Microsoft Teams Training

Calls

Your Presenter

Facilitator:

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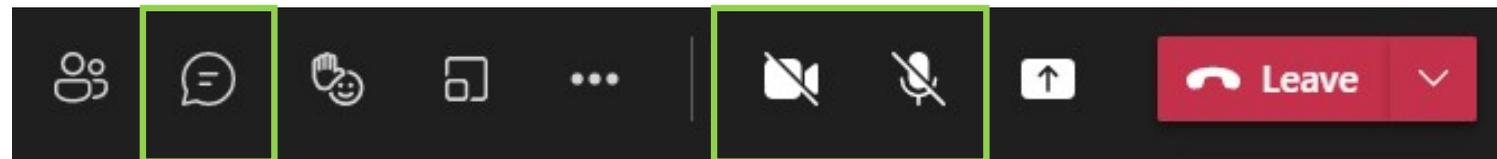
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- ✓ *Microsoft Certified Innovated Educator Trainer*

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Session Reminders

Your camera and microphone have been disabled for the presentation.

Leverage the chat feature in this meeting to share your questions

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Agenda

- Desktop Application – Calls Overview
  - Speed Dial, Contacts, History, Voicemail
- Managing Calls in Teams
  - Initiate, Answer, and End a Call
  - Hold, Transfer, Call Merge
  - Call Park
- Call Settings and Special Use Cases
  - Delegation
- Voicemail Configuration
- Mobile Application – Calls Overview (Optional)

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Desktop

The **Calls** landing page will display speed dial and suggested contacts. This will also include any speed dial groups you have created.

Use the menu in the upper-left corner to access contacts and the calls landing page.
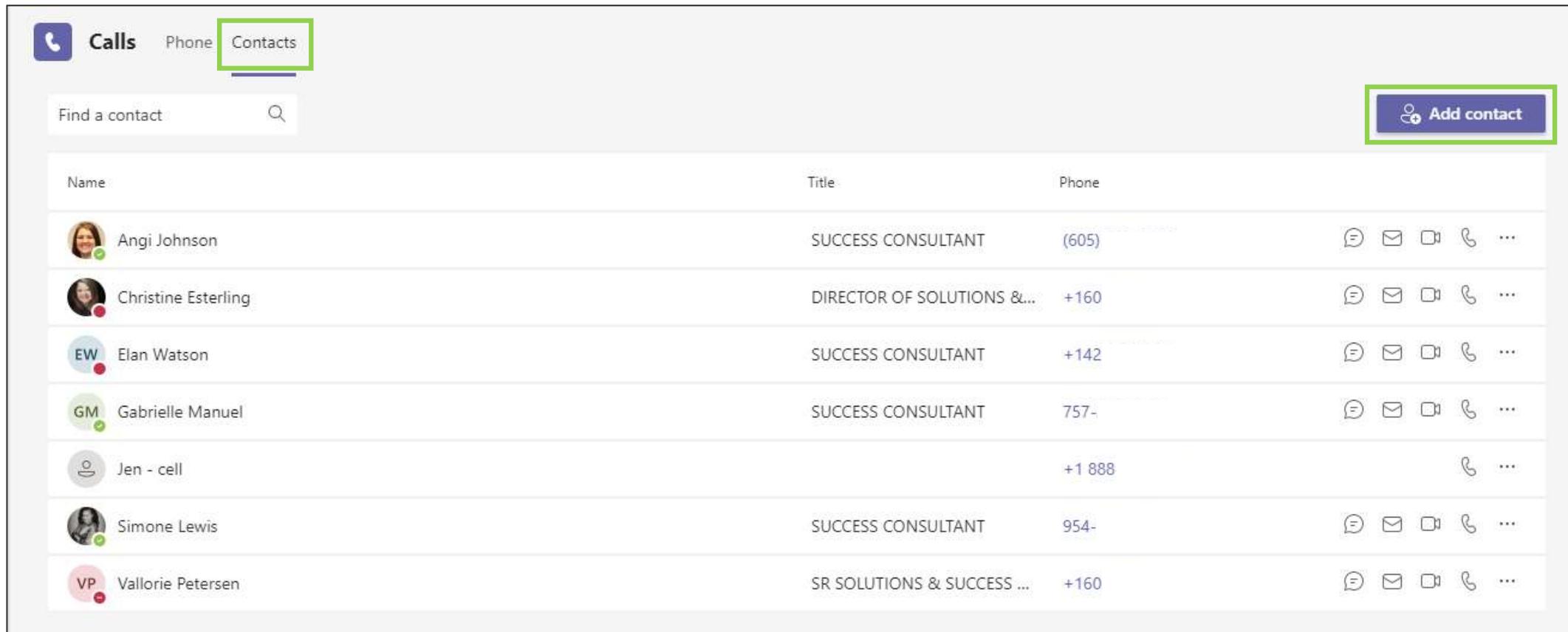
Contacts

Contacts are synced with contacts in Outlook or can also be added via Teams.

If enabled with external dialing, storing contacts makes it easy to initiate external calls with one click.
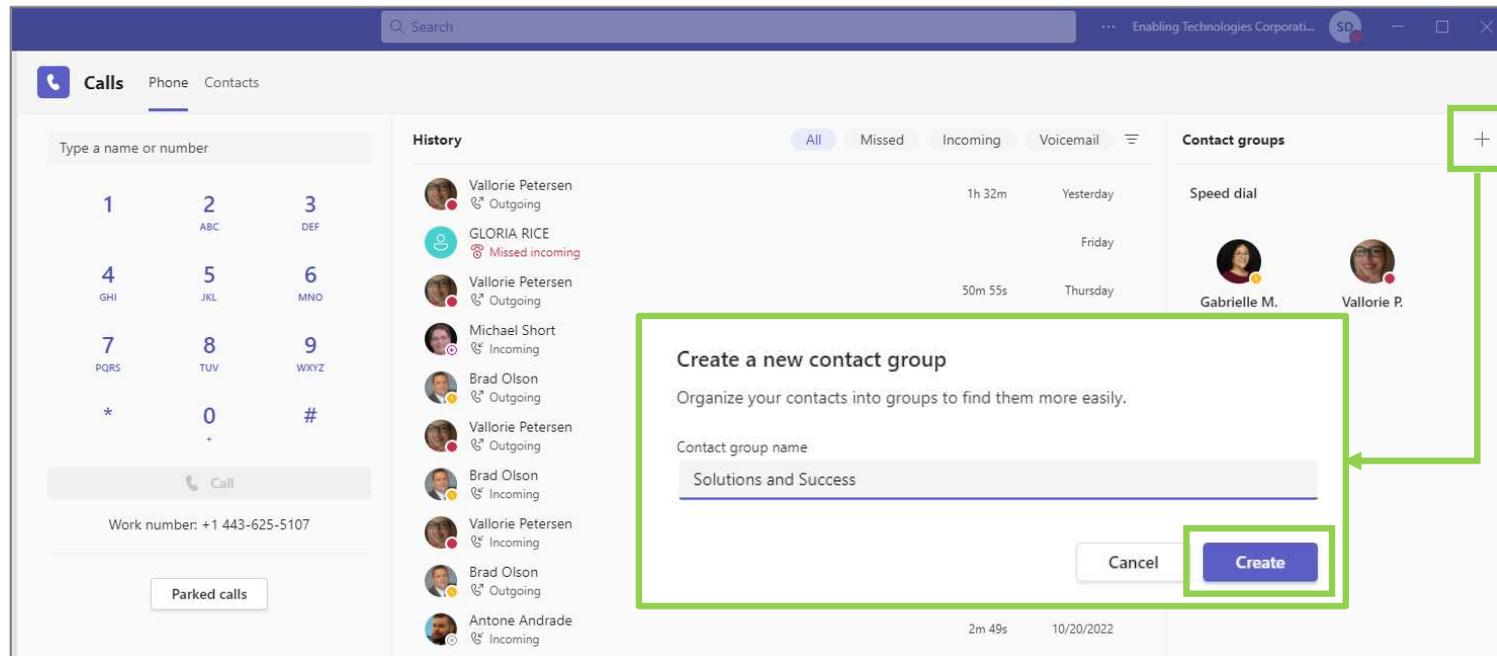
Creating Contact Groups

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You can create a contact group by navigating to the top right corner in the Teams Calls landing page.

1. Click the plus icon to the right of **Contact groups**. Next enter the name of the group and start adding contacts.

2. You can also create a contact group in the **Chat** page. Next to Chat, click on the carat and select **Contacts**. From there, select **Create a new contact group** and follow the steps to create your custom contact group.

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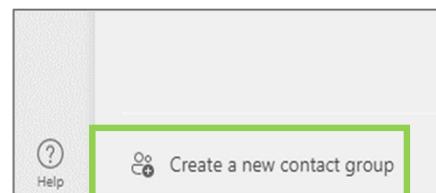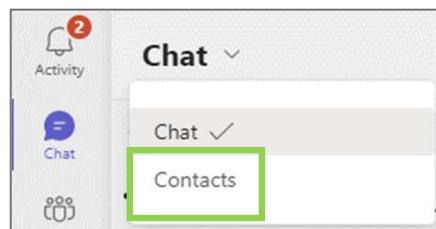
Adding Contacts to Contact Groups

You can add contacts from the Contacts area within Chat, or the Calls landing page.
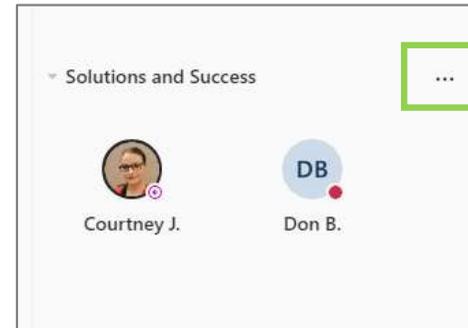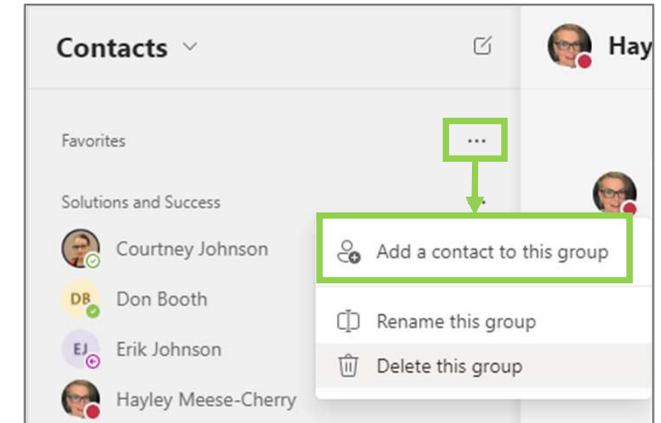
Calls Landing Page

Chat

1. Whether you are in Chat or on the Calls page, you will click on the three dot ellipses to bring up a menu that allows you to choose **Add a contact to this group**.
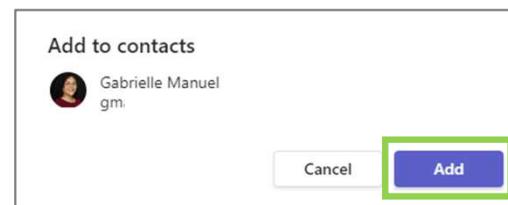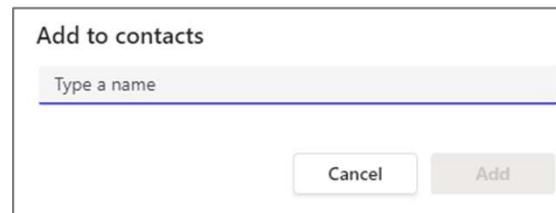
2. You can then start typing the name of the contact you wish to add, and once you see them, click on their name and then **Add** to add them to your contact group.
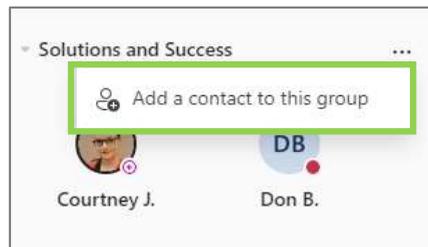
Note: *You can only add internal contacts to contact groups, there is not an option to add external contacts at this time.*

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History

Call **history** will show you all calls received, initiated or missed in the last **30 days**, at least.

