

How-to Guide for Microsoft Teams Phone

CU System Administration uses Teams Phone to enhance communication, improve functionality and streamline support while providing strong security and scalability.

Updated 12.13.2024

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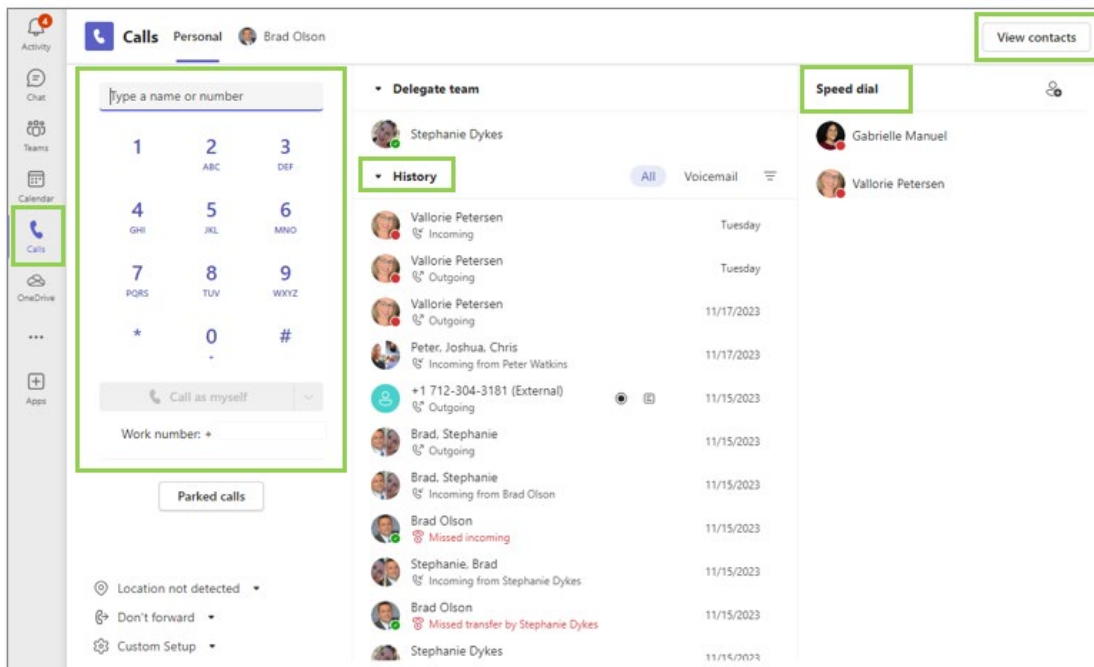
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Getting started

Layout Overview



The **Calls** landing page within Microsoft Teams will display a dial pad, call history, speed dial groups, access to voicemail and the option to view other contacts.

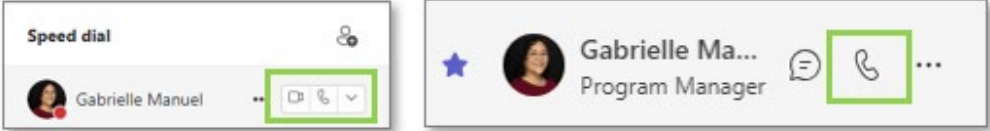

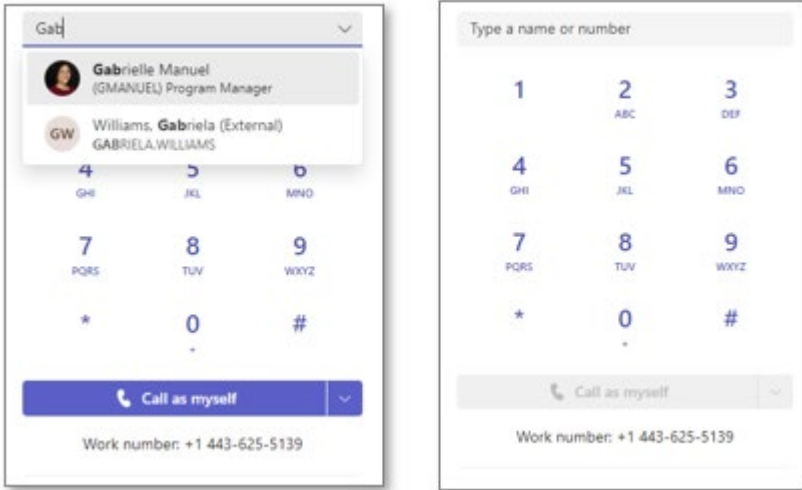


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Initiating a call

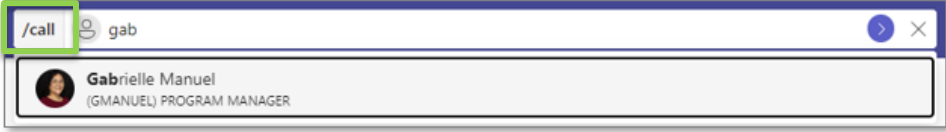
There are four ways to initiate a call in Teams Phone.

<p>1. Click the phone icon under speed dial or contacts.</p>	
<p>2. Escalate any chat to a video or audio call by selecting the applicable icon at the top of the chat window.</p>	
<p>3. Click Calls on the Teams side menu and use the dial pad by typing the numbers with a keyboard, pasting a copied number or searching for an internal</p>	

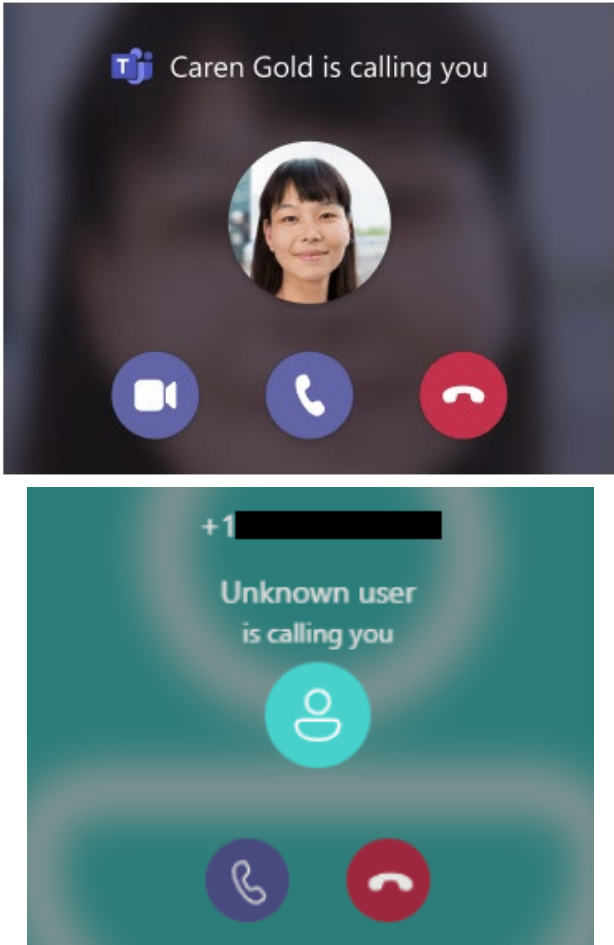


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colleague by name.	
4. Use the /call command from the search box.	

Answering or ending a call

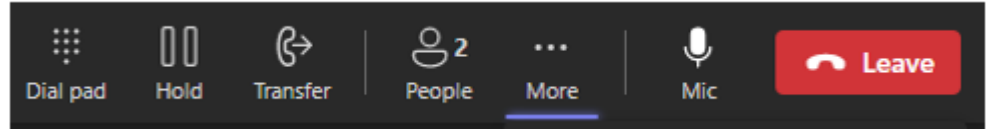
<p>When a call is incoming, a pop-up notification will appear in the lower right corner of your desktop. Click on the purple phone icon to answer the call.</p> <p>The video option is only available from another Teams caller.</p> <p>The phone number from an unknown caller will be shown.</p>	
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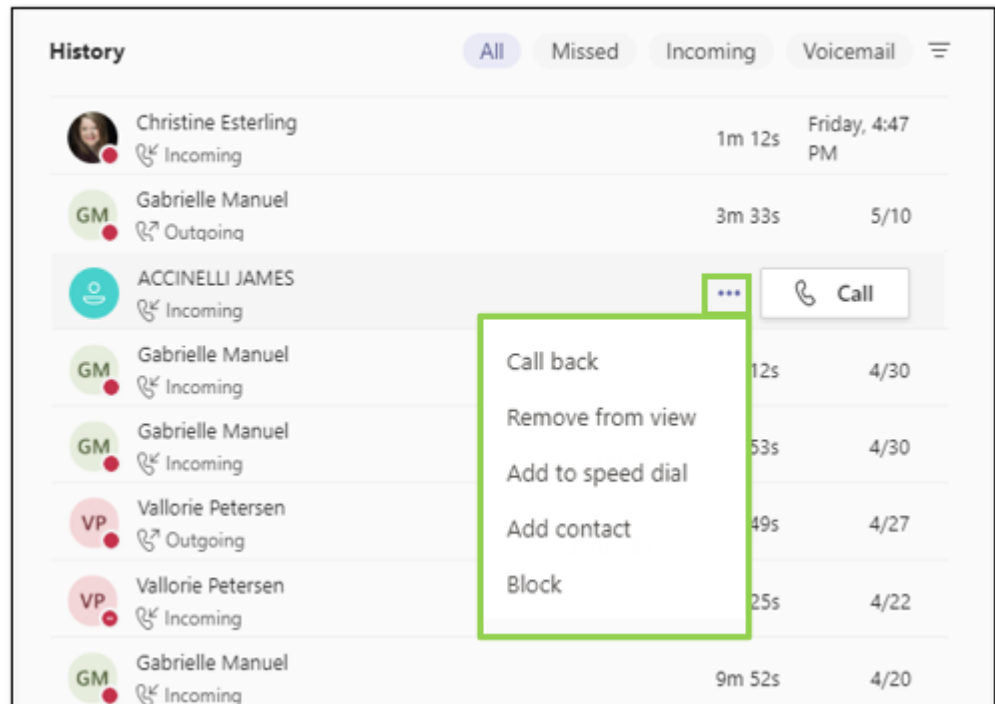
To end an active call, click **Leave** from the control bar across the top of the call window.



Using History

History will show all calls received, initiated or missed in the last 30 days.


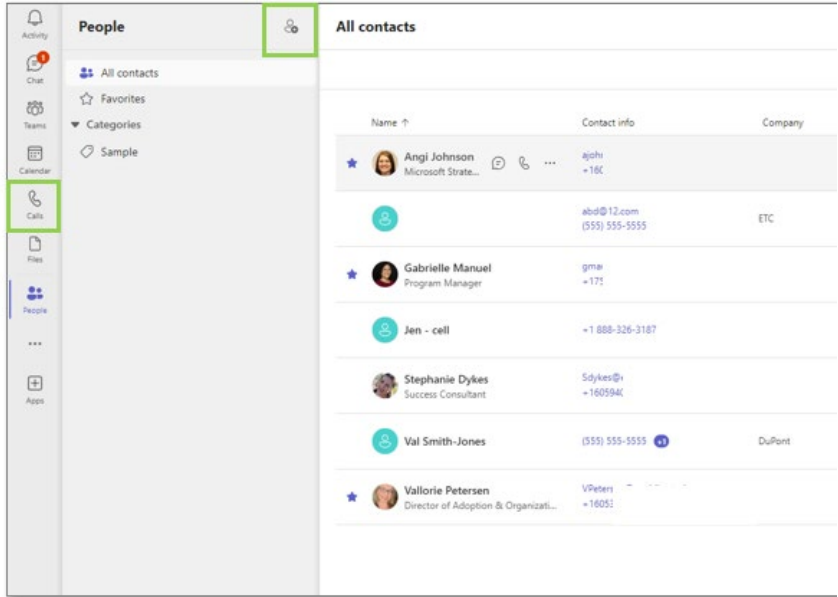
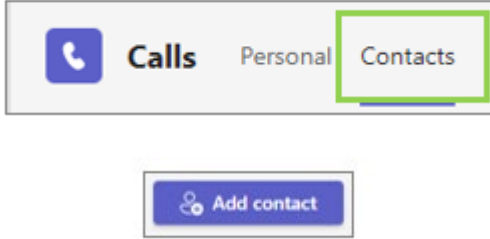
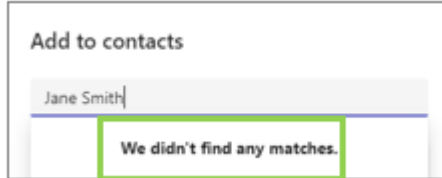
Hover your mouse over the call entry to make the **Call** button and the “...” menu appear.



