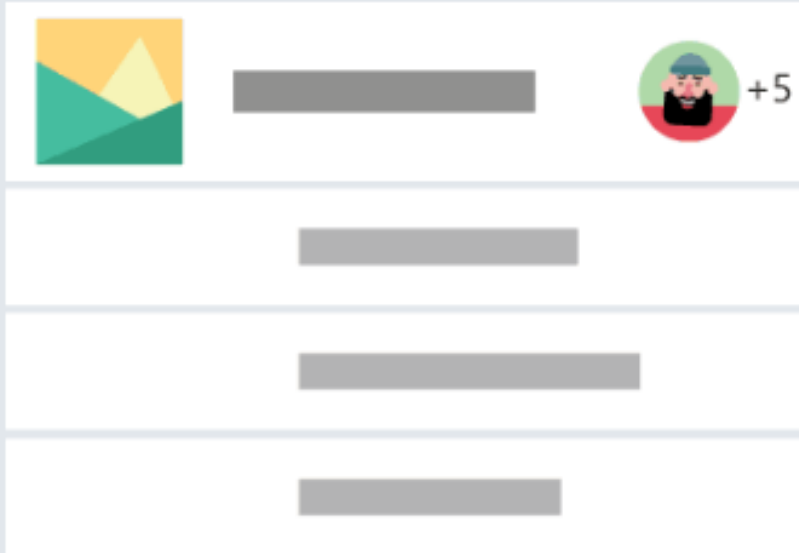
Have impromptu or scheduled meetings in any channel. Or just call someone ☐



Team files, notes, and apps in one place

Your team's tools are organized and integrated in Microsoft Teams with the power of Office 365.





Bring your team together

Create an open, collaborative workspace for your team. Use channels to organize conversations by topic, area, or anything else.



Chat 1:1 and with groups

Outside of open team conversations, chat privately and share files and notes with anyone in your organization.



Microsoft Teams help & learning

How can we help you?



Meetings



Chat



Notifications & settings



Teams & channels



Calls & devices



Files



Troubleshoot

New to Microsoft Teams?

Learn all about Teams' essential features here.

[MEETINGS >](#)

[CHAT >](#)

[NOTIFICATIONS >](#)

[TEAMS >](#)

[CHANNELS >](#)

[CALLS >](#)





Discover Microsoft Teams Premium

Enhance security and productivity in Teams with Premium features.

[EXPLORE TEAMS PREMIUM >](#)

- ✓ Gives you AI notetaking and recap functionality, including multiple language captions
- ✓ Plus other security and customisation options
- ✓ Non profit UK pricing – circa £40 per user per year (look for the Upgrade option when using Teams – you can opt for a 30 day free trial to test features before committing)



Teams quick reference

The image shows a screenshot of the Microsoft Teams application interface with several key components highlighted by red lines and labels:

- Start a new chat:** A red box highlights the pencil icon in the top navigation bar.
- Command bar:** A red box highlights the search bar at the top with the text "Search for or type a command".
- App bar:** A red box highlights the top navigation bar containing "Microsoft Teams" and the user profile "Kingston Voluntary Action".
- App bar (Tabs):** A red box highlights the tabs for the current team: "General", "Posts", "Files", "OneNote", "Superhighways", "Calendar", and "Office clear out day".
- App bar (Your Profile):** A red line points to the user profile picture in the top right corner.
- App bar (Your Teams):** A red line points to the "Teams" section in the left-hand navigation pane.
- App bar (Apps):** A red box highlights the left-hand navigation pane containing "Activity", "Chat", "Teams", "Calendar", "Calls", and "Apps".
- App bar (Join or Create a team):** A red line points to the "Join or create a team" button at the bottom left of the navigation pane.
- App bar (Write a message):** A red line points to the text input area at the bottom of the chat window.
- App bar (Send your message):** A red box highlights the send button (paper plane icon) at the bottom right of the chat window.
- A chat:** A red box highlights the main chat area, showing a message from Philippa Leary with a text message, a photo attachment (IMG_2903.JPG), and a video attachment (how to make a team call.mp4).

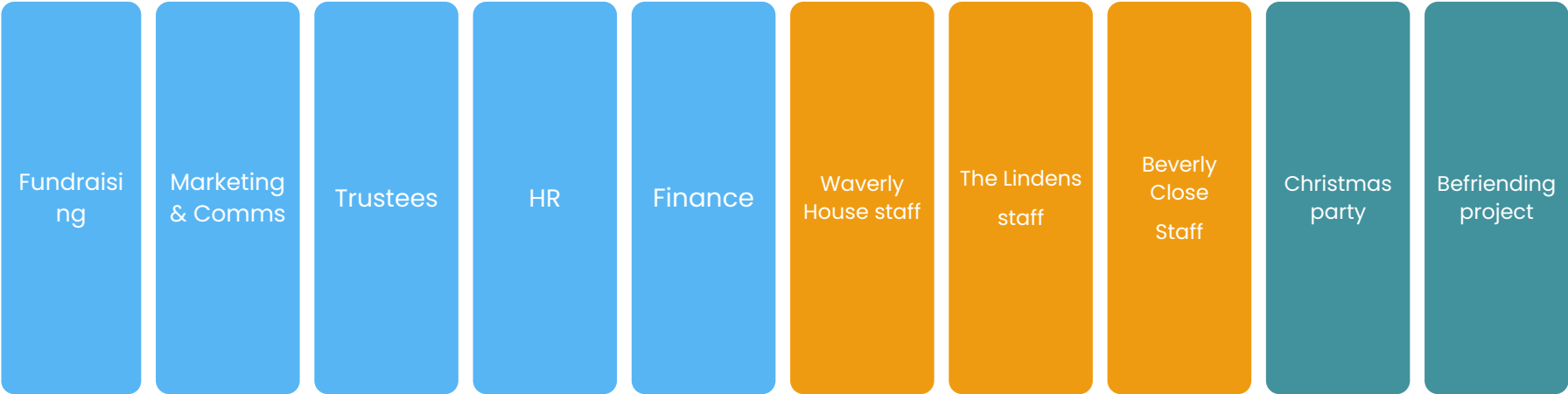


Structuring your Team with Channels

Team



Channels
(some examples)



Areas of work

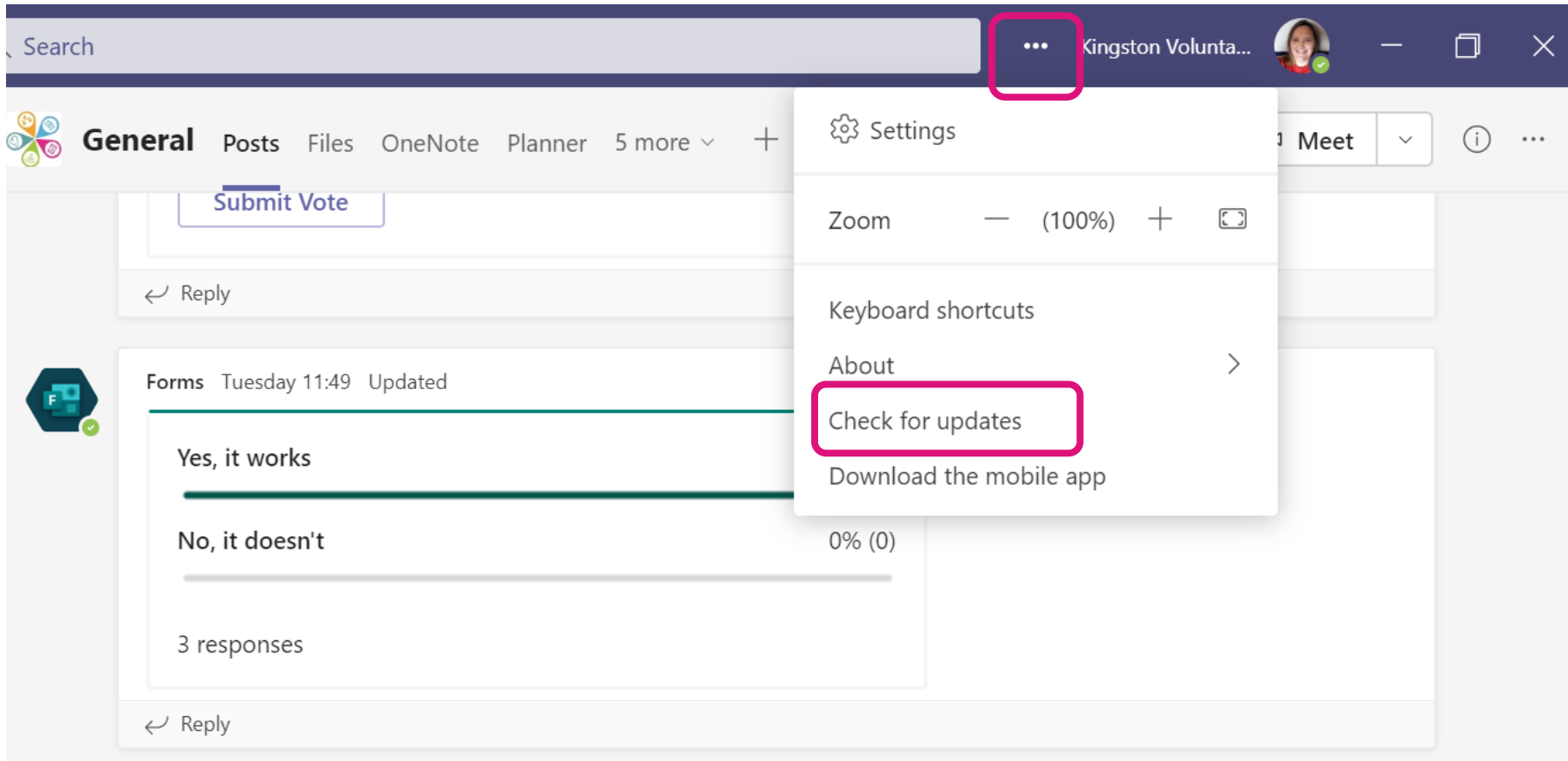
Sub teams

Specific projects



Updating to the latest version

- ✓ Click on the 3 dots to the left of your profile pic or initials in the top right of your screen and then click Check for updates