Hover your mouse over the call entry line to make the **Call** button and the "..." **More Options** menu appear. More options include:
- ✓ Call back
- ✓ Remove from view
- ✓ Chat (only available for internal callers)
- ✓ Add to speed dial
- ✓ Add contact
- ✓ Block (only available for external callers)
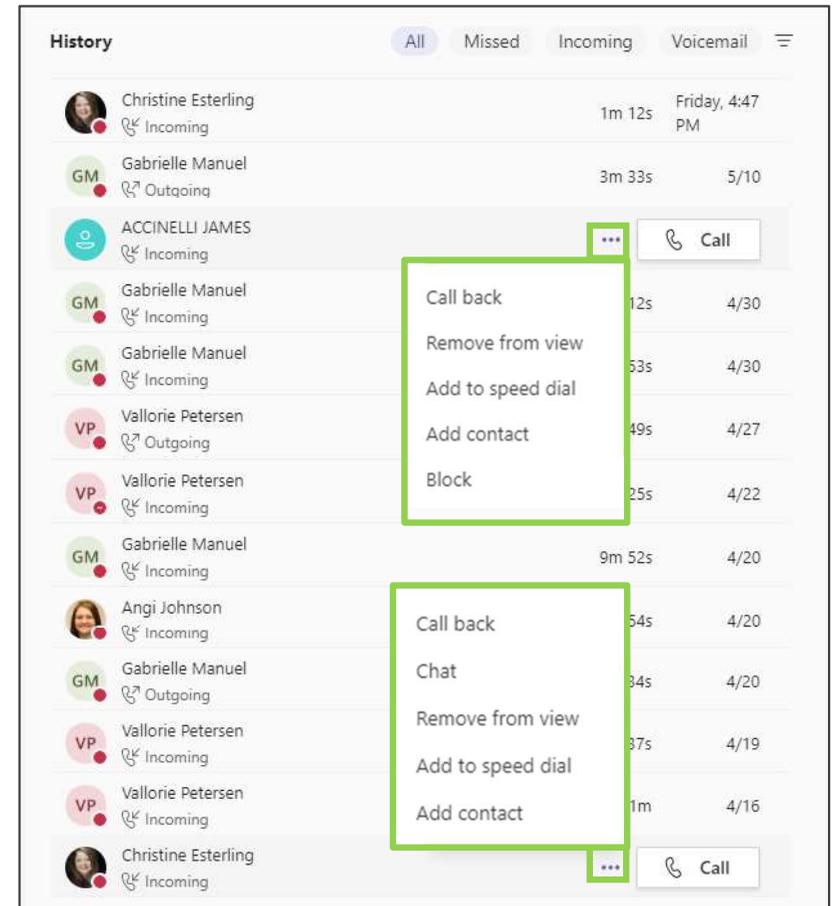
Blocking & Managing Unwanted Calls

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Blocking an Unwanted Calls

1. In your **Call History** click the ellipsis next to the unwanted call/number and select **Block**.
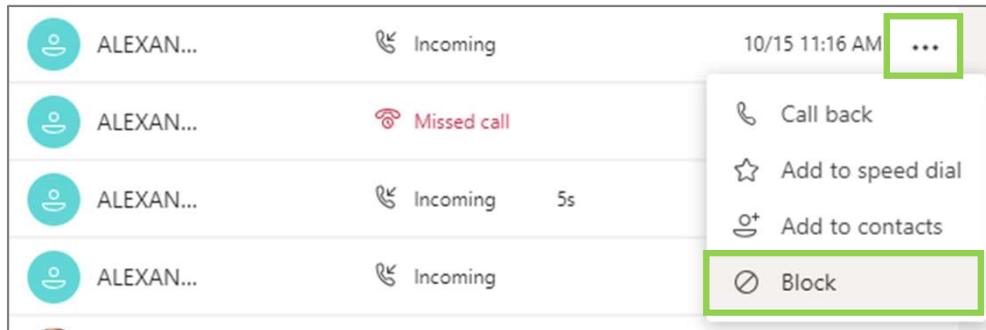
2. The number will be added to your blocked list in Settings.

Managing Unwanted Calls

1. Click **Settings**, then **Privacy**.
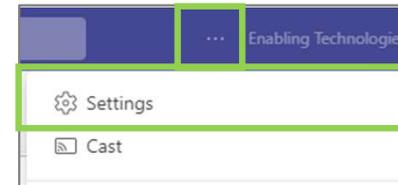
2. In privacy, click **Edit Blocked Contacts**.
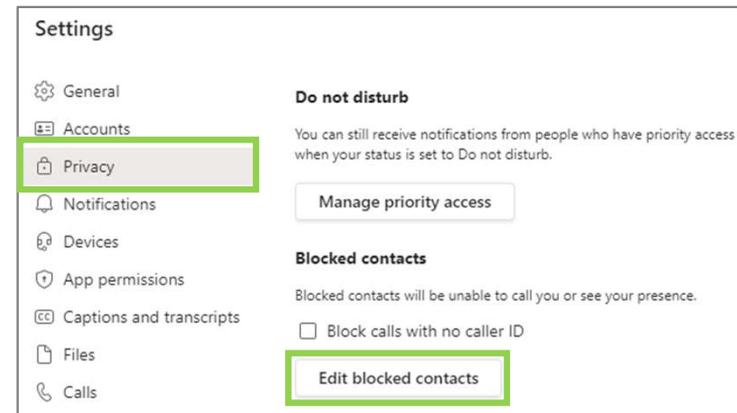
3. To unblock a call/number, simply click **Unblock**.

Note: *You can only block <u>External</u> callers.*

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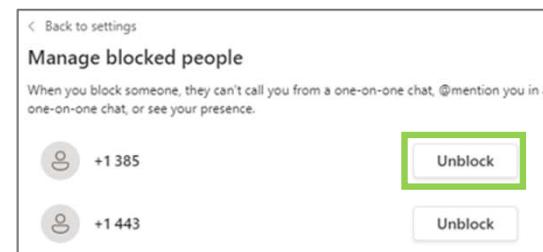
Voicemail

Voicemails received will be stored in the Calls app in Teams. Select the voicemail menu in the History section.

History		All	Missed	Incoming	Voicemail	

1. Click a message to display more information in the **Details** pane on the right.
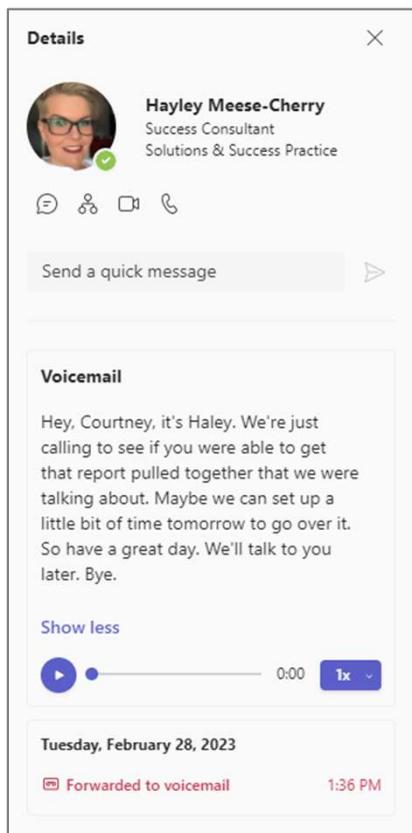
2. From the **More Options** menu you can return the call, initiate a chat, manage the message, or add the caller to your contacts.

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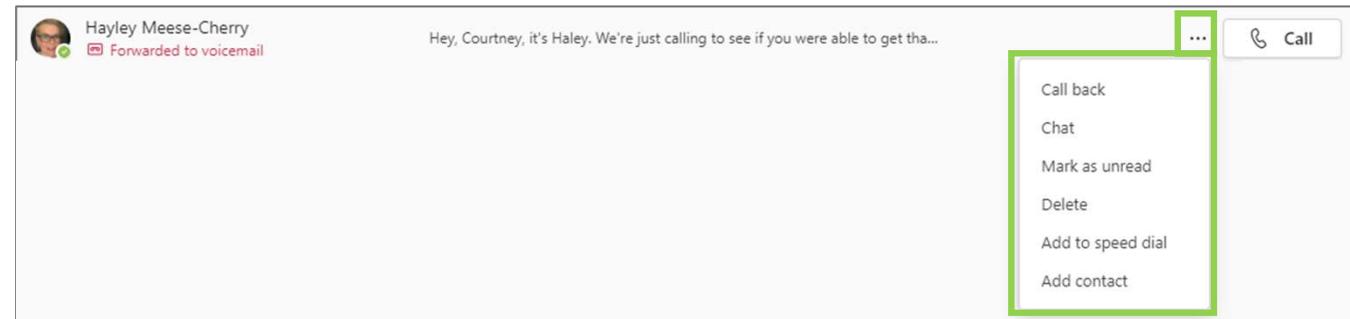
Voicemail in Outlook

A copy of each voicemail will also be sent to Outlook. Open the Outlook message to read or listen to your voicemails.

Location Services in Teams

Adding or confirming your location in Teams is designed to get the fastest emergency response when you dial 911 while working remotely. **Reminder**: When calling 911 from Teams while on campus, you will be routed to a local first responder. If calling while at home or other external network, you will be routed to a national center and asked to verify location, then transferred to local responder.
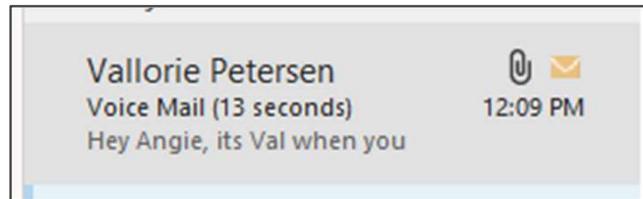
1. Access the Calls icon in the left navigation bar.

2. On the bottom left of the Calls menu, there will be a new option referring to location <u>below your dial pad</u>. This option will appear above your call forward, device, or call group settings. In this section, you may see one of three things:
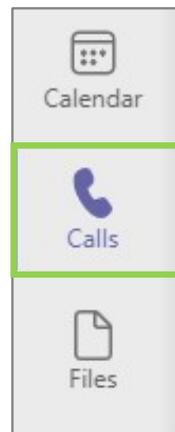
You may see an address:
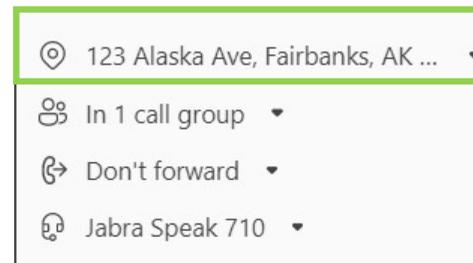
"location not detected":
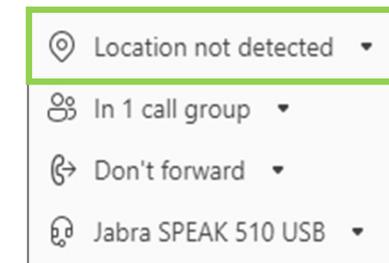
Or no item referring to location at all.
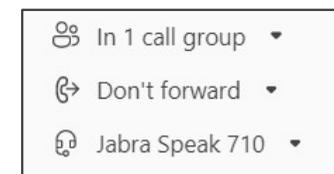
If you don't see anything referring to location in this section, submit a ticket at https://it.ucf.edu/

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Location Services in Teams

3. Click the **dropdown** next to the location option (showing an address or "location not detected") and select **edit or add** to manually confirm address (*do this even if address is correct*).

Experience if an address is listed.

Current emergency location

✏ Edit

◎ Reset

◎ 12345 Sesame St., Hollywood, ... ▼

Experience if "location not detected" is shown.

Current emergency location

+ Add

◎ Location not detected ▼

4. Enter or update your address as shown below. Review each section to ensure address is correct. Once complete, click **Add**.

Manage your location

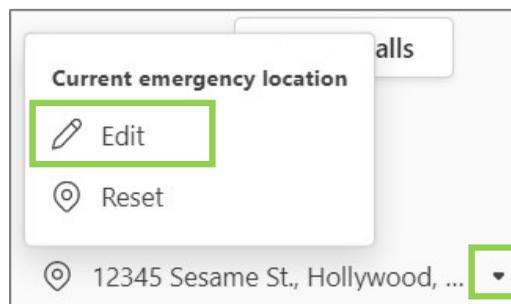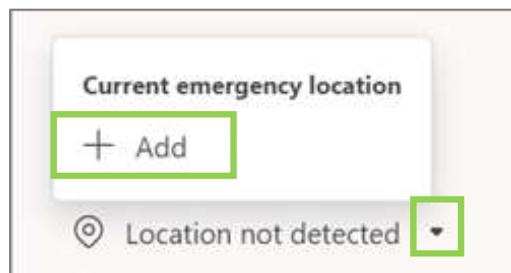Keep your address up to date so you can share your location with others and in case of an emergency. Location services on your device will need to be enabled to allow Teams to access it.

Street number *

Street number

Street name *

Street name

Floor / Unit number

Floor / Unit number

City *

City

State *   Zip code *

State   Zip Code

Country/Region *

Country/Region

Cancel   Add

Add floor/unit identifiers for apartments, condos, etc. at the end of the street name field (as shown at top right).

***Note**: Review and confirm your location each time you navigate to the Calls icon in the Teams application to place a call. You'll want to keep this updated to reflect each time you work from a new (__remote__) location.*

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Initiate a Call

1. Video and audio icons allow you to initiate a call **from Contacts or Contact Groups** with one click.
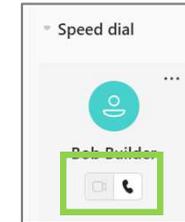
2. Escalate any **chat** to a video or audio call.

3. The **dial pad** feature will accept a phone number that is copied and pasted to initiate a call. You may also click the numbers in the dial pad or type a number using the keyboard.
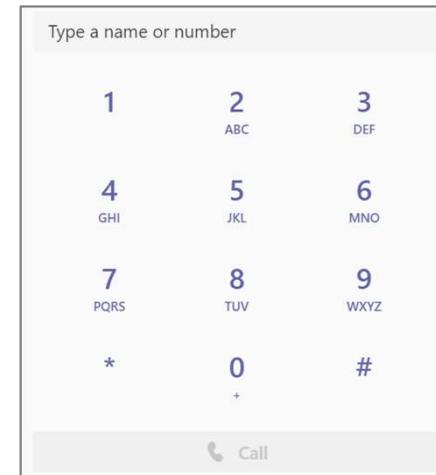
4. Use the **/call** command from the search field to make a call no matter where you're working in Teams.