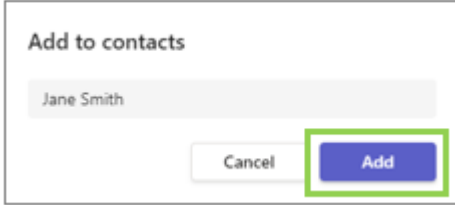
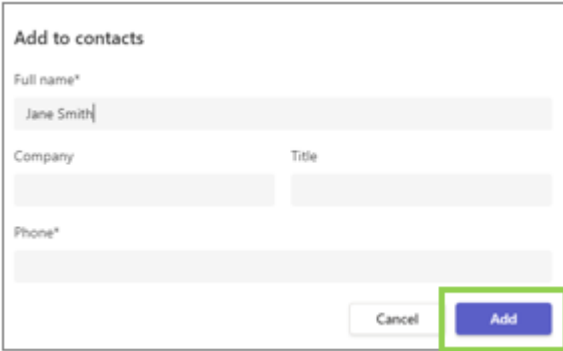
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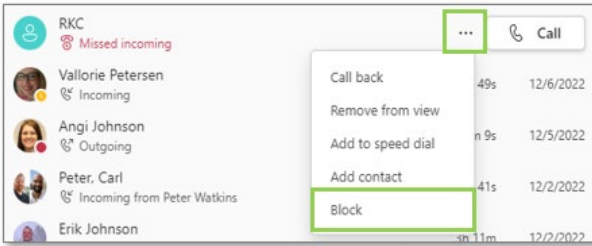
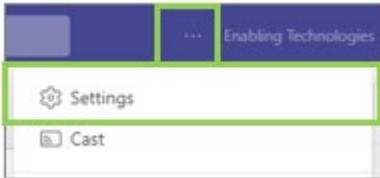
Viewing and managing contacts

<p>View Contacts displays your Outlook contacts.</p>	
<p>You can opt to view those you have marked as Favorites or contacts in Categories you create.</p>	
<p>To add a contact, navigate to Calls and select Contacts.</p> <p>Click Add contact and enter the contact name.</p>	
<p>Teams will attempt to find that name in the directory. If the contact is external, you will receive a message saying, We</p>	

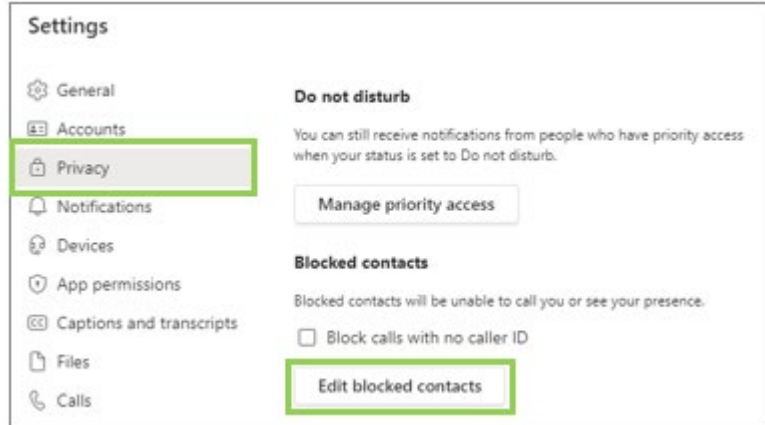


<p>didn't find any matches.</p>	
<p>To proceed, ignore the message, click back into the dialog box and click Add.</p>	
<p>Continue entering contact details and click Add when complete.</p>	

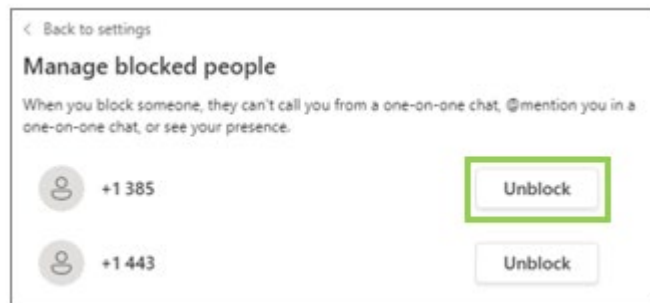
Blocking and managing calls

<p>In your History, click the ellipsis next to the unwanted number and select Block. The number will be added to your blocked list.</p>	 <p>Note: You can only block external callers.</p>
<p>To manage your blocked numbers, click the ellipsis in the top right corner of Teams and then click Settings.</p>	

In your Settings menu, select **Privacy**. Then, click **Edit blocked contacts**.



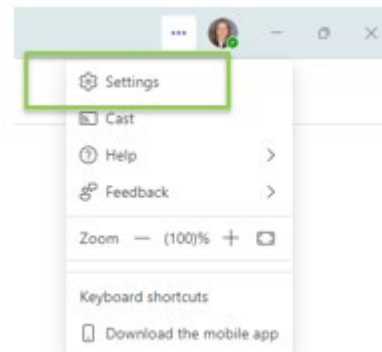
To unblock a number, click **Unblock**.



Voicemail

Setting up voicemail

Click on the ellipsis next to your profile picture in the Teams app. From the dropdown menu, choose **Settings**.

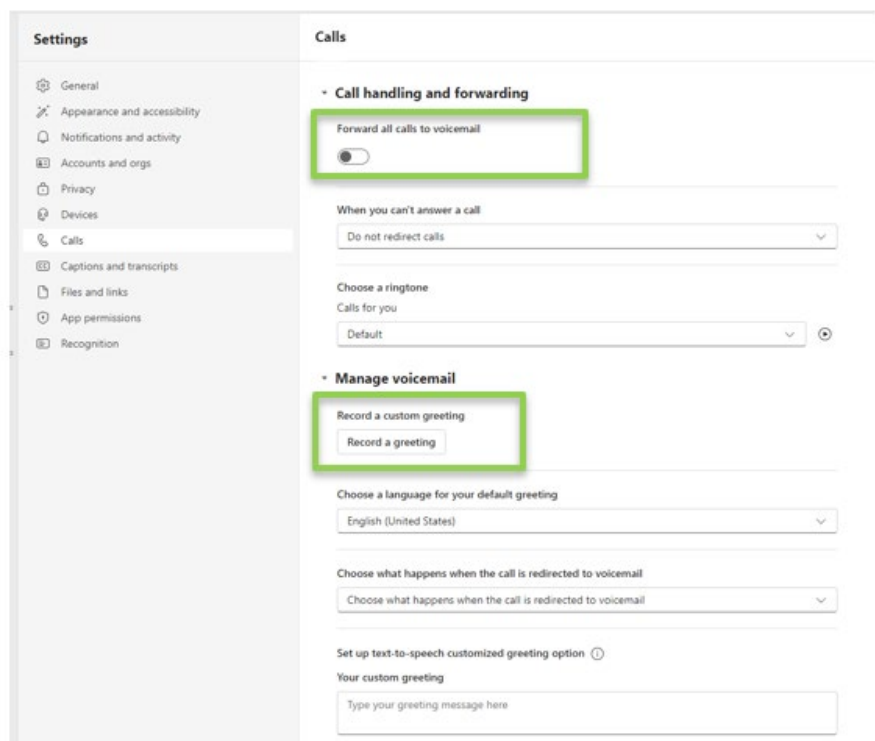


In the **Settings** menu, select **Calls**.

You have the option to forward all calls to voicemail. Select how many seconds a call should ring before being redirected.

Under **Manage voicemail**, you have the option to **Record a greeting**.

If you do not record a message, an automated message will play in the language selected.



<p>Choose what happens when a call is redirected to voicemail.</p>	<p>Choose what happens when the call is redirected to voicemail</p> <p>Choose what happens when the call is redirected to voicemail</p> <ul style="list-style-type: none">Let the caller record a messageLet the caller record a message or be transferred to someone elsePlay your greeting and end the callPlay greeting then transfer the call to someone else
<p>You can also set up text-to-speech rather than recording a message or having a standard message play.</p>	<p>Set up text-to-speech customized greeting option ⓘ</p> <p>Your custom greeting</p> <p>You have reached John Smith at the University of Colorado. I am unable to take your call at the moment. Please leave a message and I'll return your call. Thank you!</p> <p>Save</p>
<p>You can create an automated message for when you are out of the office. You can select for Teams Phone to automatically revert to this message when your Outlook automatic replies are on or when you have an out-of-office event on your calendar.</p>	<p>▾ Manage out-of-office voicemail</p> <p>When should your greeting play</p> <ul style="list-style-type: none"><input type="checkbox"/> All the time<input checked="" type="checkbox"/> When Outlook automatic replies are on<input checked="" type="checkbox"/> When I have an out-of-office event on my calendar

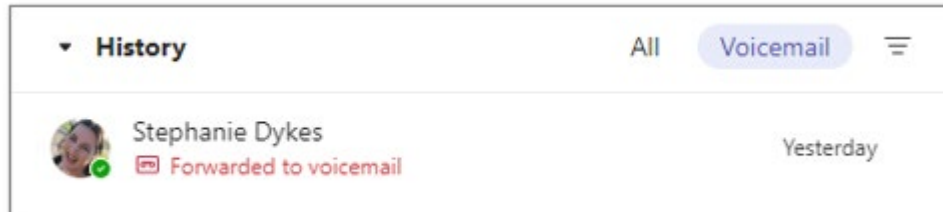


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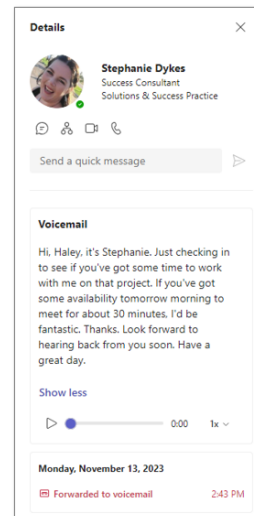
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Listening to and managing voicemail

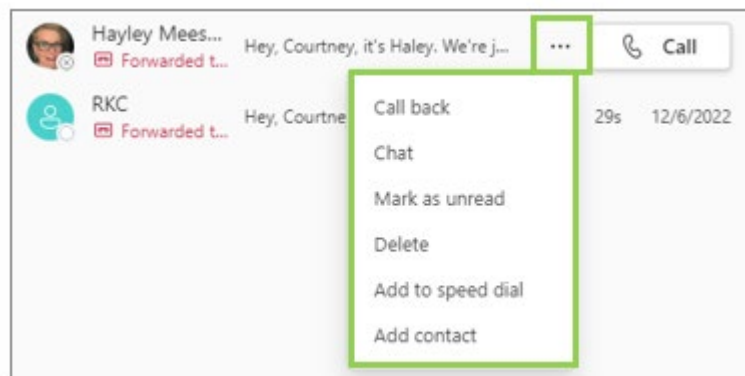
To listen to voicemail, go to the **History** section under **Calls** and select **Voicemail**.