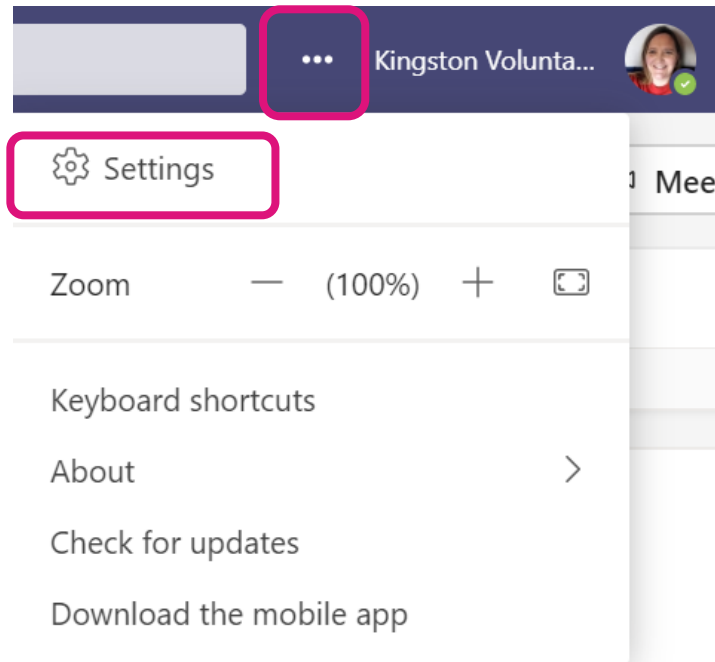


The screenshot displays the Microsoft Teams interface. At the top, a search bar is visible on the left, and the user's name 'Kingston Volunta...' and profile picture are on the right. A red box highlights the three-dot menu icon next to the user's name. A dropdown menu is open, showing options: Settings, Zoom (100%), Keyboard shortcuts, About, Check for updates (highlighted with a red box), and Download the mobile app. The background shows a 'Forms' poll titled 'Yes, it works' vs 'No, it doesn't' with 3 responses.

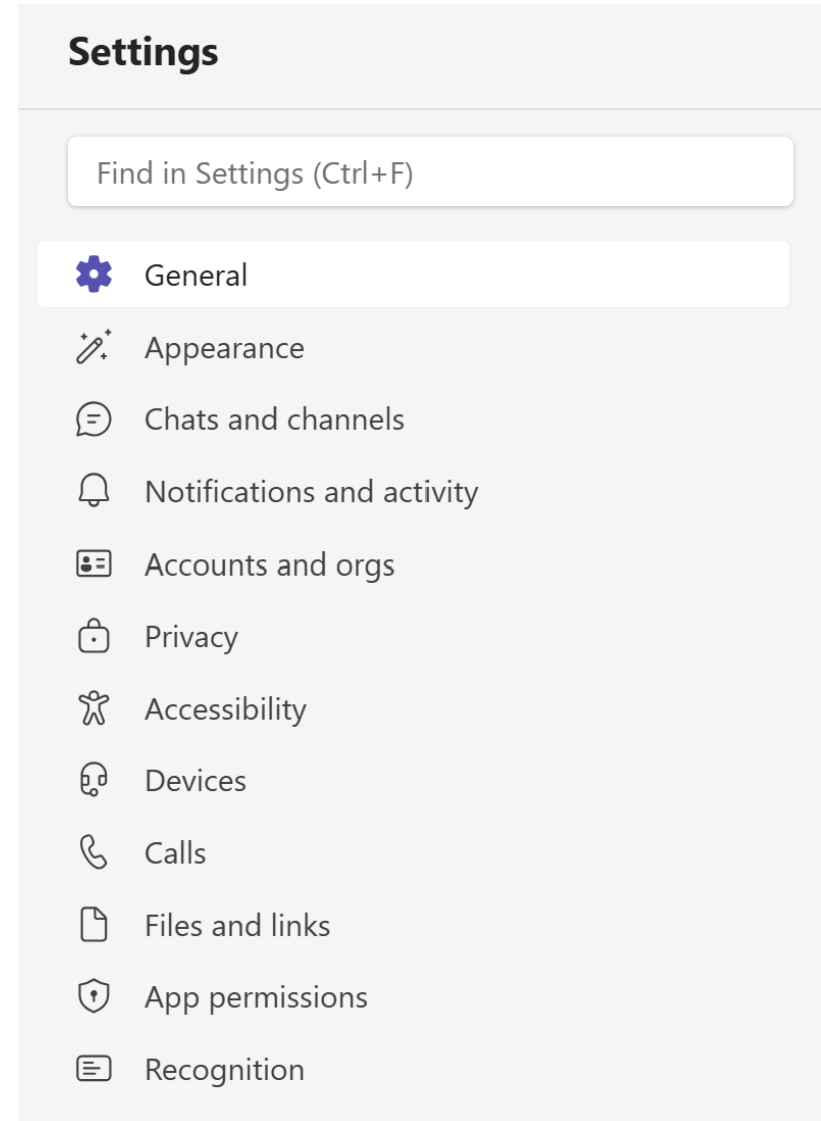


Teams settings

- ✓ Click on the 3 dots to the left of your profile pic or initials in the top right of your screen and then Settings (the cog wheel icon)

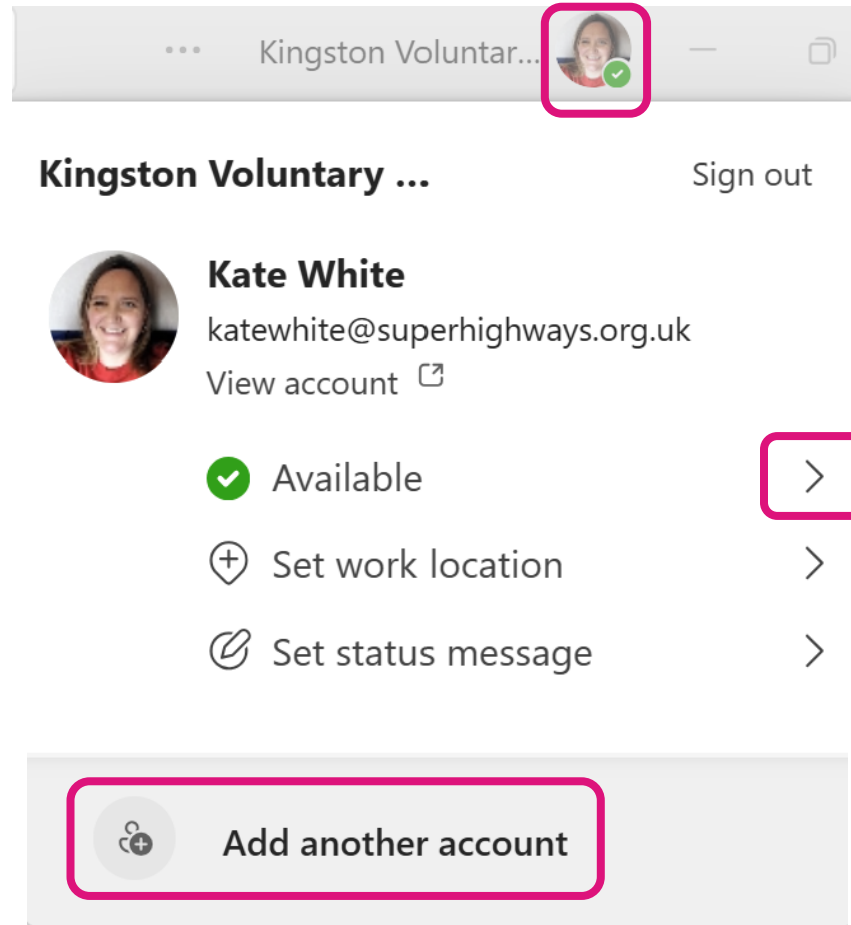


- ✓ Now choose from the left hand menu (or work your way through) to customise the default settings



Changing your Status

- ✓ Click on your profile pic or initials
- ✓ Change your Status (this automatically updates e.g shows Busy when you're in a Teams call), but you can override. Do not disturb will pause notifications
- ✓ You can also Add another Teams account. When listed, you can then switch between different Teams you are a member of.



The screenshot shows the profile settings for 'Kingston Voluntary ...'. At the top, there is a header bar with a menu icon, the name 'Kingston Voluntary ...', a profile picture of a woman with a green checkmark, a minus sign, and a share icon. Below this, the name 'Kingston Voluntary ...' and 'Sign out' are visible. The main profile section shows a circular profile picture of 'Kate White' with her email 'katewhite@superhighways.org.uk' and a 'View account' link. A list of settings includes 'Available' (with a green checkmark and a right arrow), 'Set work location' (with a plus icon and a right arrow), and 'Set status message' (with a pencil icon and a right arrow). At the bottom, there is a button labeled 'Add another account' with a plus icon.

- Busy
- Do not disturb
- Be right back
- Appear away
- ⊗ Appear offline
- ⌚ Duration



Choose your preferred layout

Settings

Find in Settings (Ctrl+F)

General

Appearance

Chats and channels

Notifications and activity

Accounts and orgs

Privacy

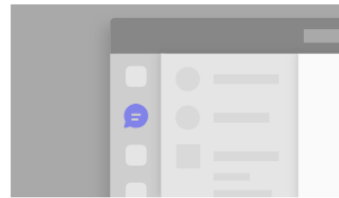
Accessibility

Chats and channels



Viewing chats, teams, and channels

See all conversations in a combined view, or keep chats separate from teams and channels.



Combined



Separate



Posts tab (broadcast messaging)



Mahirah Rahman 13/01 13:00 Edited

Jan newsletter - what we've been up to

Hi **General**,

Can you please send me one thing you've been working on recently for the newsletter? Also remind me where you went on holiday for me to add to the "Enjoying our Christmas and New Year breaks!" bullet point 😊

Newsletter will go out this afternoon hopefully. Thanks!



Sorrel Parsons 13/01 13:01

Creating a new Ai for small charities course in partnership with NAVCA for community development workers across the UK to deliver (sorry, bit long!).