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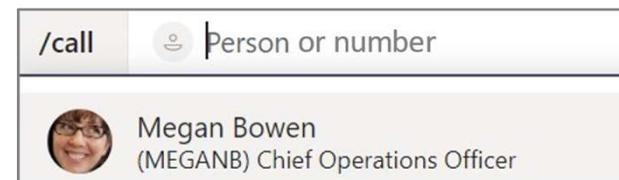
Call Controls

Call controls will appear slightly different if you are making an external call versus an internal call.

Internal (Teams to Teams)
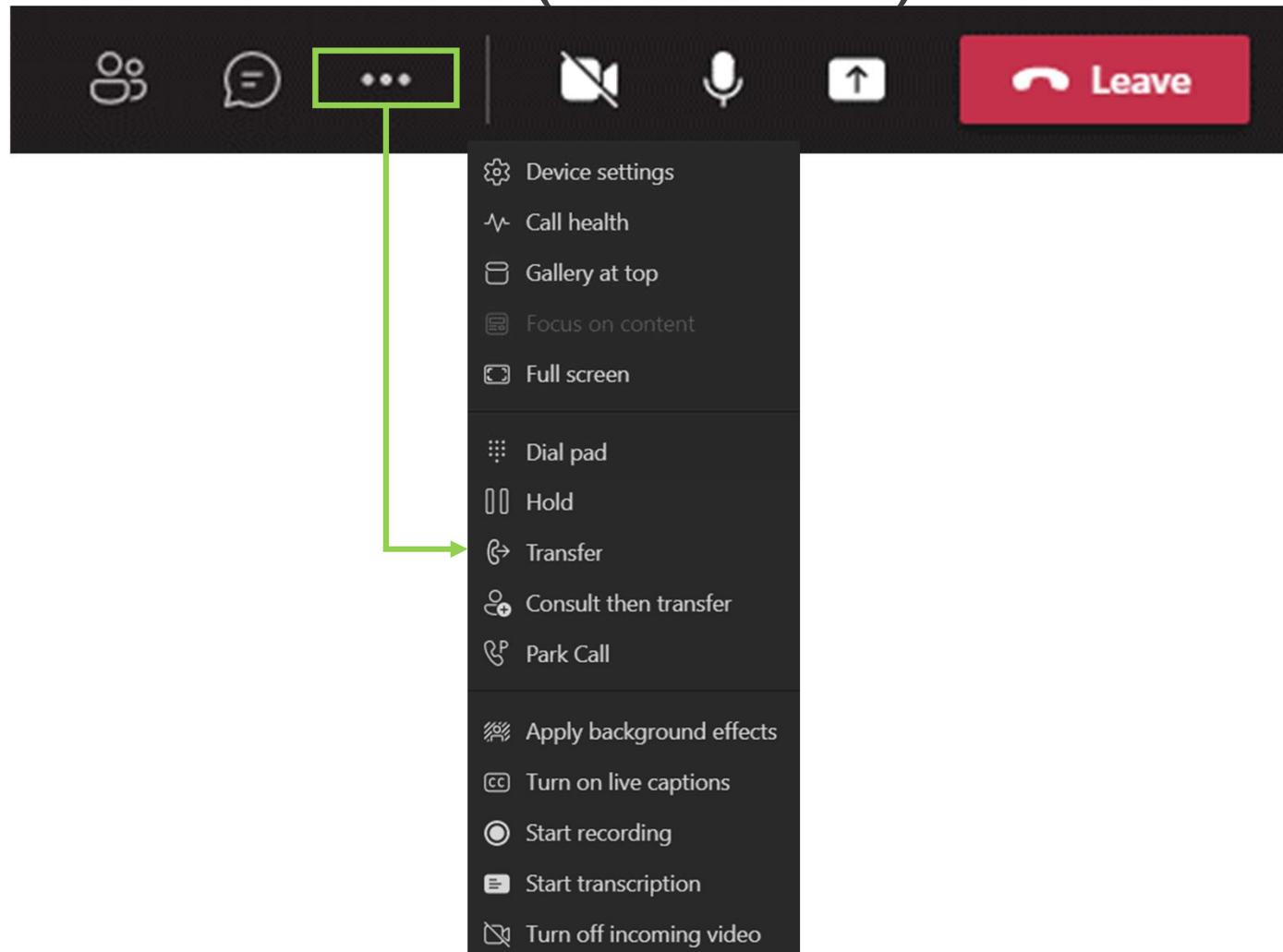
External
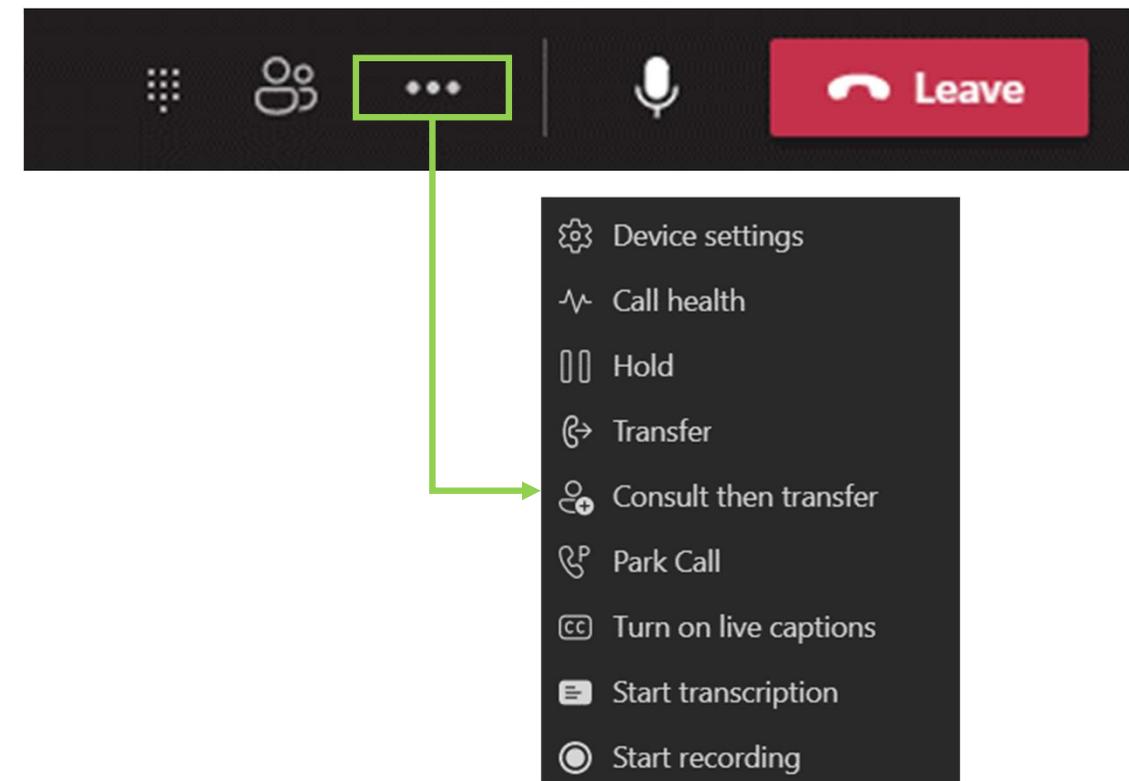
Call Recording & Transcription

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Call recording and transcription is now available for both internal and external one-to-one calls.

1. Select **Start recording** *(will automatically include transcription)* or **Start transcription.** An automated message will play notifying all parties that the call is being recorded.
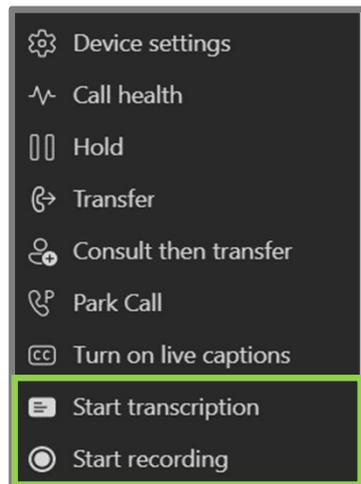
2. Once the call has ended, the recording and transcript will be available from **History** in the **Calls** app in Teams.

3. Select a recorded call from **History** and the details pane will display the call recording and transcript, if available.

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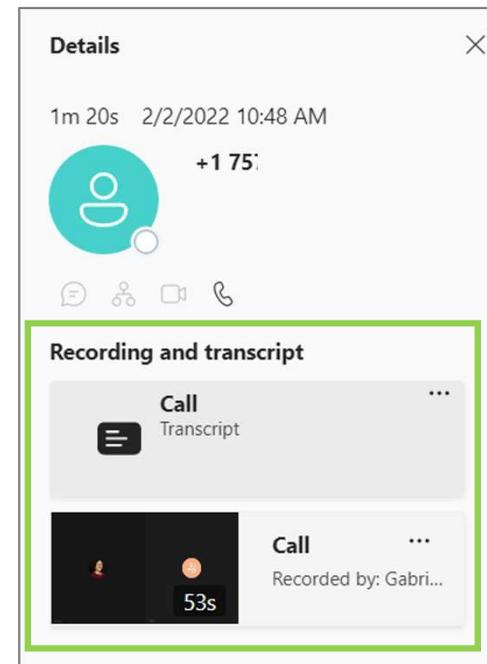
Hold

1. Place a call on **Hold** from the three dot more options menu.

   - Dial pad
   - Hold
   - Transfer
   - Consult then transfer
   - Park Call
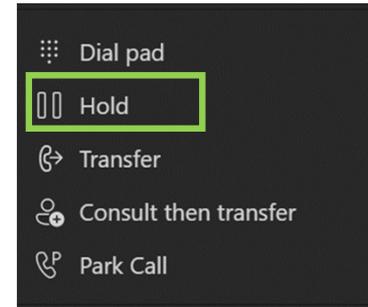
2. After placing a call on hold, you will either see a **Resume** in the control bar or on the main call screen.

On hold 00:02

Hayley Meese-Cherry

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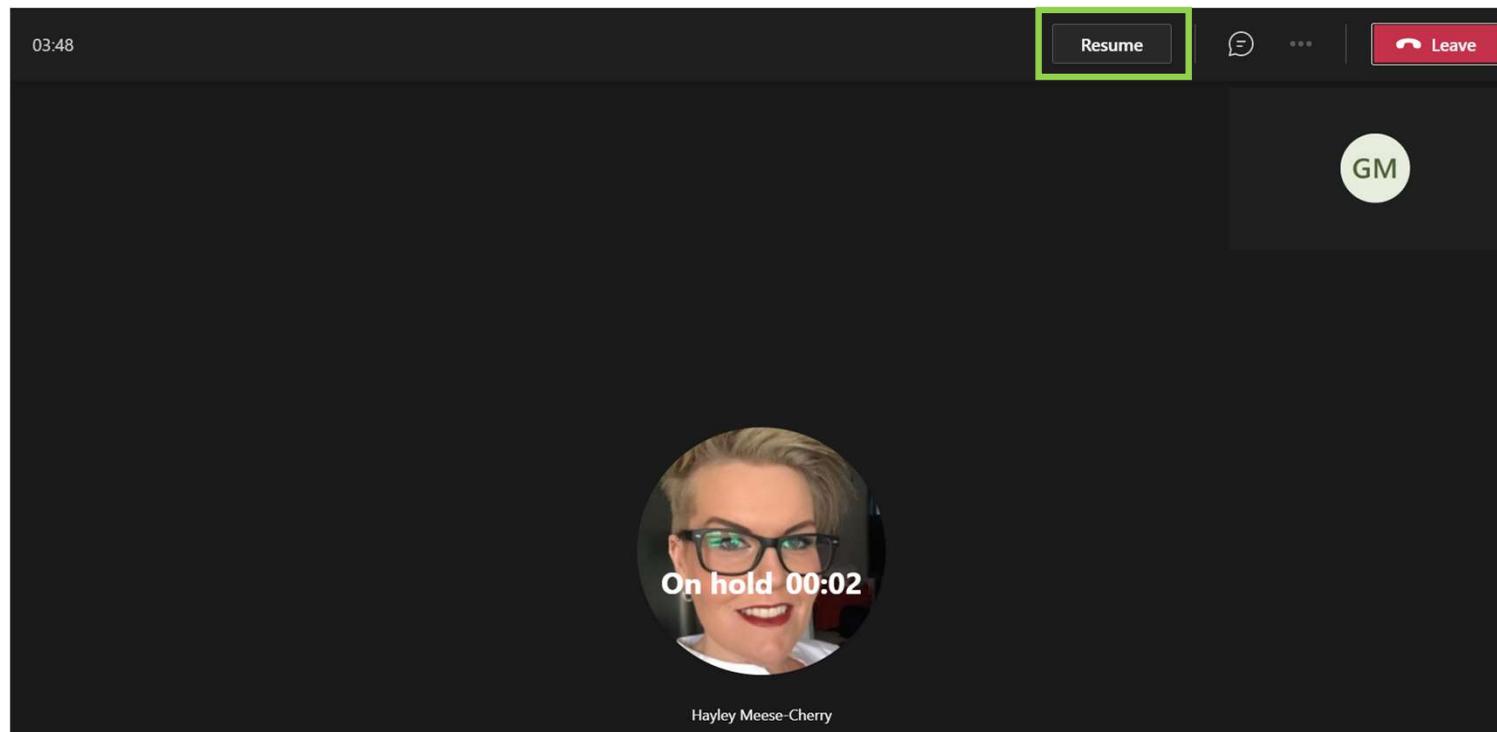
Multiple Calls Navigation

While only one call can be active at a time in Teams, you can toggle between multiple calls. If you accept an incoming call while on an active call, your original call will be automatically placed on hold, and the new call (if answered) will display in a separate call window. The call window(s) remain active until you select the Leave, or the caller hangs up.

