Microsoft Teams

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Section 1 – Teams Overview

Video: Teams Overview

Deb: Hello everyone, I hope you're having a wonderful day from wherever you're joining us in the world today. My name is Deb, and I'm Microsoft IT trainer. And, I am very excited to be hosting and guiding you through this training course on Microsoft Teams.

Now, I've been using Microsoft products for about 25 years now. And over that time, I've really got to see how each application has evolved from around the mid-90s until the present day. And in comparison to other applications, Teams is a fairly new addition to the Microsoft suite of applications. But, a very welcomed one at that.

With the introduction of Office 365 came Skype, a communications tool that allowed you to chat and make calls with colleagues. And really, the evolution of Skype is what brings us now to Teams. Teams integrates all of the functionality you loved in Skype, and adds a whole host of collaboration features and utilities to really supercharge Teamwork and collaboration. Now, if you've never used Skype, Teams, or maybe even Office 365 before, I'm going to start out by just giving you some information about Teams and why it might be useful for you.

Microsoft Teams is a chat-based collaboration tool available from Microsoft. It's a hub for Teamwork that fuses group chat, video and audio meetings, file sharing, and other collaboration utilities to really bring people together no matter where they are located. As part of Office 365, Teams is fully integrated with all of the Microsoft Office suite of applications, making it really simple to do things like share files, folders, content, and really supercharge how you're working with all of your colleagues around the world.

Microsoft Teams is available to Office 365 commercial customers with one of the following plans, Office 365 Business Premium, Business Essentials, and Enterprise Versions E1, E3, and E5. Microsoft Teams is a great way to stay connected to colleagues within your organization. And it also enables you to work in collaboration with Team Members who work remotely or in different locations. So with that said, let's look at some of the main features of Microsoft Teams.

Teams is predominantly known for chat. It provides a modern conversation experience using persistent and threaded chats to keep everyone engaged in the conversation. You can do things like reply to comments, like comments, share files and videos, you can @mention others, and also send private messages. You can also add a fun element into your conversations using the inbuilt emojis, stickers, gifs and custom means. You can also participate in voice and video conferences, taking your meetings completely online.

You can share your Desktop and your applications with meeting participants and collaborate on documents. Teams is essentially a hub for Teamwork. It pulls through the full capabilities of Office 365. So applications like Word, Excel, PowerPoint, SharePoint, OneNote, Planner, Delve, and Power BI are all integrated into Teams so everyone has all of the information and tools they need when they need them.

For example, you can create a document in Word, you can save it to your OneDrive cloud storage, and then you can share it easily with others in Teams. Everything is fully integrated making Teams a true hub for seamless Teamwork. You can also customize your Team. Not all Teams are created equal and not all Teams are the same. You can customize your Team to suit your particular needs. For example, you may wish to add tabs to access frequently used documents and cloud services.

Finally Microsoft Teams is secure. Data is encrypted in transit and at rest, and Microsoft Teams supports all major compliance standards. And it's hosted out of Microsoft's network of data centers, automatically provisioned within Office 365, and managed centrally.

So sit back, relax, grab that cup of coffee, and join me to explore the wonderful world of Teams. So if you're ready, let's get started.

Video: Course Overview

Deb: Hi everyone, and welcome to this first introductory module, where I really just want to set your expectations and also give you some details with regards to the structure of this training course and what to expect.

Now, this course is divided down into eight sections. Each section contains a number of modules related to the section topic with a total of 35 modules in the course. And each module contains a demo video, which is usually 5 to 10 minutes in length. Now, the videos are live demos using the E3 version of Teams with a Training account. So it's worth noting that the information contained in these videos is not live. I'm using a demo account that I've set up specifically for this training course. So, any account or email address information that you see, is not valid.

So what I'm really trying to say here is please don't attempt to contact us through any of these email accounts. Now, where possible, my aim is to give you a good idea of what it's like to work in Teams within an organization. But please be aware you may have certain Settings that differ to mine depending on how your Administrator has set up Teams for your company. There will also be questions to test your knowledge as part of this course. And finally, keep an eye out for the pro-tip indicator. These are going to pop up throughout the course with additional helpful tips and efficiency tricks.

So, Section 1 provides an introduction to Teams. It's going to provide you with information relating to the structure of this course, how to access and download Teams, how to navigate the Teams dashboard, and also how to access those valuable Help resources and training.

In Section 2, we'll create a new public and private Team and add both internal and external Team Members. We'll explore all of the components of the Chat facility, we'll start conversations, reply to posts, and add interest with emojis, gifs, custom memes and images. We'll see how to express thanks using likes and praise, and also bookmark messages of importance to us. We'll organize all of our conversations using Channels, and also see how to join existing Teams set up by others. And finally, in this section, we will learn how to have targeted conversations using @mentions and the private messaging feature.

In Section 3, we will progress onto video and audio conferencing. I'm going to show you how to initiate a video or audio call on demand, and also how to schedule a meeting for a later date. We'll explore all of the rich in-meeting features such as adding other participants mid call, sharing files, screen sharing, and also utilizing meeting notes. And we'll finish up by looking at how you can record a meeting and make it available to other meeting participants.

In Section 4, we'll look at some additional features, you may want to try to expand the capability of Teams. I'll guide you through how to add additional apps into Teams such as Wiki pages, Evernote, YouTube videos, and we'll looking at utilizing Bots and Connectors to keep your Team current by delivering frequently used content and service updates directly into a Channel. And I'm also going to show you how to customize your Channel tabs so frequently used files and information is easily accessible.

In Section 5, we'll move on to the wonderful world of searching in Teams. We're going to run some very basic searches across all Teams and then we're going to get a little more specific and search within conversations for messages, files, or people. I'm also going to show you how to utilize the Command box to trigger quick commands, which will make action and Tasks quick and simple.

In Section 6, we'll delve into the back end and take a look at your User Settings. And also explore the Administration Settings in order to set up Teams so that it suits how you work. And in the final working Section, I will speak to you a little bit about the Teams Mobile App. I'll show you where to go to download it and I'll walk you through some of the basics of using the App.

So, all that's really left before we dive into the content are a few basic checks to ensure the smooth running of this course. As this course is video-led, please ensure that you have a good WiFi or fixed cable internet connection. This will just really ensure smooth playback and cut down on any buffering issues.

Now, I will say that if you do experience buffering due to a slow connection, it is worth pausing the video and wait a couple of minutes before restarting. However, if you have a fairly stable connection, you should have no problems working through the videos. Now following along with me in real time is not absolutely necessary. But if you would like to follow the demo videos, you will need to ensure that you have access to Teams either the Online Version in Office 365, or Microsoft 365, as it's going to be known very soon, or the Desktop Application.

Now the majority of this course will be demoed in the Online Version. But if you would like to download the Teams Desktop App to your PC, you will find instruction on how to do this in the module 01-03, How to access Teams. So, make sure that you check that out next. And that is pretty much it, we are ready to go. So, grab yourself a drink, find a comfortable spot, sit back and join me in the next module, where we're going to start by learning how to download and access Microsoft Teams.

Video: Accessing Teams

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. In this module, I'm really just gonna walk you through the process of how you access Teams. And also how you can download the Desktop Version of Teams, if you want to. Now, as I mentioned in the first module Teams is available through Office 365, or Microsoft 365, as it's going to be known very soon. And it's available via some of the Business packages.

So you can see here on this screen, I'm just on the Office Products page. I'm clicked in the Business tab. And you can see here, the Business Premium and the Business Essentials Office 365 package, both have Teams included. There are also a couple of Enterprise versions. So again, if you're a large organization, you may have an Enterprise version of Office 365. And if we jump into the Enterprise versions, you'll see here that the version E1, E3, and E5, those also include Teams.

So the first thing I would make sure is that you have the correct subscription. If you have a Home subscription, you may find that you don't actually have access to Teams. So the Teams application is essentially designed for people who work in larger organizations. So, my first tip here is just to make sure that you have a subscription to a Microsoft 365 package that does include Teams. So let's close down this window. Let's jump to Bing, and all we need to do to log into Microsoft 365 is type in office.com. And that's gonna take you to your Office Home page, this is where you can log into Microsoft 365.

Now I've logged in previously, so it's giving me a little welcome back message. So I'm just going to click on Sign in. So you will then be asked to enter in your password for the email address that you're using in Microsoft 365, click the Sign in button, and it's going to jump you to your Microsoft 365 Home dashboard. Now, if you already use this portal, this is all going to look fairly familiar to you.

What you'll see is underneath where it says Good afternoon, I have a list of all of my applications that I have access to. And you'll see that one of them is Microsoft Teams. Now if I click on this Teams icon, it's going to open up a brand new browser window, it's going to initialize Teams, and it's going to jump me straight into the application. So, this is essentially the Online Version of Teams.

Now, as I mentioned, you can also download a Desktop Version. And it's perfectly fine to have both. There may be some occasions where you prefer to work in the Desktop Version, there may be other occasions where you prefer the convenience of working Online. So for example, if you're out of the office, if you're away, it might be easier for you to just jump in to Microsoft 365 and access Teams that way.

Now, if this is the first time you're logging in, you're going to get this screen here, which is going to give you the opportunity to download the Windows App. So all you need to do is say get the Windows App. And you can see now it's downloading that Teams.exe file. So we'll just wait for that to finish. And then I'm going to click on it to run it. And it's now going to go through the process of installing the Desktop application onto my PC. And I kind of get a little status of how far it's progressed in my Status bar at the bottom. So there we go, very quick. It's now finished, and it's now loading Microsoft Teams. And there we go.

So essentially, I am now in the Desktop Version. And remember another little pro-tip just here, if you want to make sure that your Teams Desktop application is always pinned to this taskbar. And what I mean by that is currently if I was to close down Teams, the icon is going to disappear from the Status bar. Now if you utilize Teams fairly frequently, you might want to pin that. So a quick way to do it is to right click on the icon and select Pin to taskbar.

Now I'm actually going to close down the Desktop Version. I'm going to close down this window, and we're just going to jump into the Online Version as well. So I'm going to click on Teams again. And now it's jumped me straight into the Online Version. So I'm working away within Microsoft 365.

Now one thing you'll notice with the Browser Version that we're in now, and also the Desktop Version is that they are pretty much exactly the same. So you definitely don't have to download that Desktop App if you don't want to. You can perfectly happily work away in the Online Version. So, the choice is really up to you. But there you go. Hopefully that’s shown you how simple it is just to access Teams via your browser and also download that Desktop application. That's all for this module, I will see you in the next one.

Video: Overview of the Teams Dashboard

Deb: Hello everyone, and welcome back to my course on Microsoft Teams. In this module, I'm just going to give you a quick tour around the main Teams Home screen, or the Dashboard, as I like to call it. And the aim of this module really is just to get you comfortable, get you familiar with all the different elements and sections that you have within Teams, so that you have a solid foundation from which to build your skills.

Now, the Teams dashboard as a whole isn't too complicated, it's not overly complex. We don't have lots of things like ribbons like we do in a lot of the other Microsoft applications. But there's probably some things in here which you aren't 100% sure of. So let's take a look at those. Now, let's start at the top with this bar, we have running across the top, this kind of purple-y gray bar, in the top left-hand corner, you'll see that you have this series of nine little dots.

Now this is actually called the App launcher. And this helps you navigate to other parts of Microsoft 365. So if at any point, I want to jump back to my Outlook email, or maybe I want to create a Word document, or possibly even upload something into OneDrive, I can very easily click on this App launcher and jump back to whichever part of Microsoft 365 that I need to. So don't forget about that, you'll see it in the top left-hand corner, whenever you're working in Microsoft 365.

We then have a little icon, and if we hover over this, it says New chat. So this allows you to start a new chat with your Team or a particular person from wherever you are in Teams. So we're going to come back to that in a moment. We then have our Search bar. So this is a universal Search bar, which will search across everything in Teams. And again, we have a whole section on searching so I'm going to leave that for now.

And then all the way over on the right-hand side, you can see my little picture, there's a green circle on top of my picture, which lets everybody know that I'm available. And if I click on my picture, you can see I have some further options in a drop down menu underneath that. So if I wanted to, I could choose to change my picture, I can set my availability status. So currently, I'm available, I’m working, I'm able to take chats, phone calls, all of those kinds of things. So I'm happy with my status staying on Available.

However, I do have lots of other different statuses in here, which I could choose to set it to. So for example, if I'm about to run off into a meeting, I could set my status to Busy so people know not to contact me. And it's also worth noting that if you do have a meeting scheduled into your Outlook Calendar, then your status will automatically be marked as Busy as soon as that meeting starts. Do not disturb is slightly different in the fact that it will block all communication.

So if you really don't want to be distracted, so maybe you're working on something really important and you don't want anybody to distract you with any chat messages, conversations, phone calls, video calls, anything like that, if you set your status to Do not disturb, you won't receive anything. The way that I use this is that if I'm hosting a webinar, a training session, I really don't want anything popping up on my screen when I'm doing that. So I will always set my status to Do not disturb.

You then have a Be right back option and also an Appear away. A little bit deceptive, you might still be at your desk but you want to appear away to your colleagues. So, feel free to set any of those. You also have a Status message that you can set in there. So if you want to add a little bit more detail as to where you are or what you're doing, you can definitely do that as well. And then some of these other things in here, Saved I'm going to go through with you. I'm also going to speak to you more later about Settings.

And then we have some information about Keyboard shortcuts. Now this is always a really useful one for people who like to use Keyboard shortcuts. You can jump into here and you can see all of the different Keyboard shortcuts that are available in Teams. So we have some really useful ones here particularly for navigating, doing things like opening chats, opening calendars, and also messaging. So if you quickly want to compose a message, if you type in C, then that will allow you to do that. So if you are a lover of Keyboard shortcuts, and they do help you work a lot more efficiently, it might be worth jotting down a few of these for use next time you're working in Teams.

And then underneath that we have an About section. And we also have opportunities to again download the Desktop application or download the Mobile application. So that is Teams for Mobile, which we'll be discussing in Section 8. So, quite a bit in that drop down menu underneath your profile picture. Then underneath there, we have three dots, which gives us More Options. And again, we're going to go through all of these as we go through the course. And you can also see here I have something which says Org-wide.

Now, that's because I'm currently clicked in a Team that I've created. So if you cast your eyes over to the right-hand side, you can see here it says Your Teams and then I have my Team called Train IT Now. I've then created three different Channels underneath this Team. Now when I created this Team, I set the settings so that it was an Org-wide Team. And that basically means that everyone in my organization will automatically be added to this particular Team.

Now I'm going to speak about this a little bit more when we get on to the creating a new Team option. But just be aware that whatever Team type you create, that's going to be displayed in the top right-hand corner.

In the middle here, this is where all the action happens. So whatever you're clicked on in the left-hand side is going to display in this area in the middle. And you can see above that we have various different tabs, and a plus sign to add more tabs if we want to. And again, all of these things we're going to cover in detail when we get to that specific section. Now, as I said, all of your Teams will be listed in this Teams panel, and you'll also be able to see all of the Channels underneath your Team.

Now if you get to the stage where you have lots and lots of different Teams and lots and lots of different Channels, you may want to start utilizing the Collapse and Expand buttons in order to make that area a little bit cleaner, and not as confusing and cluttered. And then finally, on the left-hand side, we have all of our different main sections or main parts of Teams. And you can see the top two there; Activity and Chat, currently have a little red number one next to them.