Clare Chamberlain 13/01 13:55

Preparing for up-coming January Training events:


- Power BI Interactive Dashboards - 14/01/2026
- Advanced Excel Tips & Tricks - 15/01/2026
- Advanced Power BI Training - 20/01/2026
- Exploring the new Indices of Deprivation data for London - 26/01/2026

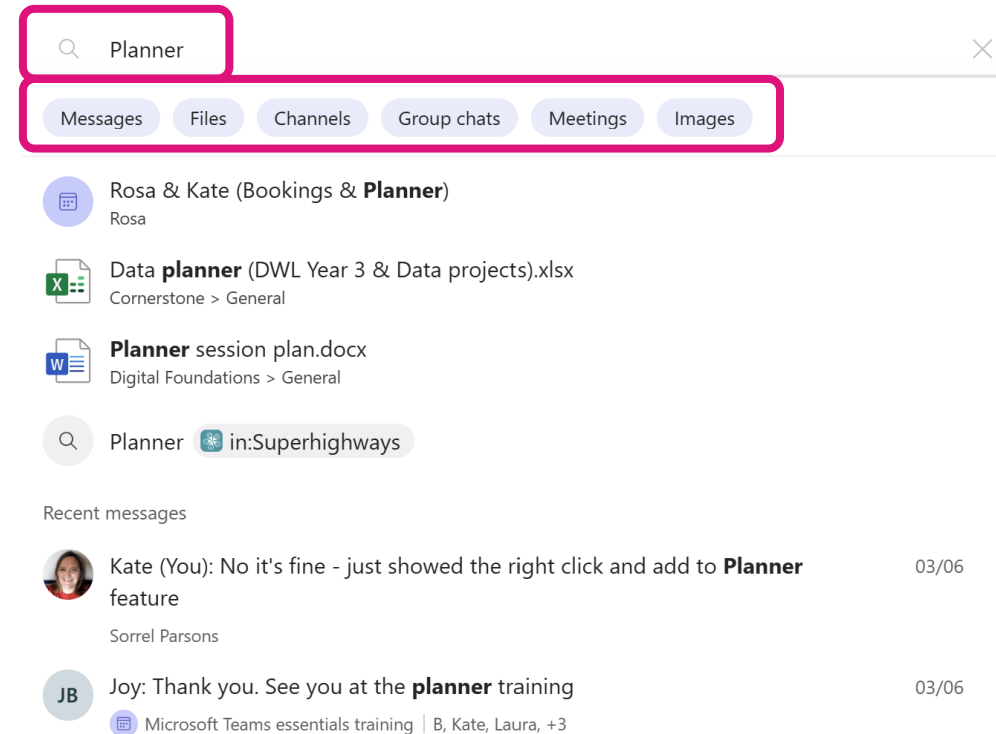
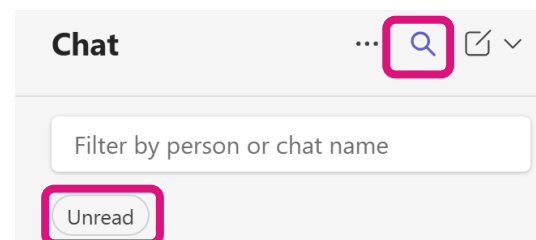
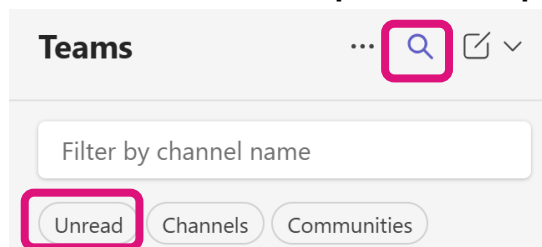
- ✓ Send a message to a Channel
- ✓ @Mention specific people or the whole channel
- ✓ Click on the Plus to Schedule your post
- ✓ Hover over someone else's message to add an emoji (thumbs up and more)
- ✓ Reply to posts in a thread
- ✓ Click on the 3 dots for more options including Pin the post for everyone

(See screenshots in Chats section for further info)



Searching & filtering to find things

- ✓ Use the Search bar at the top of Teams to search on keywords
- ✓ Refine your answers by Filtering on Messages, Files etc
- ✓ To find Pinned posts or chats – click on the Open details icon  at the top right hand side of your screen
- ✓ Similarly you can use the Search icon at the top of the left hand menu in Teams or Chat, The Unread filter can be quite helpful!



Shared tab (used to be called Files)

DF **General** Posts **Shared** Page Digital Foundations w... Miro Website +3

All documents In messages

+ New Upload Edit in grid view Share Copy link All Docum

Documents > **General**

Name	Modified	Modified By
Assets	January 20, 2023	Sorrel Parsons
Co-design workshops	June 10, 2022	Sorrel Parsons
CVS Development Worker Network	October 10, 2022	Clare Chamberlain
Development	June 5, 2023	Sorrel Parsons
Evaluation & reporting	February 5, 2023	Kate White

- ✓ Click on new to create a file to store in that location. You can also add a file or web link
- ✓ Upload files from your device
- ✓ Everyone in that Channel will have access

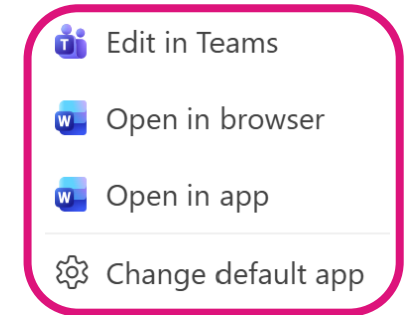
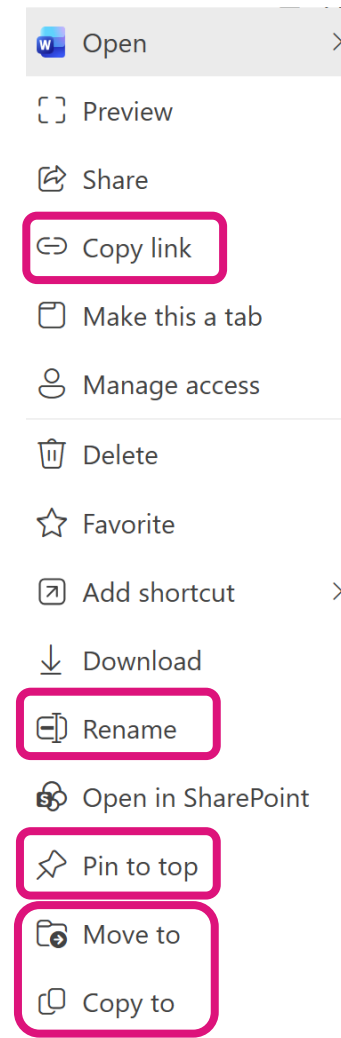
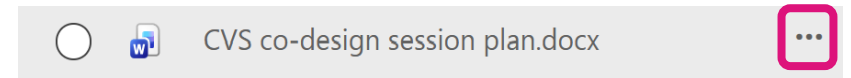
+ New Upload

- Folder
- Word document
- Excel workbook
- PowerPoint presentation
- OneNote notebook
- Forms survey
- Visio drawing
- Markdown document
- Text document
- Clipchamp video
- Link



Working with files

- ✓ Click on the 3 dots to the right of the file name to access the menu
- ✓ Choose where you want to open the file (you can override the default with your own preference)
- ✓ Choose from a range of other options to manage your file including Copy link and Rename file
- ✓ Pin to top for the file to display above the list giving quick access
- ✓ Move or Copy the file to a place of your choice (within the Team or to another Team)



Adding other Apps

- ✓ Click on the + icon in the top menu to the right and choose Apps
- ✓ Select the App you want to add for example Forms
- ✓ The App should now show in the menu bar – you may need to click on the + to see it in a drop down underneath

RBK Contract (Lot 1)

Posts

Shared ▾

Page

RBK Grant

+2



New page

Existing page

Apps

Search for apps



Word



Forms



PowerPoint



Excel



Planner



Whiteboard



Power BI



See all

Add a new app

RBK Contract (Lot 1)

Posts

Shared ▾

Page

RBK Grant

+2



Edit | Device expression of interest form



Some Chat tips

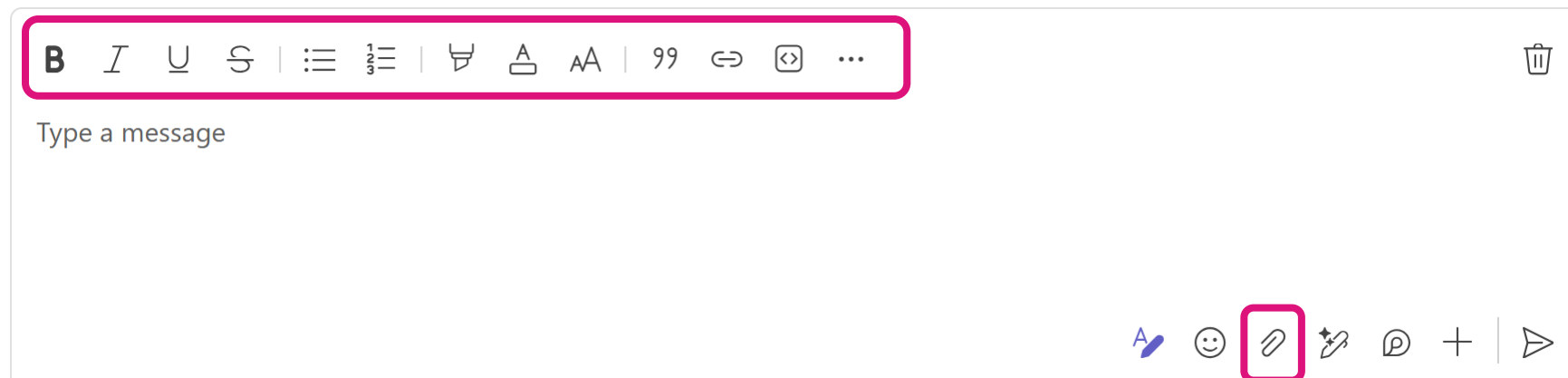
Chat



- ✓ Click on Chat in the left hand menu and the Pen/Square icon to start a new chat
- ✓ Type your message and click on the arrow to send



- ✓ Click on the A with pencil icon to access the standard formatting options

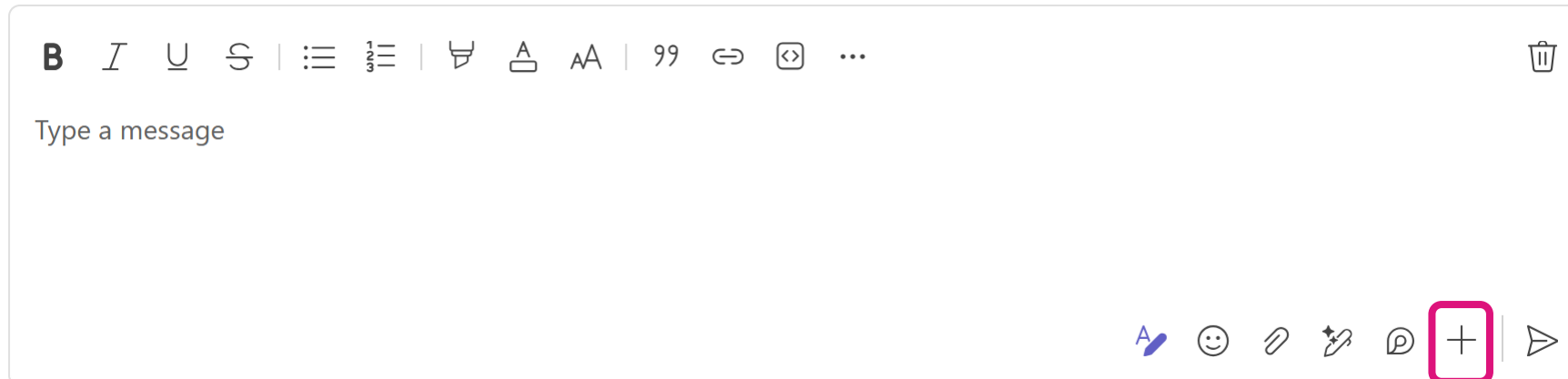


- ✓ Click on the paperclip icon to attach files (either upload from device or paste an image)

