

MS Teams User Guide

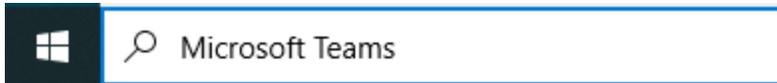
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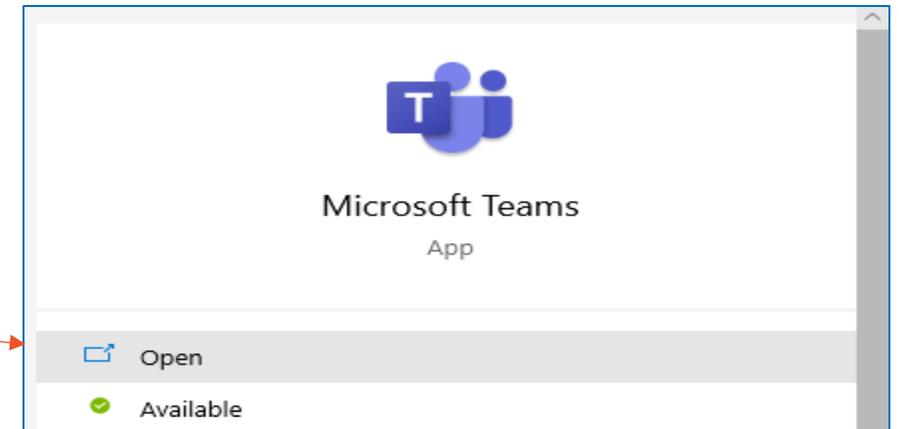
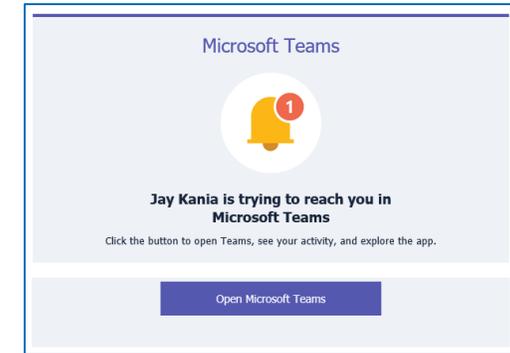
How to access MS Teams

There are several ways that you can access MS Teams

1. If you receive an email that someone is trying to notify you, you can click on the button “Open Microsoft Teams”
2. Look for the Microsoft Teams icon on your desktop. Double click the icon and it will open.
3. If you don't have the icon already on your desktop, go to the **Search** area and type “Microsoft Teams” in the box and the app will appear.



When you see the App appear, click on **Open**



How to access MS Teams (cont.)

When you open the app and see it in your Taskbar, make sure you pin it to your Taskbar to find it easily

- Right click on the MS Teams icon and click on **“Pin to taskbar”**



The good thing is that a Setting within your profile has a default that is set to “Auto-start application” meaning it will open whenever you start up your laptop.

Application

Auto-start application

MS Teams Landscape – Left Navigation Bar

The image shows the MS Teams interface with a search bar at the top and a left navigation bar. The navigation bar includes icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main content area shows a list of chat items and a chat window on the right.

Activity: Here you'll see latest activity related to you. Mentions, reactions, teams you've been added to etc.

Chat: Contains two different lists:
Chat will display a list of chats in chronological order.
Contacts allows you set up groups. You can group people by departments or project teams.

Teams: Here you'll find all the teams you belong to or have created (as owner).

Calendar: Shows your own calendar as well as the calendars of the various teams you belong to. Here you can schedule meetings as well.

Calls: This will take you to your contact groups where you can perform Speed Dial calls.

Files: Is a great way to find all the recent documents you've worked on, whether from your Teams or OneDrive. It also shows the location of the file.

MS Teams Landscape – Arrow Nav / Chat-Contacts / Search

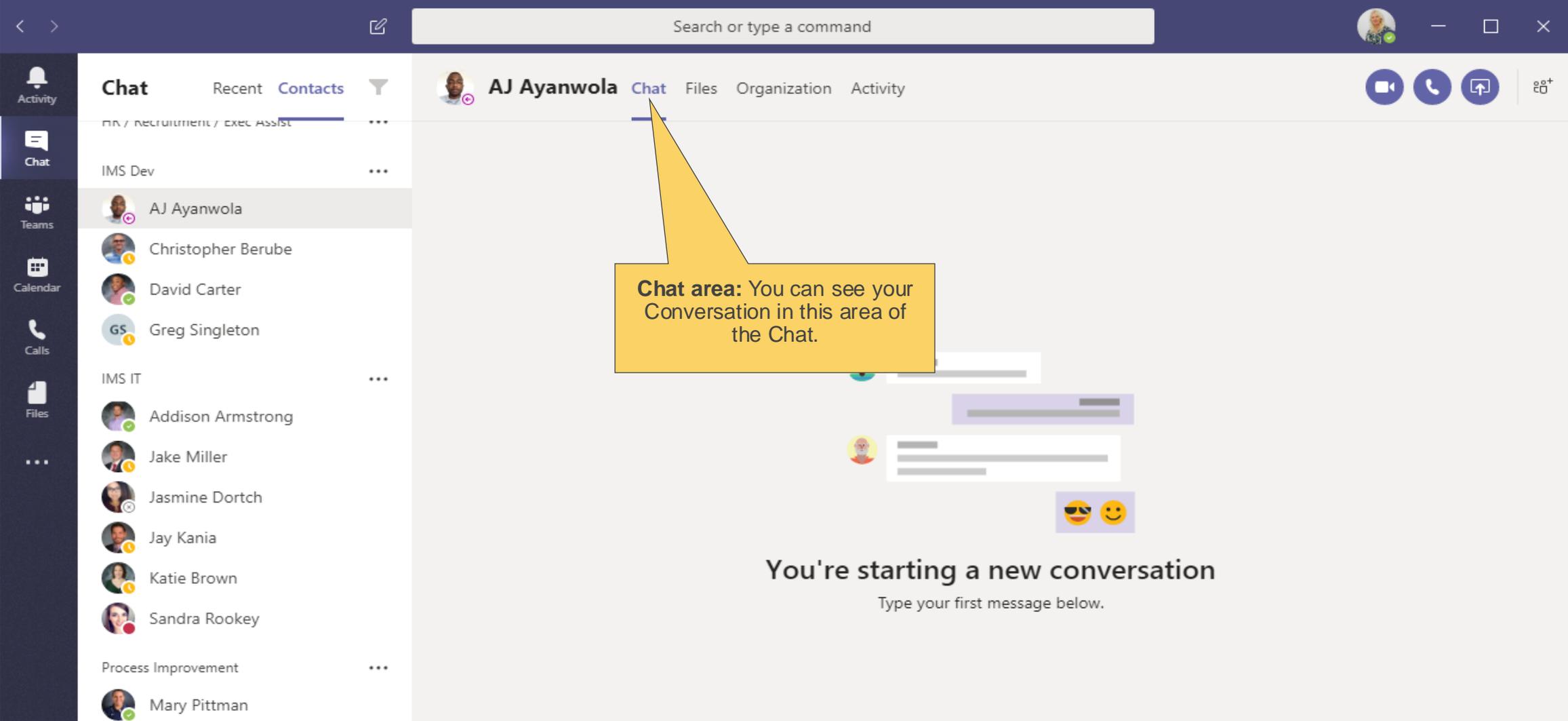
The screenshot shows the Microsoft Teams interface. At the top, there is a search bar with the text "Search or type a command". Below it, the "Chat" section is active, showing a list of conversations on the left and a chat window on the right. The chat window is currently empty, displaying "You're starting a new conversation" and "Type your first message below." Three callout boxes provide additional information:

- Back/Forward arrows:** These arrows function just like the arrows in a browser window. You can go backwards or forwards in the direction where you have been navigating from window to window.
- Chat - Chat or Contacts:** **Chat** contains a list of conversations in chronological order. **Contacts** show those individuals you have set up in Groups that will make them easy to find.
- Search bar:** The Search feature is very versatile in that it allows for many different types of searches. It is robust enough that it will search for key words, it will search for Contacts, @Mentions and has a list of built in commands you can use if you start it with a slash (/).

MS Teams Landscape – Contact Profile

The screenshot displays the Microsoft Teams interface. On the left is a dark navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main area is titled 'Chat' and shows a list of contacts under 'Favorites' and 'A-IMS Executive Team'. A contact card for 'Greg Singleton' is highlighted, showing a profile picture with initials 'GS' and a yellow availability indicator. A yellow callout box points to the profile picture with the text: 'Contact Profile: When you hover over your chat contact profile pic or icon, you will be shown their availability status, company title, department, work phone number and work email address.' The contact card itself displays: 'Greg Singleton', '46m ago', 'Software Development Manager', 'IT', '850.480.7170', and 'gsingleton@expertservices.com'. Below the card are icons for chat, email, share, video call, and voice call, and a 'Message Greg Singleton' button. The background shows a blurred chat conversation with a 'You're starting a new conversation' prompt.

MS Teams Landscape – Chat tab



MS Teams Landscape – Files tab

The screenshot displays the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main area shows a chat window for 'AJ Ayanwola' with tabs for Chat, Files, Organization, and Activity. The 'Files' tab is selected and highlighted with a pink callout box. Below the callout is an illustration of various files (Word document, Excel spreadsheet, photo) and a text box that reads: 'Share files in this chat. Everyone can work together on files you upload and create.'

Files: The Files tab will contain all the files that you shared within a Chat. Everyone that has been pulled into the Chat can work on those files.

Share files in this chat.
Everyone can work together on files you upload and create.

MS Teams Landscape – Organization tab

Organization: Choosing this tab will show you where the Contact is located in the Organization. It is synced with the Azure Active Directory and Outlook so as that changes, so will this representation.

Search or type a command

Search by name or alias

Bill Wein
CEO President

Bret Adams
Vice President of Finance

Jay Kania
Director of Information Techn...

AJ Ayanwola
Software Developer

Bonnie Green
User Experience Specialist

Christopher Berube
Manager of Systems & Infrast...

David Carter
Software Developer

Greg Singleton
Software Development Mana...

Sandra Rookey
Business Analysis Manager

MS Teams Landscape – Activity tab

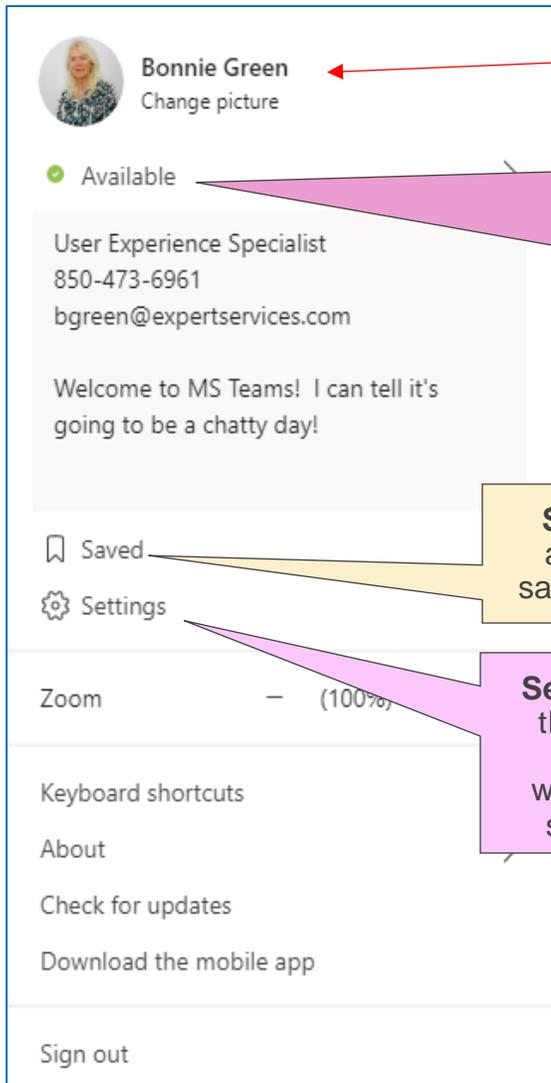
The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main area is divided into a left sidebar and a right pane. The sidebar has tabs for 'Chat', 'Recent', and 'Contacts'. The 'Contacts' tab is active, showing a list of contacts: Favorites, A-IMS Executive, HR / Recruitment / Exec Assist, IMS Dev, AJ Ayanwola (selected), Christopher Berube, David Carter, and Greg Singleton. The right pane shows the profile of AJ Ayanwola with tabs for 'Chat', 'Files', 'Organization', and 'Activity'. The 'Activity' tab is selected and highlighted. A yellow callout box points to the 'Activity' tab with the text: "Activity: This tab will display all the activity that this Contact has had in Teams that you have in common." Below the callout, the text reads: "AJ hasn't been active lately in any teams you have in common." The top of the interface includes a search bar and a user profile icon.