So that means that I have a new chat message, and it's also registering something as new activity. So let's click on the top one. And you can see here I get my Activity feed. So this area basically shows you all of the activity in essentially like a news feed. So every time somebody @mentions you or direct something towards you, it's going to appear as a little alert in this Activity area. And you can see here, I've been alerted to the fact that Adam has @mentioned me in a conversation we were having earlier.

Underneath Activity, we have the Chat area. So again, this is where chats happen, conversations happen. And again, currently, I just have a conversation between myself and Adam, where we've been talking about sales presentation. And again, you might have lots and lots of different chats going on in here with lots of different types of people. We then have the Teams area underneath. So this is where we were, it's going to list all of the Teams you have access to.

You have a Calendar for your Team. So this can be particularly useful if your Team is working on a project and you have lots of things scheduled in. And you also notice in the top right-hand corner, you can create new meetings from here as well. And that can either be a video meeting, or an audio meeting. Next we have Calls. So this is where you can really set up and manage any calls and also see things like your Call history and any Contacts that you have.

And finally, we have a Files area. Files will show you your most important files and files that you've worked on recently. And as files are populated in this list, you'll see them arranged in the following categories. So we have Microsoft Teams, and this will show all of the documents that have been created or edited recently, within your favorite Channels. You also might see in this views area, a Downloads option. And that will show a list of the files that you downloaded from Teams. Now I haven't done that yet, hence why I don't have that little folder.

And then finally you have a Cloud storage section. And this is going to show you all of the different Cloud storage services that you've connected to Teams. And you can then click on your Cloud storage in order to browse through and see those files. And you'll see a button at the bottom if you want to add your OneDrive or if you have multiple OneDrive accounts, you can add them all into here.

Underneath Files we have these three dots and if I click this is where you can go to extend the capabilities of Teams by adding more Apps, more productivity features to make Teams really useful to you. And then finally at the bottom, we have a few more icons, we have an Apps area. And this gives you a full list of all of the different Apps that you can add into Teams to make it more interactive, make it more conducive to the way that you work, and really supercharge how you work with Teams.

There's also a really comprehensive Help area where you have numerous different topics to explore. And we're actually going to cover this in a bit more detail in the next module so I'm going to leave this for now.

And then finally, at the bottom, you have a Download button. So this is another area where you can go to to download that Desktop App. So we've seen it in a few places now. We saw it when we first logged in, we have this button in this menu panel, and then if you remember when we clicked on our profile picture, there was also an opportunity to download the Desktop App from there as well. So, three different places.

And with regards to the actual interface or the dashboard, that's pretty much it. Everything we're going to do is contained within these different areas. So, I thought it would be very useful just to give you a quick run through, show you the different elements of the screen so that you have a good foundation to build your skills across the following modules. That's it for this module, I will see you in the next one.

Video: Getting Help

Deb: Hello everyone, welcome back to our course on Microsoft Teams. We're down into the last module of Section 1. And this has very much been an introductory section. So, the real work starts in Section 2.

And really, just to finish off this section, I just wanted to very quickly highlight to you where you can go if you require help or further training, or you're not sure how to do something. And we briefly touched on this in the previous module when I was showing you Navigation. But if you remember, in the Menu bar on the left-hand side towards the bottom, you have a Help option.

Now when we click on Help, we have a few different things that we could select. So everything above the line is an area you can go to to get some kind of help. So let's jump into the first one, which is Topics. Now this is something that I really love about Teams, I think the Help section in Teams is fantastic. It's divided down very logically, it's really easy to find things, and it's full of videos and screenshots which really help you understand what you're doing.

Now, it might be that you just want to have a little browse through, see if anything takes your eye. Or it might be that you've been told that maybe you have to set up a meeting or add something to the Calendar or do a video call, and you're really not sure how to do that. So if you're looking for something a little bit more targeted, you do have a Search bar at the top here as well. So you can type in exactly what you're looking for, and it will pull back all of those Help topics. So if we just briefly scroll down here, you'll see we have some of the more popular things you might want to do.

So organizing a meetup in Teams. It's going to show you how you can host Live events, how you can plan a meeting, all of those kinds of things. And then we have some further links to other Help topics for Admins. We have links to the popular topics, and we have some general sections that you can browse through.

Now, as I said, if you have been told that you need to do something very specific, you can click in the Help bar at the top here, and just type in what it is. So let's just say create a meeting and hit Enter. It's going to go away, and it's going to pull you back all of the topics related to that. So I can see here we've got Schedule a meeting, Create an instant meeting. So it really depends what you're looking to do. But if we click on Schedule a meeting, it then very nicely takes you through all of the instructions in order to be able to execute that task. So, a really nice little feature.

Now you'll also see aside from Topics, if we now look at it, this menu running across the top, we have Training. This is full of different training videos, which are just going to walk you through different processes. So again, if you are very new to Teams, I would always jump into here and possibly go through some of these videos to give yourself a little bit more of a level of understanding. Now if I just click on one of these links, you can see it's very straightforward, you get your video, and then you get a little bit of information at the bottom as well.

And finally, in our Help area, we have a What's new section. So anybody who's used Microsoft products for any length of time will know that they are always changing things which can be great, but can also be a little bit frustrating because things appear to be changing all the time. Just as you've got the hang of one thing, it changes to something else. So I always like to check this area periodically, because it will give you the latest updates to Teams, and exactly what's been changed. So I can see here that on April the 10th, so we're talking about five days ago now, you can see they added an option for meeting organizers to end the meeting for all participants.

Now it's not something huge, but it's something that's worth knowing. So as I said, I always like to do this on a Friday, I'll have a quick look and see what's been changed, see if I need to update any of my notes. And finally, just to reiterate, if you are somebody who likes to use Keyboard shortcuts when you're working in applications, do remember that when you click on your profile picture, you have that option to display all of those Keyboard shortcuts. So, that's a helpful little pop out box as well for you.

But with regards to Help, that's pretty much it, a very comprehensive Help area. We are now done with Section 1 and we're going to move into Section 2 and really start doing some work in Teams. So, please join me for that.

Section 2 – Create a Team

Video: Create a Team

Deb: Hello everyone, and welcome back to my course on Microsoft Teams. Section 1 is done; it is out of the way. We are now kicking off with Section 2. And in this section, we're really going to explore all of the elements of creating a Team and starting conversations. So, creating a Team is really the fundamental first step when it comes to working in Teams. Now, you'll see that currently, in that left-hand menu bar, I'm clicked on the Teams icon.

Now this is where it will display any Teams that you've either created yourself or Teams that you've joined. So currently, I just have one Team, it's called Train IT Now. I created this Team, and I also created three separate Channels underneath my Team. Now we're going to talk more about Channels in other modules. But in this module, I really just want to focus on how you create a new Team, and also how you can add members to that Team, whether they are internal within your organization, or external members. So, let's start out with creating a Team from scratch.

If you jump onto this page, what you'll see is at the bottom, you have a little link here that says Join or create a Team. So, this seems like a good place to start. Let's click it. And here we go, we now have two different options; we can create a Team, or we can join a Team using a code. Now in this particular module, we're all about creating a Team, so I'm going to select Create Team. Now again, we're going through this sort of wizard style dialog box, we have two options, we can build a Team from scratch, or we can create a Team from an existing Microsoft or Office 365 group.

Now, if you've never come across Office 365 groups before, they're sort of similar to Teams in a way, it's a group that you can set up and you can do it from within your Outlook, you can add people to that group, and you can share things amongst those people. So what it's saying here is if you already have a group in Office 365, you could use that as the basis for your new Team.

So, when I might use that is if I have a group that I've created in my Outlook, and maybe I've added 10 different people to it, 10 people who are working on a specific project, instead of starting or creating a new Team from scratch, if I want a very similar Team, I could build off of that Office 365 group that I already have. It's going to cut down on the amount of work I need to do.

Now in this case, I'm going to build a Team from scratch, you then need to specify what kind of Team this is going to be. And if you remember in a previous module, I did briefly talk about this. The Team that I already have created, so my Train IT Now Team, I created that as an Org-wide Team. And you'll see the Org-wide is one of the options that we have here. So what that basically means is that everyone in the organization automatically joins. So, nobody has to be invited, I don't have to add members, it's a Team that everyone is automatically a part of if they are within my organization.

So essentially, if they share the same domain, now we do have two other options. We have Private and we have Public. Now with a Private Team, people need permission to join. So Private Teams can only be joined if the Team owner adds them to that particular Team. Private Teams also can't be searched for unless you've made that Team discoverable. So if you want somebody to be able to find the Team within Teams, but then request permission to join, then you need to make sure the Private Team is discoverable otherwise, it won't even appear in the Search results.

Public Teams, on the other hand, are visible to everyone, and they can be joined without getting the approval from the Team owner. So again, which one of these you select is really determined by the kind of Team that you're creating and the kind of work you're going to be doing within those Team Channels. Now in this example, we're going to select Public and I now need to give my Team a name. So, I'm going to call this Team Northwind Traders and you can always add a description.

Once you're happy with it, click on the Create button. It goes away and it creates the Team. And you can just see in the screen behind it has actually created that Team and added it to my Teams list. But I'm now being asked to add members to Northwind Traders. And it says; "Start typing a name distribution list or mail enabled security group to add to your Team". So, I'm going to add two of my Team members to this Team.

So the first person I'm going to add is Adam. And you can see that because he's part of my organization, he automatically pops up in my list. I'm also going to add Ben, and those are the only two people that I'm going to add at this stage. And I'm going to click the Add button.

So now I have both of those listed as members. And you can see you do get the option to bump up the privileges for one or both of these people. So I could make them both owners if I wanted to, which means they have full access to execute Tasks, Admin Tasks on this particular Team. Now at the moment, I'm happy with keeping them both as members. And I'm going to say Close. And there we go, I very quickly created a new Team. And I can now see that in my Teams list. What you'll also notice is that Teams has automatically created a Channel for me.

So, General is a Channel that will be created every single time you create a Team. Now you don't have to keep this Channel, you can go in you can delete it, you can rename it to something more useful if you want to, but it is quite a nice starting points. Now just so you have an idea as to what happens on the other side, both Adam and Ben will receive an alert in their Activity area, which will let them know that I have added them to this new Team.

And, they will also both see that Northwind Traders Team appear in their Teams list, just like it is in mine. So, they can then jump in, start having conversations, meetings, sharing files. So, very, very straightforward.

Another thing to note is that now I've set up this particular Team, if you look up in the right-hand corner, you can see that it's telling me that this is an organization Channel, content is accessible to everyone in your organization. And that's because I set this up as a Public Team. Now with each Team you create, you have these three dots next to your Team, which will give you some more options in a drop down list. And there are lots of really, really useful things in here. And we're going to go through a lot of these in the following modules.

But for now, I just want to show you again, very quickly how to create a different type of Team, we're going to create a Private Team this time. So, I'm going to create another Team. But this one's going to be slightly different, it's going to be a Private Team. I'm going to show you how you can again, add internal members, but also how you can add guests or external members outside of your organization. So let's jump back down to Join or create a Team.

We're going to say Create Team. I'm going to build a Team from scratch. And it's going to be a Private Team. I'm going to call it Leadership Team, and I'm not going to add a description at this point, and I'm going to say Create. You can see that Team has been created just behind and it's now asking me to add members to Leadership Team. So again, I'm going to add Adam who is within my organization, and also Ben who is also within my organization. But now what happens if I want to add someone outside of my organization? So, I'm just going to use an old email address of mine.

I'm going to say Add, but you can see here it hasn't really appear to work, it hasn't added it into the list. And my Add button is also grayed out. So, I can't click to try and add that again. Now this is something really important. If you are struggling to add guests to your Teams, it might be that the setting in the Background hasn't been enabled. So if you are the owner of a Team, what I would suggest you do is jump into the Admin area. So I'm going to show you very quickly. Let's close this down, let's go up to our application launcher. I'm going to go to Office 365, and I'm going to select the Admin option.

Now there are a whole load of stuff in here. It's a little difficult to navigate if you're not sure what you're looking for, but I'm going to Expand users, and I'm going to say Guest users. And the first thing you'll see at the top here is Allow everyone to collaborate remotely by giving your guests access in Teams. Guest access in Teams may take up to 24 hours. So you need to click on this link to allow Guest access.

So currently, it's telling me that I'm not allowing Guest access, which is why I'm struggling to add someone outside of my organization. So all I'm going to do is I'm going to toggle this button to on, I'm going to scroll down, and I'm going to say Save.

Now, as you can see there, it can take 2 to 24 hours for these changes to take effect. So if I jump back to my Leadership Team, if I want to go in and try and add that member again, what I can do is click on these three dots and select Add member. And that's going to take me back to that screen that we're pretty familiar with.

Now, it's only been a few seconds, so I'm pretty sure that it's not going to have updated in order for me to add this person in. But what I'm going to do is I'm going to come back to this later when we're doing something else and just add this person into the Leadership Team. But I really wanted to highlight there just that little option that you need to turn on in the Admin area.

Now the final thing I want to show you here in relation to creating Teams is the final option that we haven't discussed yet. And that, is creating a Microsoft Team based off of an Office 365 group. So I'm quickly going to jump across to my Outlook. And if we scroll all the way to the bottom of our inbox, you can see here I have something called Groups. And as I said, if you've never used this before, you can create various different groups, add people to those groups, have conversations, so on and so forth. And you can see I have a group set up in here called the Friday Drinks Crew.

Now it might be that I want to essentially convert this into a Microsoft Team. And you can see here, I have five members of this particular group. There's myself, Adam, Ben, Ryan, and Vicky. So a really quick and easy way of me being able to create this Team is to utilize this Group as a template kind of. So let's jump back to Microsoft Teams and click on Create Team. So this time, we're going to say create from an existing Office 365 group or Team, I'm going to select Office 365 group, and it's going to pull through all of the groups that I have set up. I only have one, it's the Friday Drinks Crew, and I'm going to say Create. And there we go. It hasn't asked me to add any members because I already have members in this Team.

If I want to view those members, if I click on those three dots, I can say Manage Team, and it's going to show me all of those people who are part of that Office 365 group. So, it's a very efficient way of creating a Team that you already have set up as a group. You'll also see in this screen, we have an Add member button in the top corner, which makes it super quick to go in and add any additional members. Phew, so that is it on creating Teams.

We've seen how to create a Private Team, a Public Team and also how to convert an Office 365 group to a Team and add members. In the next module in Section 2, I'm going to show you how you can join an Existing Team that you didn't create. So, please join me for that.

Video: Join an existing Team

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. We're down in Section 2, where we're looking at how to create and manage Teams. And in the previous module, we saw how you can create a Team in three different ways.

In this module, I want to show you how you can join an Existing Team that you didn't create, and also how Join requests are handled. So if somebody requests to join a Team that you've created, where you go to see those requests, and how you accept them. Now, if you recall, we created this Friday Drinks Crew Team, and this was based off of an Office 365 group. And the members of this Team are all people who are members of the Office 365 group. And this is a private group. So anybody who wants to join this group is going to need to request access.

So it might be that I want to invite Adam to the Friday Drinks Crew private group. So what I essentially did was I clicked the three dots, and I selected the Get link to Team option. So this gives me a direct link to this Team. I copied it, and then I pasted it into an email, and I sent it to Adam. So as soon as Adam received that email, he clicks on the link, it asks him to join the group, and then it tells him that his request is pending, because I need to go and approve this request because it is a private group. So where do all of these Pending Requests live?

