Teams Training Script

This is Natasha Lim I am the Training and Communications Lead for the Implementation of Office 365 as a part of the Unified Communications Project and I, along with my training partner Shaun Maclean, will be assisting with the training for Microsoft Teams. First off, there are some brief housekeeping items that I would like to touch on.

1. This session will be recorded and available for on-demand playback
2. To mute/unmute your line press the microphone icon in your call menu
3. To ask a question click on the chat/message icon in your call menu and type your message in the chat box
4. If you would like to dial-in to the meeting, please mute your computer speakers, click the three dots for **More Options** in your call menu, then click show call info for the call in information

Now I’d like to briefly run through the first module in our series of self-paced training on Accessing Microsoft Teams from your DFO desktop device. I will keep this portion brief as the assumption is that if you are viewing this meeting you have access to Teams or are at least in a viewing room with shared access to Teams. ***(Run through slides 2-12 from Teams Training Module 1 – Accessing Teams)***

***(Continue on Slide 13)***

This is an exciting time to be at the intersection of government and technology. For the first time, there are five generations in the workplace – all with different backgrounds and expectations about collaboration tools. So where does Microsoft Teams come in?

Microsoft Teams is a hub for teamwork, which brings together everything a team needs: chat and threaded conversations, meetings with screen and file sharing, content collaboration with the power of Office 365 applications, and the ability to integrate and manage the applications that our operations rely on.

***(Continue on Slide 14)***

Teams can help you…

**Transform workplace collaboration**

Teams brings everything together into a shared workspace where you can chat, meet, create, and make decisions as a team. All your content is organized by team or project, so you are able to stay organized and in the flow of your work, and your files are backed to the Cloud by OneDrive and SharePoint. Teams also allows you to read and edit Office documents right within the context of the project or conversation at hand.

**Streamline departmental processes**

Simplify your workflows by plugging apps and services you already use, INTO Teams. With Teams you can add your favorite applications or websites as channel tabs for fast access and easy referencing. Assign tasks and track deadlines using the integrated **Planner app** which helps you organize and track your work visually.

**Connect everyone on a single platform**

Teams is just as important and effective a tool for a Chief Information Officer or Director, as it is for an Administrative Assistant, or anyone in between. Teams allows us to connect everyone -within the department, across Government of Canada departments, and extended external collaborators, on a single platform backed by the Active Directory.

**Provide enterprise grade security & compliance**

As a part of Microsoft 365, Teams provides us with the security, compliance, and control we need to operate effectively and in alignment with our governance policies surrounding Information Management.

So without further ado let’s jump into the live demo of Teams! ***(Start Teams Demo)***

Right now we are demoing the desktop version of Microsoft Teams and we’re going to walk through some of the great features that Teams has to offer and I’ll pause as we’re going through to see if anyone has any questions. Again, if you do have any questions please enter them in the Meeting Chat which you can do by clicking on the chat/message icon in your call menu and we will save some time at the end to answer any additional questions you may have.

# CHAT

In the Chat window you can connect in smaller groups or 1 in 1 private conversations. This portion of Teams is the most similar to Skype. Skype allowed you to connect chats, call someone, video call someone, or conduct a meeting. The main difference between chats in Teams and chats in Skype, is that chats in Teams are **persistent**. What this means is that all your conversations and conversation histories are saved automatically. With persistent chat, whether you talked with a colleague several days ago, a week ago, or a month ago – you are able to scroll back through the conversation and get caught up on what you’ve previously discussed.

To get started with chat, you’ll have to start a new conversation. There’s a couple ways to do this. At the top of your screen there’s the **Start a New Chat** icon. Once you click this button a new chat window will open. As soon as you start typing the person’s name, it searches through the entire organization pulling from the Active Directory. Once you select the person you want to chat with, if you haven’t chatted with them before it will indicate that you’re starting a new conversation. If you have chatted with them before, it will start at the end of your conversation.