MS Teams Landscape – Video-Audio Calls / Share screen / Add people

The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main area shows a chat window for 'AJ Ayanwola' with tabs for Chat, Files, Organization, and Activity. At the top right of the chat window, there are icons for video call, audio call, screen sharing, and adding people. Four callout boxes provide instructions for each icon:

- Video call:** If you would like to have a Video chat with this contact, click on this icon to call that person.
- Audio call:** If you would like to have an Audio chat with this contact, click on this icon to call that person.
- Start sharing your screen:** When you're chatting with one or more people, you can instantly share your screen. Click on this Share icon and choose a window to share. Other participants in the chat will receive a notification asking them to accept your share.
- Add people:** Whenever you need to add someone to a chat, video call or audio call, click on this icon, start typing a name and then click **Add**.

MS Teams Landscape – Profile / Settings



Bonnie Green
Change picture

Available

User Experience Specialist
850-473-6961
bgreen@expertservices.com

Welcome to MS Teams! I can tell it's going to be a chatty day!

Saved

Settings

Zoom (100%)

Keyboard shortcuts

About

Check for updates

Download the mobile app

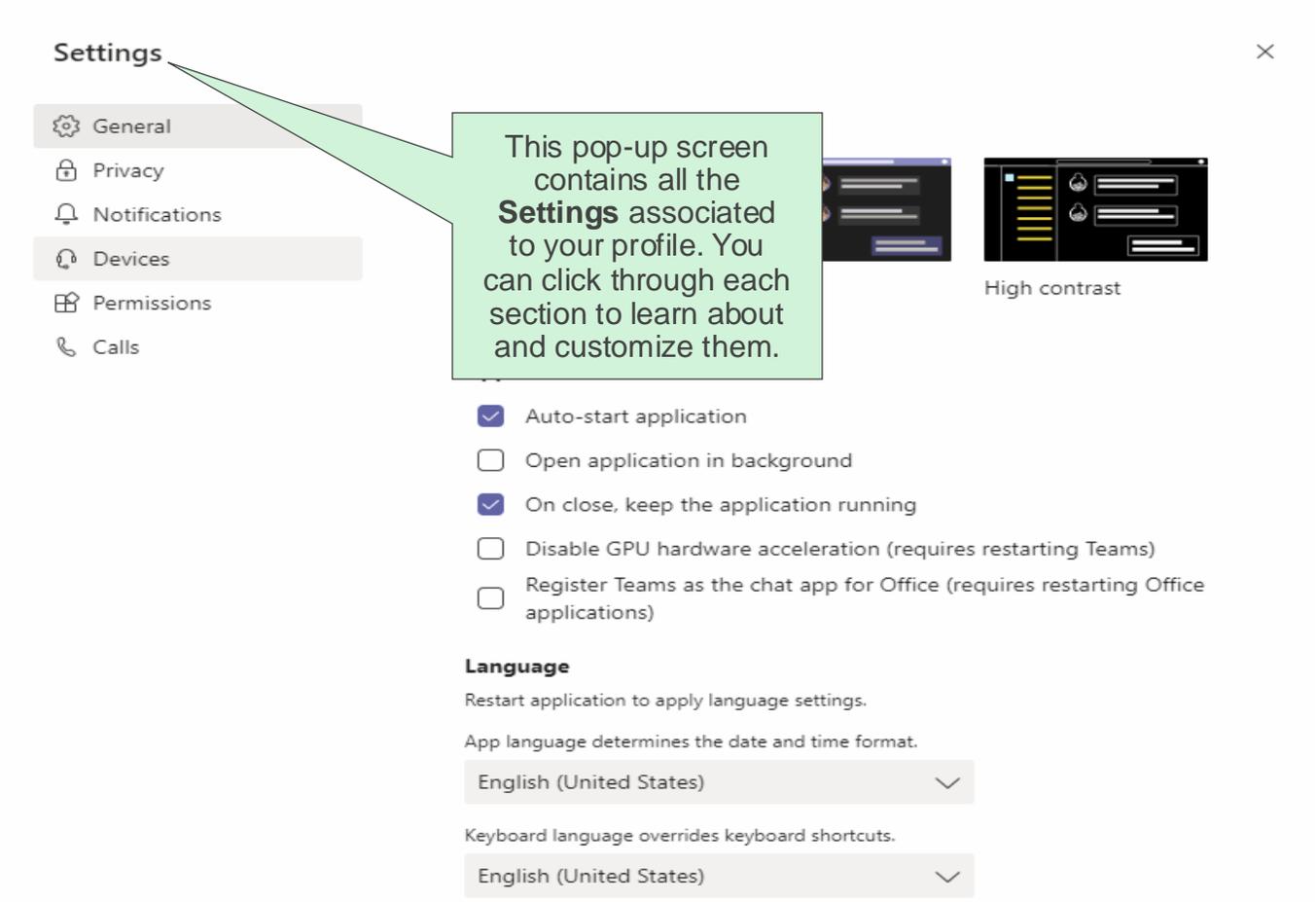
Sign out

Status: This shows your availability including the hours/days associated to how long you've been away.

Saved: You will be able to find all your saved messages here.

Settings: Clicking on this icon will open a separate Settings window with multiple sections to review.

To review all information tied to your profile click on your profile picture or icon.



Settings

- General
- Privacy
- Notifications
- Devices
- Permissions
- Calls

High contrast

Auto-start application

- Auto-start application
- Open application in background
- On close, keep the application running
- Disable GPU hardware acceleration (requires restarting Teams)
- Register Teams as the chat app for Office (requires restarting Office applications)

Language

Restart application to apply language settings.

App language determines the date and time format.

English (United States)

Keyboard language overrides keyboard shortcuts.

English (United States)

This pop-up screen contains all the **Settings** associated to your profile. You can click through each section to learn about and customize them.

Creating Contact Groups

The screenshot displays the Microsoft Teams interface. On the left sidebar, the 'Contacts' tab is selected, showing a list of contact groups and individuals. The groups 'IMS Dev', 'IMS IT', and 'Process Improvement' are highlighted with blue boxes. At the bottom of the sidebar, the 'Create a new contact group' button is circled in blue. A yellow callout box with a blue border contains the text: 'It is very easy to Create a New Contact Group for individuals we communicate with on a frequent basis'. Blue arrows point from this callout to the highlighted groups and the 'Create a new contact group' button. The main chat window shows a conversation with 'Katie Brown'.

Search or type a command

Chat Recent **Contacts**

HR / Recruitment / Exec Assist

IMS Dev

AJ Ayanwola

Christopher Berube

David Carter

IMS IT

Addison Armstrong

Jake Miller

Jasmine Dortch

Jay Kania

Katie Brown

Sandra Rookey

Process Improvement

Mary Pittman

Create a new contact group

Katie Brown Chat Files Organization Activity +

Awesome

it does an @ at me so I get tagged

Tuesday 9:45 AM

OOOOOH...I forgot that you can set your scheme to the dark layout...but it still stands out

Katie Brown Tuesday 9:45 AM

oh yes I have everything on dark theme LOL

Tuesday 9:47 AM

Katie! I appreciate the time to run through this with me! AND TRULY Thank You for some with the onboarding help!

anytime you need anything. Thank you for the badge, I really like it

type a new message

Creating Contact Groups (cont.)

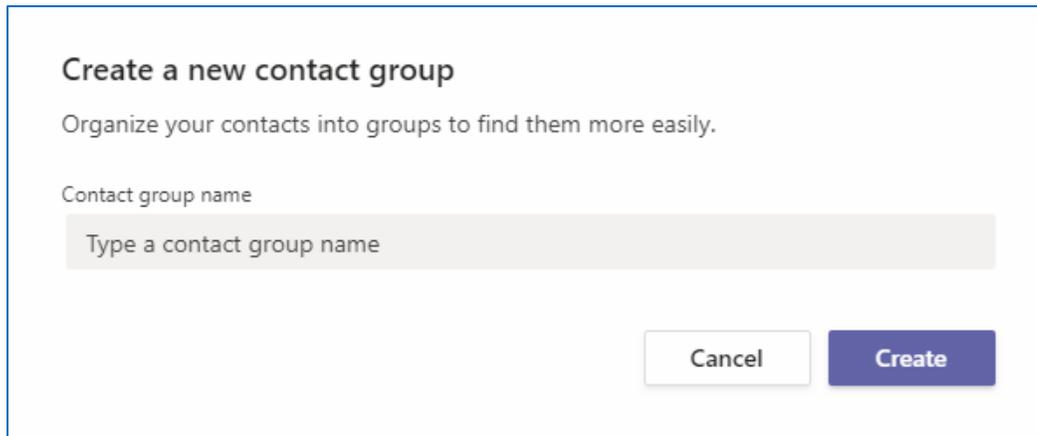
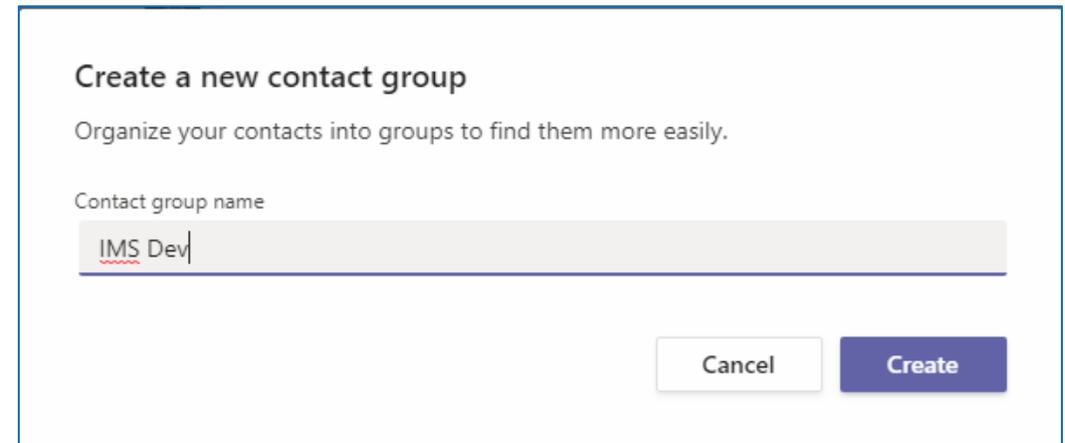
Make sure you are in the **Contacts** tab in the **Chat** window



At the bottom, click on **Create a new contact group**



The **Create a new contact group** pop-up box will appear. Type a group name in the “Type a contact group name” area. Click on the **Create** button.

A screenshot of a 'Create a new contact group' dialog box. The title is 'Create a new contact group' and the subtitle is 'Organize your contacts into groups to find them more easily.' Below the subtitle is a label 'Contact group name' followed by a light gray input field containing the placeholder text 'Type a contact group name'. At the bottom right are two buttons: a white 'Cancel' button and a blue 'Create' button.A screenshot of the same 'Create a new contact group' dialog box. The input field now contains the text 'IMS Dev' in a dark blue font. The 'Cancel' and 'Create' buttons remain at the bottom right.

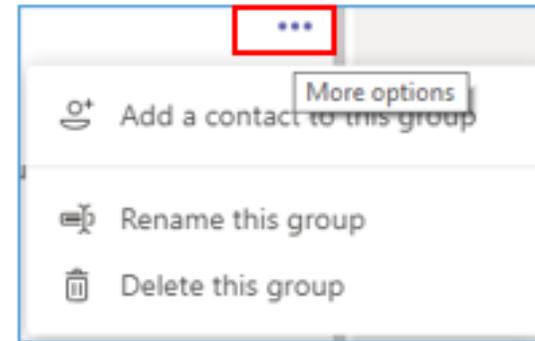
Creating Contact Groups (cont.)