Click a message to view more information in the **Details** pane, including a transcript of the message, options to contact the sender and an option to play the message.



When hovering over a voicemail under **History**, you may return the call, initiate a chat (if the caller is part of CU System Administration), or add the caller to your contacts.



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A copy of each voicemail will also be sent to your Outlook.

Open the Outlook message to read or listen to your voicemail via the attached MP3 file.

NOTE:

Deleting the voicemail in one location automatically deletes the corresponding notification and storage.

The screenshot displays an Outlook email from Stephanie Dykes to Hayley Meese-Cherry. The email subject is "Voice Mail (20 seconds)". It includes an audio attachment named "audio.mp3" (60 KB). The body text reads: "Hi, Haley, it's Stephanie. Just checking in to see if you've got some time to work with me on that project. If you've got some availability tomorrow morning to meet for about 30 minutes, I'd be fantastic. Thanks. Look forward to hearing back from you soon. Have a great day." Below the text, it states: "You received a voice mail from Stephanie Dykes at Sdykes@enablingtechcorp.com." A contact card for Stephanie Dykes is shown with the following details: Job Title: Success Consultant; Company: Enabling Technologies Corp; Work: +1 443-625-5107; Mobile: +1 605-940-9919; Email: Sdykes@enablingtechcorp.com. At the bottom, there is a note: "Thank you for using Transcription! If you don't see a transcript above, it's because the audio quality was not clear enough to transcribe." and a link "Set Up Voice Mail". At the very bottom of the email view are "Reply" and "Forward" buttons.



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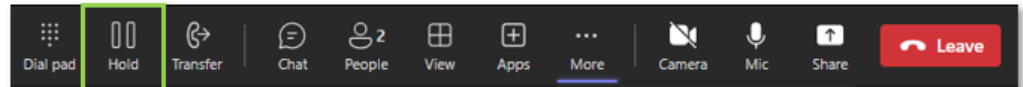
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Email: help@cu.edu

Moving calls

Holding a call

To place a call on hold, click the **Hold** button from your call window options menu.



While on hold, a timer will run below the caller's image.

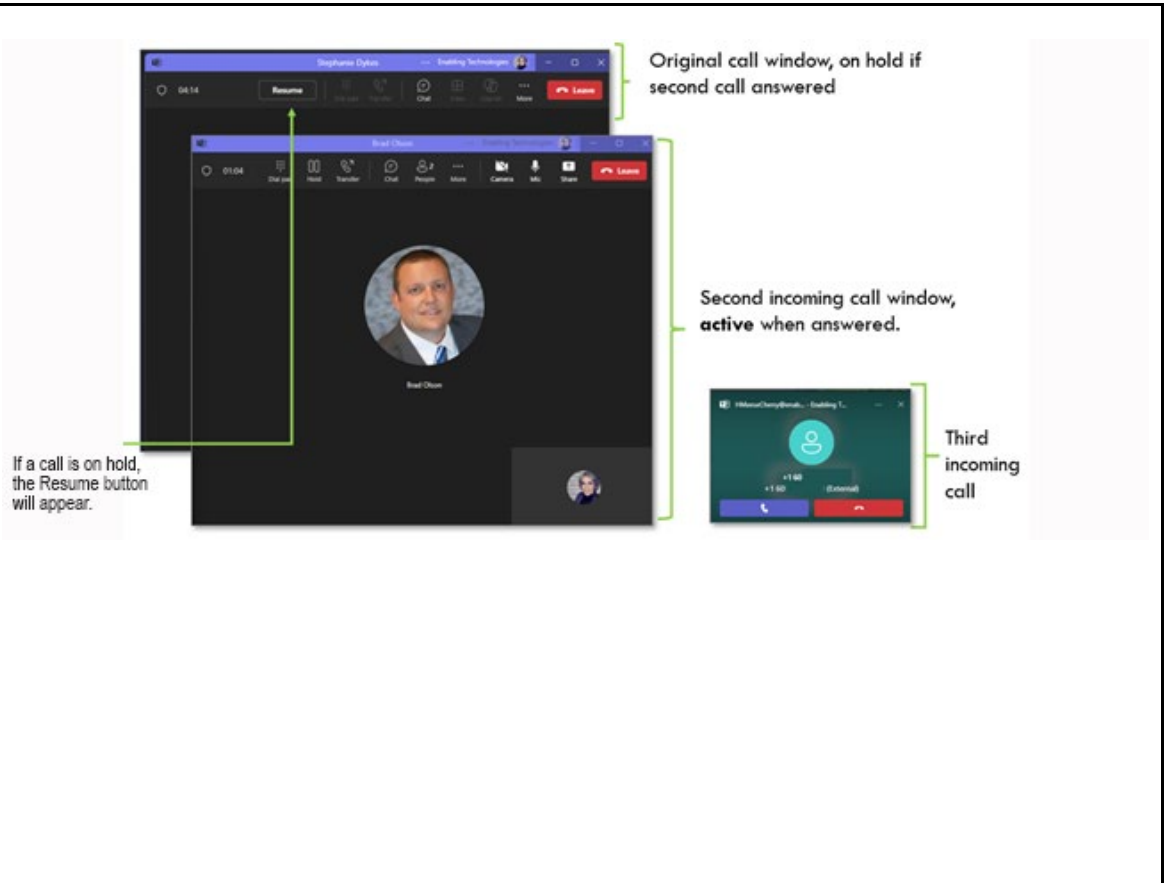
To retrieve the call, click the **Resume** button that appears after clicking **Hold**.



Navigating multiple calls

While only one call can be active at a time, you can toggle between multiple calls.

If you accept an incoming call while on an active call, that active call will be placed on hold, and the new call will display in a separate call window.

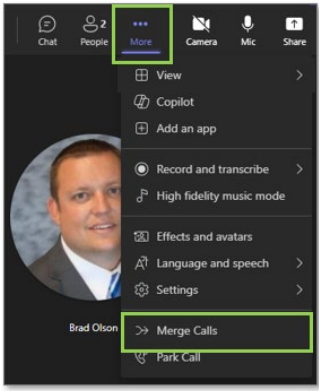

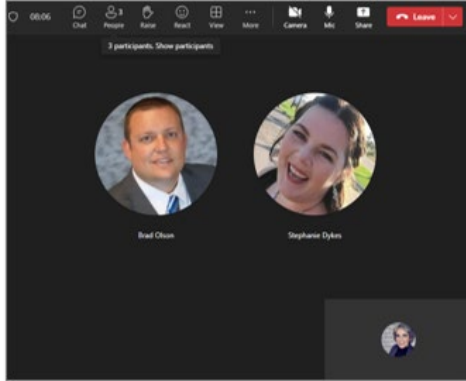


NOTE: When a call is declined, the call will follow the call answering rules that have been established in [settings](#). Additionally, the caller will not know their call has been declined. The caller will hear the standard number of rings before being redirected.



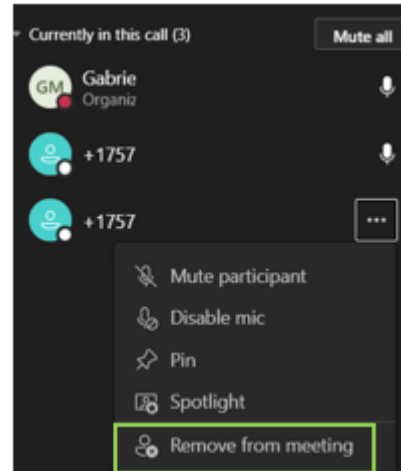
Merging calls

While actively on a call, you may combine a new incoming call or make a second outgoing call using the **Merge Calls** function.

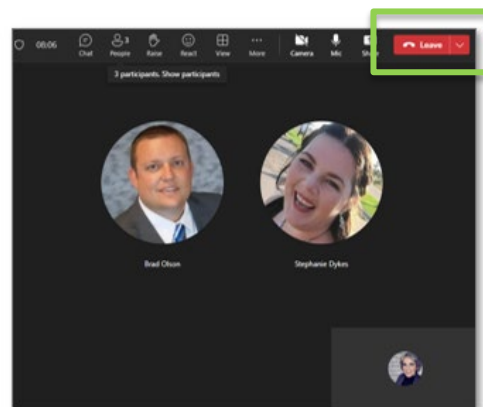
<p>From the active call, access the ellipsis and select Merge Calls.</p>	
<p>A new window will appear allowing you to choose which call to merge. Select the other caller and click Merge.</p>	
<p>You will now see both callers in one window and the call becomes an audio conference.</p>	



To remove one of the callers during the call, access the **Participants** menu and remove the caller by clicking the ellipses icon next to their name or number and then selecting “Remove from meeting.”

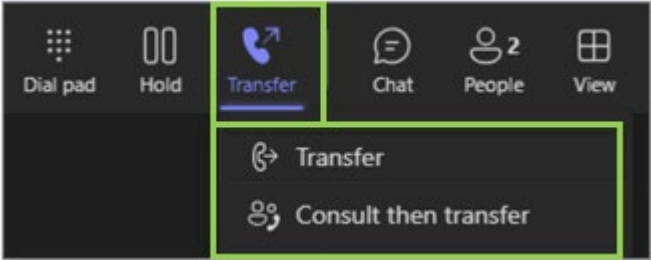
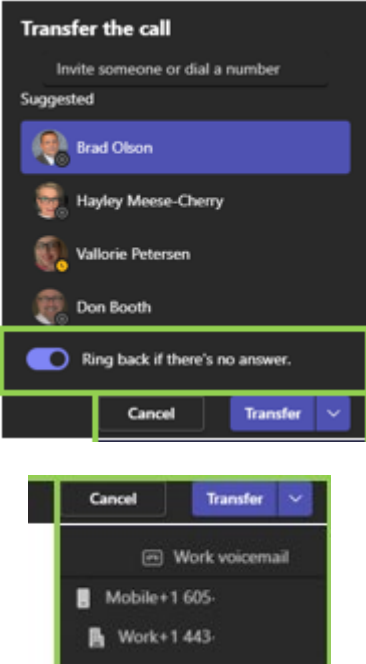


You can **Leave** the call and the other lines will remain on the call.



Transferring a call

You have two options when transferring a call: transferring a call to another user without any contact with them or consulting with them before you transfer the call.