After placing a call on hold, you will see **Resume** in the control bar or on the main call screen. Click this to retrieve calls that have been hold.
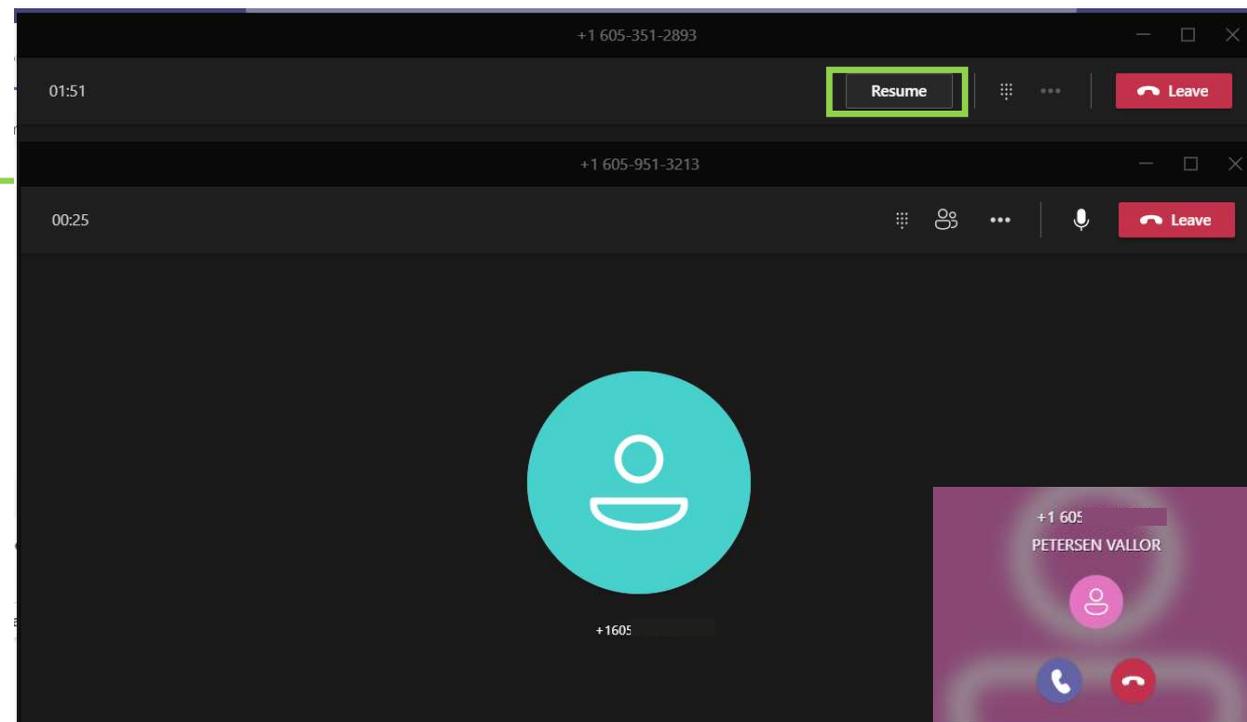
Original call window, on hold if second call answered

Second incoming call window, **active** when answered.

Third incoming call

Note: *When a call is declined, the call will follow the call answering rules that have been established in settings. Additionally, the caller will not know their call has been declined. The caller will hear the standard number of rings before being redirected.*

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Transfer

You can choose between a blind and consultative transfer from the more options menu.
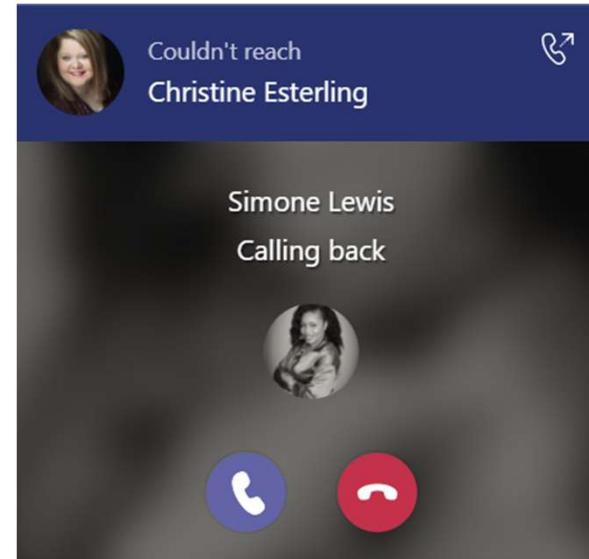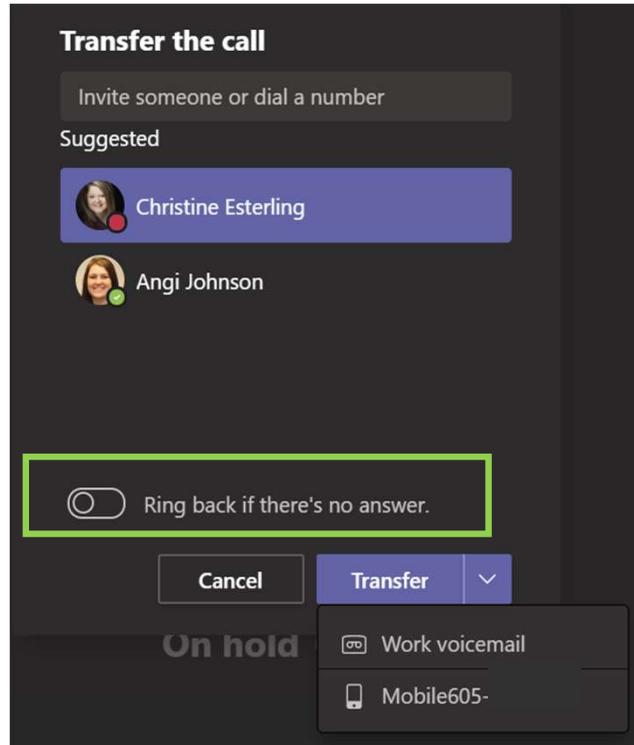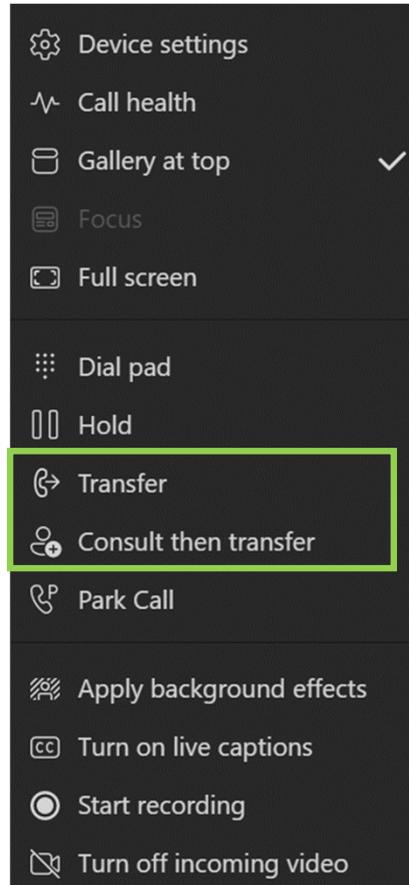
Ring back if there's no answer is only available when transferring the call Teams-to-Teams.

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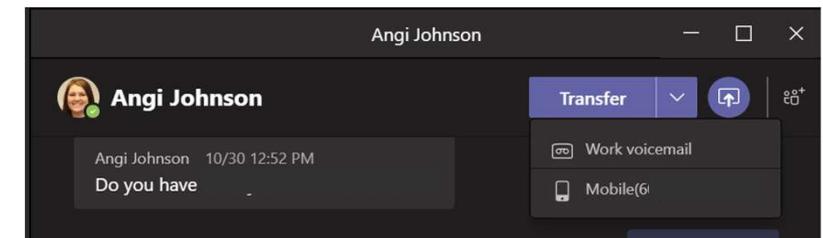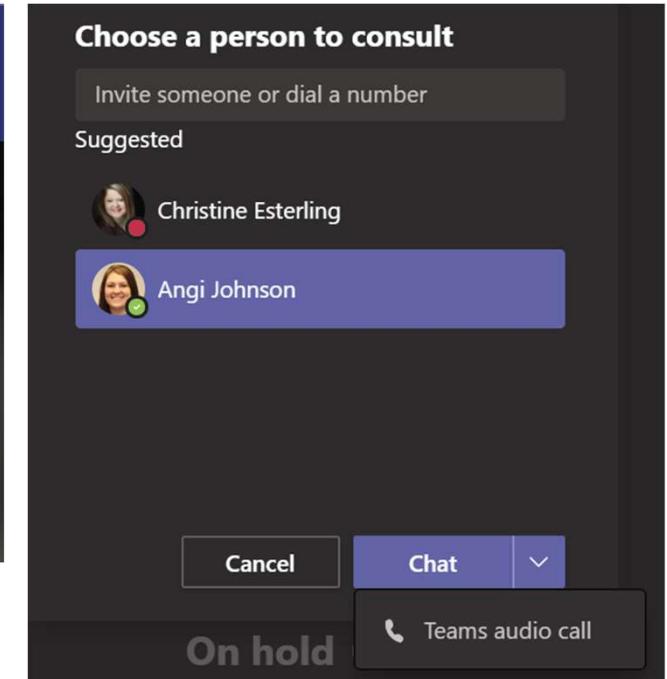
Call Merge

Whether you have received a new call while actively on a call, or if you have made a second outgoing call, the **Call merge** feature will allow you to merge these two calls into one.

1. From the active call, access the three dot more options menu and select **Call merge**.
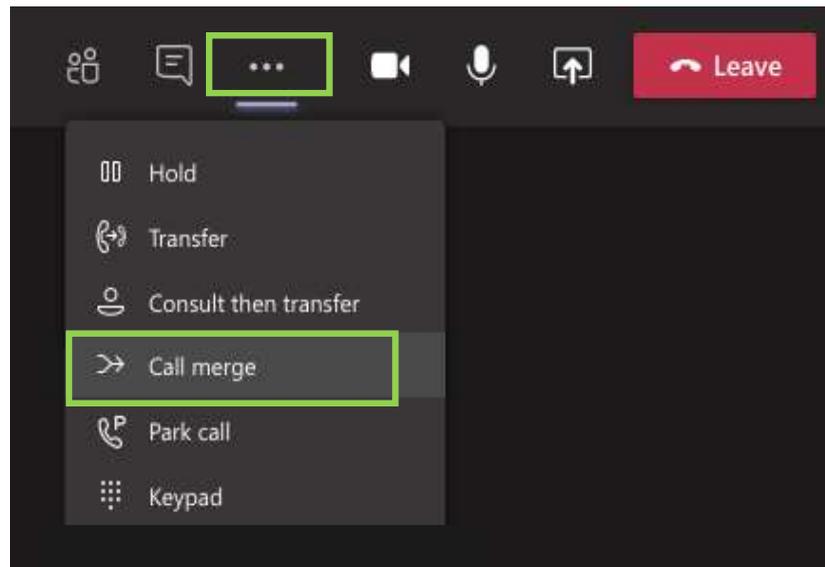
2. A new window will appear allowing you to choose which call to merge. Select the other caller and click **Merge**.

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Teams Calls – Desktop
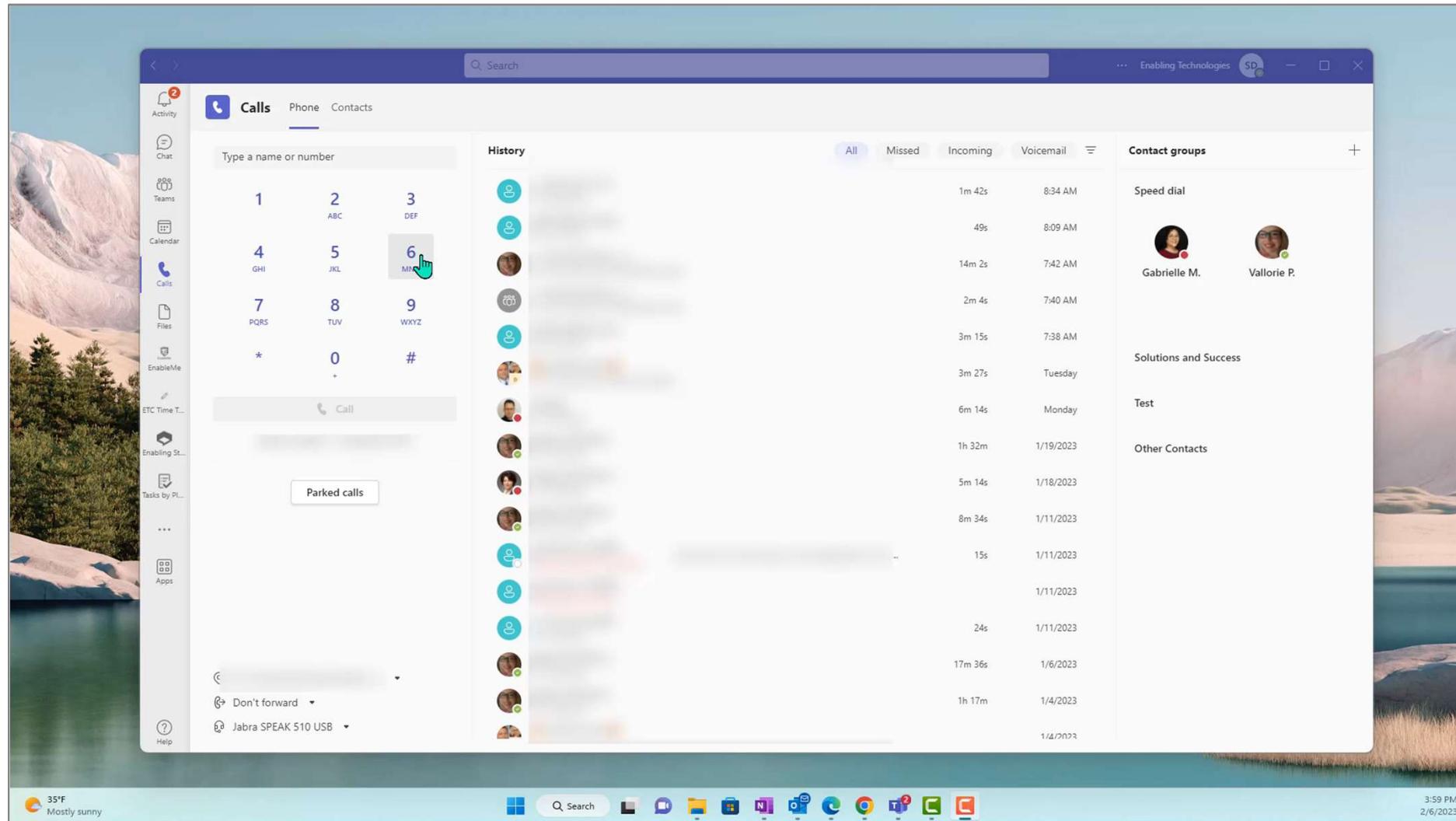
Create a Secondary Ringer

The Secondary Ringer feature will be helpful if you take your headset off and still need to hear an incoming call. This will enable your headset **and** your computer to ring when a call comes in.