You can also make contact groups if you like to organize your contacts. In the chat panel you can choose to see your recent chats, or your contacts. When you select the **Contacts** tab you’ll automatically have a Favorites group as a default, and you can your favorite contacts to this group. Click on the three dots for **More Options** beside the group name and click **Add a Contact to this Group**. Type in the person’s name and click Add. I like to organize my contacts by projects and teams so I’ve made some additional contact groups. To add a new contact group go to the bottom of the chat panel and click on **Create a New Contact Group**. Enter the new contact group name, click create, and then you can add contacts to the group just like we did before. Now if you click on a contact from here, it will also automatically pull up the conversation just like if you opened the conversation from the **Recent** tab, so you can access the conversation from either tab.

If you hover over one of your messages, you’ll see the three dots for **More Options**. From here you can edit your message. You can also save or translate messages you’ve received into the language you have set for your Teams interface, but you aren’t able to edit them. If you save a message it will notify you that the message has been saved, and you can view your saved messages by clicking on your **Profile *(show Saved option under the Profile menu)***. You’ll also see that if you hover over a message there are emojis which you can use to react to a person’s message instead of typing out a full response. For example, you can like a message by giving the thumb’s up.

In the bottom of the chat window you will also see formatting options for your message. By clicking the **Format** button (A with a paintbrush) you can format the entire message within Teams, so you don’t have to copy paste from a Word document. You can add bullet points, numbers, change font sizes, and even insert tables. Now beside the format button you’ll also see an exclamation point, this is the **Set Delivery Options** button. If a message is very important, click on this button, and you can customize the delivery option on your message from Standard, to Important, or Urgent which will actually notify the recipient every 2 minutes for 20 minutes. There are also different emojis, GIFs and other customizations that you’ll see here ***(show icons at bottom of page)*** but more importantly you can also add attachments.

You can choose to upload from your OneDrive or from your computer. When you upload a file to chat – if the file you’re sharing is within OneDrive it’s just sharing the link to the file in your OneDrive, if the file you’re sharing is from your computer it will upload a copy to your OneDrive and then share the link. Instead of having to go into OneDrive, clicking on share, finding the link, copying it, and messaging it to the appropriate person; you are doing all of these steps at once within Teams. This gives the recipient the ability to edit that file at the same time as you. It’s still your file, it’s still in your OneDrive, you’ve just given the recipient the authorization to edit that file. An important thing to note is that you can share files this way over chat, but only to people within our tenant i.e. if the person is a DFO employee, they can access/open files from your OneDrive, however if they are external to DFO they won’t be able to open the file. To send files to external parties, you have to share the attachment as a post to a channel board that those external parties are team members of as these files are stored in SharePoint, which any member of the team will have access to.

So if we go into a document ***(open document from chat conversation)*** we can actually open and edit the document within Teams. This is what we referenced earlier when we said that Teams integrates all of your Office 365 applications. You don’t have to open up Word as a separate application, you can open it directly from the conversation in Teams. From here you can see if another person is editing the document, where they are in the document, and what changes they are making with all the changes syncing and saving automatically to OneDrive. This eliminates the need for numerous emails being sent back and forth with different versions of the same file. Now if we want to have a conversation with the recipient about the changes we’re making to the file, all we have to do is click on the **Conversation** button at the top of the screen, and we can see the chat window on the side while the file is still open.

Another great feature is, any file that you send over chat, will be saved in the **Files** tab at the top of the chat window for quick and easy reference so that you don’t have to scroll back through the conversation. Now if you share lots of files with someone, and you are consistently working on one document in particular – you can actually pin the file as a tab at the top of the chat window. Click on the **Plus** sign, select the type of file you want to add (Word, Excel, PowerPoint, OneNote etc), and click save. This way you can click directly on the tab and it will open up the file. There is also a version history, so if a colleague makes a change you don’t want, you can revert back to a previous version. Whenever you open the document and your colleague has made changes, it will notify you that your colleague has made changes to the document. Now if you’re the type of person that doesn’t like to make edits within Teams or need the full functionality of the original file application, you can click on the three dots for **More Options** and open the file in the desktop application or in your web browser. It will still sync and save automatically and your colleague will still be able to view your changes, it just opens the document in the desktop client.