The Group name will show up in the **Chat** window

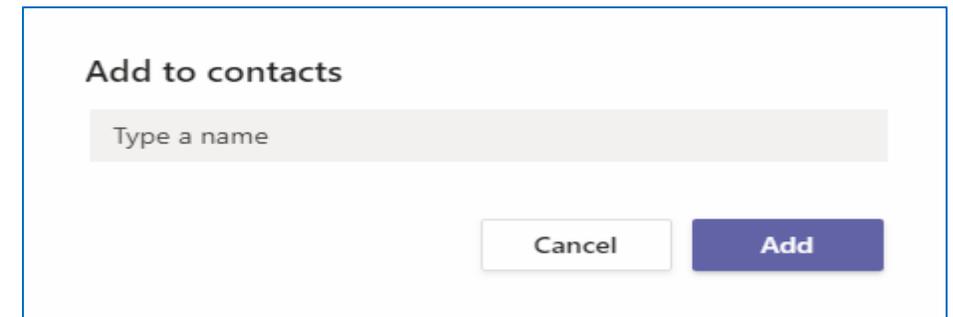


Click on the three ellipsis (...) to the right to show **More options**

- You will see that you have three options
 - **Add a contact to this group**
 - **Rename this group**
 - **Delete this group**



Click on **Add a contact to this group**.
The **Add to contacts** pop-up will appear.



Creating Contact Groups (cont.)

Start typing a name in the **Type a name** area; you will notice that it is a predictive field and will show a list of names from Active Directory that matches the criteria you're typing. When you find the Contact you're looking for, click on their profile information and then click the **Add** button. You will now see the Contact in the group.

Add to contacts

J|

- Jerold Hall**
(JHALL) Sales Integration Manager
- JK** Julie Klein
(JKLEIN) Research Associate
- JMOSLEY** Jaclyn Mosley
(JMOSLEY) Lead Contracts Specialist
- JPREVATTE** Jenifer Prevatte
(JPREVATTE) Assistant Controller
- JHAZELDINE** Jennifer Hazeldine
(JHAZELDINE) Graphic Designer
- JM** Jennifer Merchant
(JMERCHANT) Senior Recruiting Consultant
- JODY** Jody Braxton

Add to contacts

Jay|

- Jay Kania**
(JKANIA) Director of Information Technology
- Chris Jaycocks**
(CJAYCOCKS) Project Services Coordinator

Add to contacts

Jay Kania
jkania@expertservices.com

IMS Dev

- AJ Ayanwola
- Christopher Berube
- David Carter
- GS** Greg Singleton
- Jay Kania**

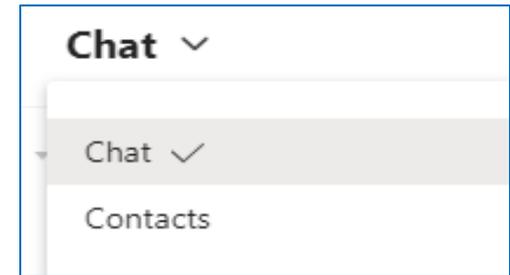
Starting a Chat

The screenshot displays the Microsoft Teams chat interface. On the left, a sidebar shows navigation options: Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main chat window is titled "Katie Brown" and shows a conversation. A callout box with a blue border and a yellow background points to the chat history, containing the text: "Persistent Chat ensures you never lose the thread and can easily find information within the chat". The chat history includes a video thumbnail with the word "Awesome", a text message "it does an @ at me so I get tagged", a date separator "Tuesday 9:45 AM", a text message "OOOOOH...I forgot that you can set your scheme to the dark layout...but it still stands out", another text message "Katie Brown Tuesday 9:45 AM oh yes I have everything on dark theme LOL", another date separator "Tuesday 9:47 AM", a text message "Thank you, Katie! I appreciate the time to run through this with me! AND TRULY Thank You for being so awesome with the onboarding help!", a third text message "Katie Brown Tuesday 9:48 AM Its no problem at all. Reach out anytime you need anything. Thank you for the badge, I really like it XD", and a text input field "Type a new message". The bottom of the chat window shows a toolbar with icons for attachments, emojis, GIFs, and other chat functions.

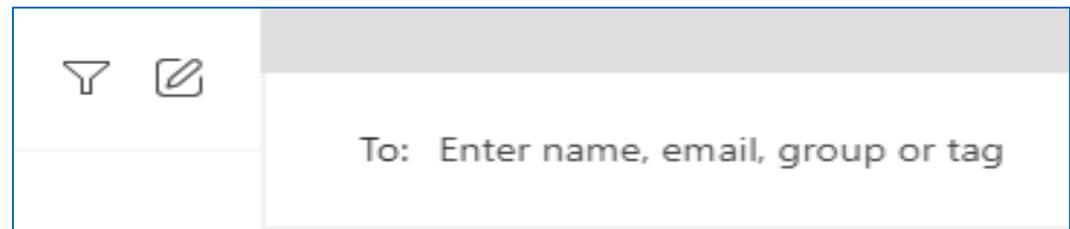
Starting a Chat (cont.)

You have several ways to start a chat

- In the **Chat** list, click on the name of a Contact you want to chat with under the:
 - **Chat** dropdown (Contacts shown in chronological chat order)
 - **Contacts** dropdown (Contacts contained in Contact Groups)

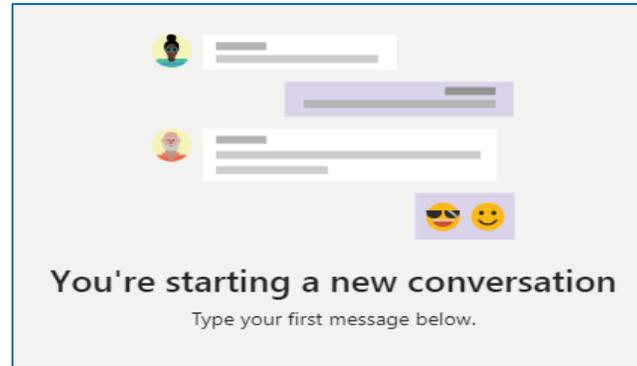


- You can also click on the **New chat** icon to the right of the Chat area and that will open an area for you to **Enter name, email, group or tag**



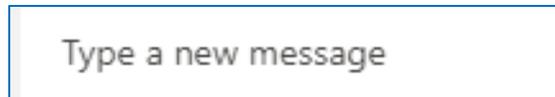
Starting a Chat (cont.)

If you are starting a new chat with a Contact, you will see this in the Conversation window



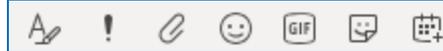
If you are continuing a chat, you will see the previous history of your chat with that contact in the Conversation window

At the bottom of the Conversation window, you can type your message in the **Type a new message** area

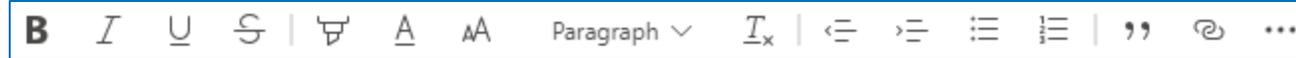


Making chats informative and fun

Below the **Type a new message** area, are icons that will enhance your chat conversation experience. Here they are with short explanations:



Format – when you click on this icon, a line of formatting options will be shown for you to use to help craft your conversation; hover over them to see their definitions (bold, italic, underline, strikethrough, highlight, font color, font size, paragraph format, clear formatting, indenting, bullet or numbering lists, quote, insert link & more options)

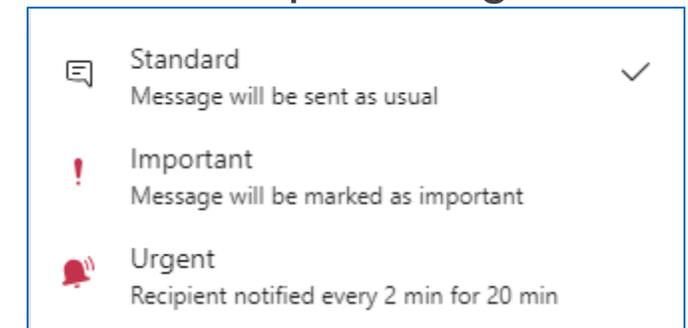


Set Delivery Options – clicking on this icon will bring up 3 options that will help to bring attention to your chat

Standard – no special attention needed (default)

Important – message marked as important

Urgent – needs immediate attention; notified every 2 minutes

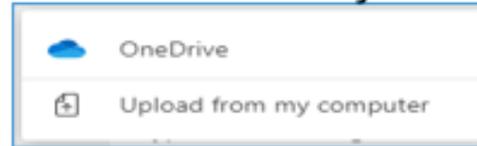


Making chats informative and fun (cont.)

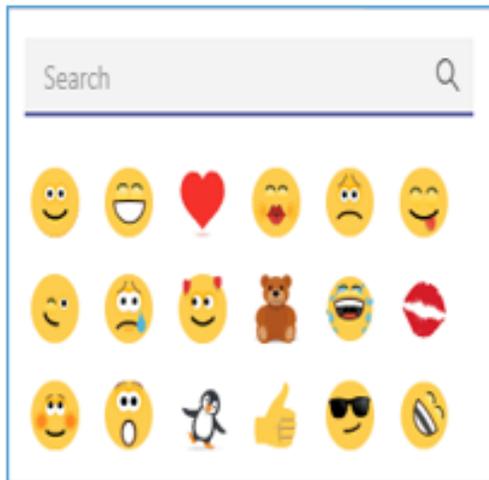
 **Attach** – if you are needing to attach something (document, spreadsheet, picture, etc.) click on this icon. You will be given a choice of whether you want to attached your item from

OneDrive or

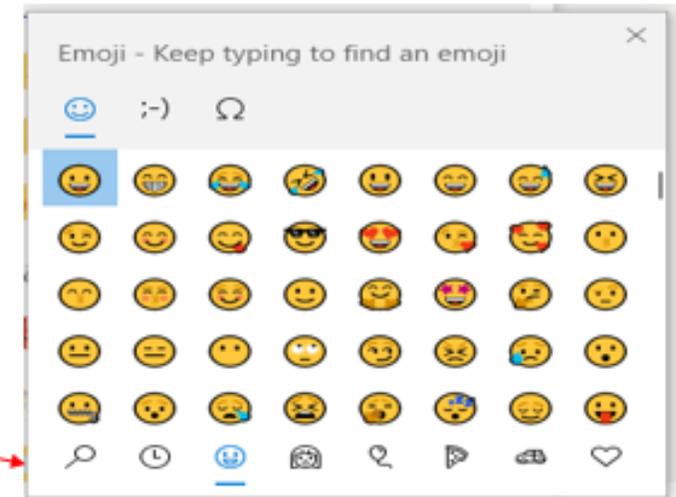
Upload from my computer



 **Emoji** – there are times when you want to add a little “something” to a chat and that’s where emojis come into play. You’ll see when you click on this icon there are quite a few listed.