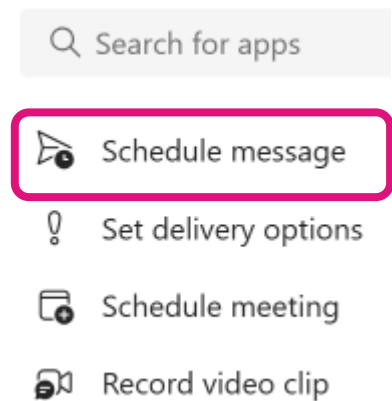


Chat tips continued

- ✓ Click on the + icon for more options

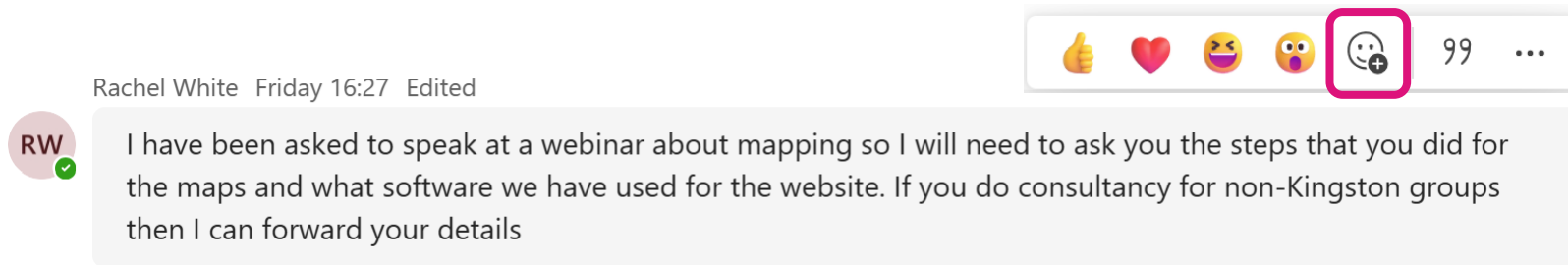


- ✓ This includes the Schedule message feature where you can set a date and time for your message to send – very useful!

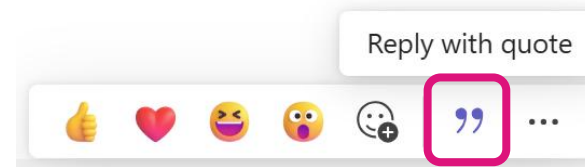


Chat tips continued

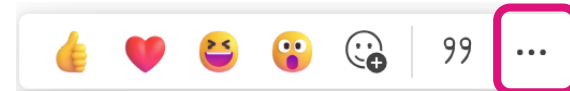
- ✓ Hover a chat message you've received and choose an Emoji reaction (we use thumbs up a lot to show we've seen a message). Click on the Emoji + icon for more.



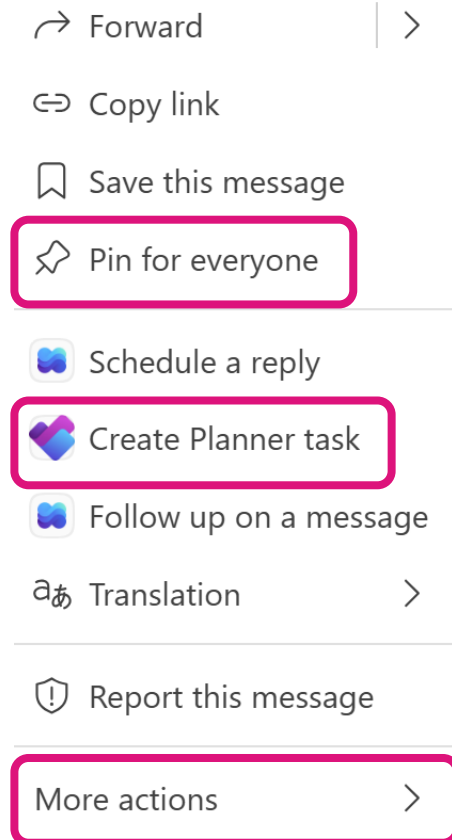
- ✓ Click on the quotation marks to reply to a specific message (it shows inline)



- ✓ Click on the 3 dots ellipsis for more options



- ✓ These includes Pinning the message (so stays visible), Creating a Planner task or in More actions – send to Outlook or set up other Workflows

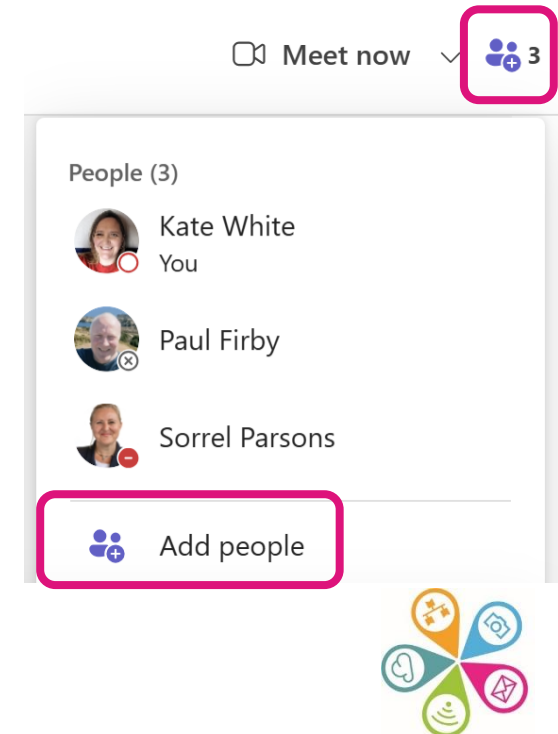
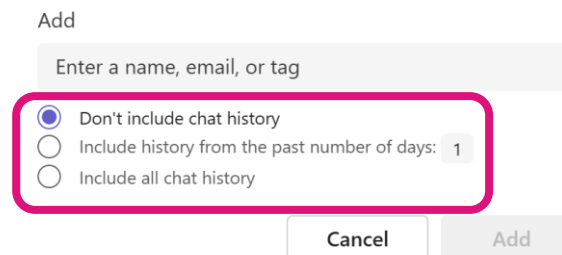
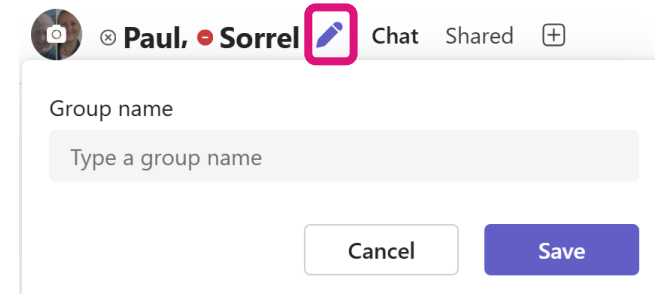


Group chats

- ✓ When you start a new Chat – just add multiple people to turn into a Group chat
- ✓ Add a Group chat name if you'd like to by clicking on the pencil icon next to the member names

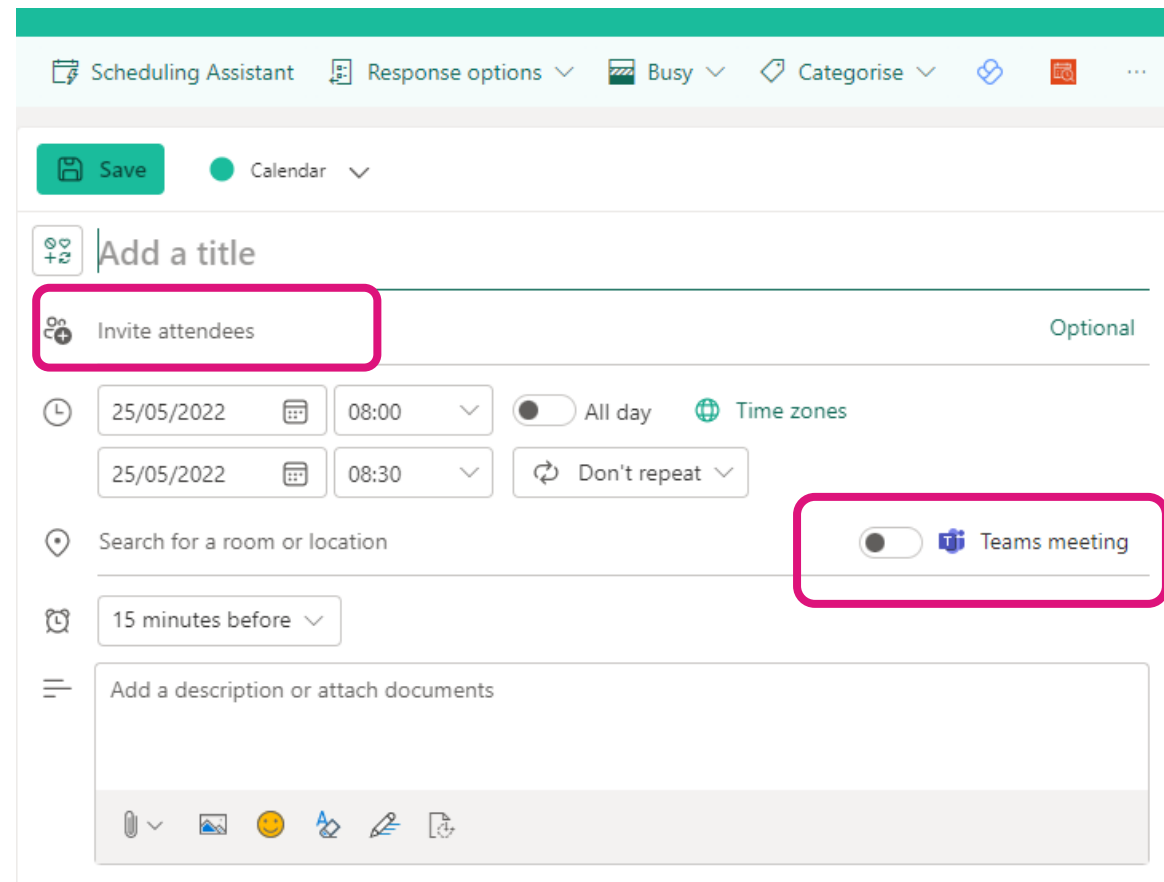
- ✓ At a later date you can add additional people by clicking on the People + icon at the top right