1. Navigate to Settings by clicking the **ellipsis** in the top, right of your screen and select **Settings**.
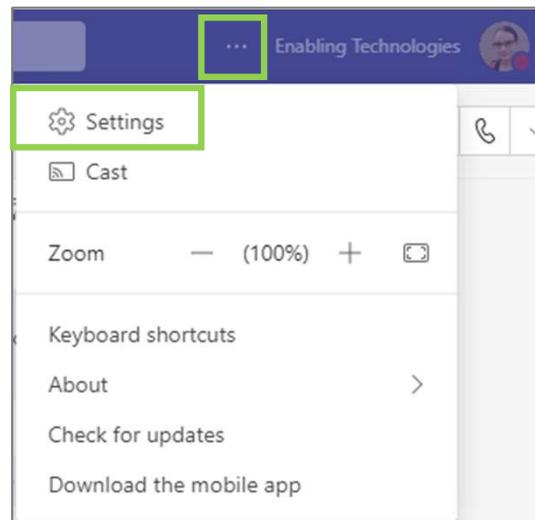
2. Next tap **Devices** and then select the drop-down under **Secondary Ringer**
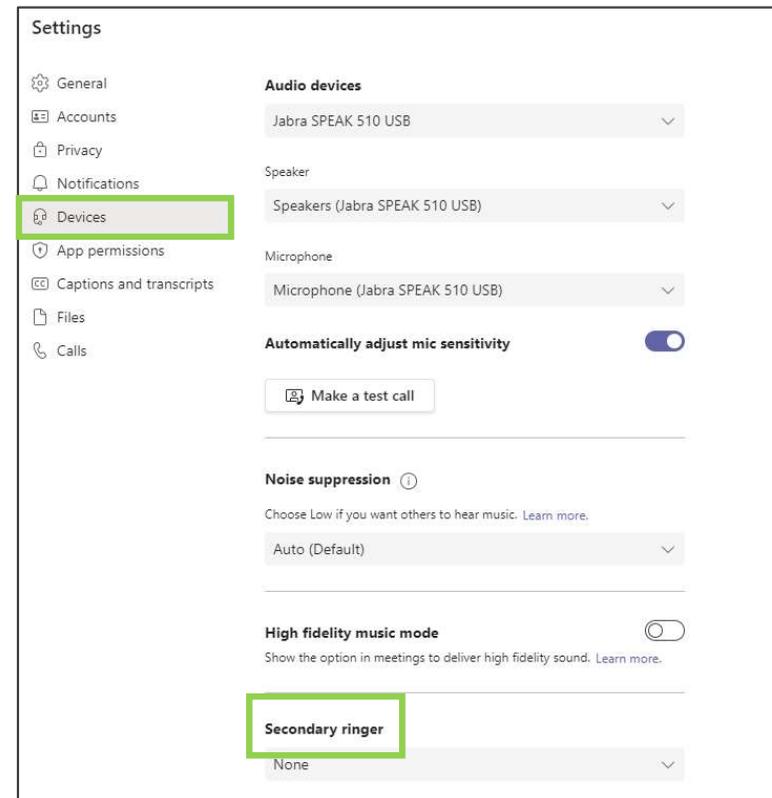
3. Under Secondary Ringer, click the **drop-down arrow** to choose where you would also like your ringtone to sound when receiving a call.
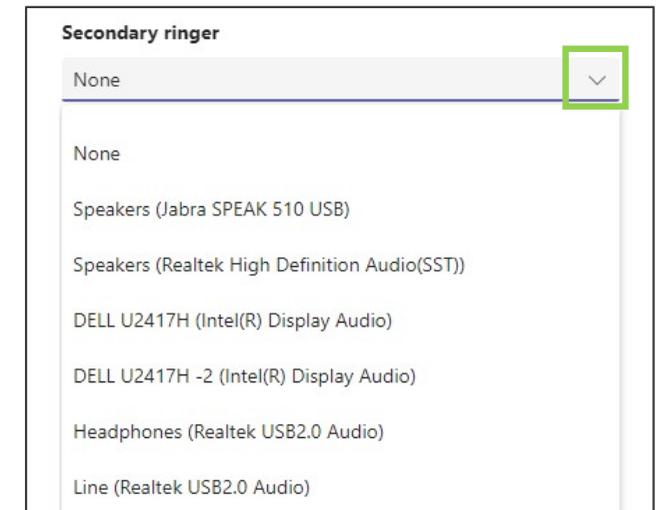
Add a Call Delegate

Assign delegate permissions to a peer to make and receive calls on your behalf.

1. Navigate to Settings by clicking the **ellipsis** in the top, right of your screen and select **Settings**.

   ... Enabling Technologies
   ⚙ Settings
   ⬛ Cast
   Zoom — (100%) + ⬚

2. Select **General** and then scroll down to **Manage Delegates.**

   Settings
   ⚙ General
   👥 Accounts
   🔒 Privacy
   🔔 Notifications
   🎧 Devices
   🔲 App permissions
   CC Captions and transcripts
   📞 Calls

   ☐ Open application in background
   ☑ On close, keep the application running
   ☐ Disable GPU hardware acceleration (requires restarting Teams)
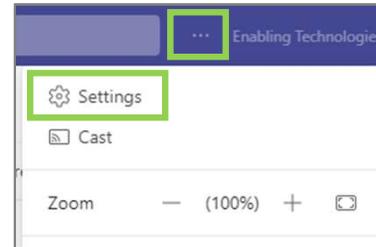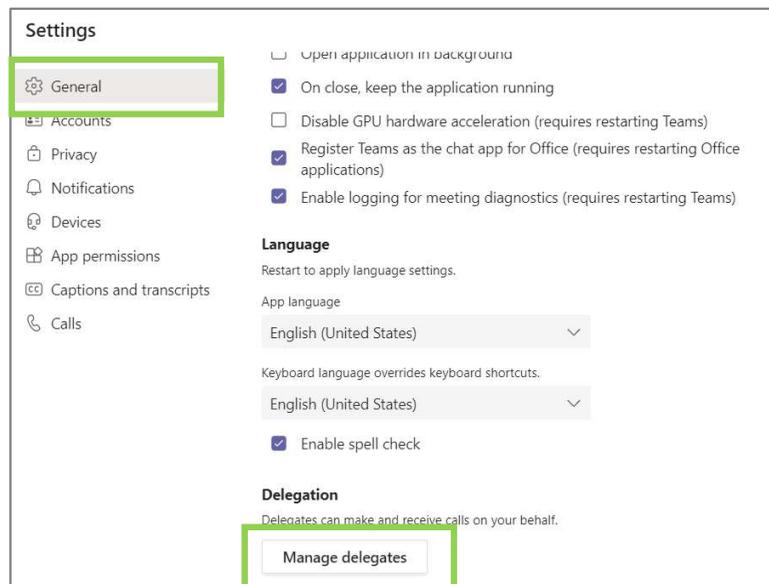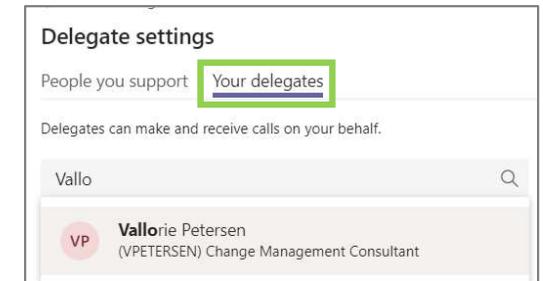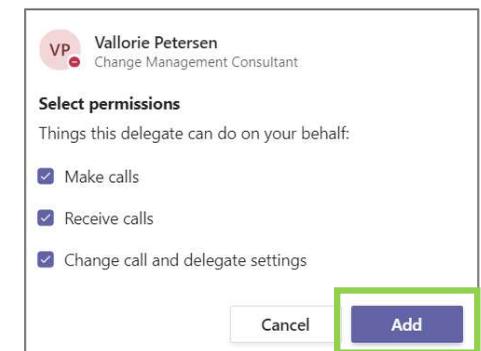   ☑ Register Teams as the chat app for Office (requires restarting Office applications)
   ☑ Enable logging for meeting diagnostics (requires restarting Teams)

   Language
   Restart to apply language settings.
   App language
   English (United States)
   Keyboard language overrides keyboard shortcuts.
   English (United States)
   ☑ Enable spell check

   Delegation
   Delegates can make and receive calls on your behalf.
   [Manage delegates]

3. Select **Your delegates**, then search for the person who will be managing your calls.

   Delegate settings
   People you support   Your delegates
   Delegates can make and receive calls on your behalf.
   Vallo   🔍
   VP **Vallo**rie Petersen
       (VPETERSEN) Change Management Consultant

4. Choose the appropriate permissions and click **Add**.

   VP Vallorie Petersen
       Change Management Consultant
   Select permissions
   Things this delegate can do on your behalf:
   ☑ Make calls
   ☑ Receive calls
   ☑ Change call and delegate settings
                          Cancel   [Add]

5. Once added, the recipient will be notified via chat that they have been added as a delegate:

   Courtney Johnson added you as a delegate.
   Now you can:
   • Make calls on their behalf
   • Receive calls on their behalf
   • Change their call and delegate settings
   • Pick up held calls
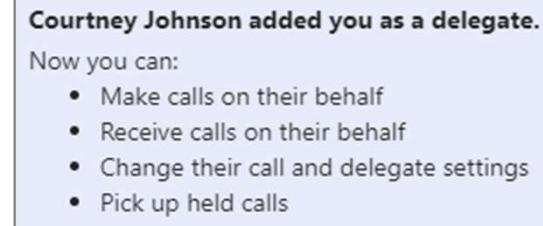
***Note**: Delegation from Cisco is NOT following to your Teams Calls experience. These will need to be re-created.*

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Make & Receive Calls as a Delegate