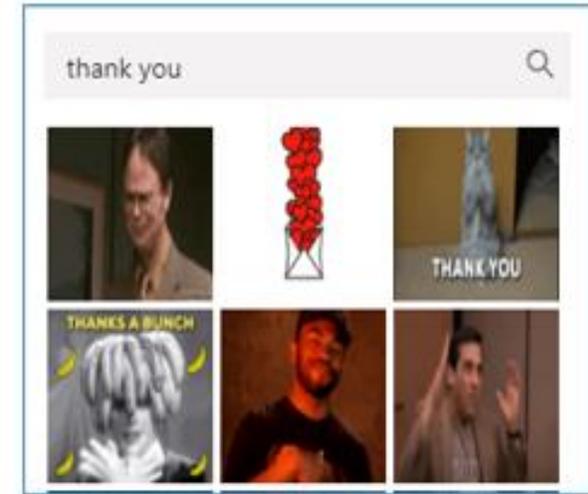
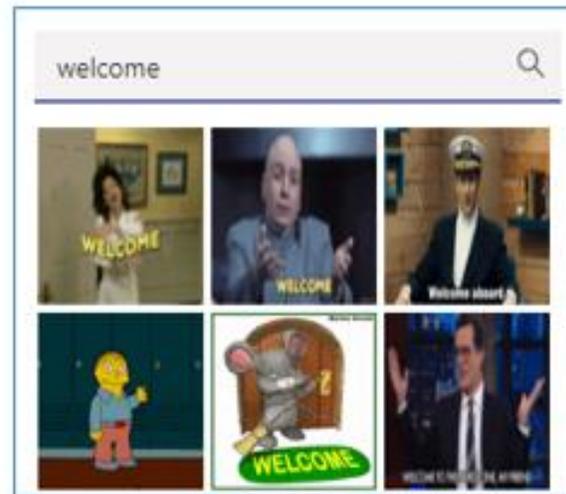
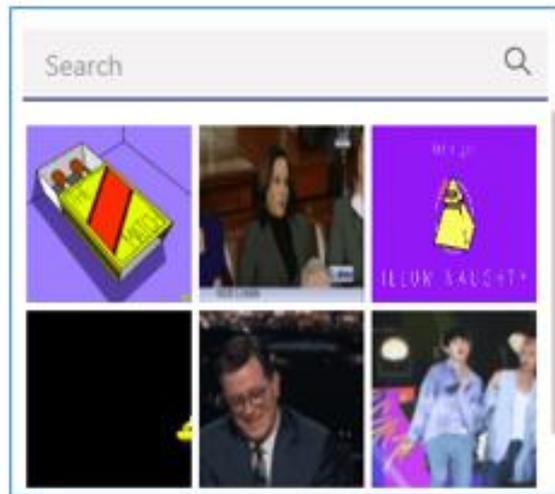
If you want a broader list, similar to what you see on your cell phone, at the same time on you keyboard, type the Windows key  and the semi-colon (;) and you will get the pop-up window that shows more categories of emojis.



Making chats informative and fun (cont.)



Giphys – Giphys go one step further than emojis. If you would like to be a little more expressive within your chat, click on this to review your GIF choices. In the Search, type an expression you would like to see (example: welcome, thank you, etc.)



Stickers – There are almost an endless amount of stickers that can be used, so explore them when you have a little time.

Making chats informative and fun (cont.)



Schedule a meeting – when you click on this icon, a New meeting window will pop up and you will be able to set up a meeting between you and your Contact or Group. How handy is this??!

New meeting Details Scheduling Assistant

Time zone: (UTC-06:00) Central Time (US & Canada) ▾

Add title

Christopher Berube × + Optional

Nov 10, 2020 4:00 PM → Nov 10, 2020 4:30 PM 30m All day

Suggested: 4:00 PM-4:30 PM 4:30 PM-5:00 PM 5:00 PM-5:30 PM

Does not repeat ▾

Add channel

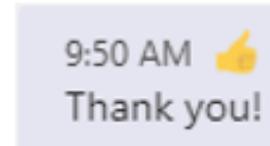
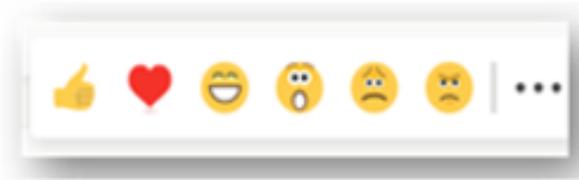
Add location

B *I* U ~~ABC~~ | Paragraph ▾ | | | | | |

Type details for this new meeting

Making chats informative and fun (cont.)

Along with the emojis you can embed in your chat, you can also use a small set of emojis, we define as “reactions or expressions” and you can see those if you hover over a chat message someone sent. When you use one it will appear to the right of the time on the message. **Let’s level set on what those mean to our teams:**

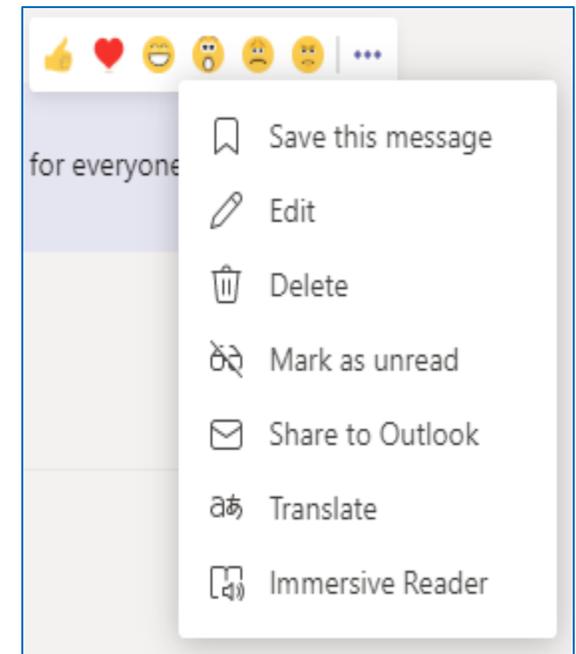


-  **Like** = I like it! Thumbs up! I agree. I've seen it. Good job! Acknowledged. Got it! Thanks!
It does not mean = Approved. Go ahead. Confirmed. Do it. Buy it.
-  **Heart** = Love it! Wonderful! So sweet. That is so kind. THANK YOU!
It does not mean = Anything inappropriate.
-  **Laugh** = That's funny. That makes me so happy.
-  **Surprised** = What??!?! Really?! I'm surprised. Oh my!
-  **Sad** = That's so sad. I'm sorry to hear that. I empathize with you.
-  **Angry** = That makes me so angry. That is upsetting. That is so wrong.

Making chats informative and fun

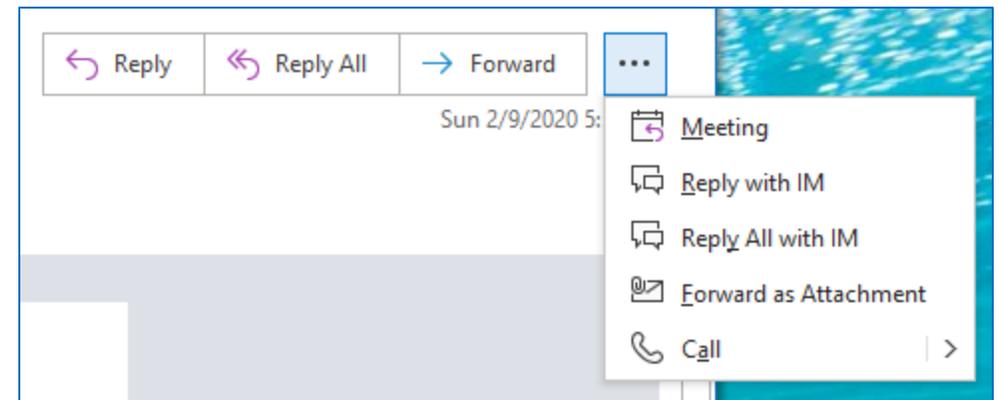
The ellipsis to the right of the emojis are what you would imagine... more options!
Here is a quick overview of what they mean

Save this message	Use this to save a chat message. Please keep in mind it save the whole conversation and not just the line you performed the action on. To retrieve it, click on your profile photo and click on "Saved" and you will see all your saved messages.
Edit	You can actually change a message with this feature and the recipient(s) in your chat will get the update.
Delete	If you choose to delete the message you sent, use this feature. The recipient(s) may have already seen the message, but it will disappear from yours and their view.
Mark as unread	This feature will place a "Last Read" line into the conversation and if you filter a conversation to only show what is "unread", those messages will appear. (To undo it go to the Contact and click on "Mark as read")
Share to Outlook	Choosing this option will send the single message to an email in Outlook.
Translate	Should you get a message that's not in your default language, you can click on this and it will translate the message within your chat.
Immersive reader	This feature turns the entire MS Teams window into a "reader screen" with a large font for those that are not able to read a small size font. If you click on the Play button at the bottom, the text will be read to you out loud.



Tips and Tricks

- To obtain a larger selection of emojis, click on the emoji face, then on your keyboard, at the same time, type the **Windows key**  and **semi-colon (;)** and a larger selection of categories for emojis will pop-up
- When we fully cut over to MS Teams and you receive an email that could probably be contained within a chat, click on the ellipsis to the right of **Reply**, **Reply All** and **Forward** in an email and from the dropdown choose Reply with IM or Reply All with IM. The email message will be sent to MS teams as a chat.



The Difference between Teams & Channels

- **Teams** are a collection of people, content, and tools surrounding different projects and events within an organization. Examples: launching an application, creating a digital war room, departments or office locations)
 - They can be...
 - Private – for only the owner(s) and invited users
 - Public – open to anyone within the organization
- **Channels** are dedicated sections within a team to keep conversations organized by specific topics, projects, disciplines—whatever works for your team! Conversations, files and notes across team channels are only visible to members of the team and it's where the work actually gets done.

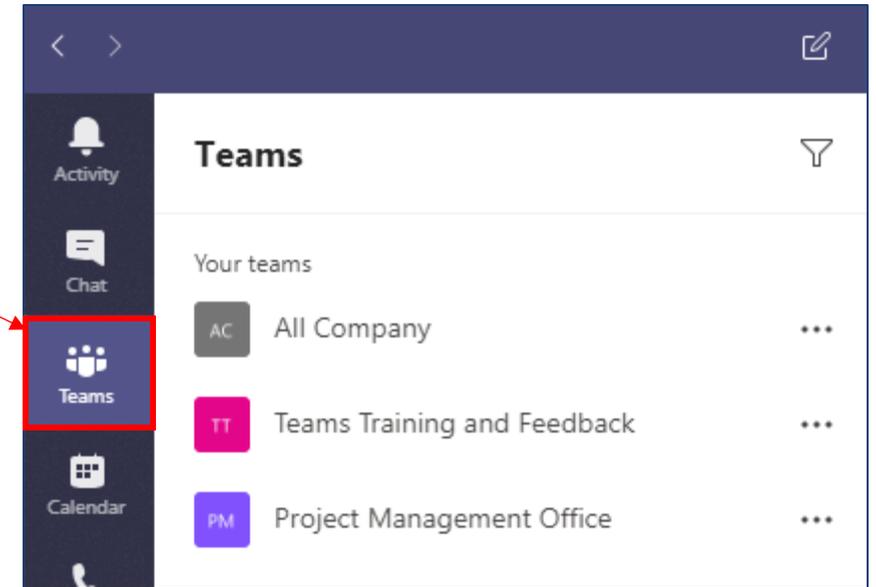
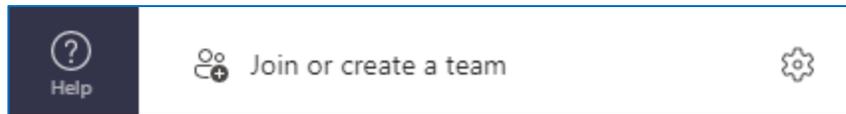
They can be...

- Standard – Accessible to everyone on the team
- Private – Accessible only to a specific group of people within the team

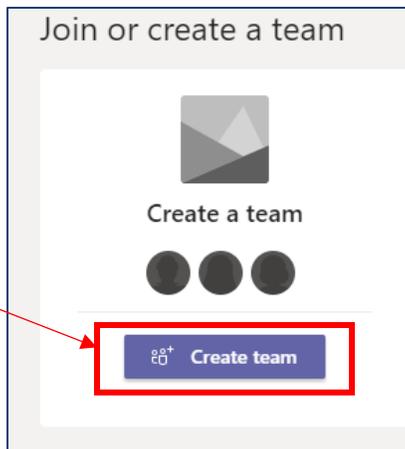
How to set up Teams

Make sure you are in the **Teams** section of the left navigation panel.