- ✓ You can then choose what chat history they can see



Setting up a Teams meeting from Outlook

- ✓ You can do this from your Outlook calendar – create a calendar entry and as soon as you have added an attendee, depending on your settings, either the Teams meeting option will show as on, or you might need to manually click, to toggle it on



The screenshot shows the Outlook meeting creation interface. At the top, there are navigation options: 'Scheduling Assistant', 'Response options', 'Busy', 'Categorise', and a red Teams icon. Below this is a 'Save' button and a 'Calendar' dropdown. The main area has a title field 'Add a title' with a plus icon. Below the title is a red-bordered box containing the 'Invite attendees' button. Further down, there are date and time pickers for '25/05/2022' at '08:00' and '08:30', with options for 'All day' and 'Time zones'. A 'Don't repeat' dropdown is also present. Below these is a search field for a room or location. A red-bordered box highlights the 'Teams meeting' toggle switch, which is currently turned off. At the bottom, there is a field for 'Add a description or attach documents' with a toolbar containing icons for attachments, images, emojis, and other formatting options.



Setting up a Teams meeting from the Teams Calendar

- ✓ Alternatively, you can create your Teams call directly in the Teams calendar (see left hand vertical menu bar)
- ✓ Now invite attendees as usual – they will get a link to the Teams call included in their calendar invite so they can click to join

New event - Calendar

Event | Series | Busy | [Icons]

Calendar (katewhite@superhighways.org.uk) | Response options

Add title | Response options

SI Superhighways Info Available | [Response options icon]

Mon 08/06/2026 00:00 - 00:30 | Scheduler

If conflicts arise, let Copilot reschedule this event. Acceptable times

Add a room with Copilot

Teams meeting | Facilitator is off for this meeting. Turn on | Options

Add a title and at least one attendee so Copilot can draft an agenda

- ✓ Click on Response options and toggle on/off the options – Hide attendee list is similar to BCC in email.

[Response options icon]

Request responses

Allow forwarding

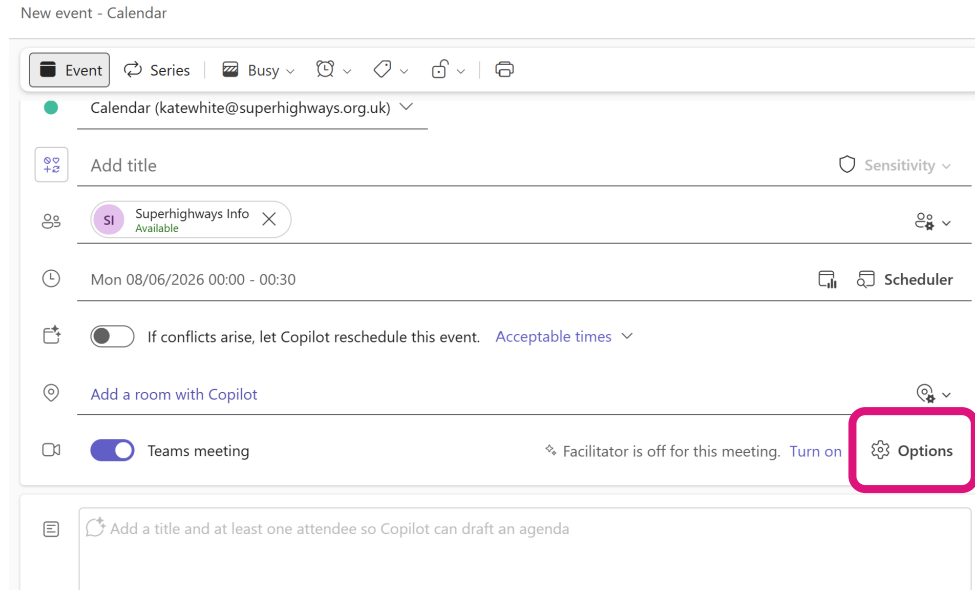
Hide attendee list

Add optional attendees



Meeting options

✓ Click on Options for more settings



✓ Click on Options for more settings and work your way down the list to override default settings

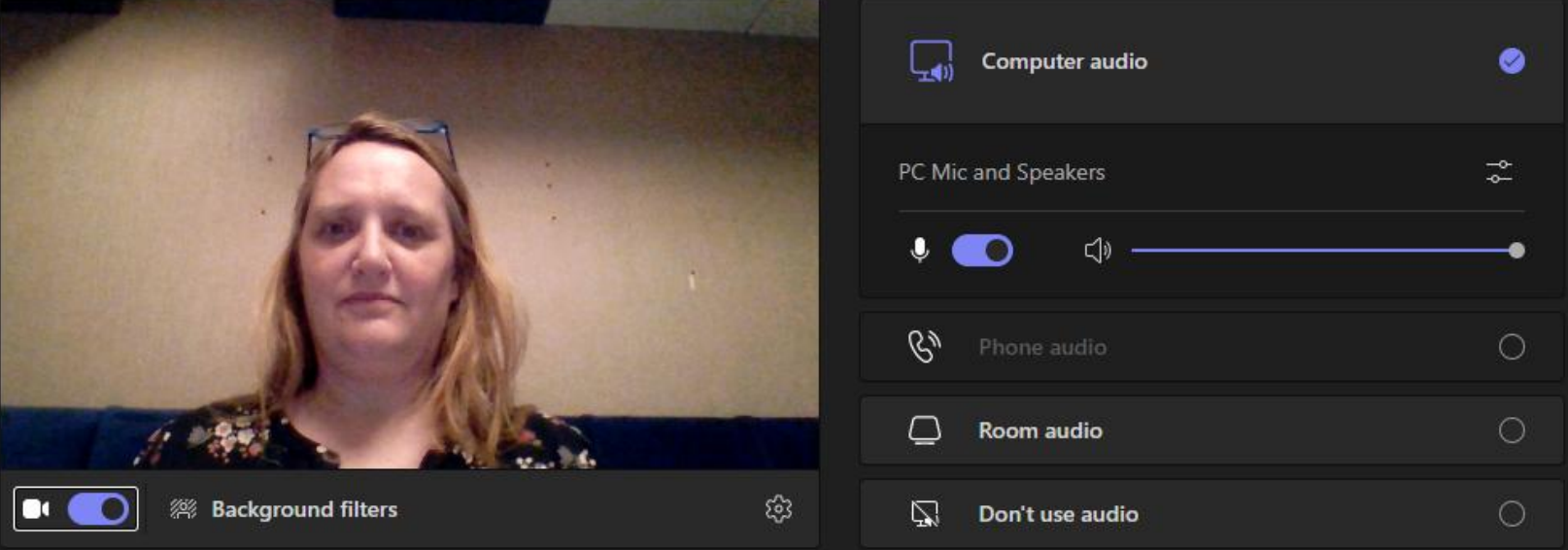
Meeting options


- Meeting access
- Roles
- Production tools
- Participation
- Recording & transcription
- Copilot and other AI
- Accessibility

The screenshot shows the 'Meeting options' settings panel. The 'Meeting access' section is expanded, showing options for 'Who can bypass the lobby?' and 'Who can admit from the lobby?'. The 'Who can bypass the lobby?' dropdown is set to 'People in my org'. The 'Who can admit from the lobby' dropdown is set to 'Organizers, co-organizers, and presenters'. There is a toggle for 'People dialing in can bypass the lobby' which is turned off. The 'Show meeting info on join screen' section is also visible, with a dropdown set to 'Users allowed to by pass the lobby'. At the bottom, there is a toggle for 'Announce when people dialing in join or leave' which is turned on.








Settings when joining a meeting

Choose your video and audio options



Video controls: Video Background filters 

Audio options:

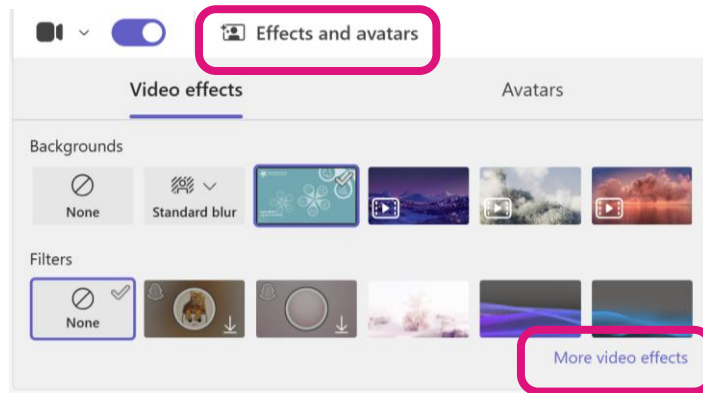
- Computer audio 
- PC Mic and Speakers 
  
- Phone audio 
- Room audio 
- Don't use audio 

Buttons:

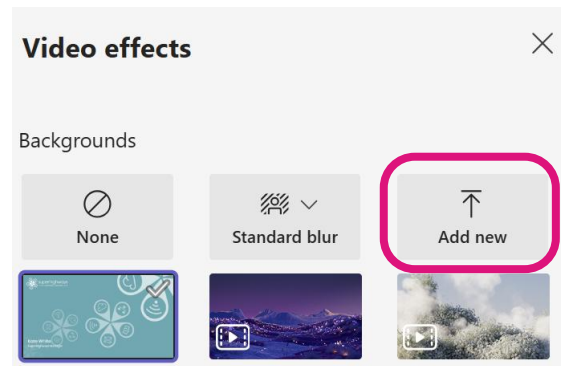


Choose / add a background

- ✓ Before you Join a meeting, Click on Effects & avatars and More video effects



- ✓ Choose from Blur or one of the background options. Or click Add new to upload your own



- ✓ Your background image should satisfy the following formatting requirements

Image requirements:

- Min Size: 360 x 360 px
- Max Size: 2048 x 2048 px
- File type: jpeg, jpg, png, bmp
- Aspect ratio (Width:Height): Less than 4



