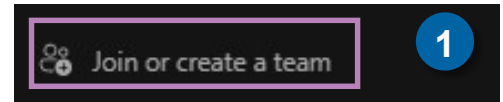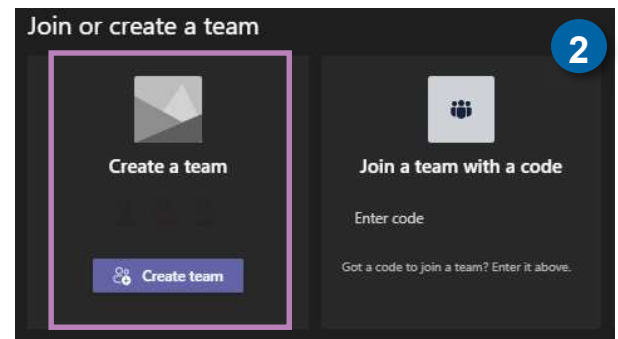## CREATING A TEAM USING A TEMPLATE

In Microsoft Teams, you'll join or create an organization made up of various teams. Each team can have different settings with different channels (e.g., General, Project Documentation) to allow project team members in those teams to chat through voice, text, or video, as well as share and collaborate on files.

You can create a team in the Microsoft Teams desktop app or in the web app using the same steps.
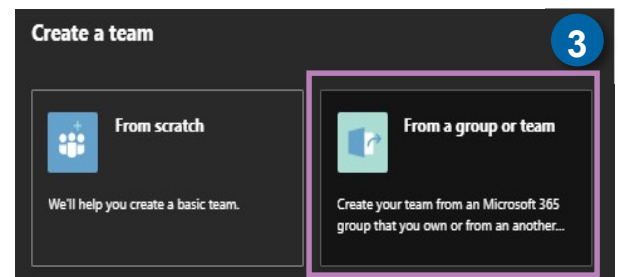
1. From the Teams section, click on **Join or create a team** in the bottom lefthand corner of the application.



2. From the list of options, select **Create a team** to proceed.



3. From the list of options, select **From a group or team**.



⚠ IMPORTANT INFORMATION          ❓ QUESTION AND ANSWER REINFORCING TOPIC          ℹ FOR YOUR INFORMATION
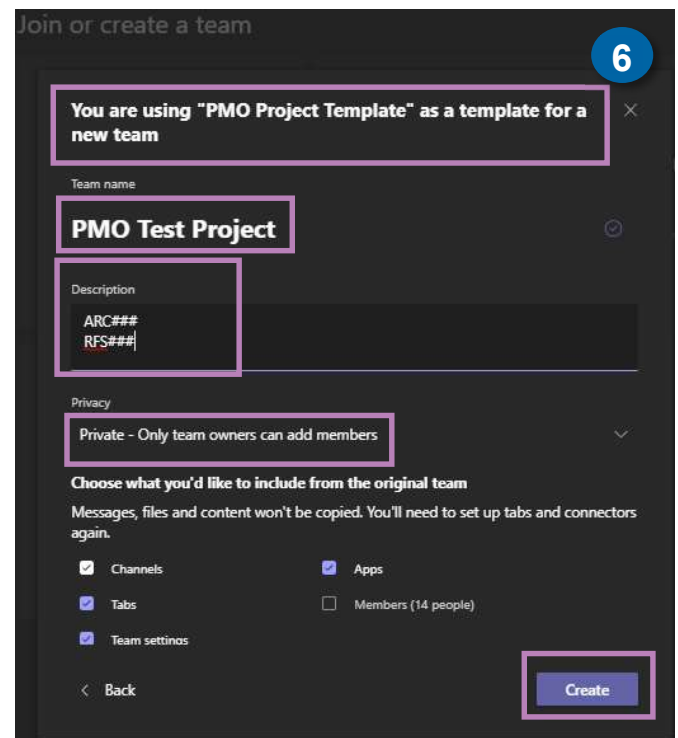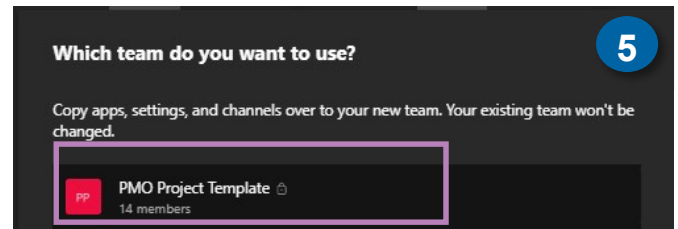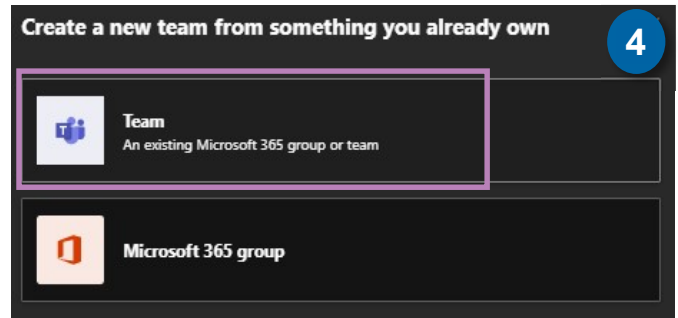
## CREATING A TEAM USING A TEMPLATE

4. From the list of options, select to create a new team from **an existing Microsoft Team.**



Create a new team from something you already own

Team
An existing Microsoft 365 group or team

Microsoft 365 group

5. From the list of options, select **PMO Project Template** to proceed.



Which team do you want to use?