At the bottom of the section, click on **Join or create a team**



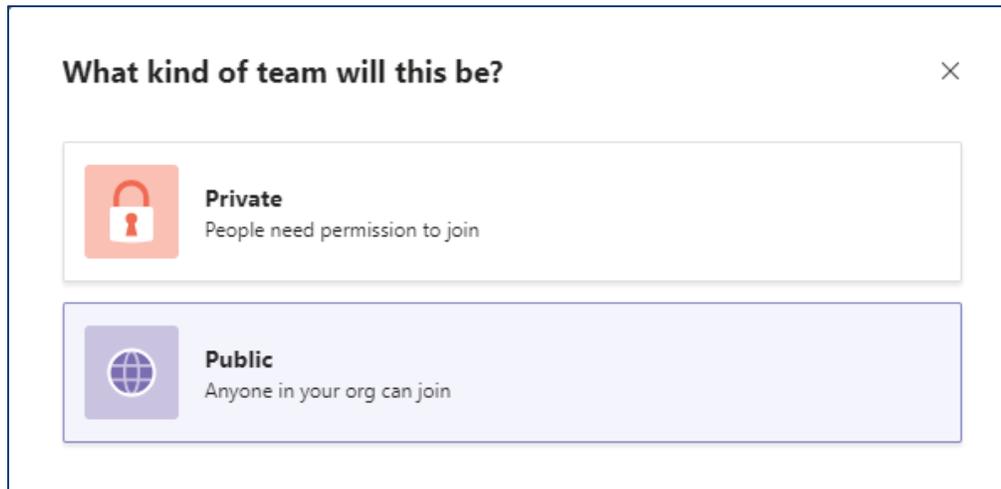
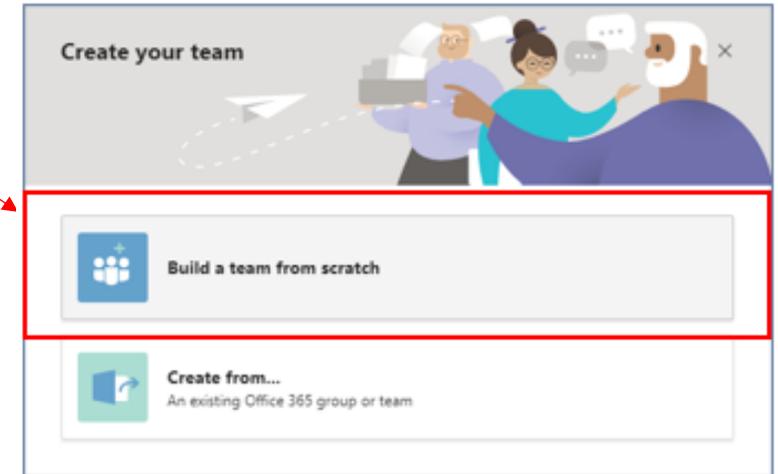
Click on **Create team**



How to set up Teams (cont.)

More than likely you will want to **Build a team from scratch**, but you do have the option to create one from an existing team.

Choose whether you want it to be **Private** or **Public**

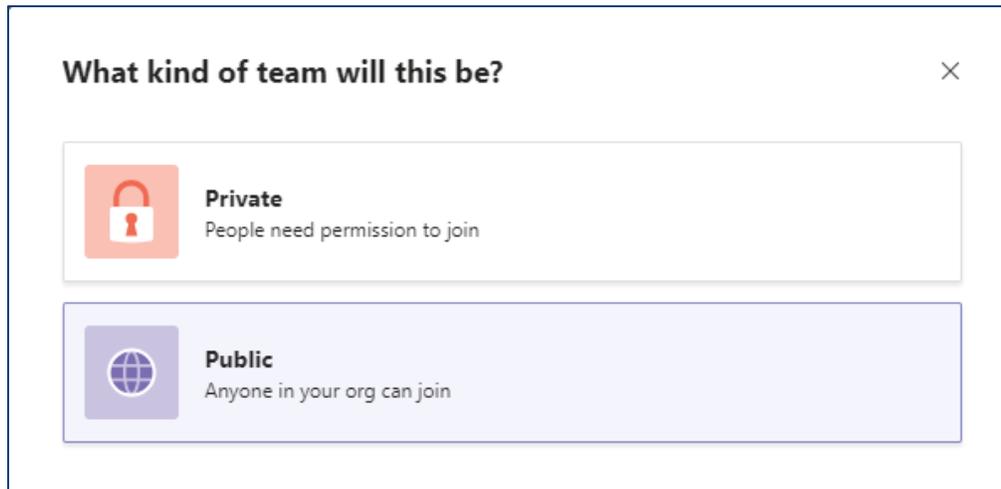
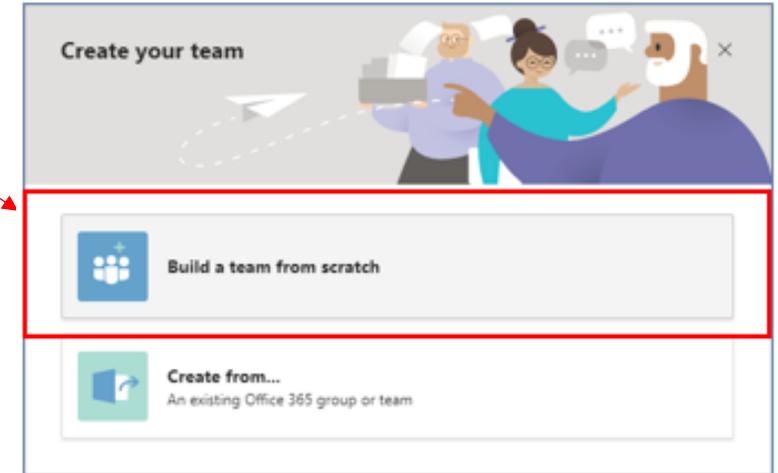


Note: You can change a **Public** team to a **Private** team but understand that it will no longer be discoverable to new Members.

How to set up Teams (cont.)

More than likely you will want to **Build a team from scratch**, but you do have the option to create one from an existing team.

Choose whether you want it to be **Private** or **Public**

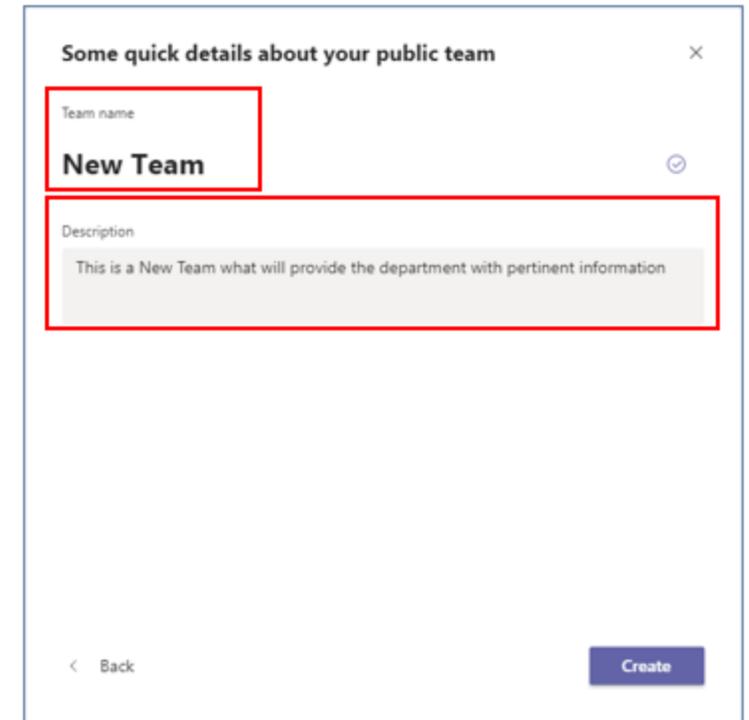
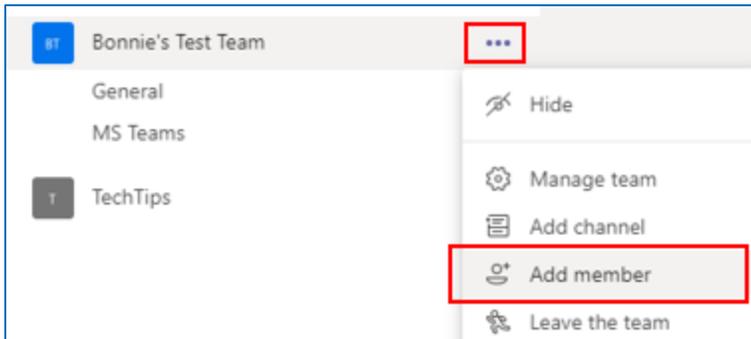


Note: You can change a **Public** team to a **Private** team but understand that it will no longer be discoverable to new Members.

How to set up Teams (cont.)

Type in your **Team Name** and fill in a short description for the purpose of the team.
Click **Create**.

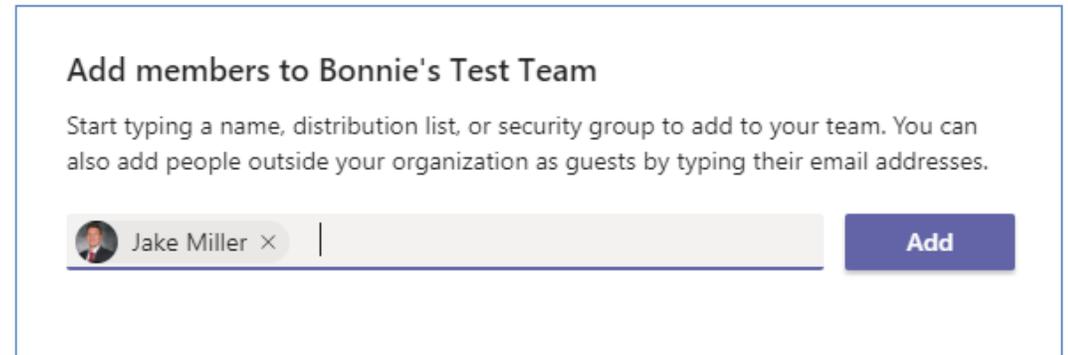
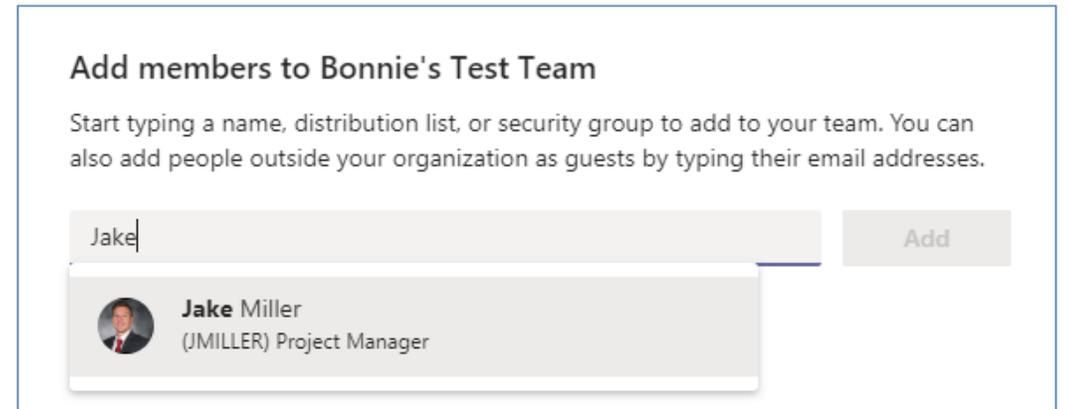
Now that you have your Team, you will want to add members to the Team.
Click on the ellipsis (...) to the right of the Team name, and choose **Add member** from the list.



How to set up Teams (cont.)

When you start typing in the fill area, if that person is in Active Directory, it will show the full name.

Click on the member's name and then click on **Add**. You can continue to add members to the Team and then when you're finished, click on **Close**.



How to set up Teams (cont.)

To add a Guest or someone outside the company, fill in the email address of the person you wish to add. Click on **Add** then **Close**.

You will also want to go into your settings to set the Guest permissions. They won't have a lot of flexibility but you can choose what they can do within the channels.