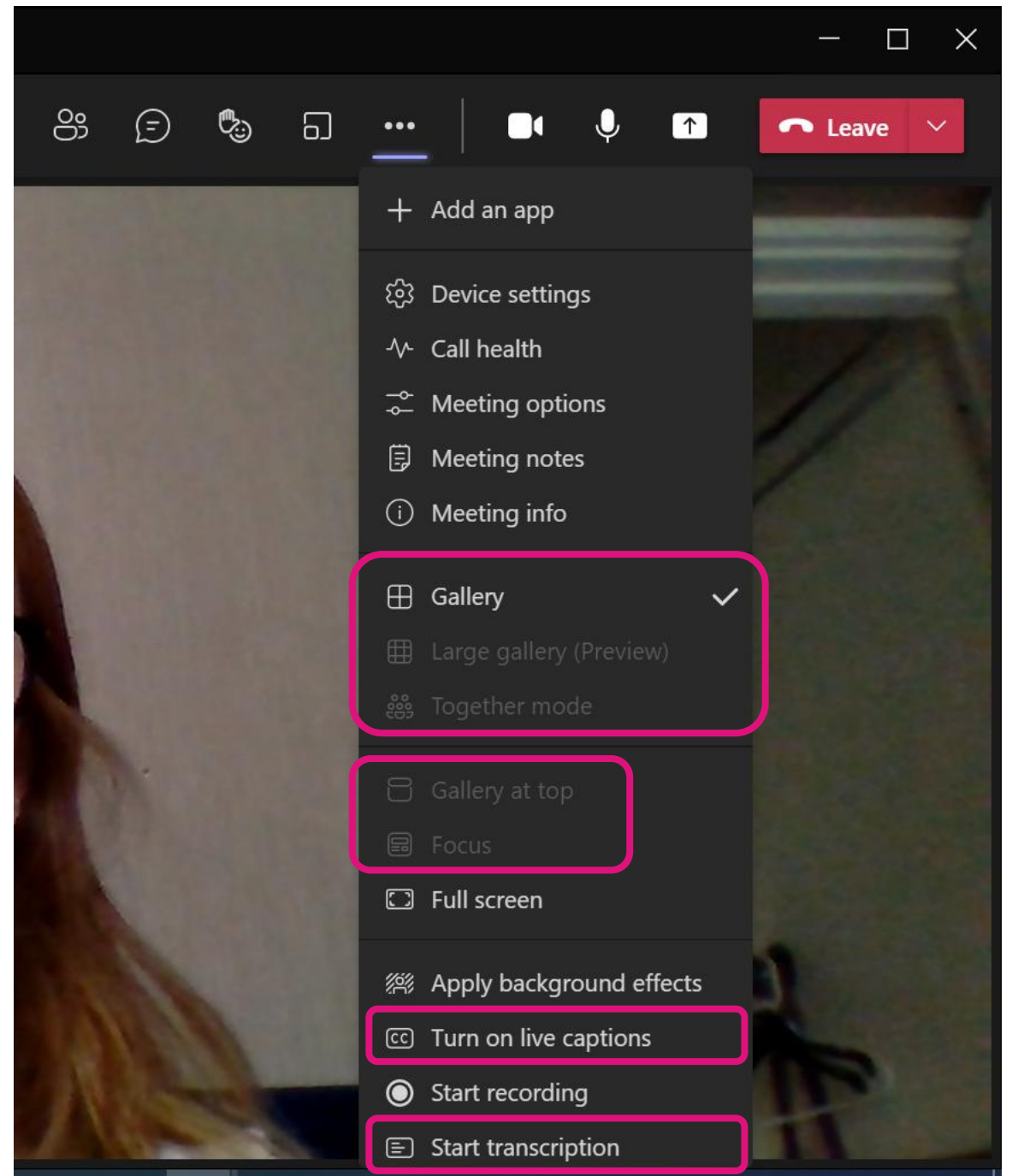
- ✓ If you have writing – it will show as 'back to front' to you, but the right way round in the meeting for others!



Meetings tool bar

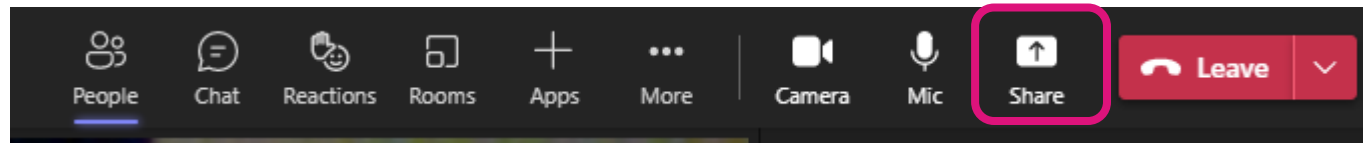
Useful features:

- ✓ Switch between Gallery & Large gallery / Together mode
- ✓ When someone is screensharing – choose to have Gallery at the top and / or to view in Full screen or Focus to see a larger screenshare view
- ✓ Turn on Live captions (even if you're presenting, each person needs to do this themselves) and you'll see 'subtitles' at the bottom of your screen
- ✓ Start transcription – only visible if you set up the meeting. A transcript of the meeting will then save for you to reference later. It will show in a left hand bar by default, but you can then choose to hide. If you have Premium Copilot – you will get an AI recap