Within each chat you also have the option to create a **Group Chat**. At the top of the chat window there are options to make a video call, audio call, share your screen, and **Add People**. If you click on this, you can add as many people as you want to the conversation. Teams will automatically create a new chat window for the group conversation. You can edit the name of the group chat, share files specific to the group, or add specific tabs to customize the group chat. Any messages in a group chat will be seen by all the members of the group chat and any files shared will be editable by all the members of the group chat. Any time you add a fourth person or more to a group chat, it will prompt you to select what extent of chat history you want to include for them. You can select to not include any chat history, include history from the past “X” number of days, or include all chat history. This way, any new chat members can scroll back through the conversation history and get context and quickly caught up. If you’re in a group conversation and you’d really like to get someone’s attention on a particular message, you can **@mention them**. When you do this, the person receives a personal notification in their activity feed, and you will see the @mention symbol beside the message. This is a great feature to keep in mind for when we take a closer look at working in team channels, as your team may have numerous members, so @mentions can be very useful for getting a specific person’s attention.

Are there any questions on the Chat function?

# ACTIVITY

In the Activity tab ***(go to Activity)***, you can see all of your activity in your **Feed**. When someone @mentions you, you can click on the notification and it will bring up the @mention in the context of where it was mentioned – if this was in a chat it will bring up the window, if it was in a channel it will bring up the conversation board. Your activity feed will automatically show you all relevant activity, but you can also **Filter** the type of activities that you’d like to see. You can filter to see all your @mentions, all of your replies, reactions, any missed calls etc. You can also filter to see only your activity.

# MEETINGS

So because we don’t currently have Exchange Online and the Meetings/Calendar app within Teams is not supported with Exchange 2010, we currently cannot embed meetings within a team calendar or schedule meetings directly through Teams. However, we can still have meetings over Teams. You can still hold on the spot meetings through Teams and schedule them through Outlook. So we’ll switch over to Outlook to showcase this ***(open Outlook and demo scheduling a Teams meeting)***. There are multiple ways to schedule a meeting over Teams in Outlook.

* You can do it right from your **Inbox**, by clicking **New Item** then selecting **New Teams Meeting**
* You can do it from your **Calendar**, by clicking **New Teams Meeting**
* Or you can do it from your **Calendar**, by selecting the date and time you want to have the meeting, and clicking **Teams Meeting**

Once you do this it will add the **Join Microsoft Teams Meeting** link. An important thing to note is that you won’t have Telephone Conference Numbers automatically assigned. They will be available if requested and approved via an Application for New Software Request through the IT Service Desk for an additional licensing fee of around $5/month per license. Once you send the invitation out, the recipient will be able to use the link to access the Teams meeting. If the recipient has Teams, it will open a browser window and then launch the meeting directly in Teams. If the recipient doesn’t have Teams, it will launch them into the meeting via their web browser. So whether the recipient has Teams or not, they will still be able to attend the meeting. All of the rest of the meeting parameters will stay the same – you still enter a subject, recipient(s), date and time, and use the scheduling assistant, but the location will automatically populate as a Microsoft Teams Meeting. You can also book a room for the meeting. Essentially, there are still all the same features and functionalities of any other type of meeting, just over Teams. Now we’re going to jump back to Teams and go over the features in meetings ***(go back to Teams Call screen)***.

So when you first join the meeting, you will have the option to join with your camera and microphone on or off. Video conferencing will be available for those who already have video conferencing licensing in Skype for Business and can be made available to those who don’t (if approved) by requesting video conferencing capabilities through the IT Service Desk, however we are not recommending using video conferencing unless necessary due to network latency concerns. This is a great feature because you won’t just be launched into a Teams meeting with your camera/microphone on, you have that option before actually joining the meeting.