<p>Option 1: Start the process by clicking Transfer in the call window and selecting Transfer in the drop-down menu.</p>	
<p>Search for someone by name (if internal) or enter a number to an external recipient.</p> <p>If transferring to an internal user, turning on Ring Back will allow the original caller to automatically ring back to your line if the new recipient does not answer. You may then handle the call or transfer directly to the recipient's voicemail.</p>	



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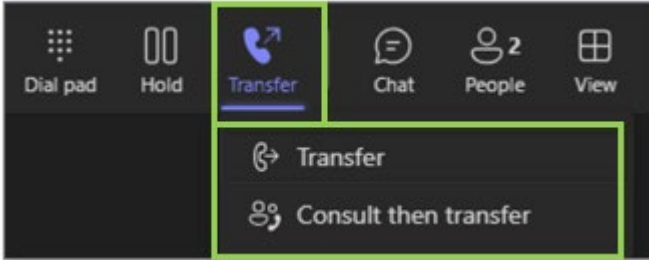
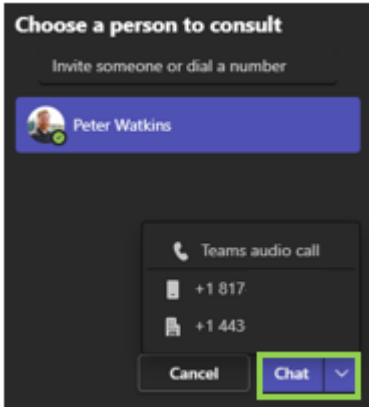
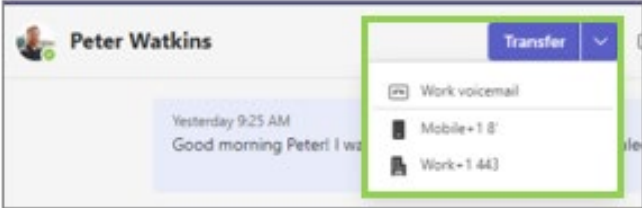
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<p>Option 2: Select Transfer from the top control bar, then select Consult then transfer.</p>	
<p>Again, search for someone by name or enter a number. If the recipient is internal, select Chat to start a chat with them.</p> <p>If an audio call is preferred for your consult, click the drop-down menu under Chat to initiate a call.</p>	
<p>A separate chat or call window will appear. Select the appropriate transfer option from the top, right corner when ready to transfer the call.</p> <p>The new recipient will see who is</p>	



calling and who is transferring the call.



Forwarding calls

To forward your calls, go to the **Calls** menu under **Settings**.

Toggle the **Forward all calls** switch and select from the drop-down menu where they are forwarded.



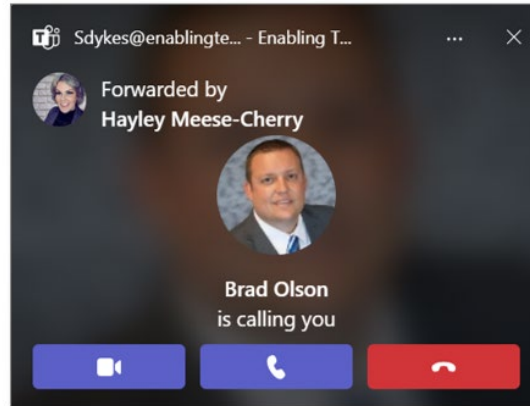
Once you have added a name or number for call forwarding, you cannot add another. Click the X next to the current forwarding selection to change your forwarding destination.



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NOTE: The new recipient can see that the call was forwarded and by whom, but the original caller cannot. The new recipient must identify themselves and explain they are taking calls for the intended recipient.





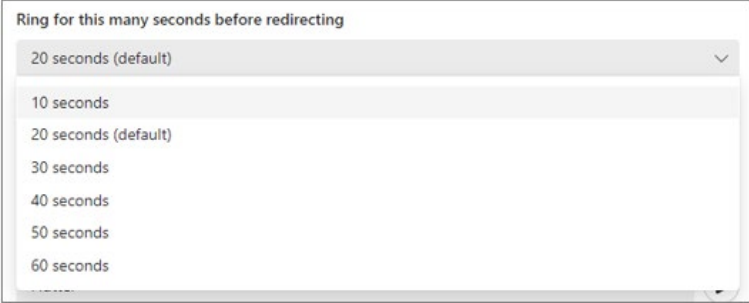

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Settings

Setting answering rules

Rules are set under Settings > Calls menu.

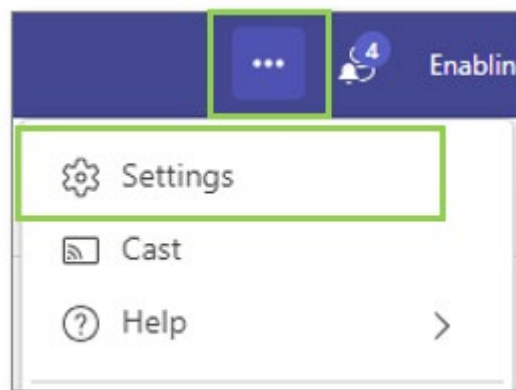
<p>Designate where a call should simultaneously ring when it's coming in.</p>	 <p>When you receive a call</p> <ul style="list-style-type: none">Do not ring anyone elseAlso ring a new number or contactAlso ring a call groupAlso ring delegates
<p>Designate what should happen when you do not answer a call.</p>	 <p>When you can't answer a call</p> <ul style="list-style-type: none">Redirect to voicemailDo not redirect callsRedirect to a new number or contactRedirect to a call groupRedirect to delegates
<p>Designate how long your calls should ring before redirecting to your designated preference. Each ring = 5 seconds.</p>	 <p>Ring for this many seconds before redirecting</p> <ul style="list-style-type: none">20 seconds (default)10 seconds20 seconds (default)30 seconds40 seconds50 seconds60 seconds
<p>Select a unique ring tone for calls for you, forwarded calls or delegated calls.</p>	 <p>Choose a ringtone</p> <ul style="list-style-type: none">Calls for you: RemixForwarded calls: FlutterDelegated calls: Drip Drop



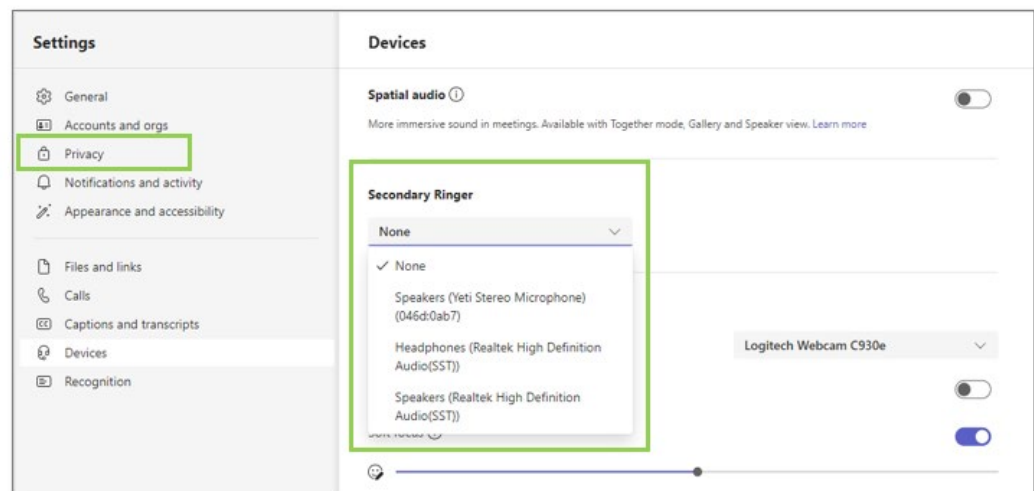
Creating a secondary ringer

If you use a headset and want to hear an incoming call from both your headset and your computer, you can create a secondary ringer.

Click the ellipsis at the top of Teams and go to **Settings**.

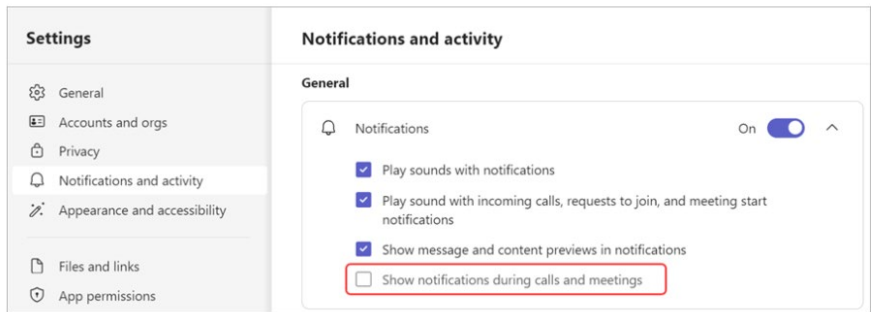
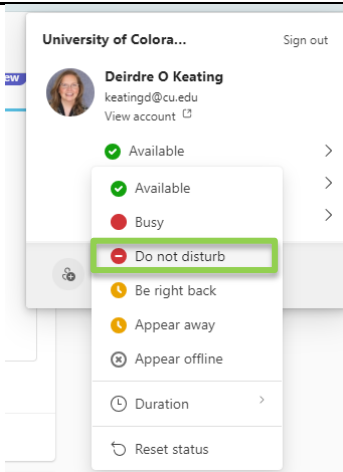
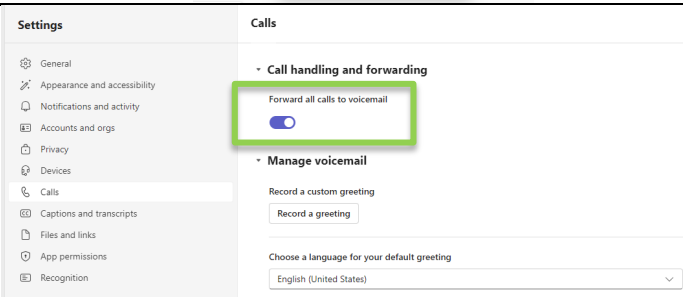


Click **Privacy > Devices** and in the Secondary ringer section, select the device from the drop-down menu to ring along with your headset.



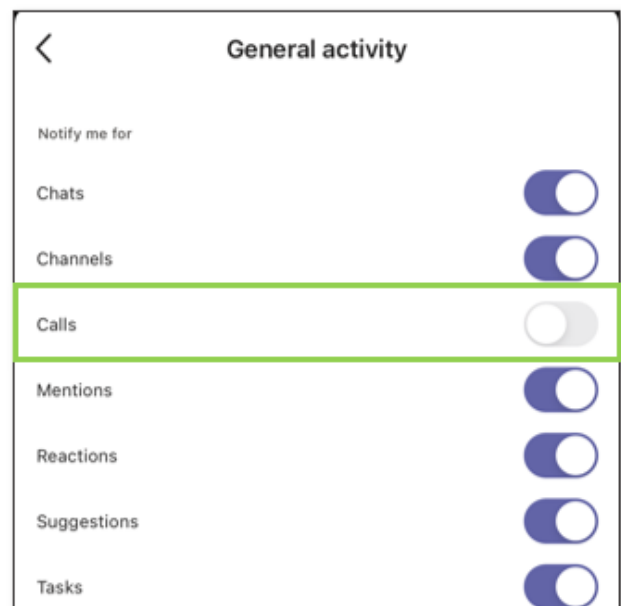
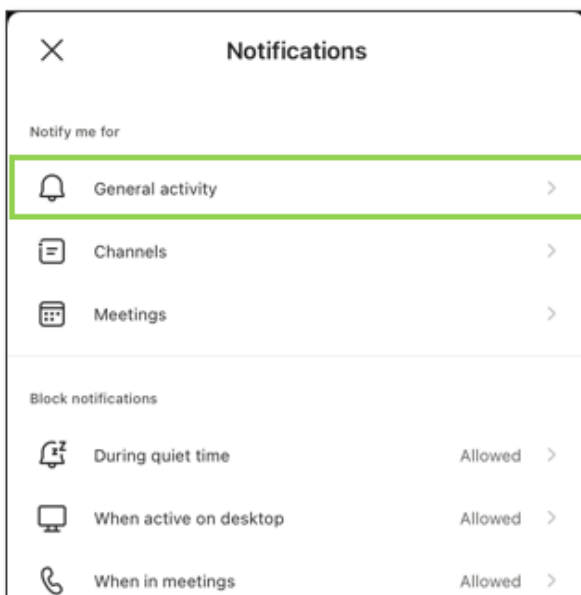
Silencing calls

There are multiple ways to prevent calls from coming through Teams. Here are the three most common and two options for a mobile device.