Copy apps, settings, and channels over to your new team. Your existing team won't be changed.

PP PMO Project Template
14 members

6. You will be notified that you are using the "PMO Project Template" as a template for a new team, make sure to update team name below. In the decription, you will need to add both the ARC & RFS numbers associated with the project. Set your team to **Private**, leave checked boxes as is, and select **Create**.



Join or create a team

You are using "PMO Project Template" as a template for a new team

Team name

PMO Test Project

Description

ARC###
RFS###

Privacy

Private - Only team owners can add members

Choose what you'd like to include from the original team
Messages, files and content won't be copied. You'll need to set up tabs and connectors again.

☑ Channels          ☑ Apps
☑ Tabs              ☐ Members (14 people)
☑ Team settings

‹ Back                          Create

⚠ **IMPORTANT INFORMATION**     ❓ **QUESTION AND ANSWER REINFORCING TOPIC**     ℹ **FOR YOUR INFORMATION**

# CHOC
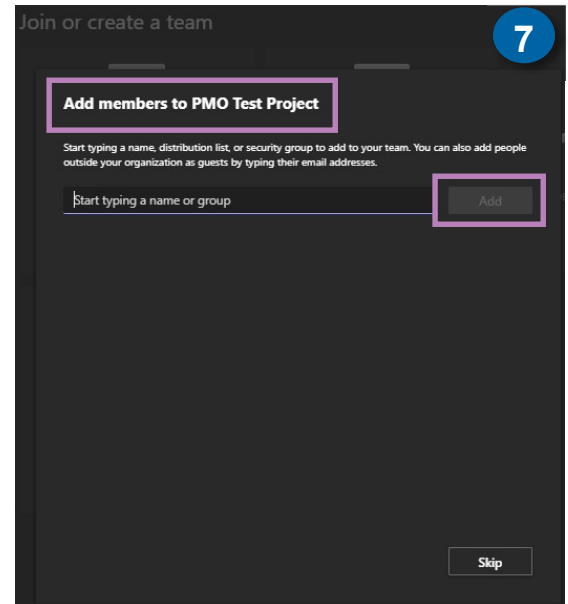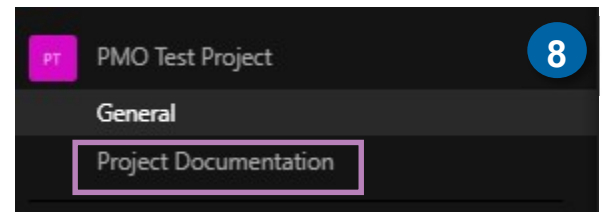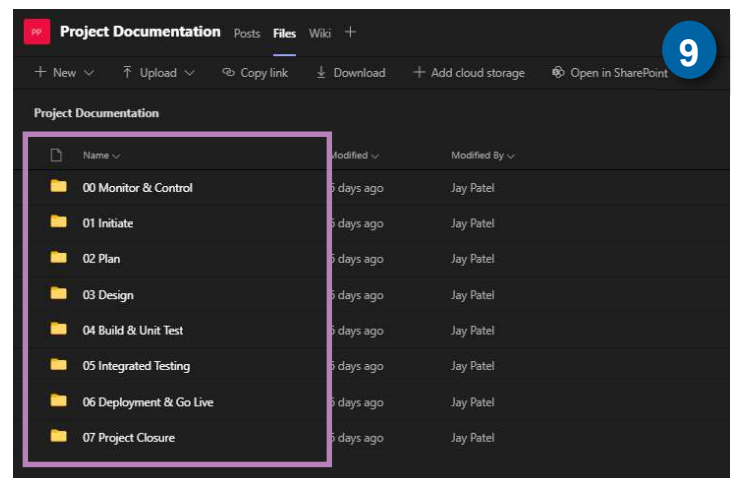
## CREATING A TEAM USING A TEMPLATE

7. You will be prompted to add members to your team by typing the name of the associates in the search bar. Once all associates have been found, select **Add.**



8. There will be two channels for each team. **General** will be used for vendor documentation. **Project Documentation** will be used for project related documents.



9. The **Project Documentation** channel will populate via the template. You will have to go into the files section to create the folder structure that houses the project related documents. **Please follow example to the right.**



⚠ IMPORTANT INFORMATION

❓ QUESTION AND ANSWER REINFORCING TOPIC

ℹ FOR YOUR INFORMATION