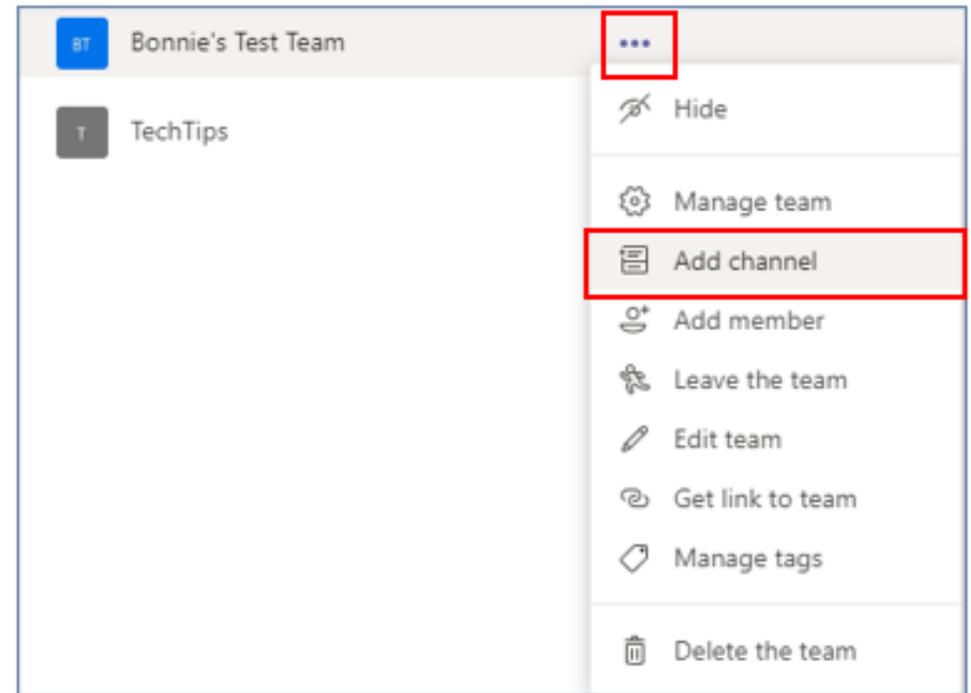
Click on the ellipsis to the right of the team name and choose Manage team. Under the Settings tab you will find the Guest Permissions

The image shows three screenshots from the Microsoft Teams interface. The top screenshot is the 'Add members to Bonnie's Test Team' dialog. It has a text input field containing 'traci.morgan@verizon.com' and an 'Add' button. A dropdown menu is open below the input field, showing a guest icon and the text 'Add traci.morgan@verizon.com as a guest'. The middle screenshot shows the 'Bonnie's Test Team' header with a menu open to the right. The 'Manage team' option is highlighted with a red box. The bottom screenshot shows the 'Settings' tab for the team. The 'Guest permissions' section is highlighted with a red box, showing three settings: 'Enable channel creation', 'Allow guests to create and update channels', and 'Allow guests to delete channels', each with an unchecked checkbox.

How to set up Channels

Now that you have your Team and Members, you will want to add Channels.

Click on the ellipsis (...) to the right of the Team name and choose **Add channel** from the list.



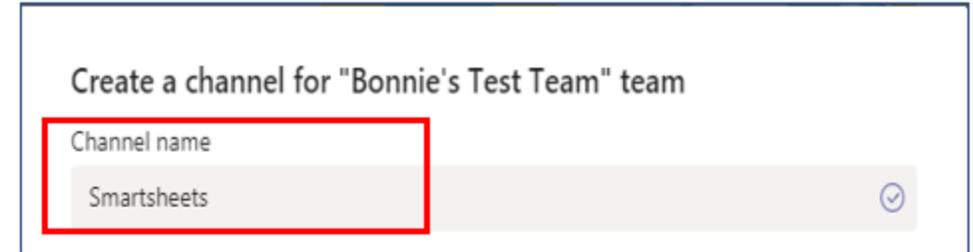
How to set up Channels (cont.)

Give the new channel a name.

The **Description** shows as optional but it's always a good idea to describe something whenever possible.

Choose the **Privacy** setting of **Standard** or **Private**.

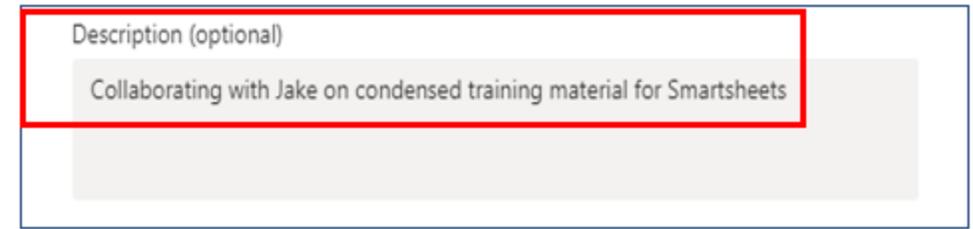
It's also a good habit to get into, to check the **Automatically show this channel in everyone's channel list**. They can always hide it from view at anytime. Click **Add** to add the channel.



Create a channel for "Bonnie's Test Team" team

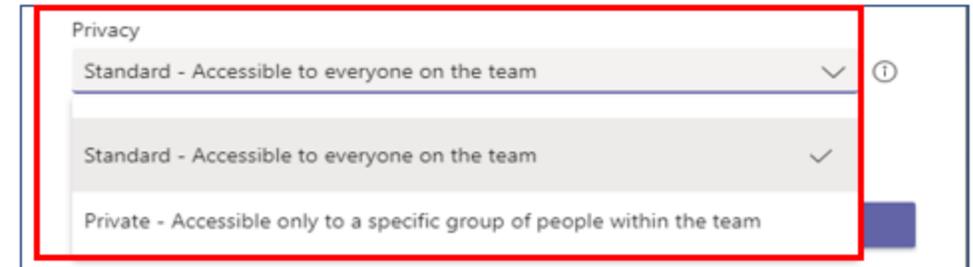
Channel name

Smartsheets



Description (optional)

Collaborating with Jake on condensed training material for Smartsheets



Privacy

Standard - Accessible to everyone on the team

Standard - Accessible to everyone on the team

Private - Accessible only to a specific group of people within the team

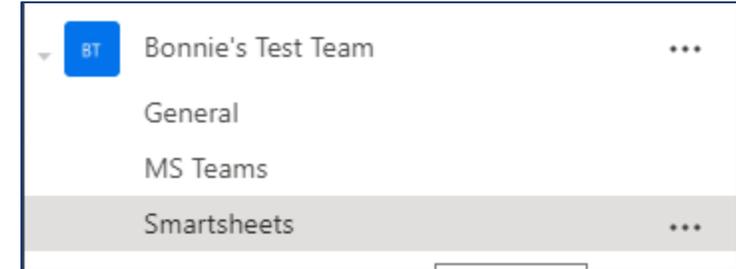


Automatically show this channel in everyone's channel list

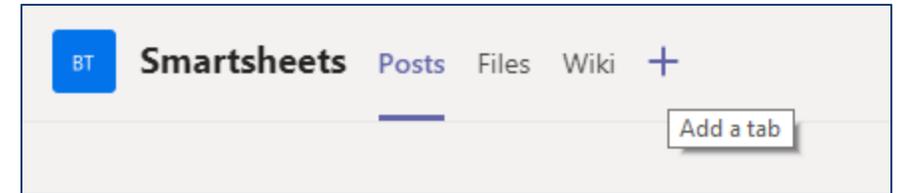
Cancel Add

Adding Smartsheet to MS Teams channels

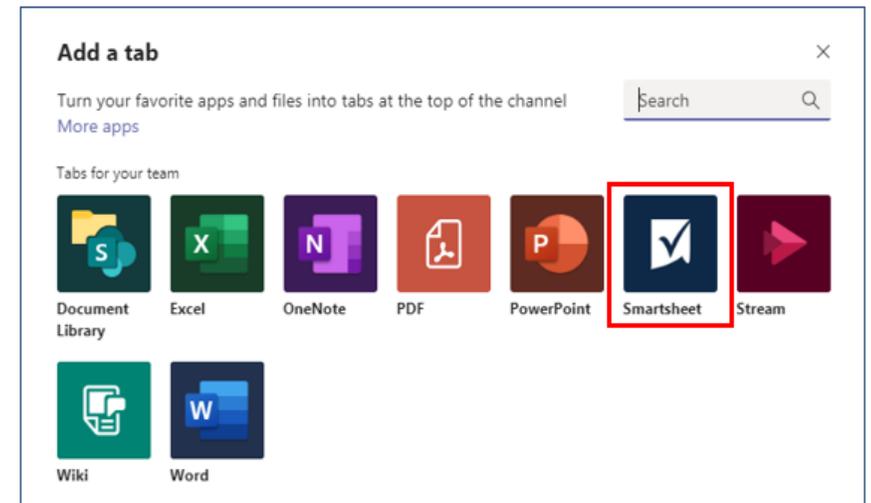
Click on the Team channel where you want to add the Smartsheet



Near the top, under the Search area, click on the plus sign (+) to “Add a tab”



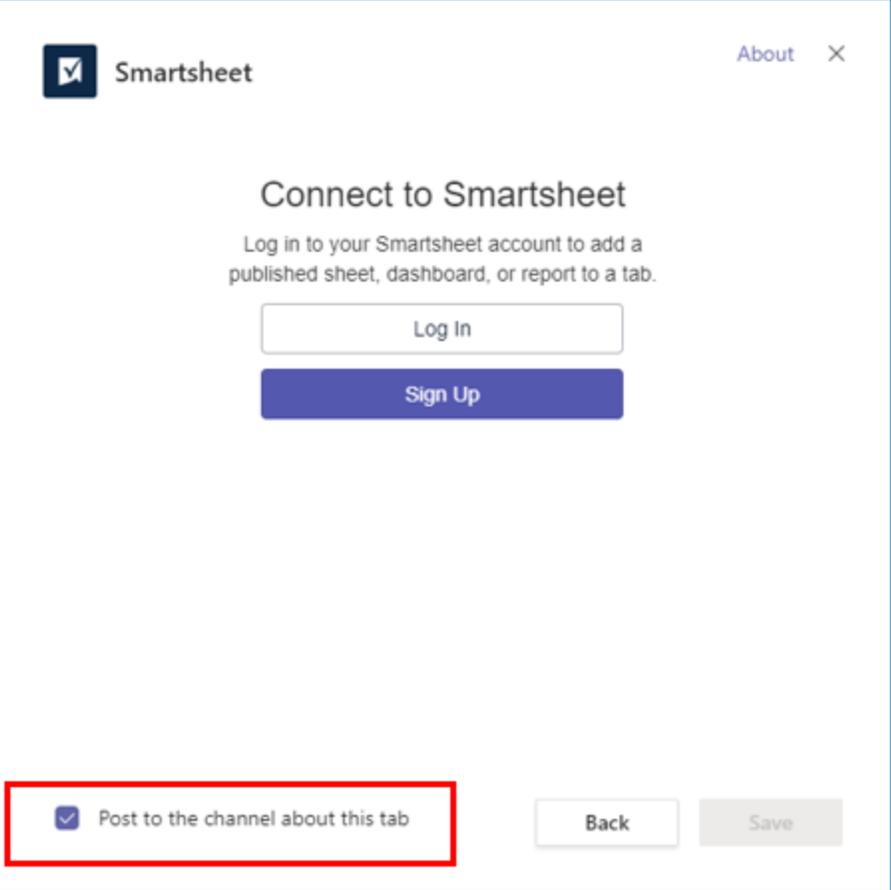
Choose the **Smartsheet** app for your tab



Adding Smartsheet to MS Teams channels (cont.)