Well, again, if we click on the three dots and jump to Manage Team, you'll see running across the top, you have a section for Pending Requests. And you can see there is Adam waiting patiently for me to either accept or deny his request. So I'm going to say Accept, and he's now been added as a Team member into this particular Team. So, pretty simple to accept requests.

Now another way that you can get people to join your Team is by generating a Team code. Now we're going to stay in this screen, I'm going to jump across to Settings. And you'll see that there is an option here for Team code, and it says; “Share this code so people can join the Team directly, and you won't get any join requests”.

So whoever you send the Team code to, they can join the Team using the code. And it just means that you're not getting loads and loads of requests come into pending, which you then have to go in and check and approve or deny. So, in order to generate a code for any of your Teams, if you click on Settings, Expand Team code, and click the Generate button. And you can see that there we go, I could then copy that to my clipboard, jump across to my mail, and compose a new message with the Team code. And then essentially, they can use that code to join the group.

So now let's look at this in reverse. I'm back in my Outlook email, and I can see that Adam has sent me a code to join the Customer Service group that he's created. So I'm going to double-click and copy that code, Ctrl + C. I'm going to go back to Teams, and I'm going to click on the Join or create a Team link. And you can see here, the first thing we have is Join a Team with a code.

I'm going to click and I'm going to paste that code in and I'm going to say Join Team. And there we go, you can now see that the Customer Service Team has been added to my Teams list. Now remember, if the group is Public, then you won't need a code or to request to join. And if it's

Organizational wide, then you will automatically be a member of that group. So it's only really Private groups that you need to request to join.

Hopefully that's cleared that up. That's it for this module, and I will see you in the next one.

Video: Manage Teams and Members

Deb: Hello everyone. This is Deb and welcome back to our course on Microsoft Teams. In the previous two modules, we've seen how to create a Team and add internal and external members. And we've also seen how you can join a Team as well. Now in this module, I just want to expand a little bit on the Teams idea, and just show you some options that you have when it comes to managing your Teams and Team members.

Now, before we do that, I'm going to jump back to something that we started in a previous module, but didn't quite finish. If you recall, when I was walking you through the process of adding external guests as members, we had to change a setting in the Admin area. And that setting takes between 2 and 24 hours to update. So what I'm going to do now that a few hours has passed is that I'm going to go back in, and I'm going to add that external member into my Northwind Traders Team.

So I'm going to click the three dots, I'm going to say Add member, I'm going to type in the email address of the external member. And you can see now this already looks slightly different to before. It's recognizing the email address, and if I select it, the Add button is now active. And you can see in brackets, it says that this person is a guest. So I can say Add. And that person is now added into this particular Team. And if I just want to double check that, I can click on the three dots again, I can say Manage Team, I can expand Members and guests, and you can see there she is sitting at the top, but her role is slightly different to the other two.

So both Adam and Ben are members, whereas Dasher is a guest. So now that's done, let's take a look at some of these other options you have in this screen for managing your Teams. Now, as we're on this Members page, you can see here at the top, it's telling me that this Team has external guests, I have a Search option. So, this isn't too helpful for me at the moment because I have so few members. But if you had lots and lots of members in a Team, it can be quite helpful just to be able to search for somebody by typing in their name. You can see all members are split down by their role.

So as I'm the owner, I'm at the top here, and then we have the rest of the members and guests. And for both Adam and Ben, I can bump up their access to owner if I want to, which is exactly what I'm going to do for Adam and give him a few more privileges. And you can see as soon as I do that, Adam has now moved up into that Owners area. I could also choose to add another member from this screen by clicking on the Add member button. And I'm going to invite Vicki along. And I'm going to keep her as a regular member, and click Close. So, some very useful but simple member administration on this page.

The next tab along is the Channels tab. And we haven't really spoken about Channels yet, we're actually going to do that in the next module, we're going to create some Channels, and we'll come back to this area then. Next we have Settings. So this is where you can customize some of the settings relating to your Team. Now the first one here, Team picture, let's expand that, I'm going to actually change this to a different picture. So I'm going to say Change picture, I'm going to upload a picture, and I'm going to select the Northwind logo. And I'm going to say Save. And there we go. So it's quite nice to be able to customize your Teams, give them a logo, give them a picture, that all helps with the personalization of your Teams application.

Underneath that I have Member permissions. So this is what I will allow anybody who has the role of member in a Team, these are the things they're allowed to do. Now, I will say it's worth going through each one of these and reviewing it and either enabling or disabling whichever ones you want to allow or deny. Now, I'm fairly happy with members being able to do all of these things. So I'm going to leave all of those selected. And you have a very similar thing here for Guest permissions but obviously not quite as many options.

So in this one, I could allow guests to create an update Channel, I don't want them to be able to do that. And I can allow guests to delete Channels, and I definitely don't want them to be able to do that. So I'm going to leave both of those unchecked. Let's expand @mentions. Now, again, @mentions isn't something we've discussed yet. So we're going to come back to this section a little bit later on in the course.

Team code we saw in the previous module, this is where we can generate a code which we can then send to colleagues, which will enable them to join whichever Team this code has been generated for without us needing to approve their request. We have a fun stuff section. So here, we're just really saying if we want to enable things like Giphys, stickers, memes, custom memes in our conversations, and you'll see how we can utilize these, when we start having a conversation back and forth.

You can also choose what to filter out. So currently, it says; "Filter out inappropriate content using one the settings below". Now mine is set to Moderate, I'm actually going to change that to Strict. And then finally, we have Tags at the bottom. And again, Tags, I haven't spoken to you much about, but what I'm going to say here is that all members can add Tags. So I've changed a few things there in my Settings, you'll also notice that there is no Save button. But all these changes you've made will save despite there being no Save button.

We then have an Analytics tab. So this just gives me really a summary of this Team, tells me how many Users, how many Messages, how many Apps I have, so on and so forth. And obviously, as we start using this Team, this section is going to get more and more populated. And then finally we have an Apps area. So this is just showing me the Apps that I currently have installed for this particular Team. So I have Forms, OneNote, Planner, Power BI, Praise, and SharePoint. And again, there's a whole load of Apps that you can add into Teams to really expand its capabilities.

So that's pretty much what you have lurking underneath this Manage Team area. Now some other things when it comes to the management of your Teams, you do have a Hide option as well. So if I wanted to hide Northwind Traders, I could say Hide, and it essentially removes it from my list. So if I maybe no longer needed to update that particular Team, I can hide it, and it moves it down into this Hidden Teams area, which I could collapse up, and nobody would know it was there. If I want to pull that back, I can click the three dots again, and just say Show.

You also have the option to Leave a Team. So if maybe you've been part of the Northwind Traders project, and then all the tasks that you need to complete for this project have been completed, and you're not really needed on this project anymore, you could choose to leave this Team. So essentially, you'll no longer see any updates or any files that are shared for this particular Team.

And finally, you can also edit your Team as well. So if I wanted to go in and maybe change the name, change the description, or even change the Privacy Settings, then I can definitely jump into here and modify those as well.

Now another quick little tip here, which is really how you organize your Teams in this Teams list. If you don't particularly like the way it's organized, you can move your Teams around. So to do this, I'm just going to collapse up all of my Teams, just to make it a bit easier. And it might be that Northwind Traders is the one that I work on the most. So I want that one to be at the top, all I need to do is click, drag, and drop. So very, very simple to organize your Teams by dragging and dropping.

Now one other thing you may notice is that if you're the one who created the Team, so if you're a Team owner, you'll have a couple more options in that menu than if you're not the Team owner. So for example, this Customer Service Team, this isn't what I created, this was created by Adam. When I click the three dots, you can see I have a few different options. But something I don't have are things like delete the Team. Whereas I do have that for Teams that I've created where I'm the owner. I can go in and I'm the only one who can delete that Team. So just be aware of that as well. Your options will be slightly different depending on if you're the owner of the Team or not.

And finally, right at the top here we have a Filter icon and you can see the Keyboard shortcut for that is Ctrl + Shift + F. And this will just allow you to filter by Team or Channel. So again, if you find yourself with a lot of Teams in your list, it can be useful to just filter for the particular thing that you're looking for. So I've typed in customer and it's pulled back, just that Customer Service Team. And you can also use this to filter on Channels as well once you've added them. So again, if I expand this one, I have a Channel called Marketing. So I could choose to search by marketing, and it's going to pull that Channel back.

So that's it. Those are the different options that you have when it comes to managing different elements of your Team, and also the members from within your Team. That's it for this module, please join me in the next.

Video: Create and Manage Channels

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. In this section, we've been taking a look so far at how to create Teams in numerous different ways, and how to manage members of those Teams. In this module, I want to speak to you very quickly about Channels.

Now, Channels are essentially kind of like sub folders within your Team. So if you can kind of relate it back to something like Outlook, you have your Team as your inbox, and then you can have your Channels as similar to your sub folders. And Channels are a great way of housing conversations related to a specific topic. So for example, with this Northwind Traders Team that I have at the top here, I have one Channel so far, that's called General and that's the one that's automatically created when I create the Team. But, I can add additional Channels.

So for example, I might want to add a Channel related to Sales Pitches, I might want to add a Channel related to Marketing, or maybe a Channel related to Budgets. And it just means that you have separate Channels for each of those conversations so you don't have everybody just in the Team itself, talking about lots and lots of different topics. So it keeps it targeted. So in this module, I really just want to show you how you can add Channels and some of the options you have for managing your Channels as well.

So, let's go with this Northwind Traders Team at the top here. As I've mentioned, we have a General Channel. Now you'll see that when you click on More Options, you don't actually have the option to delete that Channel. So, because this is a default one that's been created by Teams, it's always going to be there, and it's always going to be at the top of your list. However, you can add to it and you can have your own Channels. So to add a Channel, if you go up to your Team, click on the three dots, and you'll see you have an option there for Add Channel. We now need to give our Channel a name, we can add a description, and then we can set a level of Privacy.

So in general, I tend to keep mine on Standard, which means that this Channel is accessible to everyone on the Team. However, you do have a Private option in there as well, which means it's only accessible to a specific group of people that you specify from within that Team. And you also have a checkbox at the bottom, which says; “Automatically show this Channel in everyone's Channel lists”. So, whoever has access to this Northwind Traders Team, when I add this new Channel, as long as I've got that box ticked, this new Channel is going to appear for everybody. So let's click on Add.

And there we go, I have my new Sales Pitch Channel, I'm going to add one more. So same process, three dots, add Channel, and there we go. And you'll see within each Channel you have at the bottom an area where you can start chatting or start a new conversation. We are going to move on to that in the following modules. And you also have your links at the top, your Posts, Files, Wiki, so on and so forth. As I said all of that we're going to discuss in the following modules. So, very quick and easy to add Channels to your Teams.

Let's just very briefly explore some of the other options that you have related to your Channels. I'm going to click on the three dots again. Now the top one here Channel notifications. So this really allows you to customize if you want to be told if there are new posts posted to this specific Channel, so in this case Marketing. So the option at the top there is; "Notify me every time there's a new post in this Channel". Now I'm going to turn that on, and I'm going to say Only show in my feed.

Now if I want to see any replies that have come into that new post, I would select Include all replies as well. And I can also specify if I want to be mentioned each time this Channel is mentioned, and I'm going to leave that as Banner and feed, and click on Save. So you have a few different settings that you can change in there. You have an option to Pin Channels as well. So if I click on Pin, you'll see I now get a new group at the top here called Pinned and it's pinned that specific Marketing Channel in the Northwind Traders Team.

Now you might want to do this if you have specific Channels within other Teams that you utilize most frequently. So maybe I'm always chatting in the Trade IT Now Sales Channel, I might choose to also pin that one at the top of my list. It just makes it super easy for me to access those frequently used Channels.

And of course, as with everything, if you want to remove them, you can just very simply unpin those Channels. You can choose to Hide your Channel. And you'll see by doing that it doesn't actually hide, it just puts it in this Italic font. So it's more like a notification to you that you've hidden that Channel.

You have a Manage Channel option as well. And there's just a few things that you can change in here. You can change some of the Permissions so you can set Channel moderation preferences. So if you want to be able to moderate your Channel, then you could if you wanted to, turn this setting on and adjust some of these settings. Now I'm fairly happy to have Channel moderation turned off. I can also specify who can start a new post. So I'm going to say that everyone in the Channel can start a new post, or I have a second option there everyone except guests. So more external people can start a new post. So again, set that to whatever suits you.

And then we have an Analytics tab. Again, not much action in this Channel. So far, it's just telling me that I have five Users and six Apps within this Channel. So some basic information. Now another thing that's fairly interesting is this Get email address option. So, what you need to be aware of is that each Channel has its own email address, essentially. So, what somebody could do effectively is send an email to the Channel email address, and it will appear in the feed as a conversation which people can then reply to.

So this is essentially the email address of this Channel. I can choose to copy it, I can then paste that into an email and send it to someone else. So as you can see here, if I click back on the Marketing Channel, somebody has utilized that email address that I've sent them, they've sent an email from their Gmail account, and it's posted into the Marketing Channel conversation feed. So now everyone can see that email. And you have an option to download the original email as well.

Now, one thing that's worth noting here is you can't reply to the email essentially, from here, this is now a conversation so you can reply to the post from within Teams, but it won't send an email back to that person. You also have an option to get a link to this Channel. So this is very similar. If you want to very quickly link somebody directly to this Channel, you can copy that link and you can send it to them in an email.

And then you have an Edit this Channel options. So this is where you can come if you need to make any changes to the Channel name, or if you want to update the description. And then a final couple of options we have in this little menu, Connectors is something we're going to discuss a little bit later on. So I'm going to leave that there for now. And you also have a Delete this Channel option.

Now it's worth noting that the General Channels, you do not have that option. You can't delete those General Channels as they're generated automatically, but any that you create, then you can delete the Channel if they're no longer needed.

So, that's it. Pretty much very simple to create new Channels and manage your Channels through that pop out menu. So that's pretty much it. Very, very simple to add new Channels to your Teams and also manage the information within those Channels. That's it for this module, I will see you in the next one.

Video: Post and Receive Messages

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. In the previous module, I showed you how you can create new Channels within your Teams. And now in this module, we're actually going to start to have a conversation. Finally, after all of these modules, we get around to actually typing something to someone. And really one of the big features of Teams is the chat area or the conversation area as it's more commonly known.

Now, I'm currently clicked on the General Channel in the Northwind Traders Team, and you can see that there on the left. And what you're looking at in the main part of the screen is you can see that I've added some people to this Team. Then underneath that, underneath the Today heading, it's showing me that email that came in via that email address into this Team Channel.

And right at the bottom, you can see I have a little area that says; "Start a new conversation. Type @ to mention someone". Now we're not going to talk about mentions in this particular module, all I want to do here is make sure that you're comfortable with sending messages, responding to messages, so on and so forth.

Now, I'm sure we've all used systems like this previously. So this isn't going to be rocket science. But just to make sure that we are all on the same page, one thing I need to point out to you is that each Channel has its own chat. So you can start a conversation at the bottom here, whichever Channel you are in. So let's jump back to General. And you can see there, I'm getting a little pop up message, which is saying to me, I can reply to the message above or start a new conversation below. And that is exactly what I'm going to do.