<p>1. Select Notifications and activity under Settings and uncheck the Show notifications during calls and meetings box.</p>	 <p>The screenshot shows the 'Settings' application with 'Notifications and activity' selected in the left sidebar. The 'General' section of 'Notifications and activity' is open, showing a list of notification preferences. The checkbox for 'Show notifications during calls and meetings' is unchecked and highlighted with a red box.</p>
<p>2. Set your Teams status to Do not disturb. No notifications or calls will come through when your status is set to Do not disturb.</p>	 <p>The screenshot shows a user's profile card in Microsoft Teams. The status menu is open, displaying various status options. The 'Do not disturb' option is highlighted with a green box.</p>
<p>3. Under Settings > Calls, toggle on Forward all calls to voicemail.</p>	 <p>The screenshot shows the 'Settings' application with 'Calls' selected in the left sidebar. The 'Call handling and forwarding' section is open, and the 'Forward all calls to voicemail' toggle switch is turned on and highlighted with a green box.</p>



4. [Schedule Quiet Time](#), which will disable notifications on your mobile device during your selected time.
5. Turn off call notifications on your mobile device by tapping your profile in the top left corner in the app and selecting **Notifications**. Tap **General Activity** to receive a list of activity types and toggle switches for each. Finally, locate the toggle for **Calls** and switch it to the off position. This will prevent all call notifications from coming through, regardless of Quiet Time settings.



Scheduling quiet time on the mobile app

Quiet Time allows you to specify the hours and days you do not want to receive notifications from Teams on your mobile device. Quiet Time is not available on the desktop version of Teams. **NOTE:** If you have multiple mobile devices with the Microsoft Teams app installed, there is no synchronization of Quiet Hours settings between those devices.



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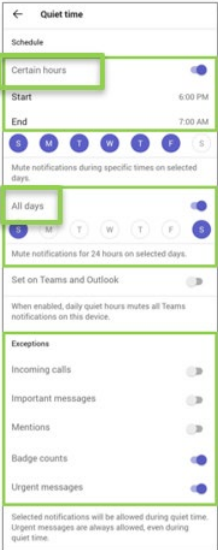
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During quiet time, you won't receive sound or push notifications from Teams on your mobile device. However, when you open the Teams app, you will still be able to view new messages or see activity notifications.

<p>Open the Teams app on your mobile device and tap your profile picture in the top left corner.</p>	
<p>Select Notifications, and under Block notifications, select During quiet time.</p>	
<p>Set specific times and days to mute notifications on that device.</p>	
<p>To mute notifications during certain hours, turn on the Certain hours toggle and select which hours of the day you want notifications muted.</p>	
<p>To mute notifications during select days, turn on the All Days toggle and select which days of the week you want notifications muted.</p>	
<p>Other people won't know if your notifications are muted. To let others know you're unavailable or when you'll return, set a status message in Teams. If you are an Android user, under Exceptions, choose which notifications you would like to allow through during your set quiet time.</p>	



Setting your e911 location

To support secure, remote work, Microsoft has a location feature in Teams. Adding or confirming your location in Teams is designed to get the fastest emergency response if you dial 911 using Teams Phone.

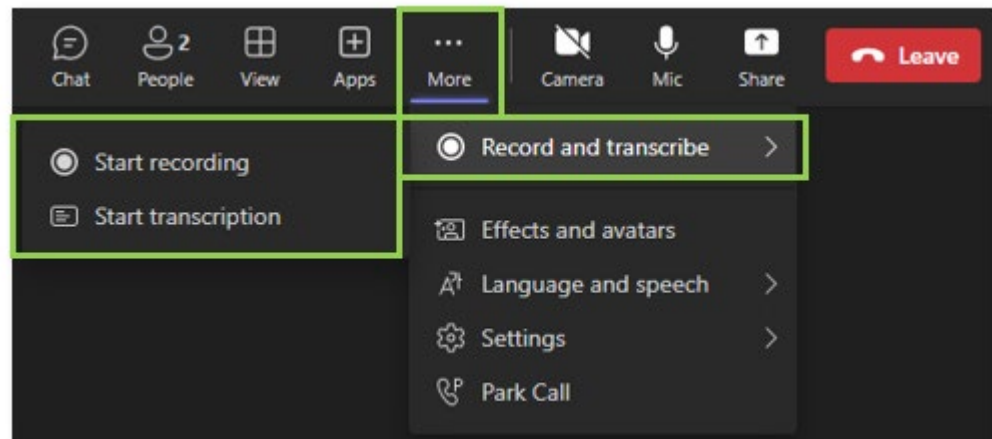
<p>On the bottom-left corner of the Calls menu, below the dial pad, there is an option to indicate your location. This may be prefilled with an address or say Location not detected.</p>	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p style="text-align: center;">An address</p> <p>📍 123 Alaska Ave, Fairbanks, AK ... ▾</p> <p>👤 In 1 call group ▾</p> <p>🔊 Don't forward ▾</p> <p>🎧 Jabra Speak 710 ▾</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p style="text-align: center;">Location not detected</p> <p>📍 Location not detected ▾</p> <p>👤 In 1 call group ▾</p> <p>🔊 Don't forward ▾</p> <p>🎧 Jabra SPEAK 510 USB ▾</p> </div> </div>
<p>Click the drop-down menu next to the location option and select Edit or Add to manually confirm an address (do this even if the address is correct).</p>	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p style="text-align: center;">Current emergency location</p> <p>✎ Edit</p> <p>📍 Reset</p> <p>📍 12345 Sesame St., Hollywood, ... ▾</p> </div> <div style="width: 45%;"> <p>Experience if an address is listed.</p> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p style="text-align: center;">Current emergency location</p> <p>+ Add</p> <p>📍 Location not detected ▾</p> </div> <div style="width: 45%;"> <p>Experience if "location not detected" is shown.</p> </div> </div>
<p>Click Search for a location and type your address. If it populates, select it and click Confirm. If it doesn't populate, enter it manually.</p>	<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: auto;"> <p style="text-align: center;">Address</p> <p style="text-align: center;">Search for a location 🔍</p> <p style="text-align: center; border: 1px solid #00a651; padding: 2px;">Enter address manually</p> </div>
<p>If you are at 1800 Grant St., your location will be detected based on your IP address and there is no need to add or edit in Location Services.</p>	



Recording or transcribing a call

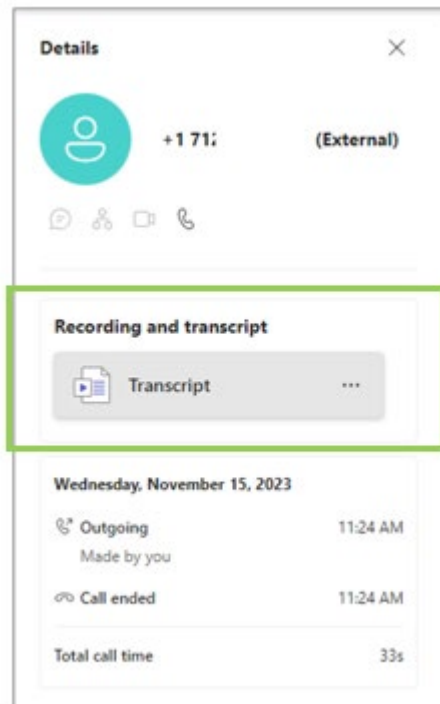
Call recording and transcription is now available for both internal and external one-to-one calls, but not for conference calls.

Select **Start recording** (will automatically include transcription) or **Start transcription**. An automated message will play notifying all parties that the call is being recorded.



Once the call ends, the recording and transcript will be available from History in the Calls app in Teams.

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



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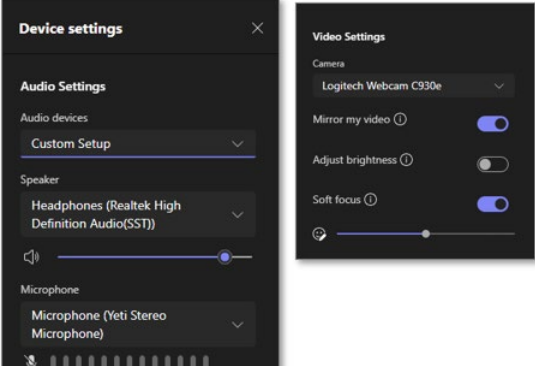
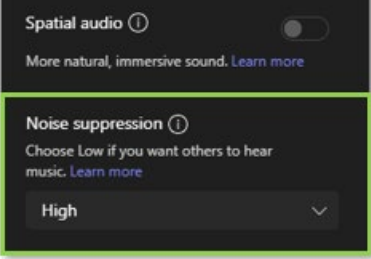
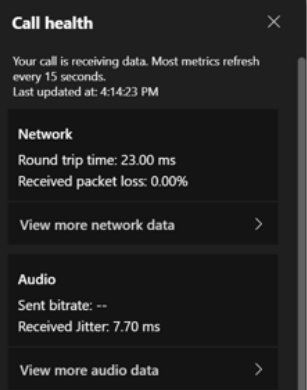
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Email: help@cu.edu

Troubleshooting with Device Settings and Call Health

If you experience poor audio or video quality, use the **More** menu to view Device settings and Call Health.

<p>Confirm both audio output and microphone input are adjusted and responding appropriately.</p>	
<p>Adjust noise suppression settings from the same menu.</p>	
<p>If issues continue during the call, we recommend taking a screenshot of the data metrics displayed in Call health, located in the More Actions... menu at the top of the call window. These data metrics can be shared with the UIS Service Desk to help troubleshoot.</p>	
<p>NOTE: Call health is only available on Teams to Teams calls.</p>	



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Delegating calls

Creating a call delegate

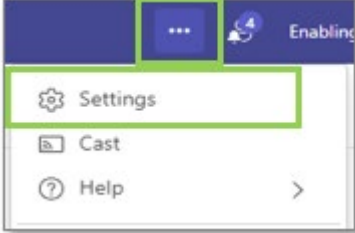
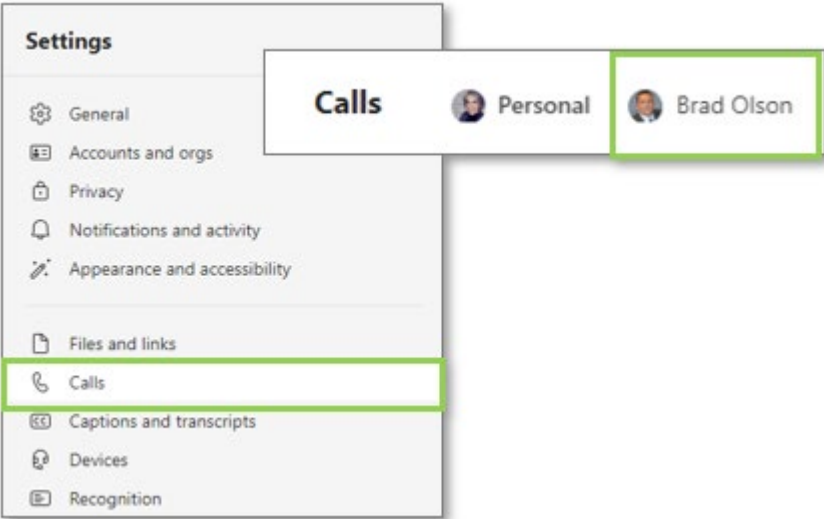
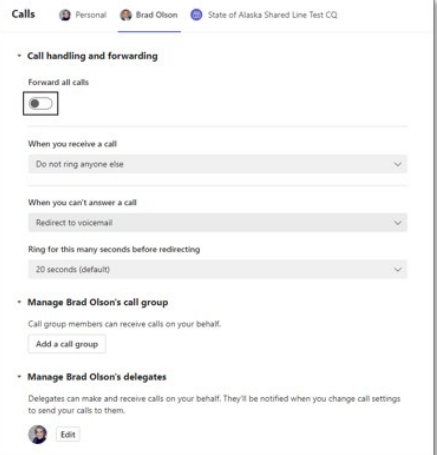
Assign delegate permissions to a peer to make and receive calls on your behalf.