Check the box for **Post to the channel about this tab.**

Click **Log In.**



Smartsheet About ×

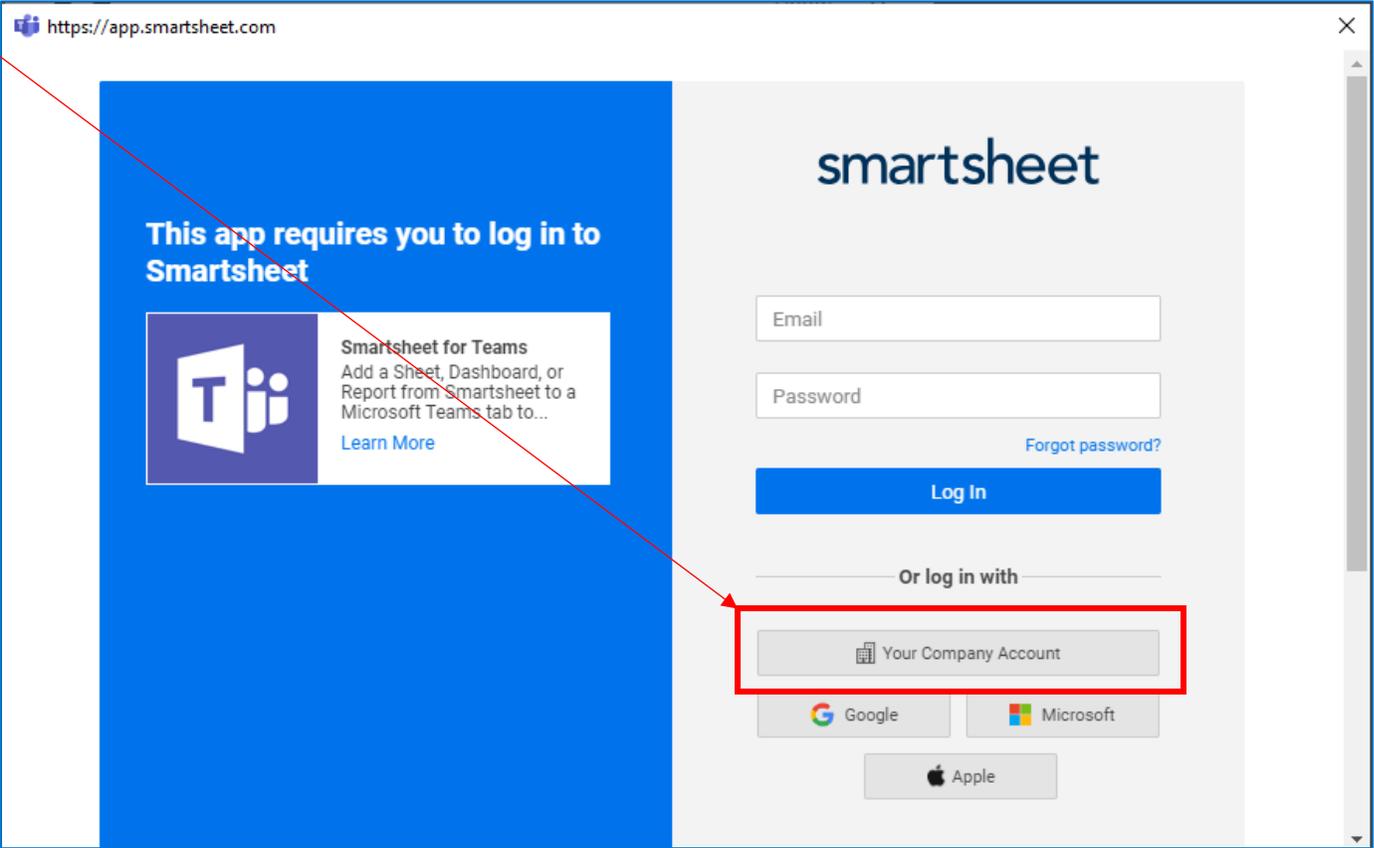
Connect to Smartsheet

Log in to your Smartsheet account to add a published sheet, dashboard, or report to a tab.

Post to the channel about this tab

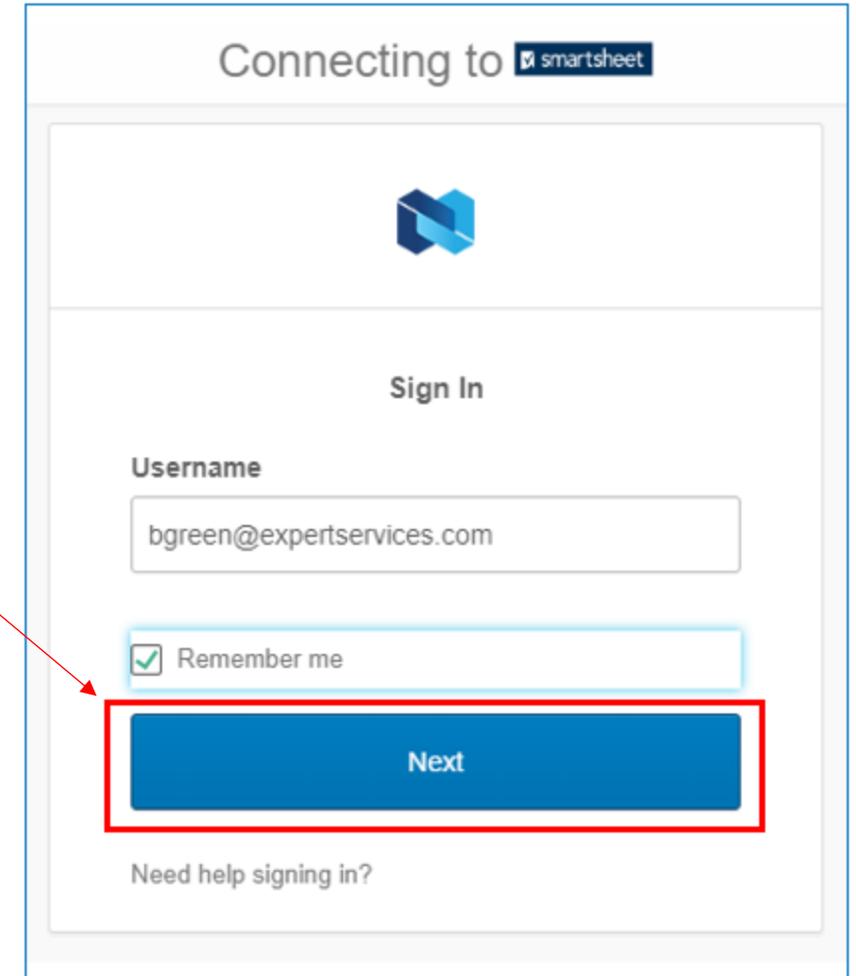
Adding Smartsheet to MS Teams channels (cont.)

Click on **Your Company Account**.



Adding Smartsheet to MS Teams channels (cont.)

Check to make sure the **Username** is correct then click on **Next**.



Connecting to 



Sign In

Username

bgreen@expertservices.com

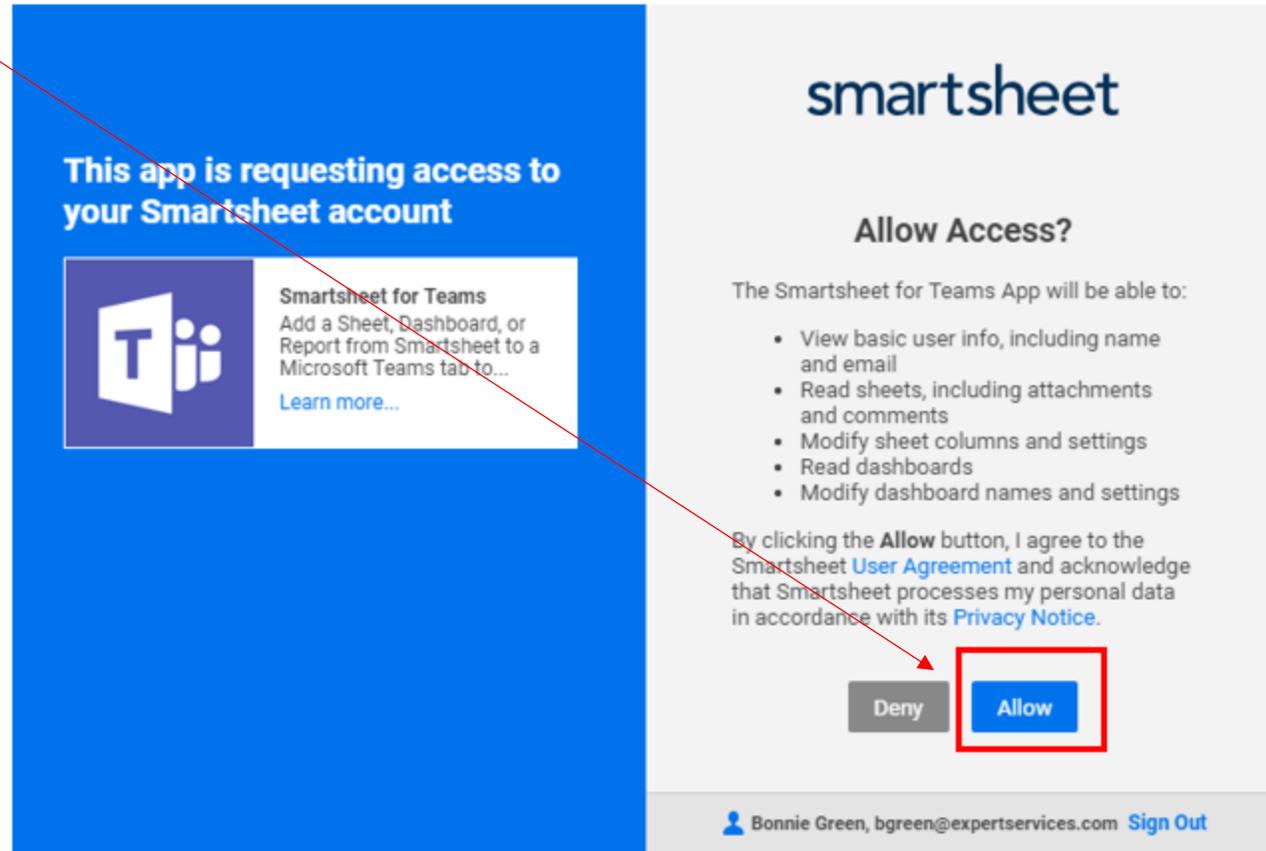
Remember me

Next

Need help signing in?

Adding Smartsheet to MS Teams channels (cont.)

Click on **Allow**.



The screenshot shows a dialog box for granting access to a Smartsheet account. The left side has a blue background with the text "This app is requesting access to your Smartsheet account" and a card for "Smartsheet for Teams" with a "Learn more..." link. The right side has a light gray background with the Smartsheet logo, the heading "Allow Access?", and a list of permissions. At the bottom, there are "Deny" and "Allow" buttons, with the "Allow" button highlighted by a red box and a red arrow pointing to it from the text "Click on Allow." above.

This app is requesting access to your Smartsheet account

Smartsheet for Teams
Add a Sheet, Dashboard, or Report from Smartsheet to a Microsoft Teams tab to...
[Learn more...](#)

smartsheet

Allow Access?

The Smartsheet for Teams App will be able to:

- View basic user info, including name and email
- Read sheets, including attachments and comments
- Modify sheet columns and settings
- Read dashboards
- Modify dashboard names and settings

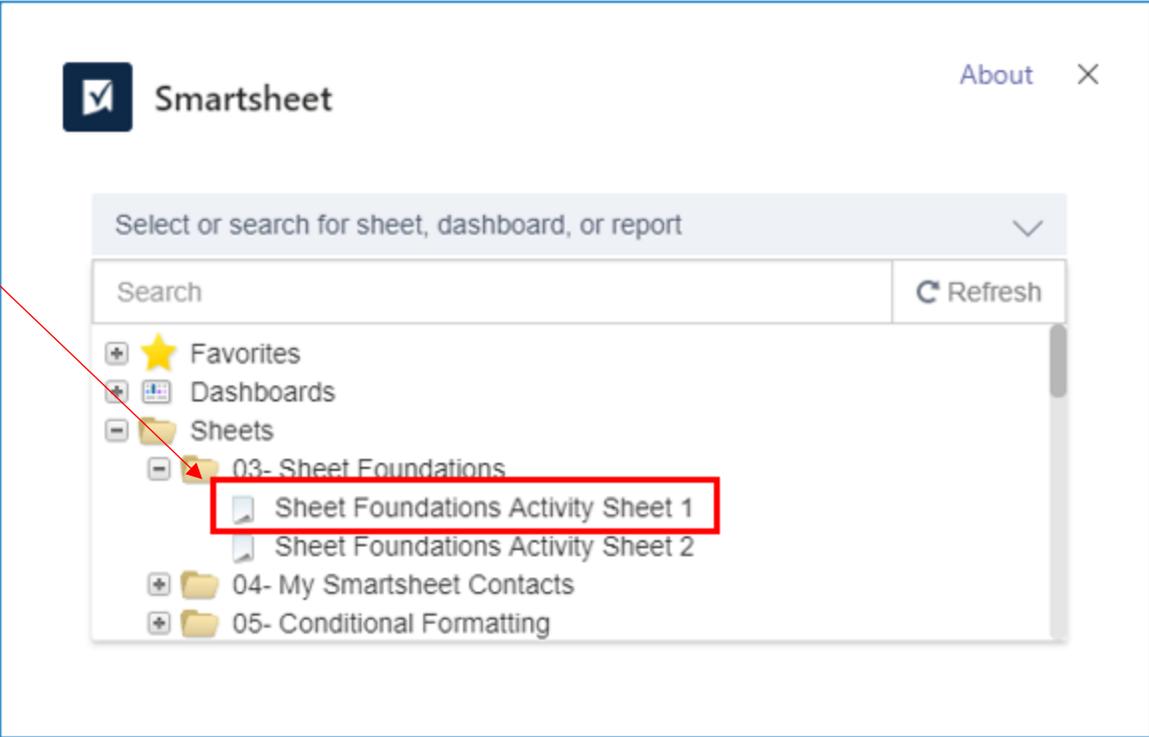
By clicking the **Allow** button, I agree to the Smartsheet [User Agreement](#) and acknowledge that Smartsheet processes my personal data in accordance with its [Privacy Notice](#).