I'm going to click in the box at the bottom, and I'm just going to post a message to the General Channel in the Northwind Traders Team. So I've typed out my message, if I want to send this message to the other people who are in this Channel, I can either hit the Enter key, or I can click on this little paper plane button to send and it's gonna post that message to the Channel.

So I can see that that Ben has just responded to the message that I've put in there. And you can see underneath that I have a Reply button as well. So I'm going to click on Reply. And again, I can hit Enter, just to send that reply back. I can see now that Adam has joined the conversation as well. And once again, I have a Reply button underneath and I can carry on replying. And you'll see this is almost like a threaded conversation because all of these replies coming in are related to my initial post.

So I have a Collapse All button if I want to collapse them up just to save on some space, or I can Expand those replies out again. Now if I carry on replying to this conversation, it's going to carry on being a threaded conversation of this original post. If I want to start a completely new conversation that isn't related to this, I would just go back to my box at the bottom and start a new conversation. So, as you can see, really simple just to post messages and also reply to messages.

Over the next few modules, we're going to expand on this idea and I'm going to show you how you can utilize some of those icons at the bottom so you can start formatting your messages, adding attachments, and fun things like Gifs, emojis, custom memes, so on and so forth. So please join me in the next module and we'll get onto that.

Video: Mentions

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. In the previous module, we started to discuss conversations within Channels in Teams. And you've seen how simple it is to post messages and also reply to messages. We've also seen how Teams uses threaded conversations to keep all the replies with the original message. In this module, I just want to talk to you a little bit about @mentions.

Now @mentions might be something that you're already familiar with, but maybe don't realize in other applications. So the two that springs to mind would be if you are somebody who uses Twitter, or maybe if you're somebody who uses Instagram, you're probably very familiar with using the @symbol, and then someone's name in order to direct a message or a conversation towards that person.

And you can use it in exactly the same way in Teams, they are just called @mentions in Teams, as opposed to @replies. So let's just very briefly take a look at how @mentions work. So I'm down in the General Channel in the Northwind Traders Team, and I've got a couple of different conversations going on here with Ben and Adam.

And you can see this conversation at the bottom here, I've basically asked the members of my Channel, if they have a copy of the Trade Report from last month. And you can see that Adam has replied, he says; “No, I think Ryan has it”. And Ben's also dropped in a reply there saying, “Nope, denied” and then a little bit of a laughy emoji.

And you can see that Adam is also asking if Ryan is a member of this Channel. And he's actually not. So the first thing I'm going to do is I'm going to add Ryan to this Channel. And there's a couple of ways I could do this, I could go up to my Northwind Traders Team, I can click the three dots and I can add a member.

Alternatively, I can scroll up to the top and you can see here it says Add more people. And I'm going to add Ryan. There he is, I'm going to select him, and click on Add. So Ryan will now get a notification letting him know that I've added him to this Channel. And now, anything I direct his way he can reply to.

So I'm going to click the Reply button at the bottom here, and I'm going to direct this next comment towards Ryan. And you can see there I've got a helpful little pop up that says; “Notify someone about your message by typing @ before their name”, which is exactly what I'm going to do I'm going to say @, I'm going to start to type in Ryan, there he is. And I can say; “Hi Ryan, do you have a copy of the Trade Report?” and I can hit Enter to send that.

Now what happens when you @mentions someone is that they will get a notification in their Activity stream just to let them know that there are comments being directed towards them. And you'll see that now that Ryan has also @mentioned me, it's showing in red and I have the little @symbol just next to the message.

Also, if I jump across to Activity, it tells me the at top, “Ryan has mentioned me”. So, really nice and simple to direct things to other people. You can also direct things to multiple people. So I might want to direct something to Adam and also to Ben. Both Adam and Ben will now receive a notification that they've been @mentioned in this conversation. So @mentions, super simple to direct conversations to a specific person. That's it for this module, I will see you in the next one.

Video: Editing and Deleting Messages

Deb: Hello everyone. This is Deb and welcome back to our course on Microsoft Teams. In this section so far, we've been looking at posting messages, you've seen how to post messages, respond to messages. And in the last module we looked at utilizing @mentions, in order to target our messages to a specific person.

In this module, I just want to show you how to edit any messages that you've sent. And also, if you've sent something in error, how you can delete that message. So, we're still in our Northwind Traders Team, we're in that General Channel, and we're following a couple of conversations in here.

So, I'm just going to expand all of the replies to this topic down here. And this is the conversation where I asked for the Trade Reports, Adams said that he thinks Ryan has it, I added Ryan to the Channel, and then @replied to him to ask him for a copy of the reports.

Now, he replied to me and said yes, that he does, and he's gonna send it to me. And what I've done is I've sent a thanks back to Ryan, but I've accidentally selected the wrong emoji. I've selected the kissing emoji. And you know, as much as I like Ryan, probably not the most professional thing for me to send.

So I might want to edit this message, and just reselect the emoji that I wanted to select initially. So very simple to edit a message, hover your mouse over the message. And what you'll see if you cast your eyes over to the right-hand side, is you'll see a whole bunch of icons, and then you'll see three dots on the end. So let's click on the three dots, and you have an Edit option in here.

So this is going to take you back into your message, I can now delete out that emoji, and I'm just gonna do a smiley face to be on the safe side. Once you're happy with the edit that you've made, you have a cross to cancel or you have a tick to accept. So I'm going to say, Done. And there we go.

And I now get a little message there letting me know that I've edited that message. Now, it's worth noting that you can't edit messages that other people have sent even if you are the owner of this Team. So for example, here the message that Ryan has sent, if I click the three dots, I don't have an Edit option in my menu, so you can only edit your own messages.

You can also delete your own messages as well. So if I just scroll up to this one just here, once again, if I click on the three dots next to the message, you can see I have a Delete option. So if I click Delete, that message is now deleted. Now I can see that little message there that says this message has been deleted in my Teams.

But just know that once you delete one of your own messages, there's no indication of that deletion to any of the other Channel members. So as far as they're concerned, there was no message there. You'll also see that if you change your mind you do have an Undo option as well, which is going to put that back and repost that message to everyone's Channel.

So, very simple to edit and delete your messages. That's it for this module. Please, join me in the next one.

Video: Bookmark and Like

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. This is still, Deb, and we have been looking at conversations in Channels within Teams. And I've got quite a nice little conversation going on between me and my other Team members. Now we've seen how to post messages, respond to messages, @mention people, and also edit and delete messages.

What I want to talk about in this module is liking messages and also bookmarking or saving messages of importance that you want to refer to later. So what we currently have on the screen is the conversation that I've been involved in. And you can see where we left off in the last module, I'd asked Ryan for the Trade Report for last month. And it looks like he has now sent that through in the form of a Word document.

Now what you might also notice, which is slightly different to the previous module is on the right-hand side, you can see that I have some little emojis appearing. So there's a little laughy face emoji with a number two next to it, and then we have two thumbs up as we move further down the conversation.

So these are likes or reactions to posts. And it just lets you know that people either like what you've posted, or they find something particularly funny, adds a bit of interest into your general conversations. So it's super easy to like a post, all you need to do is hover over the post in question, and if you glance your eyes across to the right-hand side of the screen, you'll see you have a series of emojis that you can use.

So we have a little like just here, we have a heart, we have a laugh, a surprised or shocked face, a sad face, and also an angry face as well. So in this case, I'm going to give this post from Adam a like by clicking the thumbs up icon and you can see that that registers next to the post. Now if you're interested in seeing who has reacted to a particular post, if you hover your mouse over the emoji, you will see a list of all of the people who sent a reaction. So, super simple to like posts.

The other thing you might want to do here is you might want to save certain messages. So for example, Ryan sent through this Trade Report, I can see that it's a Word document. And you also see as I hover over, I get three dots, which gives me various different options when it comes to managing that attachment. So if I wanted to, I could download it, I can open it, so on and so forth.

However, at the moment, I just want to save this because I want to read the Trade Report later. I am far too busy to read the Trade Report right at this moment, but I don't want the conversation to continue and then at the end of the day, have to scroll through lots and lots of chats in order to find that Trade Report. So I can get around that very simply by just bookmarking it or saving it.

So again, hover over the message that you want to bookmark, click on the three dots, and you have an option to Save this message. Now, once you do save this message, there is no obvious indicator in the conversation that you've done that. But if you want to access all of the messages that you've saved, all you need to do is jump up to where your profile picture is in the top right-hand corner, click on it, and you'll see you have a Save option in here.

Now if we jump to Save, there we go, it’s going to show you all of those posts that you've saved in all of those conversations. And it doesn't just save that one post, it saves the conversation. But it will jump you down to the point in that conversation where that post is. So, it makes it super easy for you to come back and read this report later on. So, don't forget that saved items you can find underneath your profile picture in this Saved section.

Now it's worth noting that you can do the reverse, you can unsave messages. So maybe once I've finished reading the Trade Report, I no longer need that post bookmarked. So what I can do is go back in, I can select the three dots and I can say Unsave this message. And now if I jump back up to my Saved items, you'll see that it's no longer there. So, that's it, very straightforward. I will see you in the next module.

Video: Add Images, Emojis, and Gifs

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. This is Deb and we are still looking at conversations. And in this module, we're going to really spice up our conversations and make them more interesting and interactive, and really kind of emulate what realistically goes on when people are having conversations at work.

Not everything is just a boring conversation or file swapping, and professional messages, there is also some use of emojis, there's usually some fun elements to conversations as well. And that's exactly what we're going to look at in this module. We're going to see how we can add interest using emojis, Gifs, pictures, and memes.

So I'm in my conversation, I'm going to click on my Reply button, I'm going to type my message, and I'm going to @mention Ryan, and select him from the list. I've typed in my message, and I'm gonna add an emoji. So, underneath where you're typing, you'll see you have a whole host of icons. And the third one along is the emoji icon. And this probably looks fairly familiar to everybody, we can select whatever emoji we want to use from this list.

So I'm going to select this one just here, hit Enter to send my emoji, nothing too technical there. We've all done this many times before. Now a couple of other things I might want to send, I have the option to send Gifs. Now there's something really important to note here about these Gifs.

These Gifs, if you look at the bottom are powered by Giphy, and they do have terms and conditions. So whilst it's fine to use these Gifs back and forth with each other just in general conversation, if you are doing something and I will cite an example of this training course that I'm running, where we are essentially selling this training course, then we can't use these Gifs in this training. Which, seems a little bit crazy but you can probably understand with all the rules surrounding copyrights.

So, I'm not actually going to select any of these. But just be aware that you have a whole host of Gifs in there, which you can use to spice up your conversations. You also have a Search bar at the top, so you can type in search terms, hit Enter, and it will pull back any Gifs it has related to your search term. So just be aware that you have those in there as well. Moving along, we have stickers.

And again, these are divided down into different categories. And it really depends what you want to send, there's a whole host of them in here. You have a popular section at the top, which you might want to have a little scroll through. And once again, I'm not going to use any of these in the conversations due to copyright, but I'm pretty sure that you get the idea, you can just select it, and it will add it to the conversation.

Now you do have an option here to create your own meme. And you'll see again, some popular memes that you may have seen online. But again, to avoid selecting one of these, I'm actually going to create my own meme using an image that I'm allowed to use. So let's say upload an image. I'm going to select an image which I have saved off locally, and you can see that I now get a top caption and a bottom caption so I can now build up my meme.

So I might want to edit the top caption to say something like Sales Reports and then the bottom caption, Nailed It! And I'm gonna say Done. And I'm gonna send that through by clicking on my little paper plain Send icon. So really simple to use emojis, Gifs, stickers, and even create your own memes just to add interest to spice up your conversations.

Now another option you have down here is this little icon and that is the Praise icon. So essentially, what you can do here is you can send praise to a particular person. And again, these are all divided down into categories, and they're referred to as Badges within Teams. So I'm going to select this Thank you praise, I'm going to add my note; Awesome job, and I'm going to send that to Ryan and click on Preview. And it's just a nice little badge which when I click Send Ryan's going to get that and it's just acknowledging the fact that he's done a really, really good job with that particular report.

So all of these things whilst they aren't vital to your daily work, they do make things a lot more interesting and I think it really helps to build a really nice Team spirit, keep morale up and keep everybody uplifted and laughing throughout their work day. That's it for this module, I will see you in the next one.

Video: Formatting Messages

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. We're now getting down to the end of Section 2. And in this module, I really just want to expand on that idea of posting messages, and just show you some of the formatting options you have when you're composing your messages.

So if you click in the conversation box at the bottom, in order to see the full formatting options that you have, because currently, there's nothing there, if you click the first icon underneath that says Format, it's going to open this much larger window, and you have a whole host of options for formatting your messages. So I'm just going to put a quick message into this box, and I'm going to add a quick subject at the top here. So Sales Report Feedback.

Now I'm going to go through and apply some formatting options to this message. So it says firstly, great job on this report. And I'm actually going to @mention Ryan in there. I say I know how much time This took to put together. And I really want to emphasize that point. So I'm going to highlight my text. And I'm going to put it in Bold. And again, Keyboard shortcuts work Ctrl + B.

I've then got underneath, I have some feedback for next month's report. I'm going to add some text in here that says, @Ben and @Adam, please feel free to contribute also. And maybe I want to make this really stand out in my message. So I'm going to highlight it, and I'm going to use the Text Highlight color, and I'm going to say yellow. And then underneath I have three points that I want them to think about changing before next month Sales Report is put together. And these are going to be a lot easier to read if I put them into some kind of list.

So again, I'm going to highlight my text, we're going to go up to my formatting options, and I have a few different things I could do here. I could decrease or increase the Indent, I could make them into a Bulleted List or a Numbered List. So I'm gonna say Bulleted List, just to make those points a little bit easier. Now, you can also see that because I've had spaces in there, I now have some bullet points where I don't need them. So I could just Backspace to remove those. Alternatively, I could just click on the Bullet icon again, like so.

Now for me, I find it a lot easier just to Backspace just to remove them. So some of these other formatting options you're probably reasonably familiar with from other applications such as Word, we have a Italic, Ctrl + I, Underline, Ctrl + U, and we also have a Strike through there as well. We've utilized Highlight, we can change our Font Color in here by selecting from the palette, and we also have a Font Size option. So if we want to make it large, medium, or small, we can adjust it just there.

And then essentially, we also have some Styles available in here. So if this was quite a long message, and I wanted to make headings really stand out, I could choose to utilize these Styles. You have a Clear all formatting button. So again, I can clear all formatting on the entire message, or just make a selection and clear the formatting. Our Alignment utility is just there, our Bullets and our Numbering. We have Quote marks so if you want to quote somebody, you might want to put it in quote marks. And we can do things like insert links as well. So here I could say, link to Northwind for example. Let's just type in, like so, and I could say Insert. And that's actually inserted wherever my cursor was clicked, so you might find that you want to cut and then Ctrl + V to paste that link down there. Okay, so very, very simple to put links in.

If you want to add some code or a code snippet to your message, you can do that from here. And you also have the option of inserting a horizontal rule line. So let's see where my cursor is clicked, which is just above that link to Northwind, if I click Insert horizontal rule, it’s just going to separate that link from the main bulk of the email. And as you can see just there if I press my Backspace key, that's going to delete out that horizontal line.