Once you’re in the meeting you’ll be able to see all of the participants in the meeting. You can see up to four participants in the background, and more across the bottom of the window. From the **Call Menu** you can also click **Show Participants** to get a full list of all the participants in the meeting. In this view you can choose to **Mute All** if there’s background noise from someone who hasn’t muted their microphone, or scroll through the participants to mute certain individuals. If someone is having difficulty with their audio you can also **Remove Participants** so they can rejoin the meeting. In the Call Menu you’ll also see you’re able to turn your camera on/off, turn your microphone on/off, share your screen, or access the chat for the meeting. Because I’m currently sharing my screen I’m not able to showcase the options there, but you can choose to share your desktop which will share everything on your screen, or specific windows or monitors if you are multi-tasking. The meeting chat is one of my favorite features in Teams, because there is automatically a new chat thread created for the meeting, it has all the functionality of private or group chats we demonstrated earlier, anyone who was invited to the meeting can access the meeting chat whether or not they accepted the invitation, and you can continue to access/add to the chat even after the meeting ***(show Meeting conversation in Chat tab)***. This is where we’ve asked that you write out your questions. An important thing to note is that if the person who scheduled the meeting is outside our tenant i.e. they are external to DFO, you won’t have all of the functionalities that you do in a regular chat, however if they are within DFO you will. Now if you’re in a meeting and you’ve realized that you’ve forgotten to invite someone or they aren’t on the call, instead of going back into Outlook and having to resend the invitation and hope that they see it in time to join, you can click on **Show Participants**, type in their name in the top search bar, and call them into the meeting directly. When you do this it calls the person directly through Teams, and if they choose to accept, it will launch them directly into the meeting. In the **Call Menu** we also have the **More Options** button. There are a couple different options here, such as **Start Video with Blur** which will allow you to blur the background if you’re using video conferencing, and **Turn on Live Captions** which will give you captions on the bottom of your screen in the language you’ve set for your Teams interface for the entire meeting. If the host of the meeting is within our tenant i.e. within DFO, you’ll also be able to **Start Recording** which will start a video/audio recording of the meeting. Once the meeting has finished, you can click Stop Recording, and it will save the recording within Teams backed by Microsoft Stream. Microsoft Stream is a separate application which you can use to view all of your recordings, but it can be accessed through Teams. When you start recording you’ll be able to see that recording has started in the Meeting Chat ***(show meeting chat where meeting recording has started)***, once you’ve finished recording it will say Meeting is Saving, and once it is done if you’re the one who started the recording it will send you an email that your recording is complete and ready for viewing. From Stream, you can download a copy of the meeting or view a transcription of the meeting. Unfortunately, because the transcription services are currently based out of the United States transcription services are only available in English. For meeting recordings, you can share it to anyone within DFO by chat, however you however if they are external to DFO they won’t be able to open the file. To send the recording to external parties, you have to share the recording as a an attachment in a post to a channel board that those external parties are team members of. We will be making this meeting recording available to all of you by including it in the Meeting Chat after the meeting.

Are there any questions on the Meeting function?

# TEAMS

In the Teams tab ***(go to Teams tab)***, you can see all of your teams and channels. An important thing to note about Teams at DFO, is that currently team creation is limited to system admins. So to have a new team created, you must contact the DWS Group Inbox @ DFO.IMTS.DWS-SEN.GIST.MPO@dfo-mpo.gc.ca (which I will send out in the Meeting Chat), eventually you will be able to request the creation of a new team through the IT Service Desk, but currently it must be done through the group inbox. Now teams can be public teams or private teams – so the Digital Workplace (DW)/EM team is a public team, that means anyone within DFO can join; whereas private teams, the team owner can create other owners of that team but only team owners have the ability to add members. So on the side here in your teams panel, we're seeing all of our teams.

Now when we drop down each of these teams, you'll see what are called channels so the channels are what you're going to be working in and those are first specific projects related to that department so you'll see in the Training Demo team we have the General channel which comes as a default to all teams, the Instructor Led Training channel, and the Self-Paced Training channel. In the Digital Workplace (DW) team you’ll see the MS Teams Corner channel, the Office 365 Corner channel, and the OneDrive Corner channel.

Now if we click on one of these channels what you’ll see is a specific conversations window, a specific files window, all for this channel specifically. So any file that I send in here ***(go to Instructor Led Training channel)*** should be related to Instructor Led Training, any conversation that I have in here should also be related to Instructor Led Training – it allows you to organize the content that specific for each project that you're working on.