Deny Allow

Bonnie Green, bgreen@expertservices.com [Sign Out](#)

Adding Smartsheet to MS Teams channels (cont.)

Choose the sheet you want to add.



Adding Smartsheet to MS Teams channels (cont.)

Be sure to choose all the radio buttons and check boxes as shown below then click on **Save**.

Smartsheet About ×

Cell Linking Activity Sheet ▾

Should this sheet be editable?

- Editable by Anyone
- Read Only

Display Options

- View sheet in full screen

This sheet needs to be published in order to use it in a tab. Publishing this sheet allows anyone with a link access. [Learn more.](#)

- Publish this sheet as Editable by Anyone

Access Control

- Available to anyone with the link
- Only available to users in the owner's account

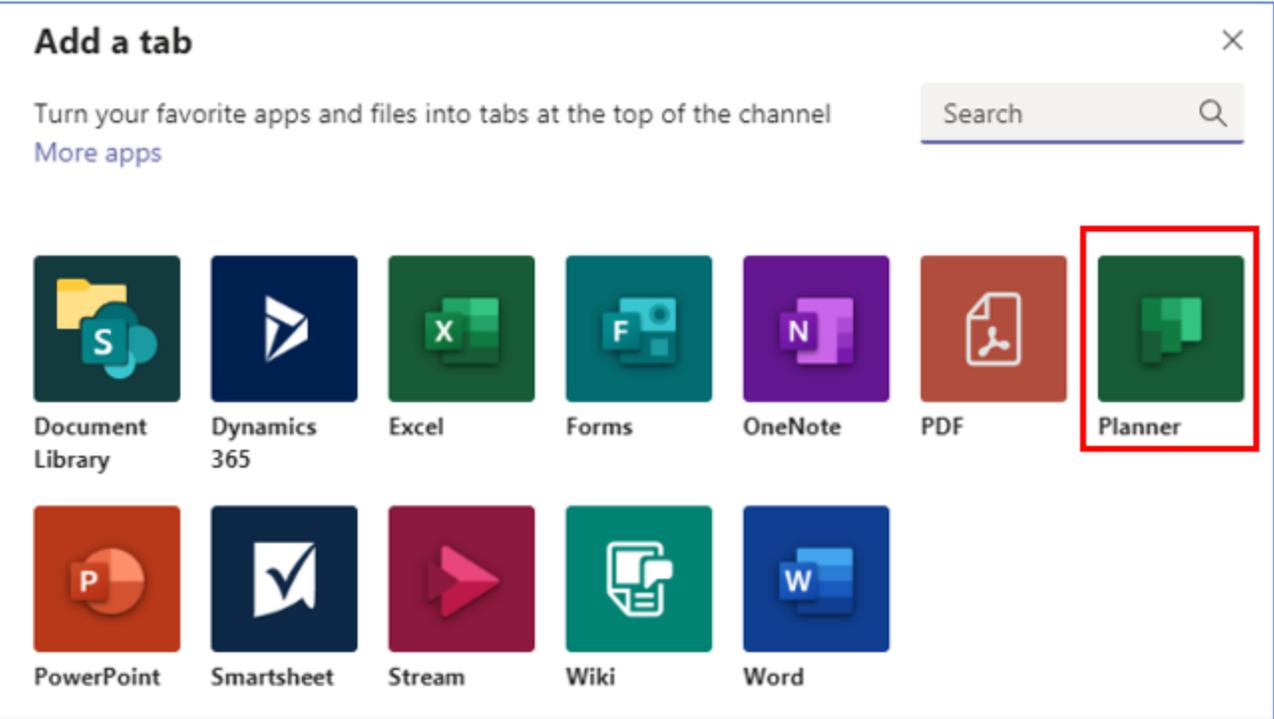
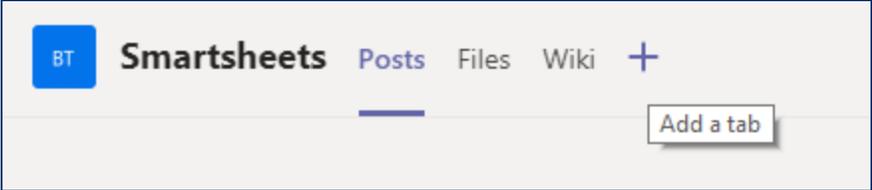
Post to the channel about this tab

Back **Save**

Adding Planner to MS Teams channels

Click on the plus sign (+) to “Add a tab”

Choose the **Planner** app for the tab.

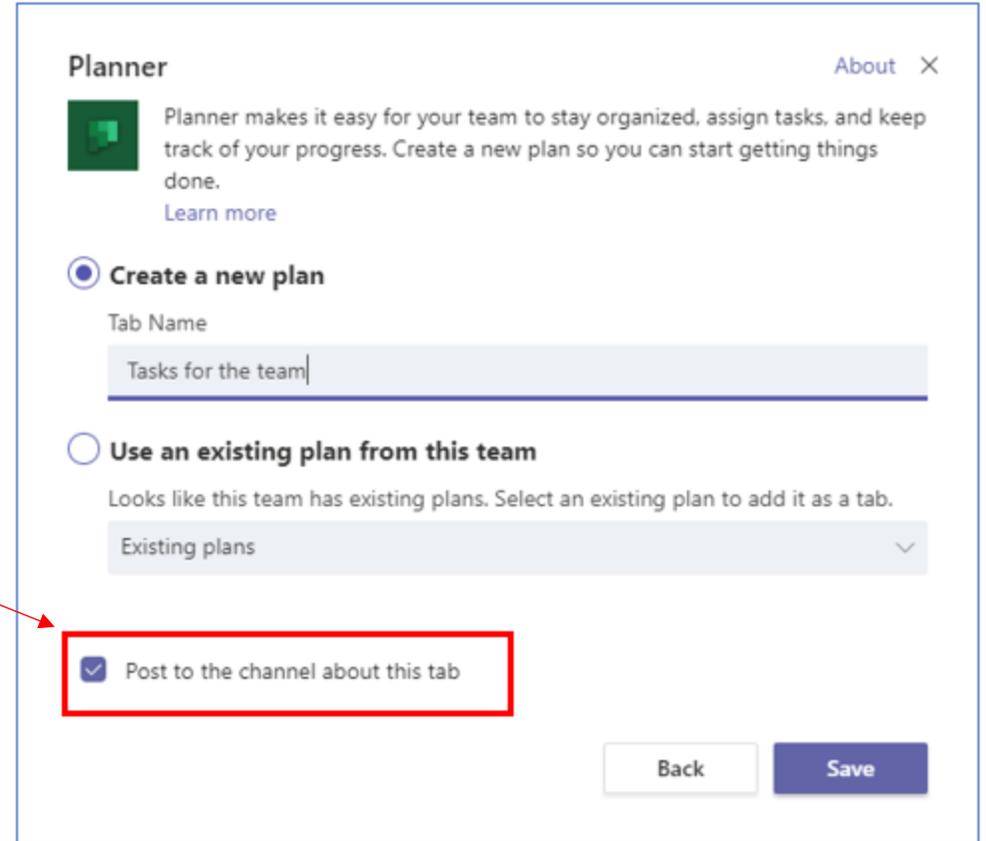


Adding Planner to MS Teams channels (cont.)

Choose the radio button to **Create a new plan** or **Use an existing plan from this team**.

Check the box for **Post to the channel about this tab**.

Click **Save**.



Planner About ×

 Planner makes it easy for your team to stay organized, assign tasks, and keep track of your progress. Create a new plan so you can start getting things done.
[Learn more](#)

Create a new plan

Tab Name

Use an existing plan from this team

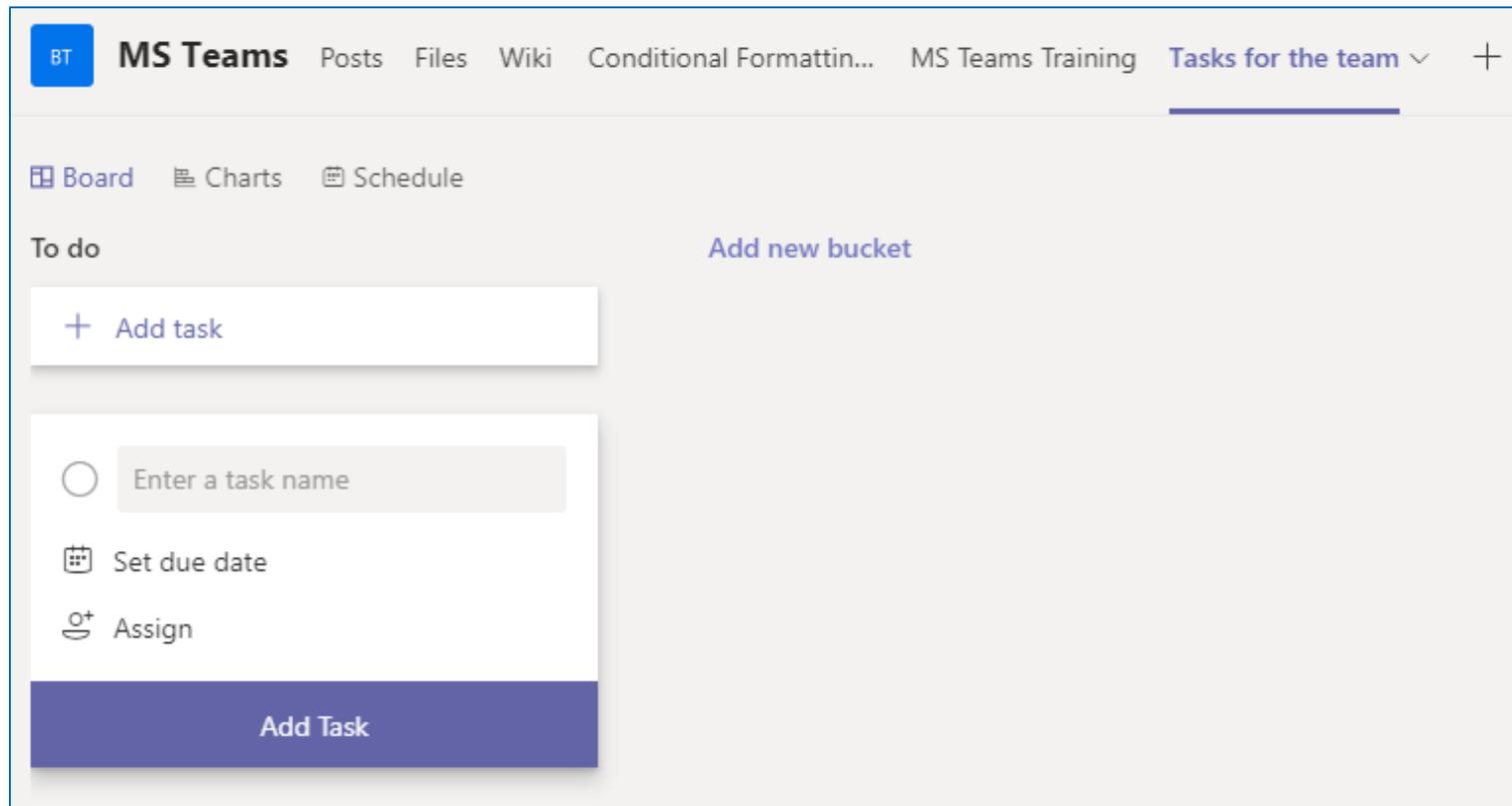
Looks like this team has existing plans. Select an existing plan to add it as a tab.

Existing plans ▼

Post to the channel about this tab

Adding Planner to MS Teams channels (cont.)

You now have an area where you can enter Tasks.



Together, we win.TM