And then the final couple of options you have the option of inserting a Table into your message and again, this is very similar to Word or Excel, you just select how many rows or columns. And if this message is of importance, I can choose to mark it as important. And you'll see it's just going to tag it as important the top there, and it stands out because it's in red. And then finally, on the end, I have an Undo, and a Redo option as well. So, lots of different options for adding some formatting into your messages.

Now before we finish up with this module, you'll see at the top here, I have new conversations selected. And if I hover over it says Select a post type. So I could choose new conversation or announcements. So I'm going to cover announcements in the next module. For this one, I just want a new conversation, I'm going to say that everybody can reply to this message. And I now get the option to post in multiple Channels.

So currently, when I click Send, this is just going to post in the Northwind Traders General Channel. But this is related to the Sales Report, which is essentially related to the Sales Pitch as well. So I might want to make sure I posted in the Sales Pitch Channel also. So I'm going to click Post in multiple Channels. It's telling me I'm posting it to General. And I'm going to jump over here and I'm going to select a Channel. And I'm going to say Sales Pitch, Update. And you can now see it's got both of those Channels listed in the To field.

If I decide after all this work, I no longer need this message, there's also a Delete button in the top right-hand corner. But I'm not going to do that I want to post this. So I'm going to click on Send. And there we go. We have a really, nicely formatted message. I have my link which looks like it's working in there. And if you have a look over in my Teams list, you can see next to General I now have that little exclamation point that’s showing me there's a new important message in this Channel.

And if I jump across to Sales Pitch, you'll see that that message is also shown in there because I sent it to multiple Channels. So, lots of options there for formatting. That's it for this module, I will see you in the next one.

Video: Announcements

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. We're still down in Section 2, and we've been discussing everything related to conversations in Teams. And we've done numerous different things in our conversation thread in the General Channel in the Northwind Traders Team. Now something we haven't covered yet is a fairly new feature to Microsoft Teams.

When I say new, it did come out last year, they started to roll it out. But I would say it's one of the newer features to be added. And that is Announcements. Now essentially, what you can do is you can make an announcement in a Channel. And announcements help you to make the conversation stand out in the Channel. So the best way to show you this is really just to demonstrate it. So let's jump into creating a new announcement.

Now, it's not very obvious where you create a new announcement from but the eagle eyed amongst you may remember in the previous module, I actually did touch on it very briefly. So let's click our mouse down here in the Start new conversation box, and I'm going to jump straight into the formatting icon, because that will open up this large box with all of my formatting options.

Now, if you remember up here, we could select a Post type. And in the previous module, when we were looking at formatting, we just did a new conversation. But if I click this drop down, you'll see we also have an option for an announcement. And we get something very different here. So we get a little background, we get a big heading or a headline that we can utilize. And I'm going to type a very quick headline. So this is going to be an announcement related to the Trade Awards 2020.

What you'll also see is if you glance over to the right-hand side, you can change the color scheme of the background. So you can choose any of these solid fill type colors. Or alternatively, what you could do is you can upload your own Background image. So I'm very quickly going to do that. I'm going to click upload an image, I'm just going to select an image that I have saved off to my local drives. And it's quite a thin box that you have to put it in. So I'm just going to do the top of the glasses like so click on Done, and there we go.

I can now add a subheading. So I very quickly filled out my announcement just there. And I'm going to utilize these formatting options, I'm going to apply some formatting to this particular announcement. So I'm going to highlight the date and the location just here, I'm just going to make that Italic. And you can see at the bottom, I put voting opens tomorrow, look out for the poll.

So, we're going to get onto polls a bit later on in this course. So we will add one to this Channel relating to Trade Awards when we get to that section. But for now, I'm fairly happy with how this look, she could go through and change some of these options.

So again, you have everyone can reply or just you and moderators. And you can also post in multiple Channels if you want to. So I'm actually going to put this in all of the Channels that I have for Northwind. And I'm going to click on the Send button. So you can see that that announcement has now been posted to the General Channel, it's also posted to the Marketing Channel and the Sales Pitch Channel. And you'll see it's denoted as an announcement because it does look different from the other posts and messages and it also has this little announcements icon next to it, so this little loud hailer or speaker in a red circle.

So essentially, anything important that you want to stand out from the other conversations, you can turn it into an announcement. That's it for this module, I will see you in the next one.

Video: Tags

Deb: Hello everyone. This is Deb and welcome back to our course on Microsoft Teams. In this module, I'm going to talk to you about the use of Tags within your conversations. Now, Tags let you quickly reach a group of people all at once. So they're really good efficiency tip. So with Tags, you can categorize people based on various different attributes of your choosing.

So it might be you want to categorize people by their role, or maybe a specific project they work on, maybe a location, something along those lines. And you can assign Tags to people so that if you want to reach a specific group of people, all you need to do is use the @mention followed by the Tag. So let me show you what I mean by that.

Now there's a couple of different ways that you can look at your Tags. So I'm going to go up to my Northwind Traders Team, I'm going to click the three dots, and I'm going to jump across into Manage Team. I'm going to expand Members and guests as well so we can see the full Team. Now you'll see here that we have a column for Tags. And if I hover over, it says; “Notify group of people all at once by @mentioning a Tag”. And you'll see that I've already assigned some Tags to the Members and the guests.

So I have three people that belong to the Leadership Tag, I have two people that belong to the Sales Team Tag and one person that belong to the Admin Tag. And you'll see as I hover over each person, I can just click on the Tag. And it will allow me to select another Tag to add that person to or create a brand new Tag. So if I wanted to, I could create a Tag called Marketing. I can say Create Marketing Tag, and it automatically assigns that Tag to myself.

And I can go down and I can also assign that Tag to somebody else. So let's assign it to our guest, I'm going to click, select Marketing, Apply, and they're now also part of that Marketing Tag. Alternatively, what I could do is if I click the three dots next to Northwind Traders, I have a Manage Tags option in here as well. So again, this just shows me all of the Tags that I currently have. And I can go in and I can create a new Tag from here as well. So, very simple to create Tags, and also assign them to other people.

So now, if I'm in my General Channel, maybe I just want to send a message to all of the members of the Leadership Tag. All I need to do is click in my New conversation box, @symbol because we're doing an @mention. And as I start to type, the Tag is going to find it. So you can see here it says Leadership, three people have this Tag, I can select it, and I can then type my message, like so. Send that through, and then only the people who belong to that Tag will be notified that they've been @mentioned.

So it really is a great way of increasing your efficiency if you need to send messages to one particular group of people. So it's worth taking a look at the members of your Team, maybe creating some Tags and assigning those Tags to different people. As I said, again, it could be that you create Tags which denote people's roles or which projects they're part of, or particular task Teams, things like that.

Now also remember here that if we jump into Northwind Traders again, go to Manage Team and jump across to that Settings tab, you'll see at the bottom, there is a setting for Tags. And we did come into here previously, but you can here specify who can add Tags. So I've got mine set to All members so anybody can, or you could set it to Owners only.

So if you want to have some control as to who can create Tags so that they don't get out of control and you end up having 50 different Tags, you could set it to Owners only in there which is exactly what I'm going to do. So, that's it. That's how Tags work, fairly straightforward. I will see you in the next module.

Video: Attaching Files

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. We're still in Section 2, taking a look at all of the elements of having conversations in chat in Teams. And what we haven't yet looked at something fairly fundamental, something you're probably going to want to do a reasonable amount, and that is attaching files and pictures and sending those through in a chat conversation.

Now, again, this is a very, very simple process. And I'm going to show you a couple of different examples. And I'm also going to show you how you can access any files that have been shared in your conversation quickly and easily.

So again, we're staying in this General Channel in the Northwind Traders Team, and I'm going to click in my Start new conversation box. And I'm just very simply going to share a file with the Team. And I'm very simply just going to share a file with the other members of this Channel. So you'll see underneath we have the second icon along which is the paperclip icon, it says Attach when I hover over, so let's click that button. And we get a few different options.

So you have the option of selecting a file from directly within OneDrive, and you also have an option to upload a file from your computer. So, we're going to do both of these options. So first of all, let's jump to OneDrive, and I can see all of the files that I have sitting in there. So what I'm going to do is I'm going to send to the Channel, the Trade Report Feedback document. So, I've collated all of the feedback from the different Team members have added it into a Word document, which I'm now going to send back to Ryan.

So I'm going to select the Trade Report, I'm going to say Upload a copy. That's now uploaded, I want to direct this to Ryan. So we're going to @mention Ryan, I'm going to add a message. Once I'm happy, I'm going to click Send. And away that goes, really, really simple to do. Now, as I mentioned before, when you do receive an attachment in chat, you will get these three little buttons on the end, which will allow you to do various different things.

So if you want to make any edits, you can open in the Desktop Version of Word if you have that installed on your PC, or you can open it in Word Online from within Microsoft 365. You can also Download the document to your PC, get a Link to it, so on and so forth. So a few different options for you in there.

So I can see that Ryan's now replied to my message. And he's asked me do I have the Trade Chart? Now the Trade Chart is something that I have saved off as a picture onto my local drives. So I'm going to reply to Ryan, I'm going to say; “Yes. Let me just grab it for you”. I'm going to click on the Attach button. And this time, I'm going to say upload from my computer, I can see my graphic just there, I'm going to select it and click on Open. And there we go, that Chart has now been sent through to Ryan.

And if he wants to see a bigger copy of it, if you just click on the chart, it's going to give you a much larger size. So, super easy to send files back and forth. And it's not only just Word documents and images that we can send through, I can jump back into Attach, go to OneDrive, and this time, I'm going to select this Excel document Sales Figures, I'm going to upload a copy. I'm going to use those Tags that I've set up to direct this towards the Sales Team. So again, @, and start to type in Sales and Team should recognize it which it does. So Sales Team, Enter to send. So very straightforward, very simple.

Now, it might be that during the course of conversation, particularly very long, ongoing conversation or conversations, I should say within a Channel, it might be that you just want to see all of the files that have been shared back and forth between the members of your Channel. So instead of how to scroll up through tens, or maybe even hundreds of messages, trying to pick out the files that you want, you will find at the top here, we currently have Post selected but you also have a Files tab.

So if you click on Files, that's going to show you all of the files, documents, items that you've shared within this Channel. And what you'll see when you come into Files is this is kind of set up very much Like OneDrive if you utilize OneDrive. So from here, I could start to do things like I could create Word documents, Excel workbooks, PowerPoint, so on and so forth from directly within this Files area.

So if I was to select Word document, it's going to ask me for a new name. I'm going to say Shortlist for Trade Awards, Create. And it's going to essentially jump me across to Word Online, but I'm still contained within the Teams browser. So I can really work on a Word document or an Excel spreadsheet, PowerPoint presentation from directly within Teams. Now I'm not going to type anything too extraordinary in here, I'm going to put in some random text just so that we have something in here.

And as with all of the online applications, you'll notice if you click on File, there is no Save button, we've already saved the document. And because we're working online in Microsoft 365, your document is automatically saved hence why there is no dedicated Save button. Now if I click on Close to close this down, it's going to take me back to Microsoft Teams into my Files list. And you can see that it's added that document there, Shortlist for Trade Awards. So, don't forget that. You can create documents from directly within this Files area.

You can also upload any documents that you have saved off locally, you can synchronize with OneDrive, you can select Copy Link, you can Download any documents just by selecting them, and then choosing your option. And you can also add additional Cloud Storage. So, it might be that you're not necessarily using OneDrive, maybe you're using something like Dropbox or Google Drive your Cloud storage, you have the opportunity to add your Cloud storage from this point.

So all you need to do is select whichever one is relevant to you, and it allows you to log in and just follow through the wizard and the prompts in order to make those files accessible from within Teams. It's also worth noting that when you click on any of the documents that you have in here, so let's just click the tick next to Shortlist for Trade Awards, you get some slightly different options in this top menu bar.

So again, you can choose to open this particular document in Word Online, as we just saw before, you can choose to open it in Word, the Desktop Version, or you can choose to just edit it from within Teams, you can Delete from here as well. And you can also Pin specific documents to the top. So you can see here I've just pinned that document there and it's at the top. So if you have anything particularly important or a document that you access all the time, you might want to think about doing that.

Now I don't want that pinned I'm just going to select it again, I'm going to go to Edit pin and say Unpin. So, lots of different options that you have for each of your documents in here as well. Now, this one here, Make this a tab, we haven't covered Tabs yet and I've been purposely leaving this out because we are going to cover that in a later section.

So hopefully, that gives you an idea of how to attach and send files in a conversation and also where you can go in order to access all of those files and some of the options that you have. That's it for this module, I will see you in the next one.

Video: Private Messages

Deb: Hello everyone, welcome back to our course on Microsoft Teams. In this section, we've been talking about conversations. And, our conversation so far has mainly been confined to within a Team and within a Channel. And I've been chatting with the various different members of that Channel, I've been using @mentions to target some of my replies. And in other cases, I've just been putting messages out there for the entire Team to respond to.

So that moves us on nicely to Private messaging. So at the moment, in this Teams Channel, the General Channel, I'm talking with all the members of my Team. Now, it might be that I want to just have a one-on-one conversation with someone, or maybe I want to just have a small group conversation outside of these Team Channels. So if you want to start Private messages, you need to jump across to the Dedicated chat tab.

So if you look in this left-hand menu, you'll see the second option down is Chat. And you can see here, I already have one Private chat going with Adam. And this is from a few days ago. And you can see I sent him Sales Presentation, which might have been a confidential document, which is why I didn't want to put it into the Channel.

Now, as we saw previously, at the top here, we have Chat, which is currently highlighted, and we also have a Files tab. So any documents, files, presentations that have been shared in your Private chat will be listed underneath here. And you can see that there is that Sales Presentation, really nice and easy for me to access. But let's jump back to chat for the time being. So if I want to start a new Private chat, all I need to do is jump up to this New chat icon that you'll see to the left of the Search or the Command box, and click on New chat.

So it opens a New chat window, and it's asking me to type in the name of the person or the group of people that I want to chat with. So I'm going to chat with Ryan, and I'm going to type him a message. So as you can see, I'm now into my private conversation with Ryan. And I'm just checking to make sure that the feedback that I gave him on something that he’s taken a while to put together didn't come across as overly critical. So, this might be something that I didn't want to put in the regular chat Channel but I wanted to discuss with him in private.

So it's worth noting that private conversations are not just one-to-one conversations, you can add up to nine people into a Private chat conversation. It's just more for things that you don't necessarily want to discuss in the open in your Team Channels. Now if I start a New chat conversation here, you'll see here that it opens up the New chat. And if I then decide that I no longer want this chat, I have my three dots, and I can just say Discard, which will get rid of that chat. And the same thing with more established chats.

If I click the three dots, I have a few different options in here. So I could choose to pin this chat to the top if it's an important chat conversation. I could also add to my Favorite Contacts if I wanted to. And you'll see next to where we have Recent chats, we have a Contacts tab. So this is where I have my Favorite Contacts. And I can click the three dots and I can add a contact to this group as well. So let's add in Vicki, like so. You also have a link at the bottom to create a new contact groups.

So again, I could click that and I can maybe call this Leadership. So I now might want to add some people into my Leadership group, I can click the three dots, Add contact to this group. I'm going to add Adam, and I'm also going to add Ben, like so. So, not dissimilar to Outlook in many ways. So let's jump back to Recent, and I'm actually going to come in and I'm just going to unpin that conversation.