<p>1. Click the ellipsis to go to Settings.</p>	
<p>2. Select Calls and scroll to the Manage delegates section. If this is your first delegate, click Add a delegate. If you already have one or more delegates, click Edit.</p>	
<p>3. Begin typing the name of your delegate and click their name when it appears.</p>	
<p>4. Select the appropriate permissions. The delegate will be notified via chat that they have been added as a delegate and what their permissions are.</p>	



Being a call delegate

When someone else has added you as a delegate, depending on the granted permissions, you may update their call settings as needed.

<p>1. Click the ellipsis and then Settings.</p>	
<p>2. Select Calls. At the top, you will see your own profile as "Personal" alongside the name and Teams icon of anyone you delegate for.</p>	
<p>3. Click on the delegator you wish to manage and update their settings as appropriate and as you have access.</p>	



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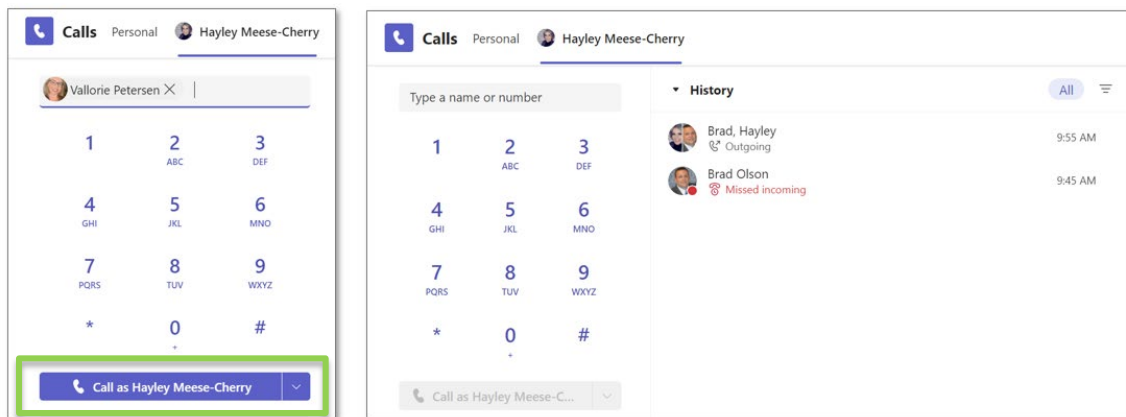
Call: (303) 860 4357

Email: help@cu.edu

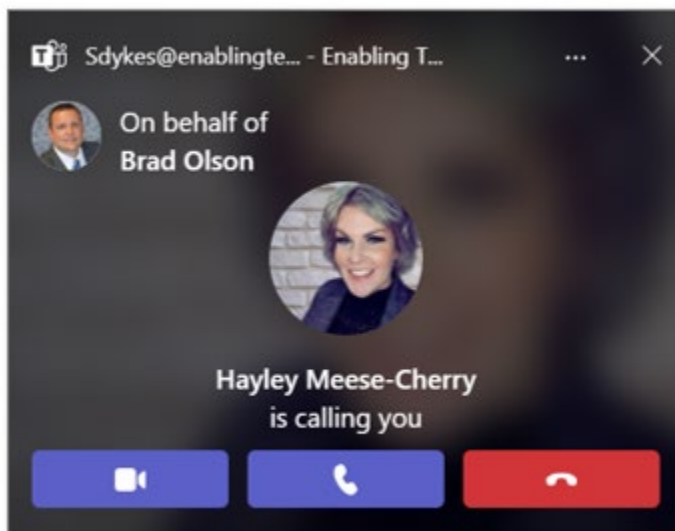
Making and receiving calls as a delegate

When you are added as a delegate, a new tab with the name of the person you are supporting will show to the right of **Personal** on the **Calls** tab.

After clicking the name of person you are representing, you can then dial as them and view their call history. In the example below, Hayley has added Stephanie as her delegate. After clicking Hayley's name at the top, Stephanie can dial as Hayley.



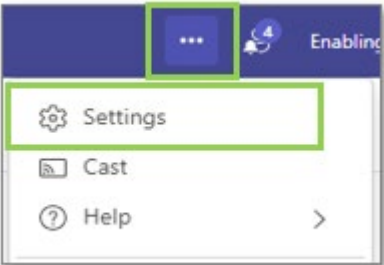
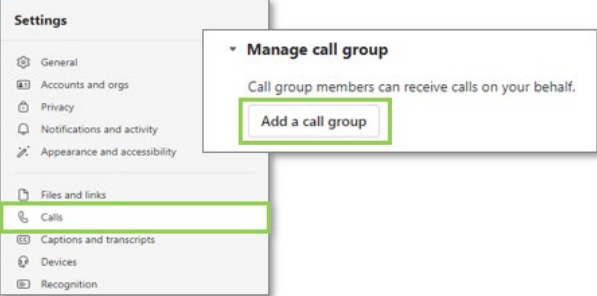
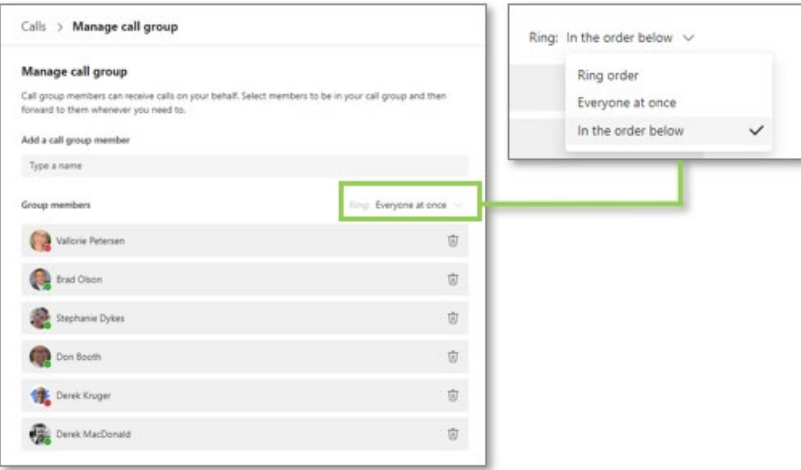
When calling a person on behalf of another person, they will receive notification that you are calling on behalf of that person, as seen in this example.



Shared lines

Creating call groups

Call groups let users share their incoming calls with colleagues so they can answer calls that occur when the user is unavailable. This is similar to a shared email that a team might use, e.g. es.communications@cu.edu.

<p>Click on the ellipsis, then Settings.</p>	
<p>Click the Calls menu, scroll down to the Manage call group section and click the Add a call group button.</p>	
<p>Begin typing the names of those to be in the call group and select as the names appear. Then, designate the ring order.</p> <p>Note: Call groups of 5 or fewer people may designate Everyone at once or In the order below. Call groups of 6-25 members may only designate Everyone at once.</p>	



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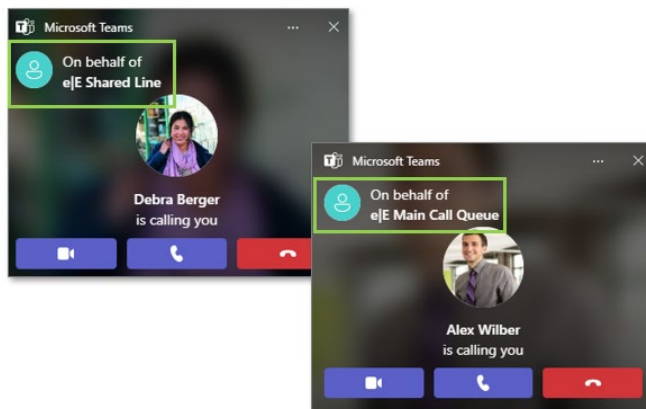
UIS SERVICE DESK

TEAMS PHONE

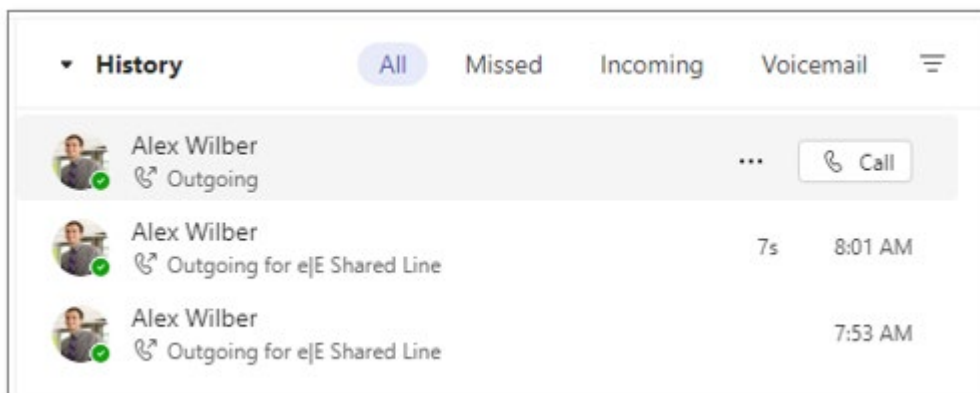
Call queues and shared lines

Departmental teams that want to use shared lines or call queues should contact UIS first.

To help differentiate between calls to you directly or calls coming from a shared line or call queue, Teams will display a note on a pop-up banner indicating the source of the call. This allows you to answer the call with the appropriate greeting.



In your call history, you will see activity for calls associated with your personal number as well as those associated with any call queue or shared line you support.



The line below the person's name or number indicated the shared line the call came from. If there is no shared line name, the call was associated with that caller's direct number.



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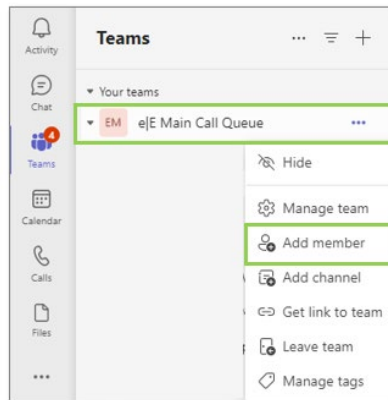
Email: help@cu.edu

Voice-enabled channel

As a team manager of a voice-enabled channel, you can add members to your Team, and they will be added to the call queue as well.

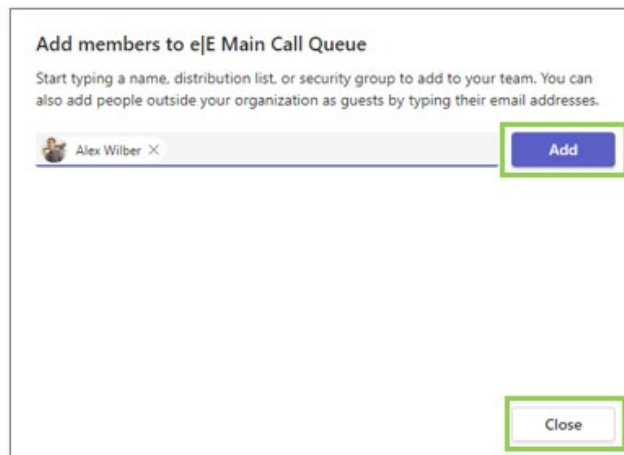
Start by selecting **Teams** in the left-hand Teams menu. Click on the **ellipsis** to the right of the relevant team name.

Selected **Add member**.