Now you may wonder – when do we create a team versus creating a channel versus creating an individual chat. So individual chats are simply to eliminate email modifications – if you're a messaging someone with a quick question on a file or you're working with one person on a document, you can use an individual chat. If there's something that you need to have a quick conversation with two or three people about – that’s where a group chat comes in. When you have an official project that you're working on you have an official team that you're working with and you’re going to be sharing files back and forth and communicating with five, six, seven, or twenty people – that’s when you should create a team or channel.

This will also eliminate the number of email notifications you receive, so instead of trying to keep track of the different projects that your team is working on by sending emails, you can put it all in one place. It's really a big project management tool and Office 365 integration tool.

So there are a couple different ways to join a team. Once we have our teams created, we can click on the three dots for **More Options** next to the team, and as the owner I can click on either add member here, or I can click on Manage Team which will bring up the team that I am the owner of and I can click add member this way. From this window you can see the owners of this team and then I can also use this drop-down to see who the members are of this team. Since I am a team owner, I can also change someone's role to make a member an owner or I can make an owner a member. Now the other option I have as an owner, I can go into settings and I can customize the settings for my team. From here I can generate a team code ***(show how to generate team code)***. What this does is once I generate this code, I can actually copy this team code and send it out to different people who I want to join my team and they can take that code they can go to **Join or create a team** and enter the team code ***(show where to join team using code)***.

Now, we're going to go into a channel and we're going to talk a bit about the features that each channel has to offer. So in this channel ***(open Instructor Led Training channel)***, you'll see a post tab a files tab, and a couple other ones that we customize specifically for this channel. So by default every channel comes with posts and files tabs, and every team comes with a general channel to start and then you can add additional channels as projects arise.

In the posts section, this is where you'll be able to send messages very similar to chat, however there are some differences. In channel posts you can **Format** the message to include **Subject Headings** ***(create new post with subject heading)***. Once we click send it's going to post this message in the channel and everyone in the team can reply directly to my message. So instead of sending a totally new message and starting a new conversation, they can simply reply directly to my thread and then I can go through and minimize replies so it's not as cluttered in the post section. You can also attach files just like we did before in chat, but teams functions a bit differently. So when we create a team by default, it's creating a SharePoint site in the background. This is different from chat because chat pulls file data from OneDrive, whereas posts in team channels pull their data from SharePoint. Each team that I create will have a specific SharePoint site for that team. This is why when you want to share files with people external to DFO, you have to post the file in a channel that the external party is a member of instead of attaching the file in a chat.

When we go into the files tab ***(go to Files tab under Instructor Led Training channel)***, we can see all the files for the channel right here and it's all backed and saved through SharePoint. At any point in time we can choose to open SharePoint see the entire SharePoint library, but we don't have to we can access all the files directly through Teams. There are also two new buttons that you didn't see before in the chat window, **New** and **Upload**. You can choose to upload a file for your computer or you can create a brand new Word, Excel or PowerPoint document from scratch directly in Teams. This means you don't have to create it on word on your desktop first, save it to OneDrive, and then upload it – you can create it within Teams. And since it's backed by SharePoint you can create new folders and organize your documents as well. Again, we can click on any of these documents and co-author just like I was showing in the chat window previously we can edit the document the same time, but now everyone on the team is able to open that document at the same time and work on it together – so it's a really great way to keep track of all your changes it'll all save and sync and there is still version history on the document because it is backed by SharePoint, but now you're editing with everyone at the exact same time. And again, we can pin important tabs, so if we go back up here, we can choose to pin an Excel spreadsheet, OneNote or websites – like GCdocs. A lot of people have been asking how Teams is going to integrate with GCdocs, and unfortunately the two are not linked, however something I’ve found that works well to help me manage my information is I’ve actually added the relevant GCdocs folder link as a tab in my channels ***(open Instructor Led Training channel’s GCdocs folder)***.

Are there any questions on the functions in Teams?