Now one interesting little option that you have within here is this Notify when available option. So essentially, what I could do is I can see from his status symbol here that Adam is currently away. But if I have something really important to talk to him about, I might want to be notified as soon as he comes available. So, really straightforward to have private conversations. And something that leads on quite nicely from this is what we'll be discussing in the next section when we take a look at video and audio calling.

If you look in the top right-hand corner, you can see that we have a video call button, and an audio call button as well. So if I'm in the middle of a conversation with Adam, and then we decide that this might be easier if we just quickly do a video call, we can very easily convert our typed chat conversation into a video call by clicking this button. We're not going to do that now, we're going to save that for Section 3.

But the final thing that I will show you that you can do here is that you have an Add people button. So if I want to now pull Vicki into this conversation, I can very quickly add Vicki, like so, and it will create a new conversation for myself, Adam, and Vicki. So, super simple to navigate around the Chat area. That's it for this module, I will see you in the next one.

Video: Messaging Extensions

Deb: Hello everyone, and welcome back to my course on Microsoft Teams. We're down into the last module of Section 2, this has been a very long section. But we've made it all the way to the end now. And really, the final thing to discuss in this section is something called Messaging Extensions.

Now, that might not mean anything to you. But basically what it means is that there are lots of different Apps that you can add into Teams, which really extend the capabilities of Teams. And adding additional Apps really kind of boosts the power of the types of things that you can do within Teams and makes it a really powerful, useful application. Now, I'm going to show you a couple of examples now.

Just to let you know, we are going to kind of touch back on this in one of the later sections. When we talk about things like Bots and Connectors. It's all kind of related. But I really want this to just kind of introduce to you the idea of integrating Apps into Teams. So we're in our General Channel in the Northwind Traders Team. I'm going to click in my Start a new conversation box. And in my icons underneath, if I click the three dots or hover over the three dots I should say, you can see I get a little ScreenTip there that says Messaging Extensions.

And if I click it, it's asking me to find an App. Or I can view all the Apps, and it's suggesting some useful things for me. Now, if you remember further up in this conversation, when we were talking about the Trade Awards that are coming up, I asked all the members of this Channel to start nominating people. So maybe I now have a shortlist of all the people nominated from each department. And I want to send out a poll to the rest of this Channel and get people to vote on that final shortlist. So what I can do is I can utilize a Message Extension.

And fortunately, one of the Apps within Microsoft that allows you to create polls is being suggested to me, and that is Microsoft Forms. So let's click on Forms. So you can see now essentially, I'm in a window that's utilizing Microsoft Forms, and it's asking me to create a new poll. And first of all, I need to start out with my question that I want to pose to my audience. So there's my question, I can now fill out my options. Now, you can add more than two options, you just click on the Add option button, and let's add one more, like so.

Now, if you want people to be able to select more than one, you can utilize this Multiple answers slider. Now in this case, I only want people to be able to vote for one person, so I'm going to keep that turned off, and I'm going to say Next. So it now gives me a preview of the poll that I'm creating, I'm going to submit my vote, like so. And I'm going to say Send to send that poll out to the Channel. And there it is. So it's now posted in that Channel, and people can go in and they can vote for whoever it is that they want to vote for.

Now, if I scroll down, you'll also be able to see the current tally. So I can see that two people have voted for Ben, and one person has voted for Ryan. So it's a really nice way of being able to gather responses in Forms by using that little Message Extension.

Now we have a whole host of other Extensions that you can add in. And you can see here that Adam has actually put a message in that he's struggling a bit with the PivotTable in the Sales Report. And he says; "Does anyone have a video I can watch, a tutorial video?" So what I might want to do is if I click on my three dots from my Messaging Extensions, I could go straight to YouTube, and you can see here that I haven't actually added this App to my Teams. So this is what it's going to look like if you haven't already added it.

So I'm gonna click on Add, and it now lets me browse for YouTube videos. So I'm gonna go to a great company that I know, Simon Sez IT. I'm gonna say PivotTables, and there we go; Excel Crash Course - Learn PivotTables in 1 Hour. So that sounds like it's going to be perfect for Adam and I'm going to send that video straight through. And you can now see that because I've actually added that App in, I now have the little YouTube icon as one of my icons listed across the bottom. So, it makes it super simple for me to add any further videos in.

Let's click the three dots again, maybe I want to take a look at these Stocks. And once again, I need to add this App in. So then I can enter in a Stock symbol, so I'm going to say IAG. I'm going to select it, and it's going to send that information through. And once again, you can see that because I've added that, I now have that icon added to my little row of icons at the bottom. So, you can go through and as I said, we've got some suggestions just here, which might be useful to you.

I also have a Weather option I might want to add in here. So, I'm going to add that one as well. I'm going to type in the weather for Toronto, I'm going to select it, and that immediately goes through as well. So, these Apps really just add a richness to your conversation experience. And if we click on the three dots again, these aren't the only ones you have access to, if you click on More Apps, you'll see there are so many of them in here. So, it really depends what you're going to find useful, what your Team is going to find useful. And you'll find lots of Apps in here that you've probably used separately.

So things like Zoom, you can add that into your Teams or even WebEx, if you utilize that. You have things like Evernote if you take notes in Evernote, Survey Monkey, you have Adobe Creative Cloud, there are so many for you to have a little browse through. So, I definitely advise you to have a little look through all of these. And they are divided down into different categories. So for example, if we click on Productivity, you'll have all of the Apps that are related to Productivity. So really, it's just a simple case of clicking them and adding them into Teams.

Now, I said there is a little bit more to it than that which we're going to get on to when we discuss Bots and setting up tabs and things like that in one of the later sections. But hopefully, that just gives you a nice introduction as to the types of Messaging Extensions that you can add into Teams and why you might find those useful.

That's it for this module, and for this section. We are now moving into Section 3 where we're going to talk all about video and audio meetings. So, please join me for that.

Section 3 – Video and Audio Calls on Demand

Video: Video and Audio Calls on Demand

Deb: Hello everyone, and welcome back to the course. In this section, Section 3, we're going to start exploring the video and audio meeting side of Teams. And this is probably something you're going to find yourself using all the time because it is one of the key features of Teams.

And within Teams, you have the ability to jump into a video or just an audio meeting at any given moment. You can have a scheduled meeting, or you can have a more ad hoc meeting, which you can start on the fly. So we're going to start out by taking a look at these ad hoc meetings. So let's set up our scenario.

I'm currently in conversation in the Northwind Traders Team in the General Channel, and I'm having a conversation with Adriana. And maybe we decide that whatever it is that we're discussing would be easier if we were just to jump into a quick meeting. And with Teams, we can do that very simply. Now, I will say that there has been a recent update to Teams where the button to start an ad hoc meeting has actually moved. Now if you're on a slightly older version of Teams, you'll find this button in the New conversation area.

So if I click New conversation at the bottom here, you'll see I have all of these different icons underneath. So if you are using a slightly older version of Teams, you might see down here, a little camera icon. And when you hover your mouse over it says Meet now, so you can basically start a new video or audio meeting by clicking on that icon.

Now, what you'll notice is that because I have the latest version of Teams, I don't actually have that because Microsoft have now moved that button. So if you can't see the little camera icon, cast your eyes into the top right-hand corner of the screen where you should see a big Meet button. So depending on the version that you're using, you'll find it in one of those two places. Now you'll notice that this Meet button in the top right-hand corner has a little drop down arrow next to it. I can choose to Meet now or I can Schedule a meeting in advance. And we're going to be scheduling meetings in a later module in this section.

For now, we're just going to focus on Meet now. So, I want to do a quick meeting with Adriana. Let's click the Meet now button, and it's going to take me into my Settings. And from here, I can just customize a few Settings before diving into the meeting. So the first thing I can do at the top here is I can give my meeting a title. So maybe this is a Sales Strategy Meeting. And you will see by default, it's turned on my camera. So this is essentially going to be a video meeting. And you'll see just underneath where you can currently see me, I have a little toggle slider just here.

So, if I decide that maybe we just want to have an audio meeting, I can toggle my camera off, very similar to being on a phone call. Now I'm actually going to turn my camera back on. And then I have some other Settings that I can customize. So I'm going to leave most of these on the default, you'll find that most of the time it will pick up the correct Settings that you're going to want to use. So I'm using my computer audio, it's telling me that I have a Yeti stereo microphone plugged in which I do, I can choose to mute or unmute my microphone, or I can choose a couple of other different types of audio. So I can use the room audio as opposed to a microphone, or I can select to not use audio at all.

Now I'm not sure why you would want to have a meeting where nobody can actually hear anything, but you have that option if you want to use it. You'll also see that I have underneath here an option to use a Background filter. And currently, I'm actually blurring out my background, so you can't see what's behind me. Now I'm going to go through Background filters in the updates section of this course. So I'm not going to focus on that for now. Let's just join the meeting by clicking the Join Now button. And there we go.

So now I'm in the meeting, and I have this little pop up window that allows me to select one of these three options. And these all relate to inviting other people to this meeting. So I can copy the meeting link. So if I want to do that, I could then send it out into an email or maybe just post it in a different Channel. I can directly add participants to this meeting. Or I can share the link via my default email application, which for me is Outlook. Now I'm actually going to add Adriana to this meeting. So I'm going to click Add participants.

Now it's worth noting that if you decide to close this window, you can also add participants once you're already in the meeting. So I'm going to click Add participants just here. It opens up the Participants pane and I can now choose to invite somebody to this meeting. And you'll see just below it's going to give me some suggestions. So these might be people who are within my Team or people that I've invited previously. Now if the person that I want to invite isn't listed here, I can simply type in a number I want to dial or I can use their email address. So I'm going to invite Adriana. And because she's listed down here, I can click Request to join, and that's going to dial Adriana.

So now that we're in the meeting, let's just run through some of the things that we can see in this screen so you understand exactly what you're looking at. So let's start in the top left-hand corner, I have a little timer, there ticking away. So that's just showing me how long the meeting has run for so far. And then we have a Menu bar full of icons on the right-hand side. Now again, it's worth noting, if you're using a slightly older version of Teams, then this screen does look very slightly different. Instead of having that Menu bar running across the top, you might see it as a floating toolbar somewhere around the middle of this window. So just be aware of that if when you go into yours, it looks slightly different.

Now a couple of things I want to point out in here, because we are going to go through many of these options, because again, some of these are quite new later on in the course. The first icon that we have here is our Participants pane. And you can see if I hover over it, it says; Hide participants, because currently, I'm viewing the Participants pane. So this just allows me to see who is currently in the meeting. And I can do things like mute everyone's mics or mute individual mics. I can also invite additional people to the meeting from here and share the invite as well.

The next little icon on this toolbar is Show conversation. So this is basically going to open up a chat panel on the right-hand side of the screen. So it's telling me the time that this meeting started. And if I want to have a conversation with the people who are also on this call, I can simply type it in at the bottom. What you'll notice is underneath where I'm typing the message, I also have a series of icons. So this is going to allow me to format my message. And this works much the same as any other type of formatting you might want to do. I can set some delivery options.

So if I want to make this message stand out, I can choose a delivery option, I can mark it as Important or maybe even Urgent. I can attach a file from OneDrive or I can upload a file from my computer. So let's just select this CSV file just here and click on open. And then if we click the paper plane that's going to send that through so the other meeting participants can view it as well. I have some emojis that I can add. So let's just send Adriana a quick smiley. And I can see there that my Notification has come up letting me know that she's replied to this conversation.

I can add in some gifs just to add a bit of fun into the conversation. And I also have an option to add things like stickers. So these are kind of similar to means again, just a little bit of fun to liven up the conversation. So chat works pretty much the same as any other chat application that you've used.

Now the next two items that we have on this Menu bar, so Emojis and Breakout Rooms. Those are fairly new updates to Teams. So you'll find the videos related to those in the Update section of this course. The final couple of options that I want to show you in here. If we click the three dots to open up the More Actions menu, this is where you can check your Device Setting. So if you're having any issues with your sound, you want to make sure your speakers and microphone are working, then you can jump in here. And you can check to make sure that you have the correct microphone and the correct speakers selected and also the correct camera.

I can choose to turn off my video at any point by clicking the little camera icon. And I can also choose to mute myself as well. And you'll notice that for this there is a Keyboard shortcut Ctrl + Shift + M. Now, another thing that you might find useful in here, if we click More Actions again, is the Dial pad. So this is where you can dial somebody his phone number and bring them into the meeting as well.

So this is quite good if you've got an external participant who maybe they're not in the office or not at their PC, but they do have their mobile phone, you can essentially dial their number and bring them into the meeting as well. So Dial pad can be extremely useful. The final thing I want to show you in here is how to leave a meeting because again, we have two options.

Now you'll see in the top corner, we have a big old Leave button. If I click the drop down, I can choose to Leave or I can End the meeting. Now what's the difference between these two? Well, if I was to leave the meeting, the meeting is still going to carry on. I've just chosen to exit the meeting. So maybe whatever I was interested in or maybe whatever I'd come into the meeting to talk about was now over, I can just discreetly leave the meeting and that meeting can carry on.

However, if I just want to end the meeting entirely for all participants, that is when I would select the End meeting option. So I'm going to do that now. Let's click on End meeting. I'm going to end the meeting for everyone and it's going to take Back to the Northwind Traders General Channel and take a look what's happened. I basically have everything logged in the Channel as well.

So it says here, Sales Strategy Meeting started, and then I can see everything that was typed or shared in that chat panel. The final thing I'm going to do here is I'm just going to give some feedback to Teams, I'm going to say my call quality was excellent. And what you'll notice is that after a few seconds, you'll also receive an Attendance Report from Teams. So, this is a report that you can download. And it's a CSV file so it's going to open in Excel, which basically shows you the details of your meetings. So things like who attended your meeting, what time they joined, things like that.

And once again, I'm going to go through this a little bit more in the Update section of this course. But for now, that's how you start an ad hoc meeting in Teams.

Video: Sharing Content

Deb: Hi guys, and welcome back to the course. In this lesson, we're going to explore sharing files. And we took a look at this a little bit in the last lesson when I showed you how you can basically attach a file via the chat panel and send that through to all meeting participants.

But there are many other ways that we can share files within Teams, and which one you select really depends on what exactly it is that you want to share. So let's start out by diving into another ad hoc Teams meeting. So I'm going to go up to the big Meet button in the top right-hand corner, let's click it. And let's give our meeting a name. So this one is going to be a Marketing Meeting. I'm gonna leave my camera on all of my settings, I'm going to leave as the default. And let's choose Join now.

Once again, I am going to add a participant, we're going to call up Adriana one more time, and I can see that she has now joined the meeting. So let's take a look at sharing different types of content. As we've already seen, we can jump across to the Conversations panel. And using the icons right at the bottom, I can choose to attach a file and send that through to all meeting participants. But what if I want to do something a little bit different?

Well, fortunately, in the Menu bar right across the top, the last icon that we have here is a Share content button. Again, there is a Keyboard shortcut for this of Ctrl + Shift + A. Now if I click Share content, this is going to open up that Share content pane. And I have a number of different options in here when it comes to what I can share, and how I'm sharing it with the participants of this meeting. So if we take a look at the first two options, I can choose to share my Screen or a specific window.

Now what is the difference between these two? Well, if I choose to share my Screen, everybody who's currently in this call, is going to see my Screen, my Desktop essentially, and anything that occurs on my Desktop. So this is the option that I tend to use most often in the type of role that I do. So when I'm running training sessions via Teams, I tend to be jumping around showcasing or demoing different applications. So I might be in Excel one minute, I might switch across to Word. But because I'm sharing my entire Desktop, that's not a problem, because I'm not limited to just one application.