When initiating a new call from your dial-pad, you will have the option to call as yourself, or call on behalf of someone you support. Use the drop-down next to the **Call** icon to select someone you support.
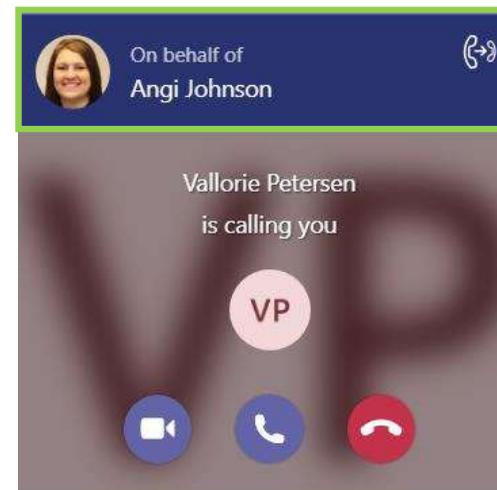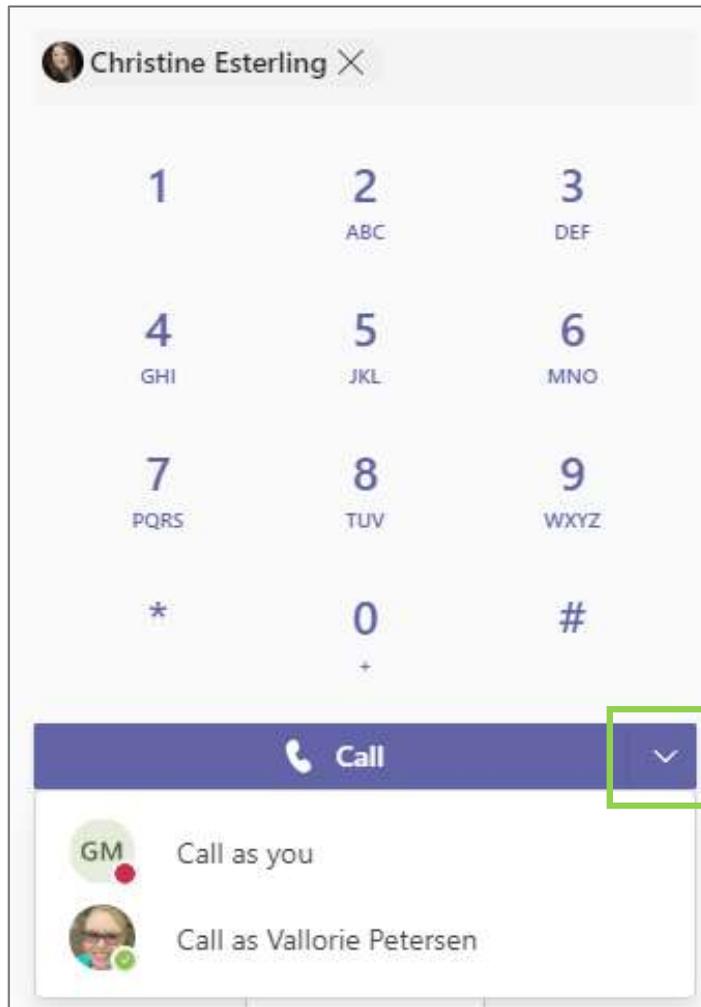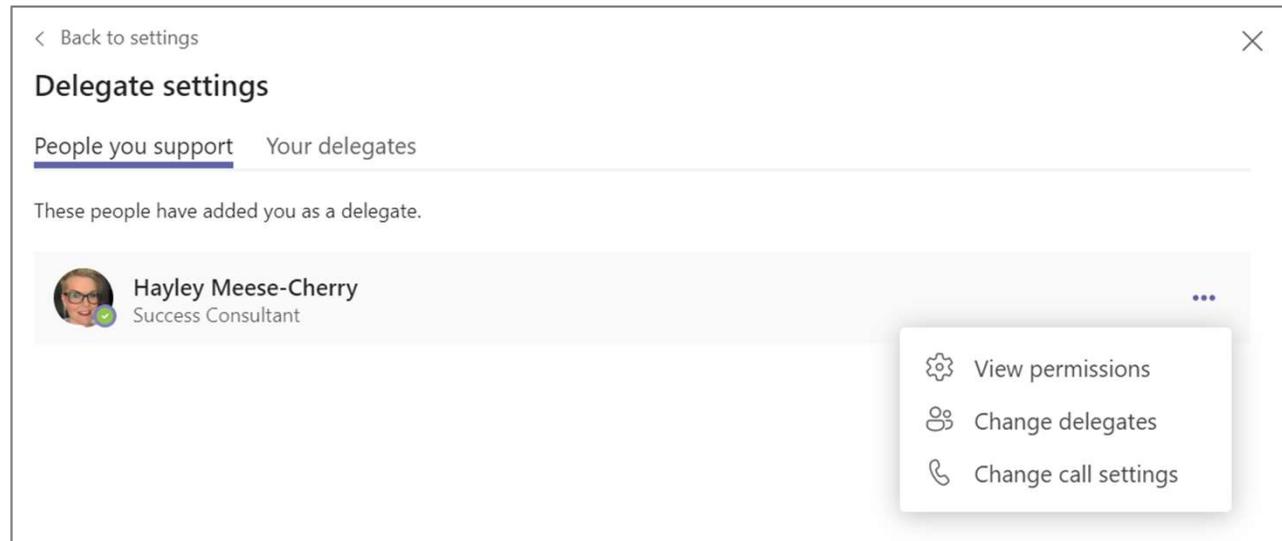

If calling someone internal via Teams, they will see a banner added to the call notification that indicates you are calling on behalf of another person.

When you receive a call for someone you support, a banner is added to the call notification that indicates you are receiving a call for someone else.

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Manage Settings for People you support

From the People you support tab, you can hover over anyone's name listed there to view your permissions, change their delegates or change their call settings.
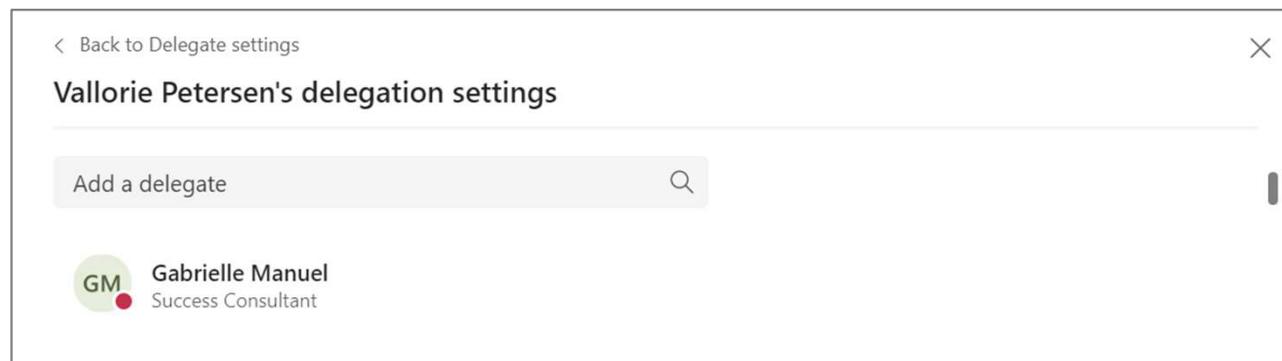
Call Answering Rules

Call answering rules can be setup to forward calls or establish a simultaneous ring to a peer or alternate phone number.
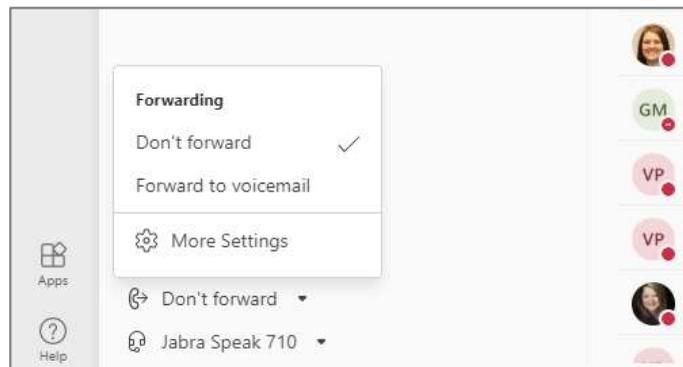

A forwarded call will have a banner at the top of the call notification indicating who is forwarding the call.

Adjust how long the phone rings before redirecting.

Quick access to call answering rules are now available by selecting the **Forwarding** drop-down menu in the bottom left corner of your Calls menu.

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Voicemail Configuration

Click **Configure voicemail** to change your voicemail greeting and rules for handling calls when they go to voicemail.
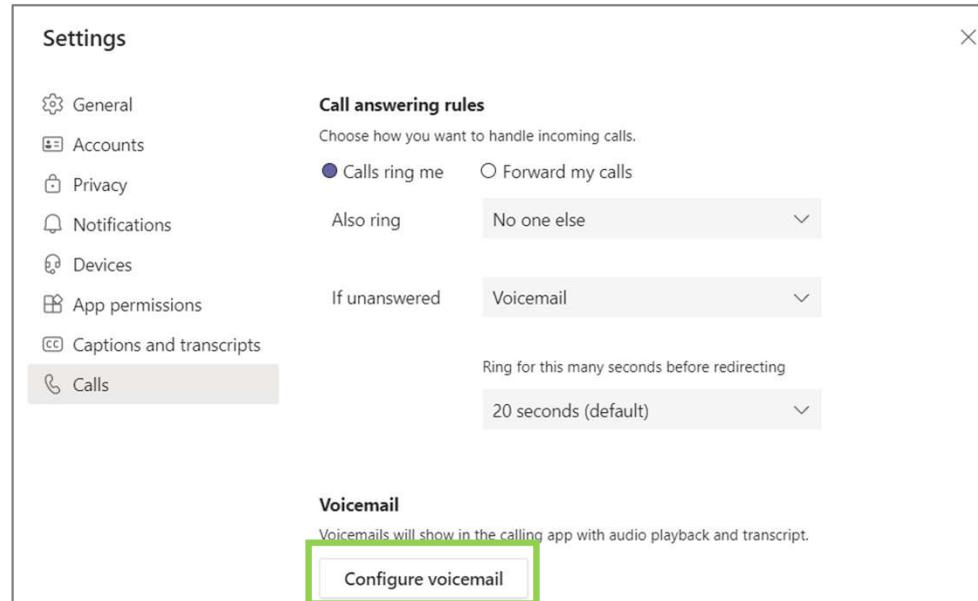
Settings

General
Accounts
Privacy
Notifications
Devices
App permissions
Captions and transcripts
Calls

Call answering rules
Choose how you want to handle incoming calls.
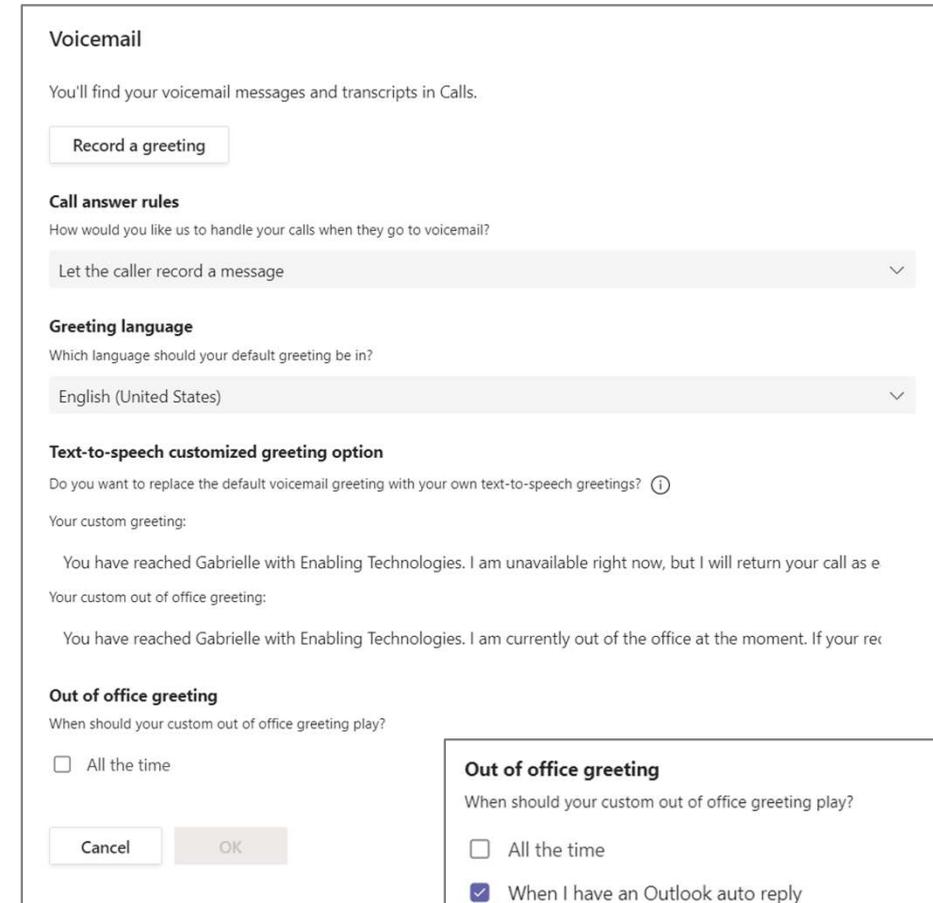
● Calls ring me   ○ Forward my calls

Also ring   No one else

If unanswered   Voicemail

Ring for this many seconds before redirecting

20 seconds (default)

Voicemail
Voicemails will show in the calling app with audio playback and transcript.

Configure voicemail

Voicemail

You'll find your voicemail messages and transcripts in Calls.

Record a greeting

Call answer rules
How would you like us to handle your calls when they go to voicemail?

Let the caller record a message

Greeting language
Which language should your default greeting be in?

English (United States)

Text-to-speech customized greeting option
Do you want to replace the default voicemail greeting with your own text-to-speech greetings? ⓘ

Your custom greeting:

You have reached Gabrielle with Enabling Technologies. I am unavailable right now, but I will return your call as e

Your custom out of office greeting:

You have reached Gabrielle with Enabling Technologies. I am currently out of the office at the moment. If your re

Out of office greeting
When should your custom out of office greeting play?

☐ All the time

Cancel   OK

Out of office greeting
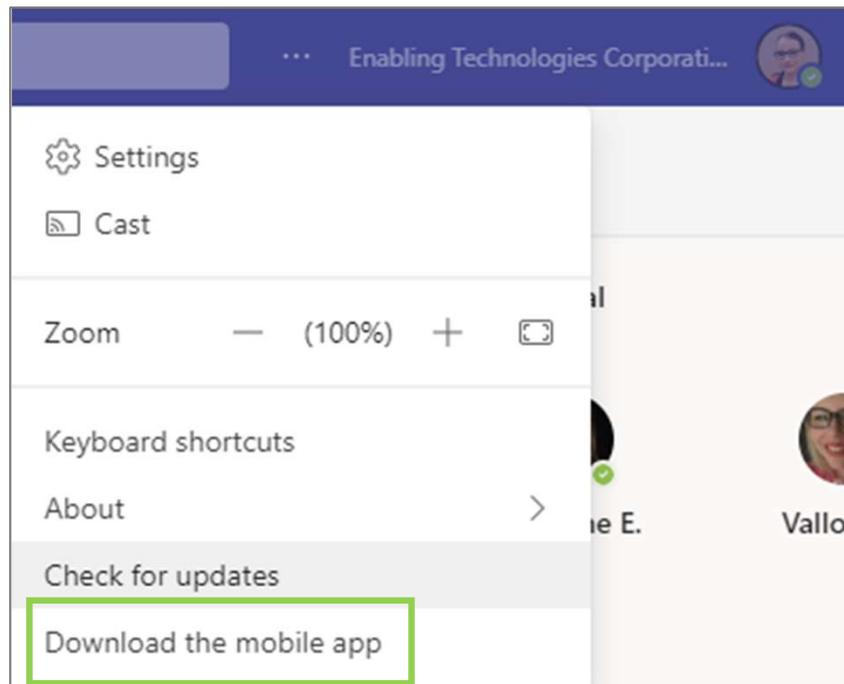When should your custom out of office greeting play?