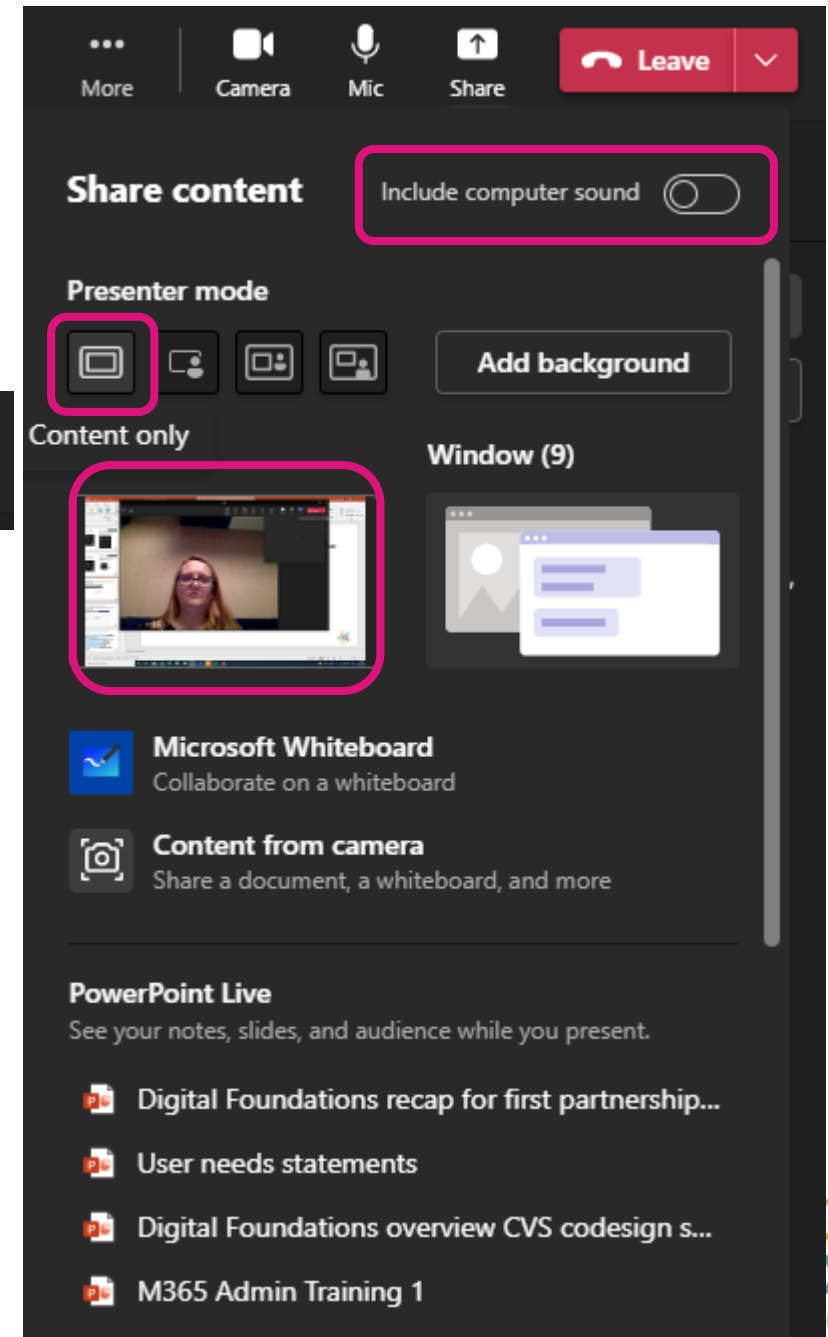


Sharing screens

- ✓ Click on the Share icon to the right of the microphone icon on the tool bar

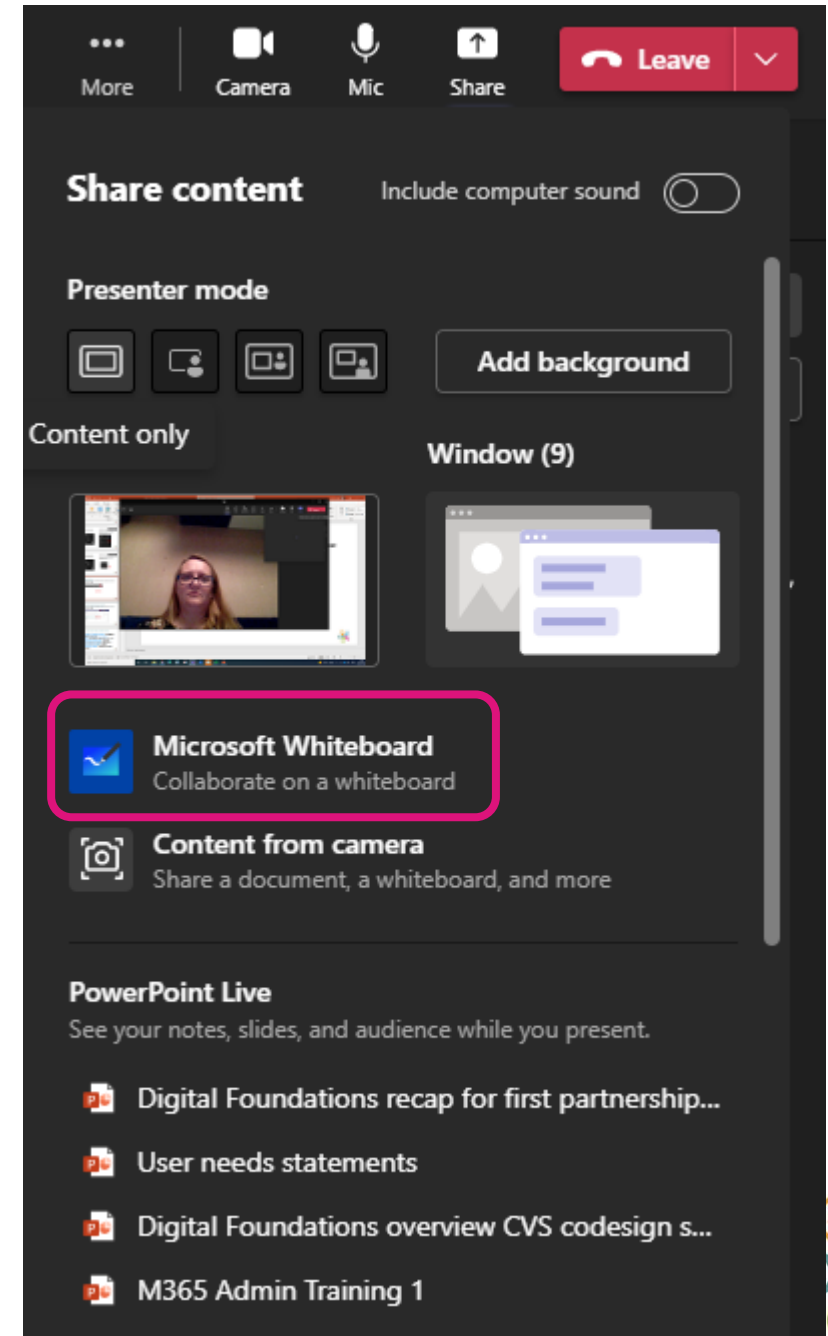
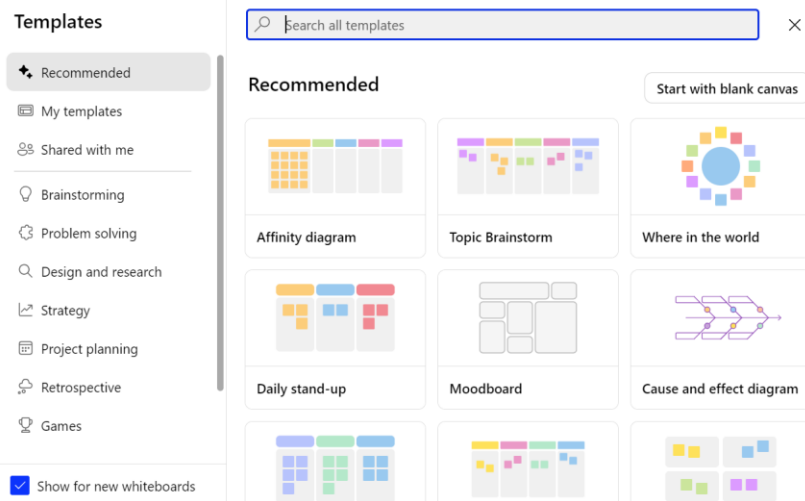


- ✓ Then click on the Content only screen to share. This is the first Presenter mode (you can also use another Presenter mode such as Side by Side or Reporter)
- ✓ If you want to share screens and play a video – remember to toggle on Include computer sound



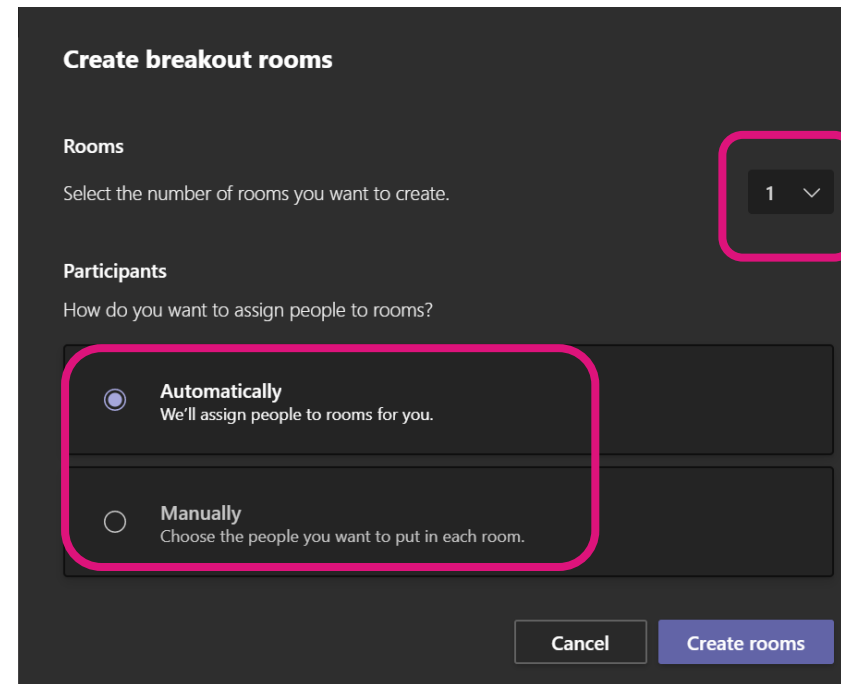
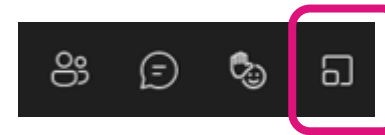
Sharing interactive Apps

- ✓ You can also link and share other Apps to your Teams meetings to make them more interactive
- ✓ One option is a Poll – you can set up in advance and then launch from the Meeting tool bar
- ✓ You can also set up and prepare a Whiteboard in advance of a meeting and then Share this so everyone can interact within the meeting window e.g. add sticky notes when doing a practical exercise. Choose one of a good range of templates

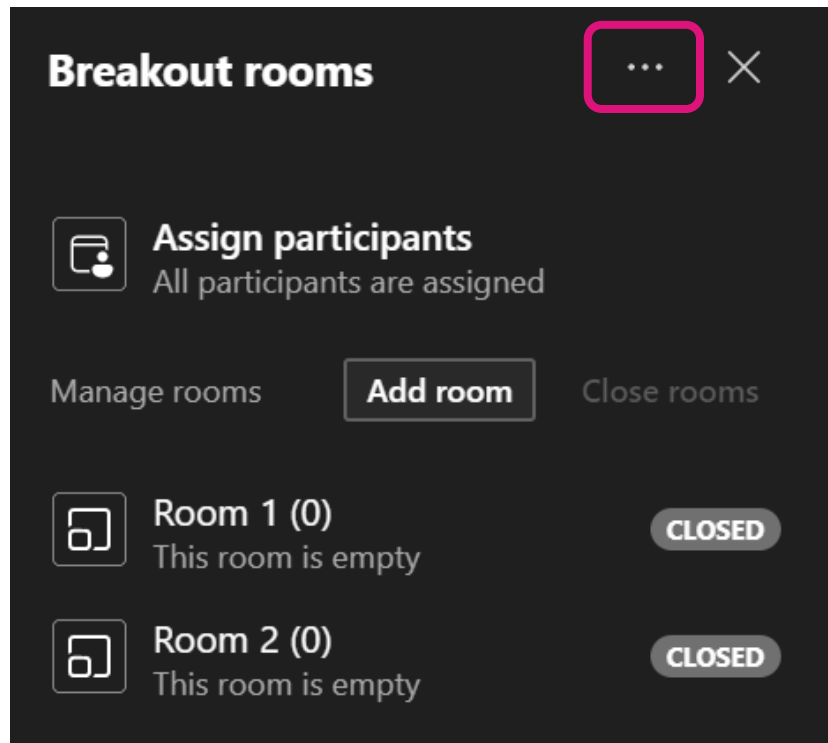


Breakout rooms

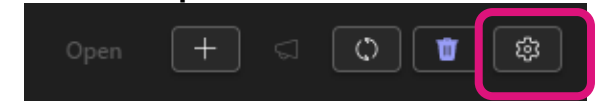
- ✓ Click on the Rooms icon on your Teams call toolbar
- ✓ Click on Create rooms and select how many you need (see drop down)
- ✓ Now choose whether you want participants to be assigned Automatically or Manually and then click Create rooms. (They won't open just yet)



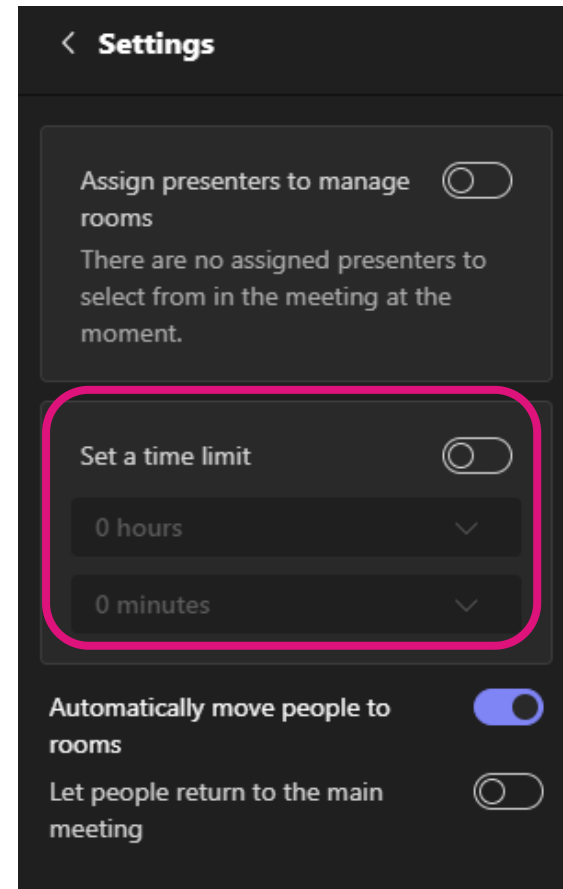
- ✓ Click the 3 dots to manually make any changes needed and e.g. to Add another room



- ✓ Click on the Cog wheel icon to open the Settings window

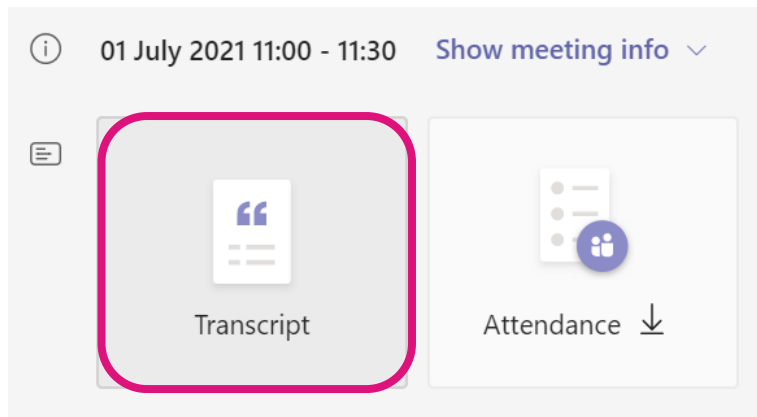


- ✓ Here you can change other default options and e.g. Set a time limit for your breakout room