Now the disadvantage of this option is that everybody on the call can essentially see everything that's going on on your Desktop. So if you start getting email notifications come in and popping up in the corner, then everybody in the call is going to see those and that might be absolutely fine. But if you have any kind of personal accounts attached to the PC that you're using, you might not necessarily want people to see those types of emails. So just bear that in mind if you're going to use the Share Screen option. And when you're going to share your Screen, it's a simple case of selecting Screen.

So now that I'm sharing my entire Desktop, I could minimize Teams, and you're going to see my Desktop background. And I could switch to a completely different application. So I could open up Excel and I can showcase something in there, I can then switch to a completely different application if I wanted to. So I'm sharing my entire Desktop.

Now because I'm the presenter, if I push my mouse all the way up to the top of the Screen, you'll notice I get that little menu drop down. So it's telling me that I'm presenting. If I wanted to, I could choose to pass control to somebody else in this meeting. So if Adriana now wants to share her Desktop, and show me something, I can pass control across to her.

Now once you've finished presenting and you want to jump back into your meeting, just click on Stop presenting, and it's going to take you back. So that is the first option to share the Screen. Now when it comes to sharing a Window, this limits you slightly and you'll see here it says Window and then in brackets, it's got 10. And that's because I currently have 10 other windows open on my PC.

So in order to share a Window, you have to have it open already. If I click Window, you can see it's going to show me all of the different Windows that I have open behind this meeting, and I can choose one of them to share.

So if I just click this Book1 for Excel, the only thing I'm sharing is this specific Window. So I can't jump around to different applications, it limits me to this Window. So once that's not quite as flexible, if I was to get any pop up notifications, then nobody else in the meeting is going to see those.

And very similar to the Desktop option, if I push my mouse all the way to the top of the Screen, I have the same options. So I can click stop presenting to come out of there and jump back to the main window. So that is the difference between sharing your Screen and sharing a specific Window.

Now the final option I want to go through with you in here is the Microsoft Whiteboard. So this basically opens a whiteboard where you and your Team can brainstorm ideas and also collaborate. And if you want other people to be able to participate in annotating on this whiteboard, if you click the cog icon, just make sure that you have this toggled on; Other participants can edit.

So I can see there that Adriana has drawn a circle, I can then jump into the whiteboard and I can move this circle around. So I could go in and grab something from this toolbox and start to make my own annotations. So this is essentially a shared whiteboard where your Team can brainstorm ideas.

Once you've finished with the whiteboard. Again, if we click the cog, you can see that you can choose to export this as a PNG image. What you'll also notice is that when we end this meeting, any whiteboards that you've shared or collaborated on will also be available in the Team Channel. So, I'm going to click Stop presenting, just to jump back into the meeting.

Now the other options that we have underneath here for sharing content relate to PowerPoint Live. And again, this is a reasonably new feature of Team so you're going to find the tutorial for this in the Update section of this course. But for now, that is how you share content. I will see you in the next lesson.

Video: Schedule a Meeting

Deb: In the first lesson of this section, I showed you how you can very easily start an ad hoc audio or video meeting from a Teams Channel. And in this lesson, we're going to take a look at how you can Schedule a meeting. So this would be for meetings that you've planned ahead of time. And you can schedule a meeting from a couple of different areas within Teams.

So if you're currently working in a Channel, and I'm currently clicked in the Northwind Traders Team General Channel, if we jump up to the Meet button in the top corner and click the drop down arrow, the second option we have here is to Schedule a meeting. And this opens up the New meeting window, and we can now go in and add the details of this meeting. So let's just give this a name. So this is going to be a Project Meeting, I can add any required attendees. So let's add, Adriana. And I'm also going to add Jen as well. I can then set the time. So let's set this for tomorrow. So June the third. And we're gonna do this meeting at 10:30am to 11:30am.

Now, if this was something like a weekly meeting, I could set a recurrence just here, Daily, Weekly, Monthly, or even a Custom recurrence, this is just going to be a one off though. So I'm going to leave this on Does not repeat. Now the next field deals with Team Channels. Now, because I'm scheduling this meeting from directly within the Northwind Traders General Channel, it's already added this Channel to this field. You'll notice in a moment, if we decide to schedule a meeting from the Calendar, because we're not actually in a Channel, this field will be blank. But we do have the option of also adding the meeting to a Channel.

We can then go in and type in the details of the meeting, I'm just going to leave that blank for now. And once we're done, all we need to do is click on the Send button to send that out to the other participants. And what you're seeing is that meeting is now logged in the General Channel in the Northwind Traders Team. And if I want to view it, I can simply click on it, and it's going to take me back into those meeting details. Now what you'll see once I go back into this meeting is that a few things have changed.

So now, I have a Cancel meeting button at the top, I can copy the link to this meeting and maybe send it to other participants or post it in a Channel. And you can see that in the main body of the email, I now have a link. So when both Adriana and Jen received this meeting, they're going to get an email and it's also going to notify them within Teams. When it comes time to join this meeting, they can simply click on the link. So, very simple to schedule a meeting directly from within a Teams Channel.

Let's now jump across to our Teams Calendar. And you'll see if I scroll up to 10:30, there is the meeting that I've just created sitting in my Calendar. And of course, when it comes time to join this meeting, I could just click to open, and then I have a Join button just here. Now, as I mentioned, you can also schedule directly from your Calendars. So let's say I want to schedule another meeting for Friday at 1pm. In the top right-hand corner, I have a New meeting button. I'm going to say this is a Lunch Meeting, I can again go through and add the required attendees. I can set the date, and also the time. So let's do this at 12:30 to 1:30.

This time, I'm going to say that this does repeat, and we're going to repeat this Weekly. But notice that underneath, it's not posting directly to any Channel at the moment because I'm creating this from my Calendar. But if I wanted to, I could go in here. And when I click, it's going to show me all of my different Teams. I'm going to expand Social Committee, and then I can choose a Channel. So let's just say General, I can then add my meeting details, click on Send, and that invite is going to go out to those participants as well.

So because I've set this up as a recurring meeting, if I click the drop down and go to let's say next week, you'll see that that Lunch Meeting is in there as well. Now if we jump back to our Teams, and this time, let's go to the Social Committee General Channel, you'll see that because I selected this particular Channel to post the meeting to, it's sitting just there. And when it comes time to join, I can simply open up and I have a Join button in the top corner. So, very simple to schedule meetings ahead of time in Teams.

Video: Scheduling a Live event

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. In the previous module, I showed you how to Schedule a meeting. And in this module, I just want to very quickly talk to you about Live events. Now, if we click on this New meeting button in the top corner, if you remember the other option we have in there is Live event.

Now the difference between a meeting and a Live event is that a Live event is a Live stream, and it's normally for large audiences. So for example, I host webinars every single week. And normally I can have 500 people or so from all around the world attending my webinar. So in that instance, a Live event would be more appropriate as opposed to a meeting. Now the way that you set up a Live event isn't a great deal different to the way that you schedule a meeting. But let's just do one so you can see exactly what to expect. So I'm going to select Live event.

You can see here it says; “You're setting up a Live event. To invite attendees copy the link once you schedule the Live event and publish it or send it in a Calendar invite”. So, because this Live event is going to a large audience, and with Live events, they won't necessarily all be within your organization. So it's much more efficient to copy the link to the Live event, and then send it out via Outlook, or maybe publish it to a website, something along those lines. So I'm going to say Training Event. I'm not going to add a location, I am going to set a time and a date, though.

So let's say Friday, and this is going to be at 5pm until 6pm. You could put the details about the Live event in there. For the sake of time, I'm not going to do that. And you can invite presenters. So I'm listed as the event producer, but if Adam is speaking at this Live event, I can invite him as a presenter, and he will have presenter privileges in the Live event. I'm going to click on Next. Now this is where you can specify the Live event permissions. So the top option here, People and groups, only the specified people and groups can watch the Live event, I can set it to Org-wide.

So that means that everyone in my organization, so sharing the same email address can watch the Live event, or I can have Public, the Live event will be open to anyone. And it says; “Use this where most of the attendees are outside of your organization”. Now you can see that that one for me at the moment is grayed out because this option hasn't been enabled by my Administrator. But if it has, that will be an option that you can select. So I'm just going to say Org-wide. And I'm gonna say Schedule. And there we go.

So it says to invite attendees copy the link, so I'm gonna say Get attendee link, and it's been copied to the clipboard, and I'm gonna close down. So I can now see that Live events scheduled in my Calendar. And if we click on it, we have a Join link in there. But in order to notify people about this Training Event, I need to send them the link. So it might be that I want to jump across to Teams, and maybe I want to put the link into the General Channel, I can do Ctrl + V to paste that in. And when I click it, that's going to take me into the Live event. And you can see here it says the Live event hasn't started yet.

Alternatively, I could paste that link into an email and send that out. So that's particularly useful if you have a lot of external participants joining the Live event. So really, what I want to get across to you here is the difference between just a regular meeting and hosting a Live event. That's it for this module, I will see you in the next one.

Video: Record a Meeting or Call

Deb: Another important aspect of Microsoft Teams is the ability to be able to record your meetings. And this is particularly useful if you want to review a meeting. And it's also useful to send out to participants who maybe weren't able to join the meeting at the time. And I would say when it does come to recording your Teams meetings, it's always good to let the participants know that you're going to start recording. There are some situations where possibly recording isn't the most appropriate thing to do, maybe if it's some kind of HR meeting.

So, just make sure that everybody who's on the call is in agreement and are happy for the meeting to be recorded. And when it comes to recording, this is a very simple process, we can jump up to our Menu bar running across the top, and we need to click the three dots where it says More Actions. And towards the bottom of this menu, you'll see that I have a button here that says Start recording. So if I click this, you'll notice that I have a red recorder indicated in the top left-hand corner. And I've also got this purple bar running across the top that lets me know that I am recording.

And of course, it basically just says there what I just mentioned to you; “Be sure to let everyone know that they're being recorded”. Now I'm going to dismiss this message because I don't need that lurking around. But now everything that I'm saying, everything that I'm sharing, everything I type into the chat panel, and all the input from the participants is being recorded in a file. Now once the meeting is finished, or you want to just stop recording, it's the same process. So we jump back up to More Actions, and you'll see that now, I have a Stop recording button.

So if I click Stop recording, and just confirm that that is exactly what I want to do, you can see now this warning message says the recording is being saved. And I can find a link to the recording in the meeting chat history. It's also worth noting that you'll see when we go back to the Channel that we started this meeting in, there'll be a copy of the recording in there as well. So this is a really nice, simple way for people to be able to access a recording of the meeting. So what I'm going to do now is let's just end this meeting, and jump back to Teams. And if we go to the Channel that this meeting was started in, take a look at what we have in here.

So here we have the meeting recording. And we also have an Attendance Report, which we can download. I’ll also find the meeting recording underneath the Files tab in the Channel. You can see that I now have a new folder that's been automatically created for me. And in here, I'm going to find all of the meeting recordings that were started from this particular Channel. So, it's a great way of keeping all of your recordings together.

And of course, with these meetings, if you click the three dots again, you have a menu full of different options. So you can Download this recording, you can Delete it, you can Pin it to the top. So if it's something that you want to access frequently, that can be helpful.

And you can also Rename which I find really useful, because you'll see that the meeting recordings will have a rather generic title. So, not that easy to identify when you have quite a few of them in the list. So you might want to rename that to something a little bit more meaningful.

And you'll also find a copy of the recording underneath Files. If we go to Microsoft Teams, you can see right at the top there again, that is the recording of the meeting that we've just hosted. Now something else that's worth mentioning is that depending on the length of the meeting that you recorded, it can sometimes take a few minutes for that to come into the Team Channel.

Of course, my meeting was only a couple of minutes long, so it was reasonably quick. But if you've got a meeting that's maybe one or two hours long, then you might have to wait a few minutes for that to actually generate and come through. And a couple of other things you can do in here, if we hover over the meeting and click on those three dots, we have another little menu with some options.

So, if I wanted to send someone a direct link to this recording, I can choose to get the link. It’s going to give me the link just here, I can then copy that and maybe paste that into an email or into another Channel. So, very simple and straightforward to record Teams meetings.

Video: Meeting Notes

Deb: Another great feature of Microsoft Teams is the ability to take notes whilst you're in a meeting. And I know from personal experience, I love to take lots of notes when I'm listening to a meeting. And in the past, what I've done is I've normally had a separate notetaking application. So something like OneNote, open in half of the screen and then the meeting open in the other half. And that can be problematic, particularly if you're using something like a laptop where screen space is minimal.

So fortunately, we now have notes available from within Microsoft Teams, which makes the whole process a lot less cumbersome. So to access Meeting Notes, once you're in a meeting, again, we're going up to our menu running across the top. If we click the three dots to open the More Actions menu, you'll see the third option down there is Meeting Notes. And the cool thing about this is that any notes that you take are automatically shared with others, and are accessible before, during, and after the meeting. So you can essentially take Team notes.

So, if I click the Take notes button at the bottom, so you can see it jumps me across to a new tab in the Northwind Traders General Channel. I now have a tab that says Meeting Notes. And I can simply click and start typing in my notes. I can format my notes. So if I want to select this and maybe add some bullet points, I can do that. I can make things Bold, Underlined, Italics, all of the usual formatting options that you would expect to find in a Microsoft application. What I can also do is separate my notes into different sections. If you take a look just underneath there is a plus icon.

When I hover over, it says Add a new section here. So if I click, I can now edit the heading and I have myself a brand new section. And for each section, if you cast your eyes over to the right-hand side, we have More Options underneath the three dots. And you can actually copy a link to specific sections of your notes. So if I select Copy Link, what I could then do is go to another Channel, and maybe I want to post in here Ctrl + V to paste in a direct link back to that section of the notes.

And if you want to view this page in a completely different way, then if you click the three lines just at the top there, you can now essentially navigate through your notes by the specific section, simply by clicking on whichever section you want to jump to. Also, right at the bottom, you have the ability to add a new page to your notes. So I'm going to give my page a name, and now I can see my separate pages with the relevant sections underneath.

Now because these are notes that you can collaborate on with the other people in the meeting, Adriana is also in this meeting and can access these same notes simply by clicking on Meeting Notes. And, Adriana can add her own points into these notes. If I want to see any notes that have been updated, I have a Refresh button in the top corner. Now another thing you can do here, if you want a little bit more room when it comes to writing and organizing your notes, if you take a look in the top right-hand corner, there is a diagonal or double headed arrow.

If I click this, it's going to allow me to expand that tab out so that it takes up the full screen and I just have a little bit more room when it comes to organizing my notes. Now currently, we're on that Meeting Notes tab in the General Channel. If I jump across to where we have Posts, take a look at what we now have in that Channel. It’s showing that the meeting has been started, and it's also showing that I've created Meeting Notes for this meeting.

I then have a link underneath which is basically going to jump me across back to that Meeting Notes tab, so I can carry on typing in more notes. And of course, if you want to further reorganize the different sections of your notes, if you hover over the heading and click on the three dots, you have options here to Move up or Move down. So maybe I want to move this section down so the Action Points is first. So I'm going to click Move down, and it just switches those two around.