☐ All the time
☑ When I have an Outlook auto reply
☑ When I have an Out of office calendar event

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Download the Mobile App

1. From the Teams Desktop App, select the three dot more options menu and click Download the mobile app.
2. Enter an email address accessible from your mobile device and Teams will send a link to download the mobile app.
3. Click the emailed link from your mobile device to launch the mobile app store .
4. Use your personal app store account to download the Teams app.
5. Once downloaded, use your work credentials to sign in.

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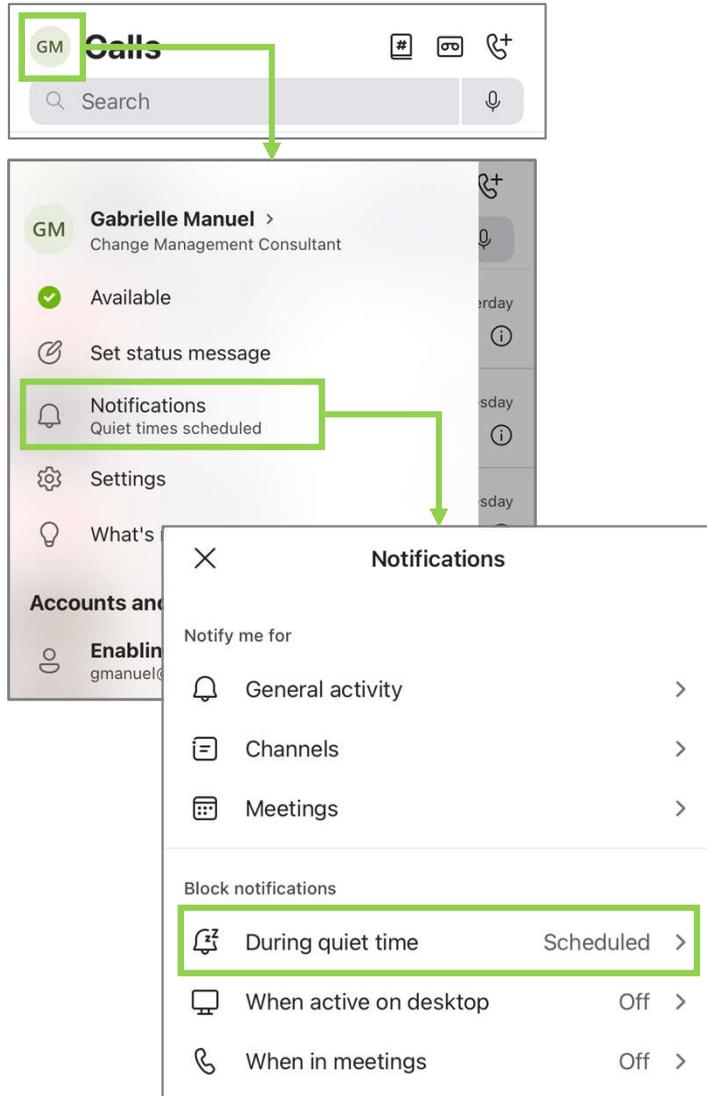
Mobile App – Quiet Time – Android
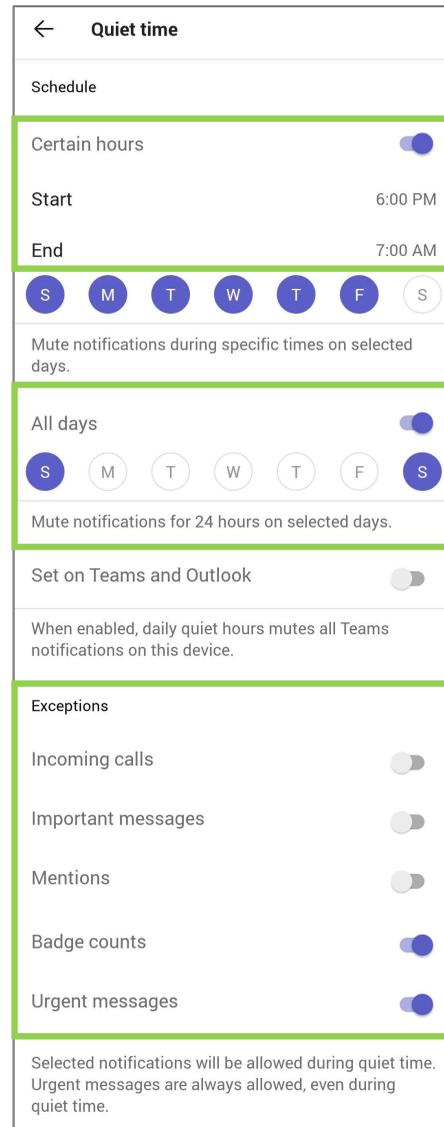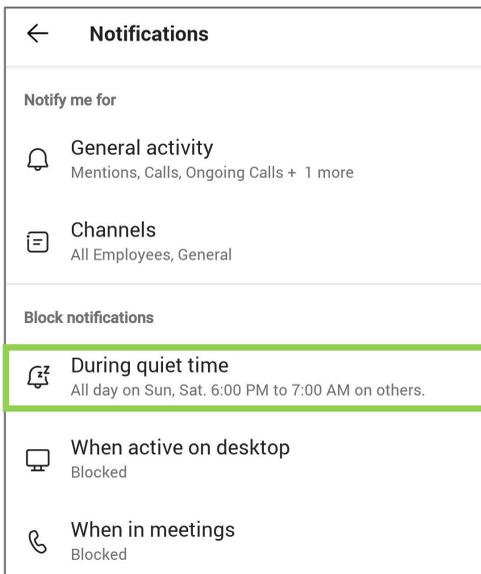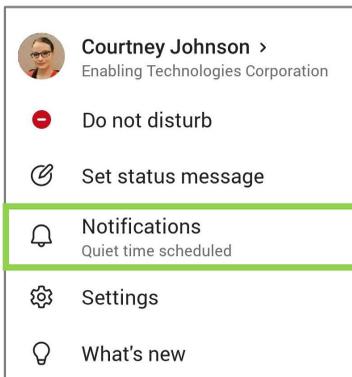
1. Click on your **initials or profile picture** icon in the upper left corner
2. Select **Notifications**
3. Click **During quiet time**
4. Click on the **switch** next to Certain hours
5. Set your **Start** and **End** time,
   - *Notifications from the Teams mobile app will be disabled during these hours every day (calls will still come through)*
6. Select the **Quiet days** for which to block notifications for the whole day
7. Under **Exceptions**, choose which notifications you would like to allow through during your set quiet time.
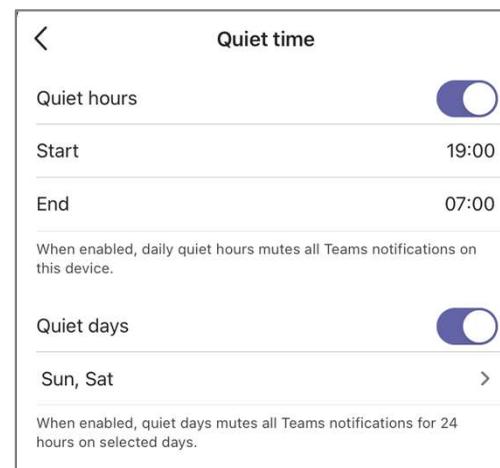
Note: *If you have multiple mobile devices with Microsoft Teams app installed there is no synchronization of quiet hours settings between those clients.*

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Mobile App – Quiet Time – iPhone

1. Click on your **initials or profile picture** icon in the upper left corner
2. Select **Notifications**
3. Click **During quiet time**
4. Click on the **switch** next to Daily quiet hours
5. Set your **Start** and **End** time,
   Notifications from the Teams mobile app will be disabled during these hours every day (calls will still come through)
6. Select the **Quiet days** for which to block notifications for the whole day.

***Note**: If you have multiple mobile devices with Microsoft Teams app installed there is no synchronization of quiet hours settings between those clients.*

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Prevent Calls on Mobile App - iPhone

eGroup | **ENABLING** TECHNOLOGIES

To prevent calls from coming through the Teams mobile app on iPhone, follow the instructions below for turning off call notifications.
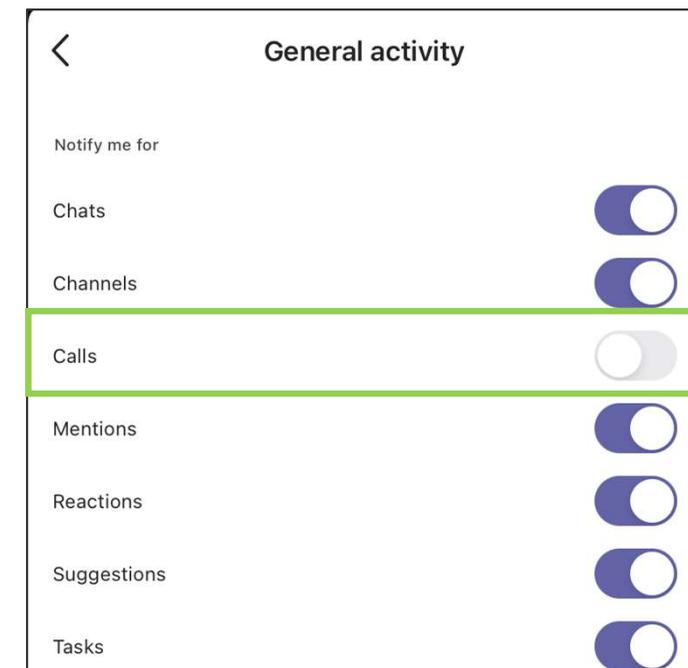
1. Within the app, tap your Teams icon in the top left corner, then select **Notifications**.
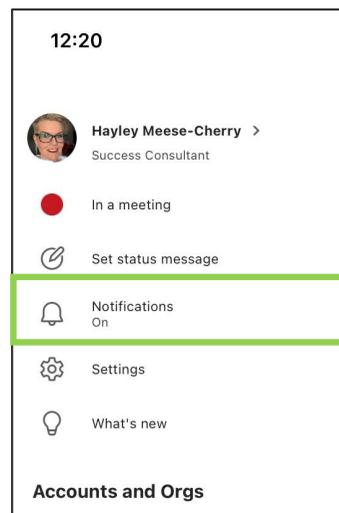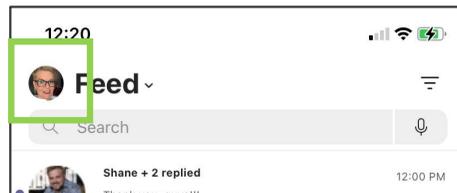
2. Tap **General Activity** to receive a list of activity types and toggle switches for each.
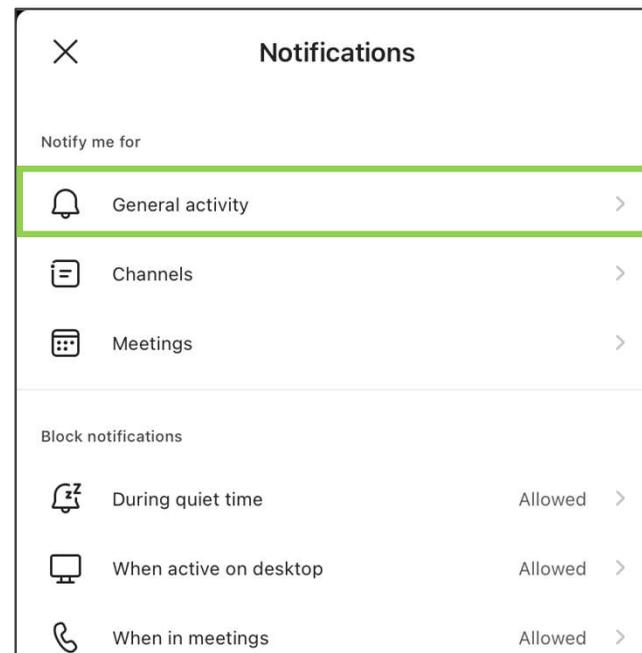
3. Locate the switch for **Calls** and toggle it to the off position. This will prevent all call notifications from coming through, regardless of Quiet Time settings.
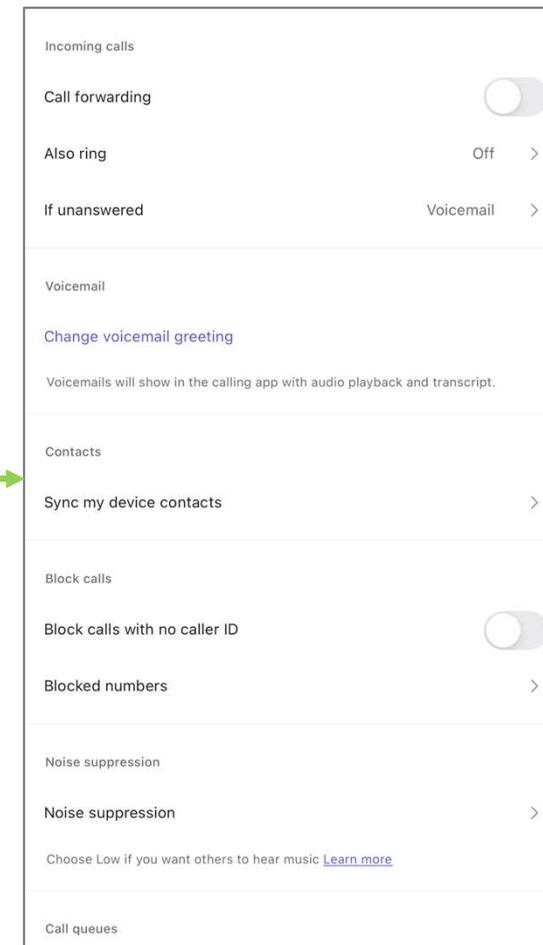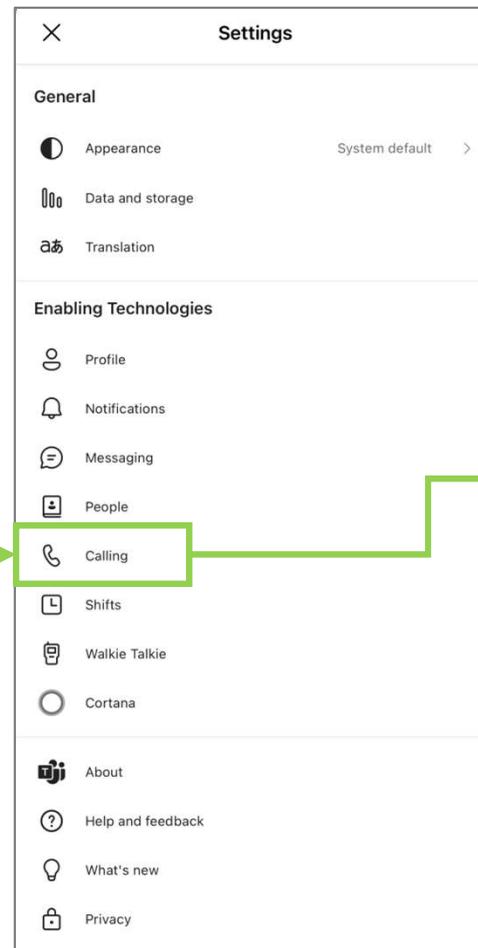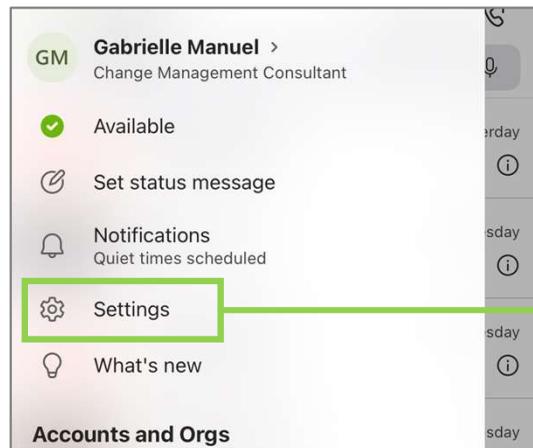