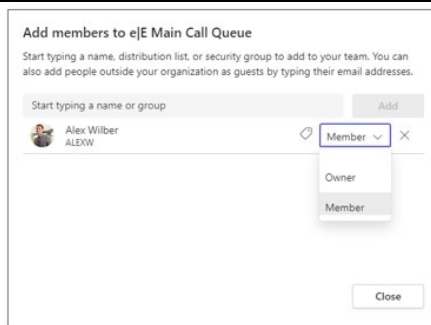


Start typing the name of the individual you want to add, select them and click **Add**.

When complete, click **Close**.



Next to the person's name, click member, and choose if you would like that person to be a member or owner.



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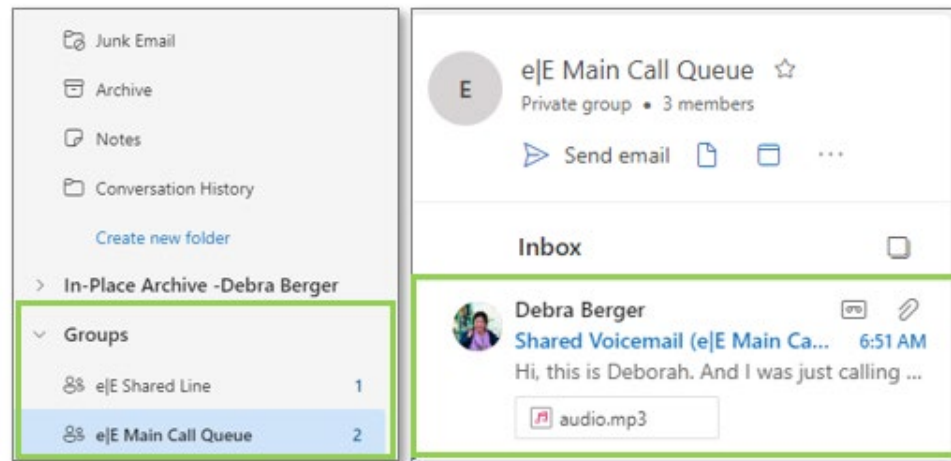
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Sharing voicemail in Outlook

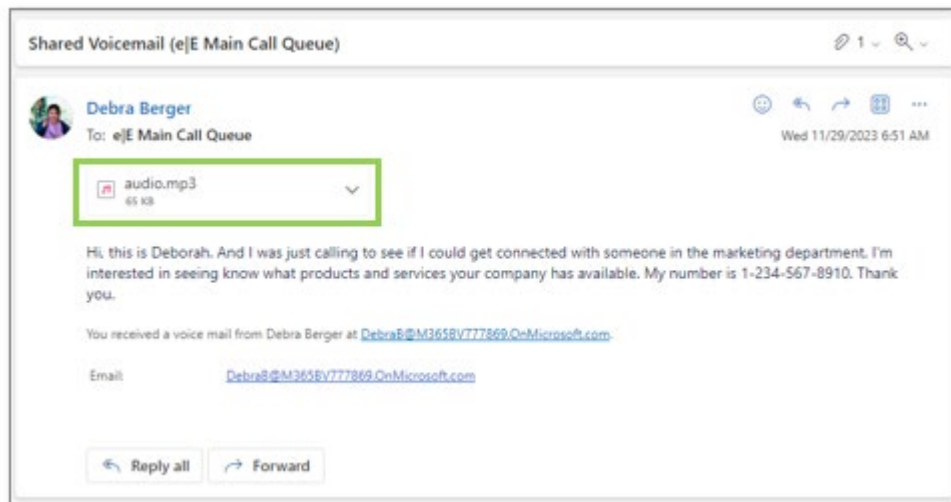
If the main line or call queue that you manage has a voicemail tied to it, you will be added to a new group in Outlook.

If the call queue/shared line you support does not use a voice-enabled channel in Teams, you will only access the voicemail via the group mailbox in Outlook, and all members of the call queue will have access.

In the Groups section of Outlook, click the group name that matches the name of the call queue.



Voicemail-related emails will contain a printed transcript and an MP3 attachment of the voicemail that you can click to play.



Best Practice: For shared voicemail, we recommend building a process to determine who is responsible for reviewing and/or managing voicemail. If the message is for a specific person, the email can be forwarded to their email address, which gives them the audio recording.



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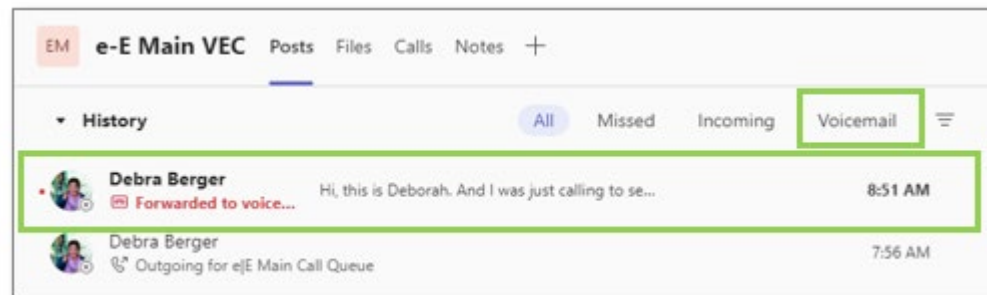
Email: help@cu.edu

Sharing voicemail in Teams

If the call queue you support has voicemail and uses a voice-enabled channel, all members of that queue can review and manage voicemail via the group mailbox in Outlook and directly within the voice-enabled channel in Teams.

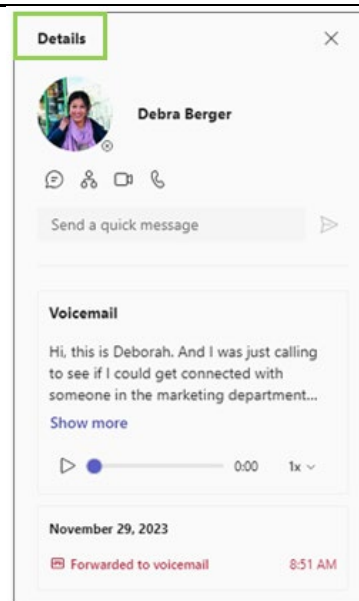
Go to the voice-enabled channel in Teams and locate the voicemail in the **History** section or by clicking on **Voicemail** to filter only that activity.

You will see who called, the opening transcription of the call and the time of the call.



To listen, click the voicemail to open the **Details** pane on the right. You can:

- View details about the caller.
- Send the caller a message via Teams.
- Read the transcript.
- Play or speed up the message.



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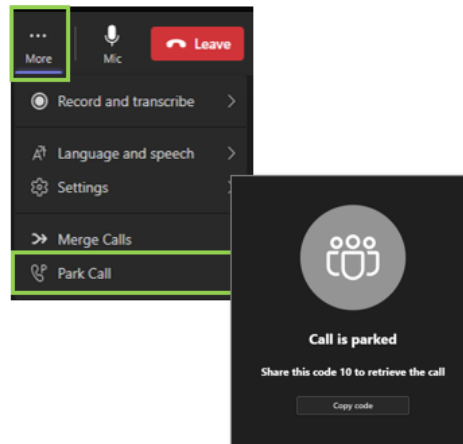
Using Call Park

Parking a call puts the call on hold and provides a code you can provide to another person to retrieve the call.

To Park a call

From an active call, select **More...**

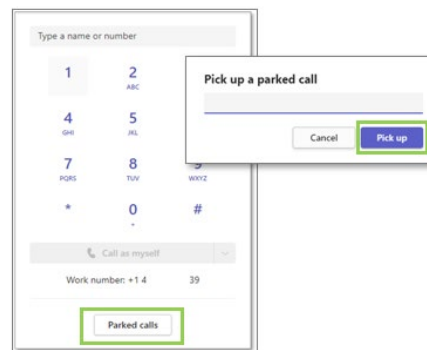
Select **Park Call** to place the call on hold from one device and retrieve it from another device.



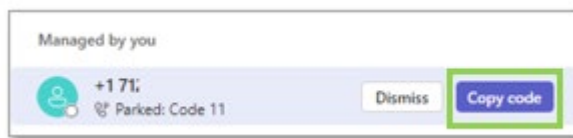
To retrieve a Parked Call

In the **Calls** menu, click **Parked calls** under the dial pad.

Enter the code and click **Pick up**. The call window will automatically open, and the call is active.



If you ever need to go back to a parked call and forgot the code, you will see the call and the **Copy code** button in your call history.



Note: If a parked call is not picked up within several minutes, the number calling will ring back to the line that placed it on park.

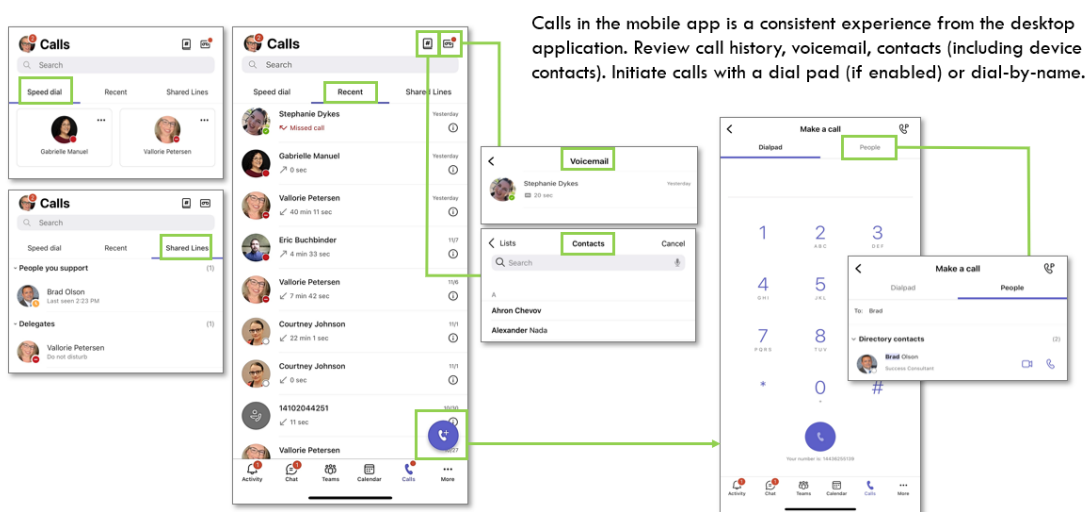
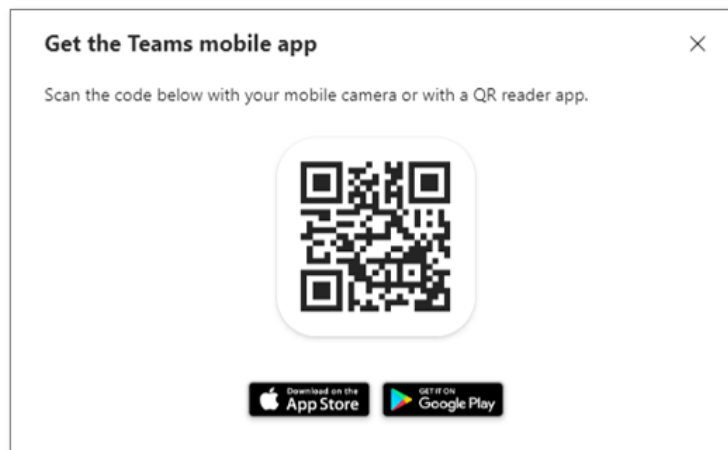


Mobile app

Downloading the mobile app

Scan the provided QR code with your mobile camera or a QR reader. You will be automatically directed to download the Teams mobile app from the app store for your device.

Most importantly, you must use your work credentials to sign in.