PLANNER
Now we’re going to take a quick look at Planner. If we go into the Instructor Led Training Plan ***(open Training Demo General channel’s planner)*** this is a plan created through planner, which is a separate Microsoft application that has been integrated in Teams. Planner is used create plans and manage projects with your team, so if you have a project coming up and it has 50 or 60 different tasks, you can create a plan for that project and set all of the tasks by bucket. There's automatically a To-do section started, but then you can add different sections like Training Tracking or Communications and have tasks listed for each section.

You can also go through and assign specific people to these tasks so that they know that it's their job or responsibility, instead of everyone creating their own individual to-do lists and checking in with them daily or weekly. You can put all the tasks for this project in the team’s planner, assign people to it, and based on their progress they can update whether they haven't started the task, whether it's in progress, or the or it's been completed. Again there are tons of customizations. You can set priority levels for a task, add notes, and even add the relevant attachments.

SEARCH & COMMAND
Now we’re going to take a look at some of the features of the Search/Command bar. Some people might call it a search bar, but it's way more expansive than people think it is. If we go through I can search for keywords, so for example training ***(type training into the search/command bar)***, Teams is going to search through all of my messages, all my people, and all of my files. Once I hit enter, I can actually see the results and filter what the results that I get – so I can filter who the message might be from, I can filter where the message might be housed so whether it's in chat or channel, and there's many more filters that I can go through as well such as the date range or a specific channel based on a team.

Now if I were to search for a specific person say, for example Shaun ***(search for Shaun in Search/Command bar)***, you'll see as soon as I start typing in the search bar it's searching through everyone in DFO. Once I find the right person I can click on them, and because I already have a conversation started with Shaun it will bring up that conversation. I can also just Search for Shaun and hit enter – when I do this Teams is going to search through all the messages that contain Shaun’s name or I’ve had with Shaun. If I go to the **People** tab I can go to people and Teams will show me everyone in DFO with the name Shaun and again files – Teams will show me all the files that Shaun has shared or that have the keyword Shaun in them.

Now what if I'm working on a file, but I realized that I need to send a message to Shaun and I don’t want to leave the window I’m working in. Instead of switching back to chat, losing the file that I'm working on, and I'm losing my place; all I have to do is type the **@** symbol in the **Search/Command bar** and type Shaun's name, select him, and now I can type a message to Shaun ***(type in a brief message to Shaun)***. Once I hit Enter/click the arrow the message will be sent to Shaun and I didn't have to leave the current window I was working in. There are also different commands that you can use. If you type the backslash key **/** into the **Search/Command Bar *(type / into Search/Command bar)***, Teams will show me a list of different commands I can execute. Just another quick and easy way to navigate through Teams and make changes quickly and easily.

PROFILE & SETTINGS
You also have a status within teams ***(hover over Status in Profile menu)***. As you can see, currently my status is set to Presenting. Anyone in Teams can read this and see that I'm currently sharing my screen and presenting. I can also go through and manually set my status to: available, busy, be right back, or appear away.

Now if I go down to settings ***(go into settings)***, I can customize my notifications and what I see in Teams. I highly recommend you look through this and customize your notifications to your preferences. One of my favorites is the Meeting Started notification. If you're someone who's constantly in back meetings, Teams will actually give you a notification when someone has started your next meeting. That way you know you don't have to drop off your meeting if it's running over, until the next meeting has officially started and someone has joined. This will give you a little banner pop-up notification on the side. I also really like to use Dark theme, which I have turned off for this training session for continuity, but I find it easier on my eyes.

HELP
Last but certainly not least, for all the features that we discussed – if you need more information there's a **Help** tab at the bottom left ***(open Help tab)***. There’s tons of different topics within teams, there’s also a training tab which will give you one to three minute videos on topics, and there's also a what's new tab that has information on all the recent Teams updates so you can quickly get up to speed with new Teams features.

For anyone interested, there is also a Teams mobile application. It has all the features and functionalities that you’ve seen here – you can answer chats on the go, you can join into your meetings and launch you them in the Teams mobile app, and you can see all of your teams and get caught up to speed on any notifications that you missed or any file changes right from your phone.

So with that, let’s open it up to questions.