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Mobile App – Call Settings

Call settings can also be managed from the Teams mobile application.

Click **Settings** and **Calling** to find settings that include:
- Call forwarding
- Voicemail configuration
- Blocked numbers
- Call queues
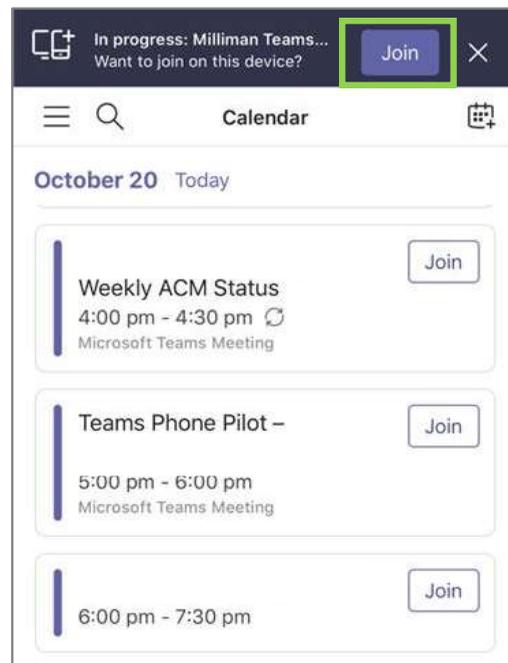
Teams Calls - Mobile

Calls in the mobile app is a consistent experience from the desktop application. Review call history, voicemail, contacts (including device contacts). Initiate calls with a dial pad (if enabled) or dial-by-name.
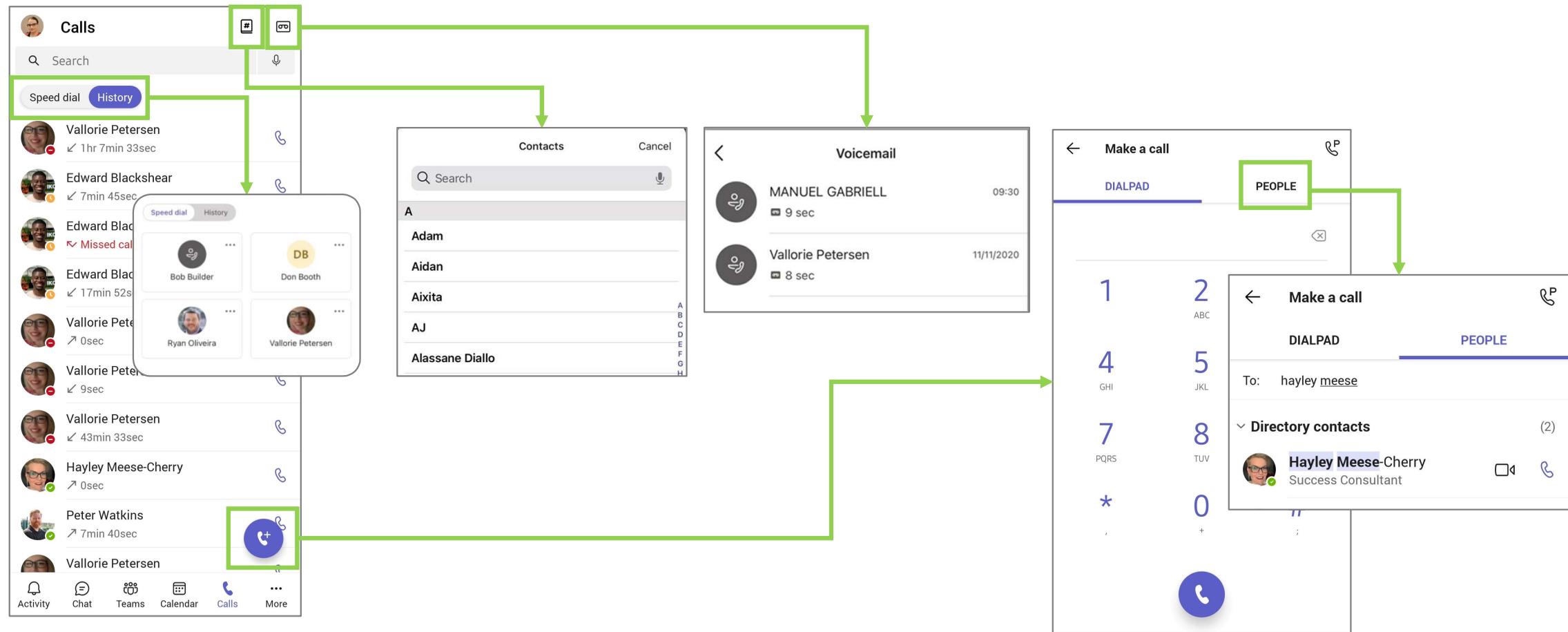
Device Transfer

Meetings can also be transferred to your mobile application when you need to be on the go during a meeting.

1. Access the **Calendar** from the Teams mobile application and click **Join** for the active meeting you are in.

2. You will be prompted with options to join the meeting, select to **Transfer to this device.**

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Teams Calls - Mobile

Resources
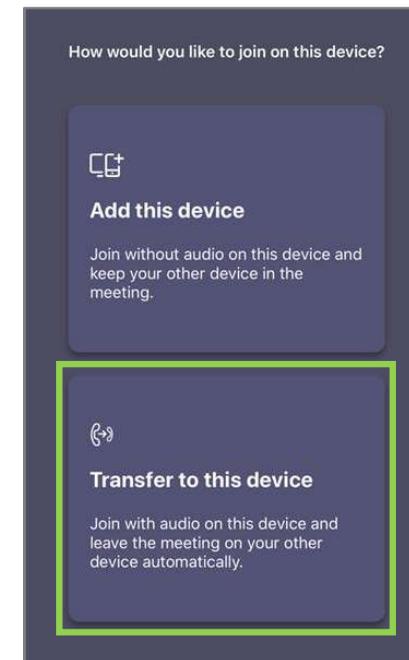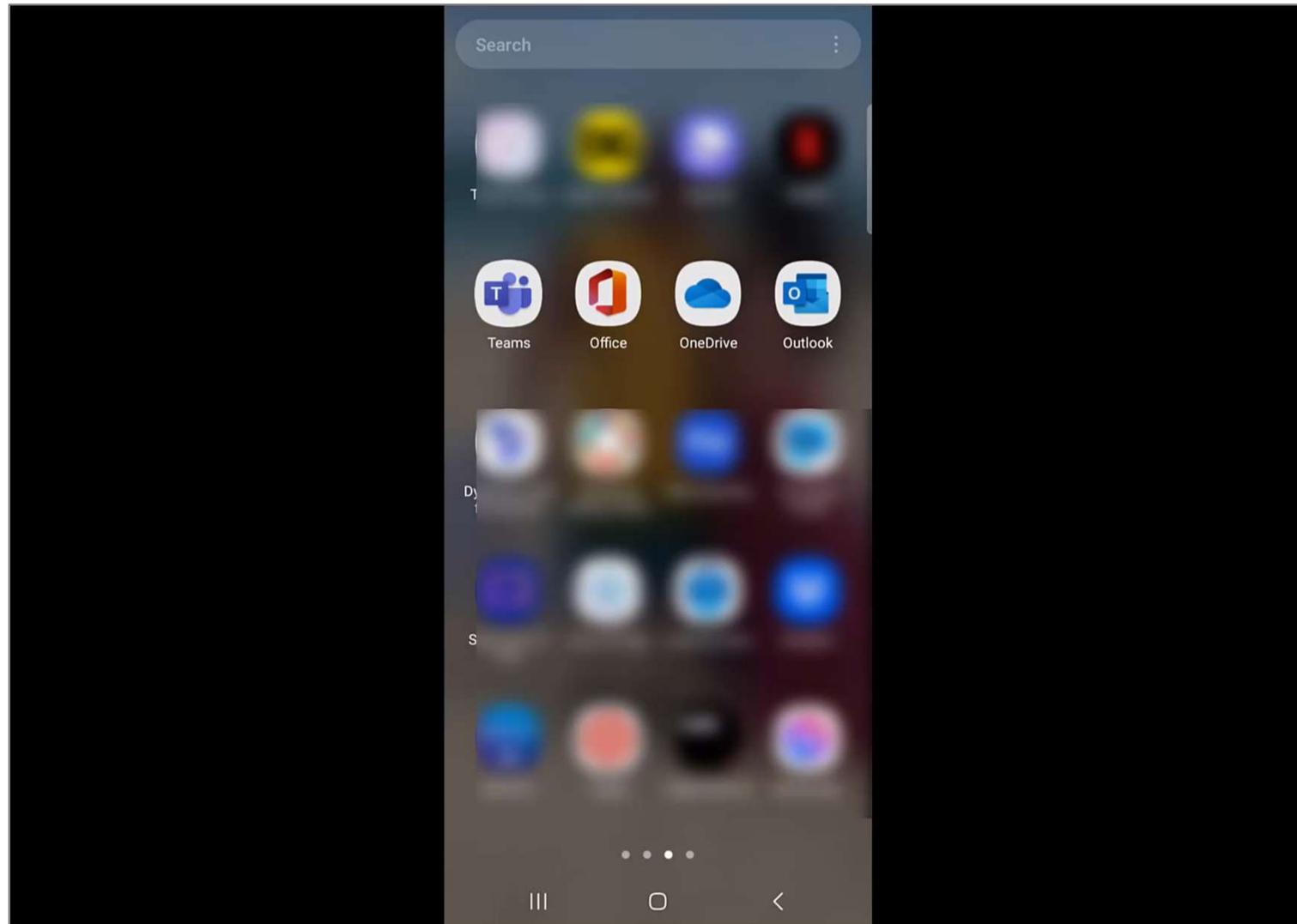
Where can you get assistance?

1. Project website: https://it.ucf.edu/teamscalling/project/
2. UCF submit a ticket for help website: https://it.ucf.edu/ and click on "Submit a ticket".
3. UCF Knowledge Base on website: https://it.ucf.edu/
4. Questions about desk phones: https://it.ucf.edu/teamscalling/project/help/

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Questions?

Thank you!