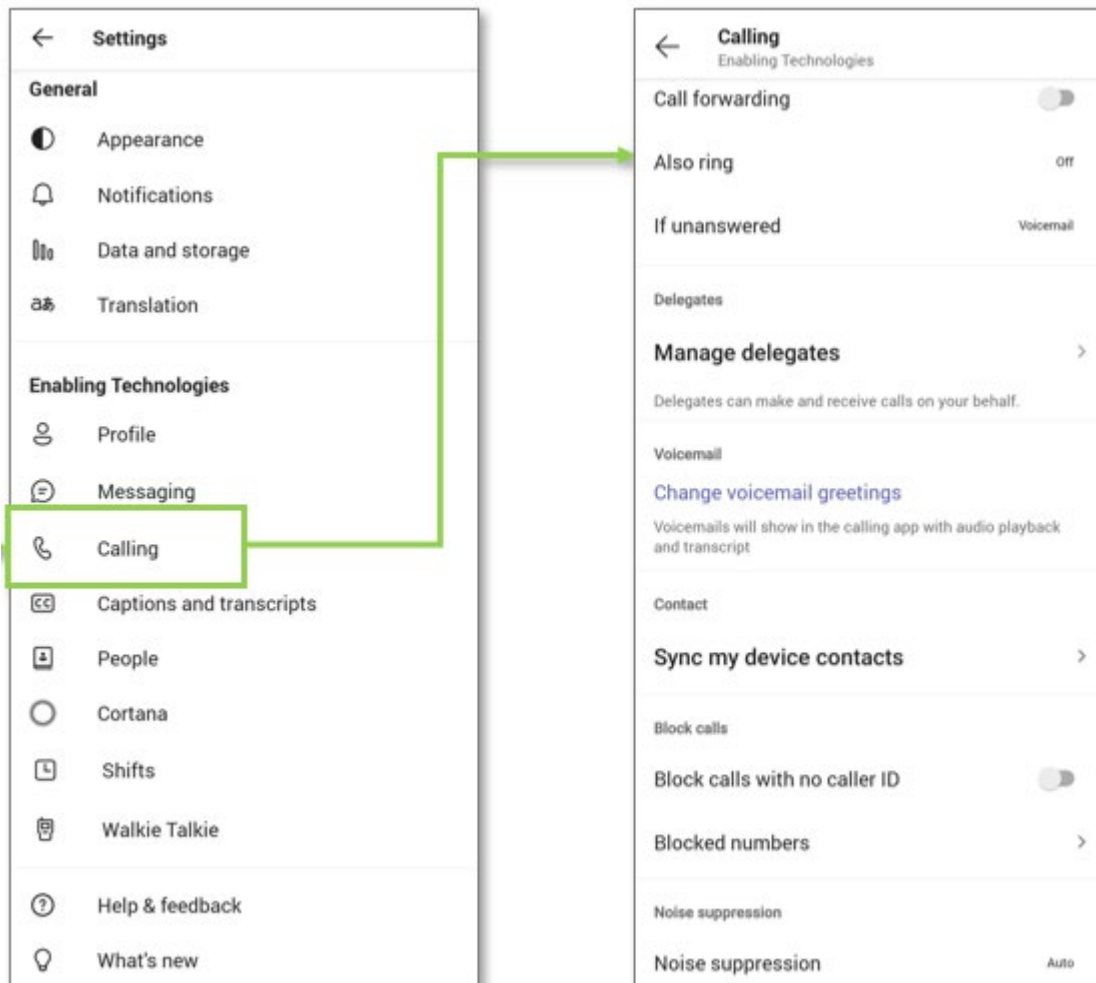
Calls in the mobile app is a consistent experience from the desktop application. Review call history, voicemail, contacts (including device contacts). Initiate calls with a dial pad (if enabled) or dial-by-name.

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
- Simultaneous ringing (Also ring)
- Delegate management
- Voicemail configuration
- Blocked numbers
- Call queues



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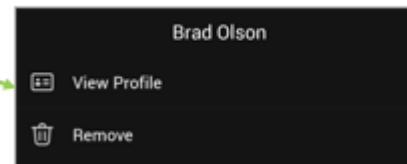
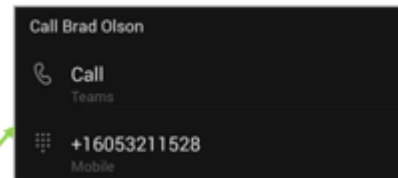
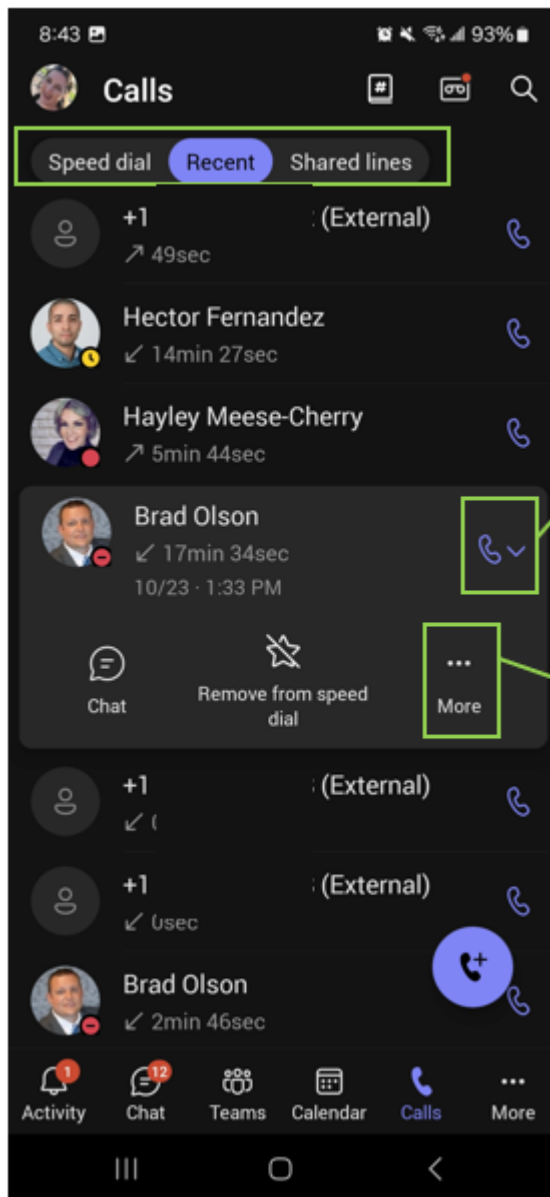
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Mobile app on an Android

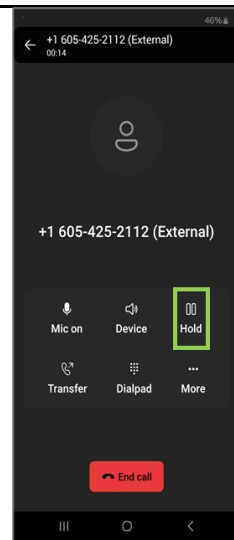
The **Calls** landing screen on an Android device looks similar to the full desktop version. Access speed dial contacts, call history list and call queues by toggling between these options.



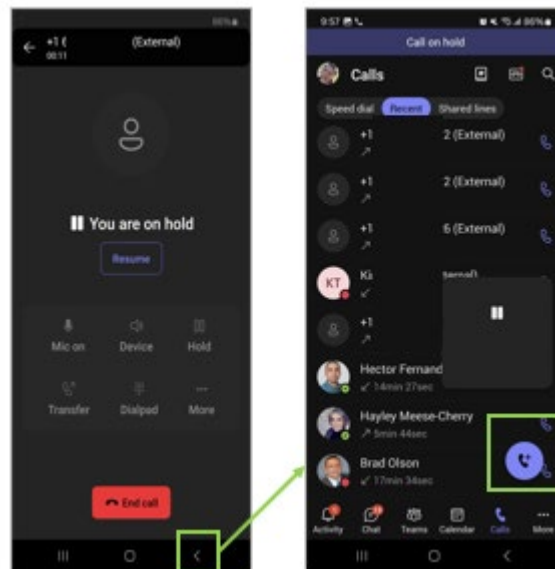
Conference Calls on an Android

Creating a conference call is a little different within the Teams mobile app. On the desktop, you can click on the people icon or use the dial pad. When using the Teams mobile app, use the call merge feature to add more participants to an active call.

First, place the active call on hold.



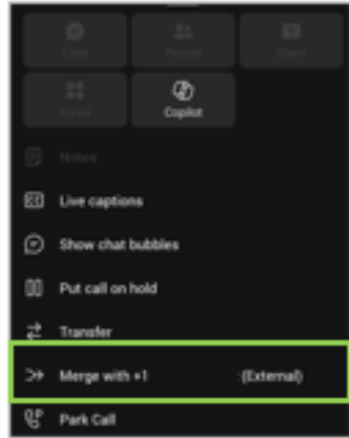
Next, tap the back arrow to return to the **Calls** landing screen. It will move the active call to a small window on the screen. From the **Calls** landing screen, tap the handset + icon in the lower right corner to access the dial pad screen.



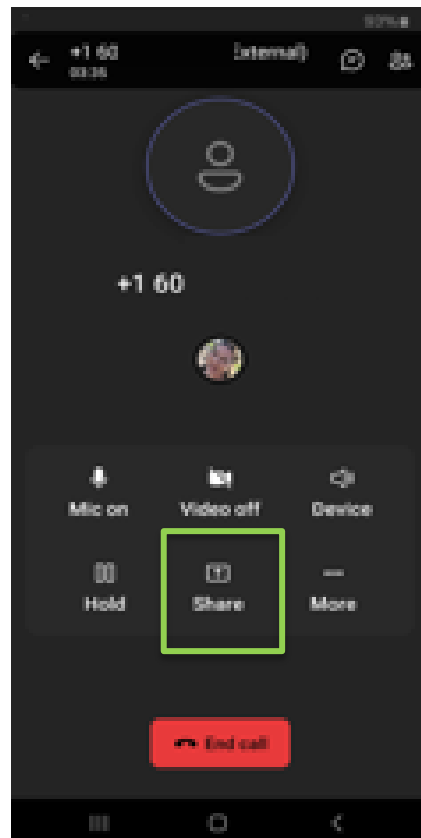
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From the dial pad screen, select someone from your contacts or dial a number. Once the new call is active, tap the More options menu in the active call. Select **Merge with** to combine the calls into a conference call.



Once the calls have been merged, a Share button will appear in the active call menu of the conference call.



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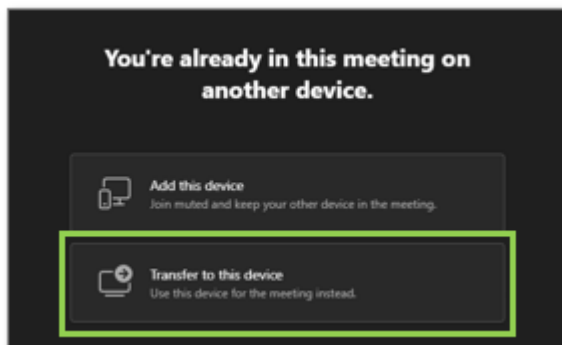
Transferring to or from the mobile app

You can transfer a call between your mobile device and the desktop Teams app anytime.

If you begin a call on the mobile app, you'll see a banner on your desktop Teams that you are on a call with a Join call button.



To take the call on your desktop Teams, select Transfer to this device. You will then make your audio and video selections and join the call.



If you begin on the desktop, you can open the mobile app and click **Join** in the top banner and select **Transfer to this device**.



You'll be prompted to make audio/video selections and then click **Join now** to join the call.



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TEAMS
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Still have a question about Microsoft Teams Phone?

Contact the UIS Service Desk at 303-860-HELP (4357) or email help@cu.edu.



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