Accessing recordings & transcripts

- ✓ Option 1: Go to Chat, find the meeting in question and select it in your left-hand list. Then look for the Transcript option and click to open or download



Accessing recordings & transcripts

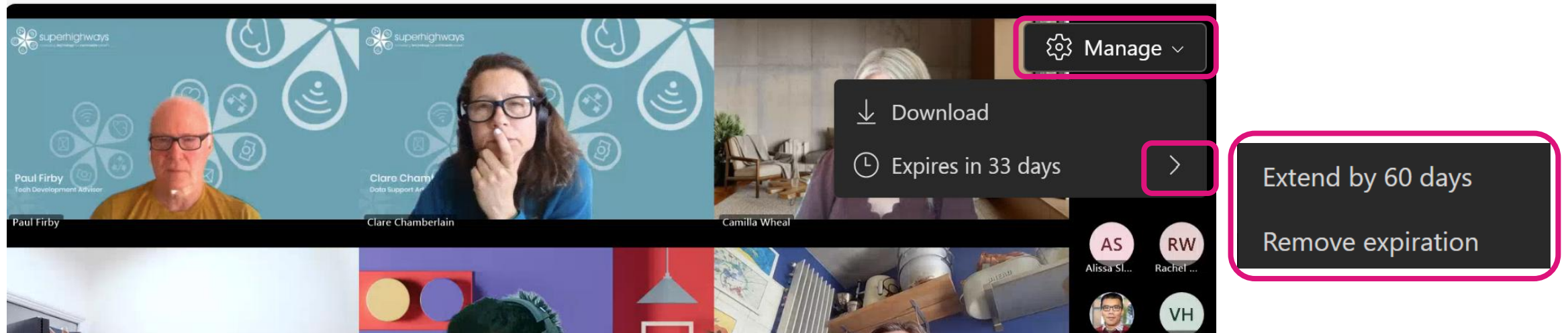
- ✓ Option 2: Or go to your calendar and double click on the Meeting entry & click on Transcript

The screenshot shows the Microsoft Teams interface for a meeting titled "Teams training LinkAgeSouthwark". The top navigation bar includes "Chat", "Files", "Details", "Scheduling Assistant", and "Recordings & Transcripts", which is highlighted with a pink border. Below the navigation bar, there are two action buttons: "Download" (with a downward arrow icon) and "Delete" (with a trash can icon), both highlighted with pink borders. The main content area shows a chat message from "Kate White" at "14:46". The message text is: "Automated a transcription? I haven't used that in a live setting in teams yet. I'm but I think it's it's pretty good because it must be linked to the live captions."



Recordings – beware of expiry settings

- ✓ The default expiry for Teams meeting recordings is 60 days
- ✓ You can override this by hovering over the recording and selecting Manage



- ✓ You can download the video file and choose where to store it OR you can click on the arrow and Extend by 60 days or Remove expiration entirely



AI Recap (with Teams Premium or Copilot Premium)

✓ If you turn on Transcription, an AI Recap will automatically be generated – giving a summary and actions list.

✓ Click on View recap in the Meeting chat

✓ Click on the arrow to expand / collapse sections

✓ Copy to share with others

✓ Have a listen to the Audio recap!

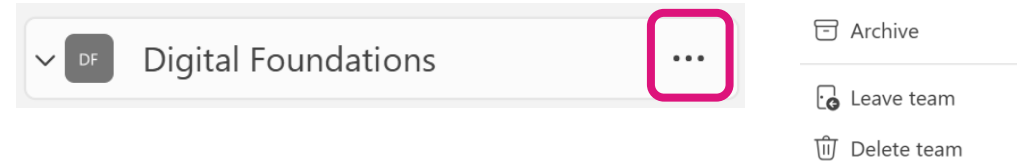
The screenshot displays the Microsoft Teams interface for a meeting titled "Microsoft Teams essentials training" on 03 June 2026 from 10:00 to 11:30. At the top right, a "View recap" button is highlighted with a red box. Below this, the meeting details show 7 speakers and 5 tasks, with buttons for "Transcript" and "Attendance".

The main chat area shows the meeting title and time. On the right side, an "Audio recap" button is highlighted with a red box, along with "Share" and "Copilot" options. Below the chat area, there is a "Shared files" section with an "Attendance" file. A navigation bar includes "Notes", "AI summary" (highlighted with a red box), "Custom summary", "Mentions", and "Transcript".

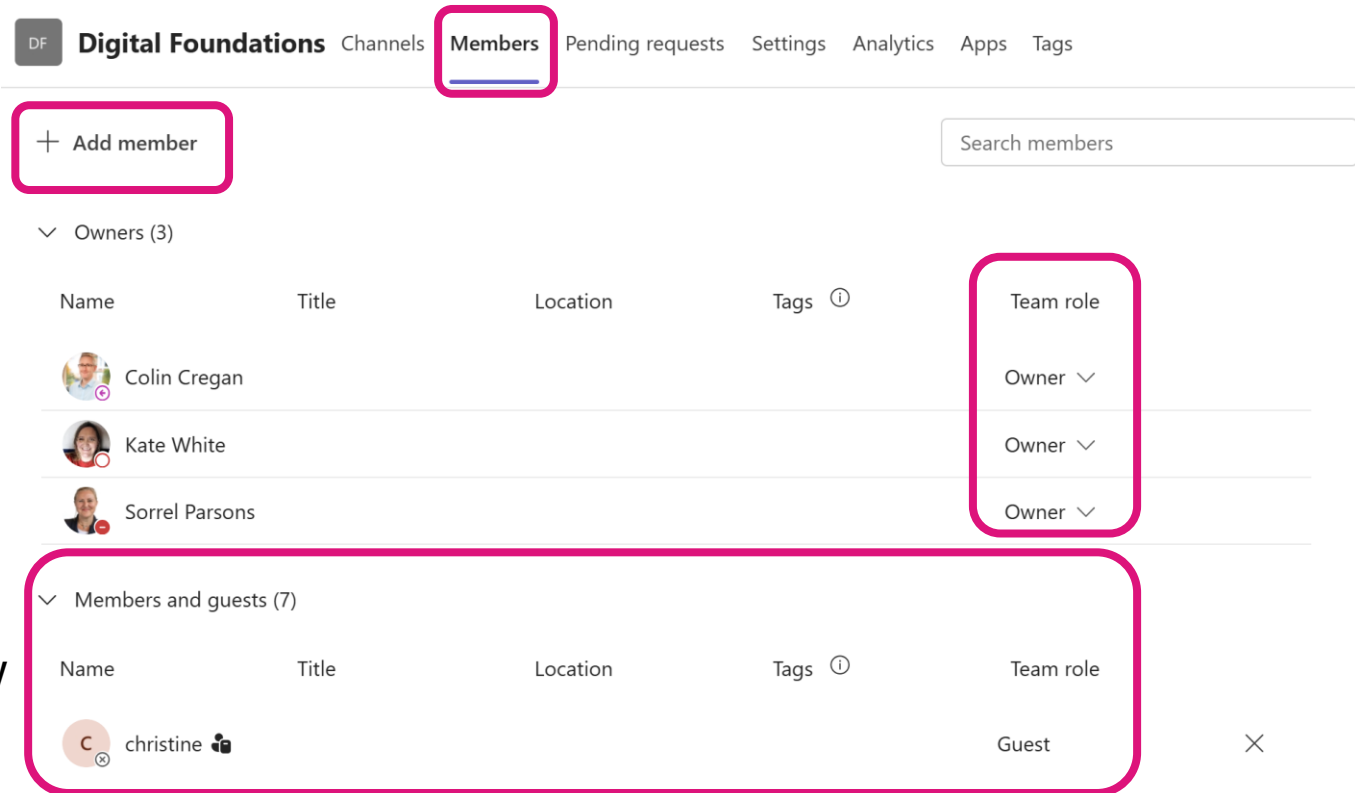
A warning message states "AI-generated content may be incorrect". Under the "Meeting notes" section, the first note is highlighted with a red box: "► **Overview and Structure of Microsoft Teams:** Kate provided an introduction to Microsoft Teams, explaining its core functionalities, including video calls, file sharing, chat, and organisational structuring with channels, and discussed how the Superhighways team utilises these features for collaboration." The second note is: "► **File Management and Collaboration in Teams:** Kate guided participants through file management in Teams, detailing how files are stored, accessed, and collaborated on, and explained integration with SharePoint, version history, and pinning documents for easy access." An "Expand all" link is visible on the right.

Managing your Team

- ✓ Hover over your Team name and then click on the 3 dots ellipsis
- ✓ In the options list, click Manage team




- ✓ Click on the Members tab at the top
- ✓ If you are a Team owner, you can add Members and give Roles
- ✓ We'd suggest having more than one Owner for a Team (in case they are off sick or leave the organisation)
- ✓ If you invite an external person to your team (this may need to be enabled in your M365 Admin portal), they will show as a Guest



Adding channels

- ✓ Click on the 3 dots ellipsis to the right of your Team name to Add a channel
- ✓ Give your channel a name (to add an icon – click the Windows key on your keyboard, usually to the left of your space bar, and the full stop key)
- ✓ Choose the appropriate access level. Private channels will be indicated by the padlock icon next to the name. You then choose which members of your team can access.

 Hide all channels

 Add member

 Add channel

Create a channel

Channel name *


 Test comms


Description


Help others find the right channel by providing a description

Choose a channel type * ⓘ

Select

 Standard
Everyone on the team has access.

 Shared
People or teams in your org or outside your org can have access.

 Private
Specific people on the team have access.



Digital Foundations programme

There are many ways we can help small community organisations make sound choices about the digital tools and technology they use.



Communications made easy

Raise your profile using digital tools to engage supporters and fund your future

[Read more »](#)



Digital basics

Work and collaborate online using free and affordable digital tools and technology

[Read more »](#)



Websites for communities

Put your website at the heart of your charity or community organisation's story

[Read more »](#)

[Find out more about the Digital Foundations programme](#)



Thanks for listening



superhighways
harnessing **technology** for **community** benefit

Kate White

info@superhighways.org.uk

www.superhighways.org.uk