So, that is how you can create Meeting Notes and collaborate on them with other participants in the meeting.

Section 4 – Wiki

Video: Wiki

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. This is Deb and we are now down in Section 4, where we're going to take a look at some of the additional features that you have to help you out within Teams. And we're going to start out with this first module, which is going to be related to the Wiki tab.

Now, again, I'm in the General Channel in Northwind Traders Team. And currently we're clicked on the Posts section or the Posts tab. And if you go to rise up to the top, you'll see we have Posts, we have Files, which we've already been into, and then finally, we have a Wiki tab. Now, it's worth noting that when you start a new Channel, you will get a Wiki tab automatically. There are some instances where you may not get a Wiki tab. And if that does happen to you, I'm going to show you at the end of this module, how you can just quickly add that Wiki feature, but for the most part, it will always be there.

Now one thing that I don't want you to confuse Wiki with is the well-known website, Wikipedia. They are two completely different things. Now the way that you need to think about Wiki within Teams is that it's like a digital notebook. So, I would liken it to something like OneNote, if you've ever used that application before, or maybe Evernote, something like that. Those are both note-taking applications. And in many ways, Wiki is very similar to that.

So the reasons you might use Wiki would be if you are having a conversation within your Channel, as I have been here, myself or someone else might post some important information. But the thing with a conversation is that very quickly, that important piece of information gets buried. Conversations are so fast, and people are adding things to them all the time that before you know it, that important piece of information has scrolled up the screen. And unless you've saved it or bookmarked it, or something along those lines, you might forget it was even there.

So what the Wiki tab enables you to do is really kind of create a permanent area for important notes or anything that you want to retain permanently, that's easy for people to access and quickly check. So you might use Wiki to store notes, or maybe actions, or even tasks or just some important information that everybody needs to know. So Wiki is very similar, and it's set up against something like OneNote. What you'll see here is that we have a page which is currently Untitled, and then we have an Untitled section as well.

Now we have three lines just here. And if I click on it, it's going to expand the Wiki menu. So this is where you can see your Untitled page, and then all of the sections within that page. And you can go in and you can add new pages and new sections as well. So, I'm going to click in Untitled page, and I'm going to add a title, like so. I'm now going to add my section title. So you can see underneath, my content goes in there. So I'm just going to paste some content in. And you'll also see just above you have all of your formatting options that we've seen in previous modules. An additional thing you can do in here is that you can insert images into your Wiki if you want to.

Now because there are numerous members of this Channel, there could be lots of different people in here editing this Wiki page. So one thing you need to remember is that when you're clicked and you're typing, you'll see you get this blue line down the side. And that basically means that you're in Edit mode, and you're the one currently editing. So that means that if anybody else in the Team comes to these Team guidelines and tries to start updating the same piece of text that you are, they going to be locked out of that section until you finished editing.

So if I click away somewhere, you'll see that I'm now no longer in Edit mode and anybody can go in and start editing. Click again in this section and I'm editing again. Okay, so just remember that. Now if I want to add another section, if I hover my mouse you see I get a little plus underneath and it says Add a new section here. I can just go in and do exactly the same thing, add my heading, add my content, so on and so forth. And you'll see that what Teams does is it numbers these sections very nicely to keep everything all organized.

Now we've been adding sections underneath this main page of Team guidelines. If I wanted to add a new page, I could definitely do that just by clicking the New page link at the bottom. And then I can go in and I can rename this page, like so. So it's a really nice way of keeping all of your permanent notes organized. There's something else you have in here you have these three dots, which gives you More Options. So you can do things like copy the link to this specific section. So I've clicked the three dots next to Using the Pitch Template.

So if I say copy link, it copies the link to the clipboard, I can then jump back to my posts, click in the box at the bottom, and I could paste that link in. And of course, if I wanted to, I could add any of my Team members in there as well. I can send that through, then Ben and Adam can both click, and it's going to jump them to that particular section in that Wiki page. So copying and pasting a link, really, really useful. You'd also have Move up and Move down, so you can reorganize your sections. And of course, you can delete any section that you need to.

Another cool feature of this is that next to the three dots, you have a Chat icon. You can see there it says; “Show section conversation”. So if I click that, it's going to open up a conversation window directly within my Wiki. So if I wanted to, I could start having a conversation about this Wiki page or something in this Wiki page without having to jump back to my Channel. So that's a nice little feature in there as well.

Also, particularly if you have this Conversation Channel open, if you're finding things a little bit squashed up, you have these Expand tab in the top right-hand corner. And if you click it, it's just going to expand that out so you can really see everything nicely laid out. Gives you a little bit more room when you're typing.

So that is it on Wiki. Just remember, it's a permanent notes, storage for anything important, anything you don't want to lose amidst the chaos of a general conversation. That's it for this module, and we'll see you in the next one.

Video: Apps, Bots, and Connectors

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. We're down in Section 4, taking a look at some of the additional features available to you in Microsoft Teams. And in the previous module, we saw how we could set up a Wiki page for all of our permanent notes. And in this module, I just want to expand a little bit more on Apps, Bots, and Connectors.

Now, we saw in a previous module, some examples of adding Apps into Teams in order to extend its capabilities. But now we're going to look at something slightly different, we're going to focus on Bots. Now, if you're not sure what a Bot actually is, or maybe you've heard that terminology and maybe don't understand completely, a Bot is an automated intelligence program. And it's a program that you can interact with, and it will provide you with answers.

So in many ways, it's similar to having a human conversation. I could ask the Bot a question, and then the Bot will reply to me with an answer. So in this module, we're just going to take a look at a couple of different Bots and how you can utilize them in your Teams conversations. Now, if you recall from before, there are numerous different ways that you can get to Apps, Bots, and Connectors from within Teams.

So you'll see at the bottom in this main menu bar here, we have an Apps button, we can also click the three dots underneath where we post messages. And you can click on More Apps, and that will take you to the correct area. Alternatively, again, we have in this menu bar running down the left-hand side, three dots, that's going to show you all of the Apps that you have currently added. And if you click on more Apps, it's going to jump across to this big Apps screen.

Now, you'll see here on the left-hand side, we have different categories. So Personal Apps, Bots, Tabs, Connectors, and Messaging. So I want to focus on Bots. So I'm going to click on Bots just there. And it's going to show me all of the applications available in that category. So these are all of the applications that I can add into Teams and essentially interact with to get information.

Now I've played around with quite a few of these Bots in Teams. And I will say that some of them work better than others. But I'm just going to show you a couple of examples just so you understand how you install them, and kind of what happens when you're interacting with one of the Bots.

So, I'm going to scroll through my list. And I'm actually going to select this SecretaryBot. And you can see here it says; "Save time by enlisting the help of a SecretaryBot to schedule your one-to-one and Team meetings". So I'm going to click on that Bot, and in the information here, it says; "Bots chat with the app to ask questions and find info". So I'm gonna say Add, to add that to my Apps list. So now that I've added the SecretaryBot, if you look over in that left-hand menu, you can see I have a new tab called SecretaryBot. And I'm now in a Chat screen where I'm actually having a conversation with the Bot.

And you can see I've had a little bit of a conversation with her already. And at the bottom she's got; "Hello, welcome to SecretaryBot. If you need to schedule a meeting with someone, please feel free to ask me". So what you can do is you can type in your questions down here. So I'm going to say schedule a meeting. And she's going away. And she says; "I'll find attendees from your relationships". And it's brought up all of my contacts. And she's asking me who I'd like to invite. So I'm going to say Adam.

She's now asking me, how long in minutes is my meeting? So I'm going to say 30. What is the subject of your meeting? I'm going to say Project Meeting. And now she's going off to find the common free time between me and Adam. And she's presented me with a whole list of different times and dates. So I'm going to say from 4:00 to 4:30. She's asking me if I'd like to send multiple invitations, or if not just select go next. And now she says I have arranged the meeting for you and your attendees as follows and there is my time and my date.

And then, she asked me if she can help me with something else. So I could arrange another meeting, arrange lunch, I have some different options in here, so on and so forth. So if I go back to arrange lunch, I'm going to say invitation settings. I can carry on going through answering her questions. So you can kind of get the idea as to how this works. You're interacting with a Bot and she's trying to automate the process of doing certain tasks. So this is a SecretaryBot. So things are very Admin related. There are lots and lots of different Bots related to many different things.

So again, it's really entirely up to you to have a little look through these Bots and see which ones are going to suit you, which ones you might want to add. You could even do things like get a Bot to create polls for you. So if I was to install this Polly communications Bots, I'm going to click Add. And again, you can see I was using this earlier, it's now asking me your question, Option1, Option2. So all I would need to do, type in my question, type in my first option. Second option, and I can carry on going through, hit Enter, and that PollyBot is going to go away and create that poll for me.

And let's just look at one more little Bot in here, I'm going to go to More Apps, I'm going to click on Bots, I'm going to select this iTrainer 365, and I'm gonna add that Bot in. You can see here it says "Hi, I'm an educational chatbot. I can help you to improve your Microsoft Office 365 skills". So it says; "Please start our dialogue with one of the following commands". And I've got Task, Progress, and Question.

So if I type in Task, you can see the Bot is typing. It says; "I'm here, the exercise for today". And it gives me a link to YouTube. So it's almost like a little daily task to help me build up my knowledge around Office 365. So if I had a question about something specific in Microsoft 365, I could start out with Question, and then type in my question as well. So hopefully that gives you the kind of things that you can do with these Bots. It's an automated, AI-driven program.

Now if at any point, you want to uninstall any of the Bots that you've already installed, if you click on the three dots just here, it's going to show you the Apps that you've added, and you can go in and you can uninstall them. So if I right click on Polly, I have an Uninstall option. And I can do the same with the SecretaryBot.

Now the final thing I want to talk to you about in this module is something called Connectors. And you can see I've gone back into Apps, I've selected the Connectors option. And again, I have all of the Apps that are available as Connectors. Now the one I'm going to demonstrate for you because these work in a fairly similar way to Bots, is the RSS feed. So you can see here it says; "The RSS Connector sends periodic updates from an RSS feed". So it might be that you have a particular news site or maybe a blog site that you follow. And every time that site's updated, you'd like to have that coming into Teams.

So this is what we call a Connector, you're essentially connecting Teams with a different website, and it will update periodically. So the example I'm going to show is I'm going to just grab the news feed from the BBC World website, and I've jumped across to that website. And you'll find that if a website does have an RSS feed, if you type in the website name and RSS, it will jump you to the correct place. So, this is just a general feed of all of the news that's coming in, and this is constantly updated.

So all I need to do is I'm going to go up to this URL, Ctrl + C to copy it. I'm going to jump back to Microsoft Teams, I'm just going to install the RSS Connector. I'm going to say Add to Team. And it's asking me which Team I want to add this to. And I'm going to add it to the General Channel in Northwind Traders, I'm going to say Set up a Connector. Now it says enter a name for your RSS connection. I'm going to say BBC World and the address, Ctrl + V to paste that feed address in there. I can then choose how often I'd like to receive an update.

So, if I'm just checking this once a day, it might be that I just want it set to daily, but I could have it set to update every 15 minutes. So if new news comes in within 15 minutes, I'm going to get that update. So I'm going to say every 15 minutes and I'm going to click Save. So now, if I go back to my General Channel in Northwind Traders, you can see there is this RSS feed and anytime I can click on any of these links and it's going to link me to that specific story on the BBC website. And as I said, this is going to refresh every 15 minutes.

So, Connectors, a similar way of installing them as Bots and Apps but they do a slightly different thing, they just connect you to other applications. That's it for this module, I will see you in the next one.

Video: Customizing Channel Tabs

Deb: Hello everyone. This is Deb and welcome back to our course on Microsoft Teams. In this module, we're going to look at how we can customize our Channel tabs. Now we've been looking at these Channel tabs in other modules. And once again, I'm still in that General Channel in Northwind Traders. And our Channel tabs are these things that you can see at the top here. So Posts, Files, and Wiki are the Channel tabs that we have set up currently.

What you can do to make things a lot easier for your Team members to access important information is that you can create your own Channel taps. So let's have a look at how we can do that. Now you'll see here we have a plus and as I hover over, it says Add a tab. And again, it says here; “You can turn your favorite Apps and Files into tabs at the top of the Channel”. And you can see here, it's suggesting some tabs for my Team. And as I scroll down, I have a whole host of other tabs that I can add.

So again, it's really kind of what you're interested in, what you think is going to be good for your Team. So I'm going to add a couple of tabs just so you can see how it works. So, it might be that I have a really important document or spreadsheet that I want to make into a tab so that it's easy for everyone to access. So I'm going to click on this Word option. And right at the bottom, there is the Trade Report. Now, this is a really important report so I'm going to add that as a tab.

Now I'm going to change the tab name from Word to Trade Report March 2020. And I'm going to select that document and click on Save. And what you'll see now is that I have that as a tab at the top. Now, I didn't put any information in this document as it was just a test one to show you. But obviously, if you click on this tab, it's going to show you all of the details of that Trade Report. And you'll also see that you're in kind of a mini Word Online preview here. So you can go in and make live edits to that document as well. Let's take a look at another one. Let's click on the Add a tab button. This time, I'm going to add a YouTube video.

So because a lot of my Team are doing a lot of analysis on figures, and trades, and stocks, and things like that, and Adam told me earlier that he was struggling to do a PivotTable, which is one of the most pivotal tools when it comes to doing analysis, I'm going to put in a useful little tutorial about PivotTables. So in here, I'm searching on YouTube for Simon Sez IT and PivotTables. I'm going to hit Enter, and there we go. The top one there; Excel Crash Course learn PivotTables in 1 hour. I'm going to select that video, I'm going to say Save. And there we go, I now have a direct link to this video.

Now if I wanted to, because this is quite a long name, if I click the little drop down there, I can say Rename. And I'm just going to call this PivotTable Tutorial and click on Save. Great. So you can see we're really starting to customize this based on the interests and things that are of importance to our Team. Let's do another one, Add a tab, and this time I'm going to add an external website.

So I'm going to do a link to the London Stock Exchange. Ctrl + V to paste in my link, and click on Save. And there we go. It takes me straight to that web page. And again, if I find that this title is a bit long, I can click it, I can rename it, and we'll just rename this to FTSE 100 and click on Save. So, really very simple to customize those Channel tabs at the top there.

Hopefully that gives you more of an idea as to how you can do that. That's the end of this module, I will see you in the next one.

Section 5 – Searching

Video: Searching

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. We're now down into Section 5, where I'm going to show you some tools and techniques for when it comes to searching for messages, strings of text, people, Channels within Teams.

Now searching is fairly simple in Teams, we have one Search bar, which we can see listed across the top, and it says Search or Type a command. So we're going to do some basic searches. I'm going to click in this box, and I'm going to search for something that I was talking about a few days ago.

I was asking the other members of this Channel if they'd seen the article that was published on the Trading Places website. So, I want to find that message again. So I'm going to type in Trading Places and hit Enter.

And what you'll see if you look over on the left-hand side is that it's found the message where I've mentioned those words, Trading Places, and I can see that that is in the Northwind Traders General Channel. And if I click on it, it's going to jump me to that specific point in the conversation so I can reread the comments underneath there. Now what you'll also see is that it's divided it down into Messages, People, and Files. So I can search for any of these things within Microsoft Teams.

So if I just clear this search by clicking on the cross, and this time, I'm going to search for Ben Lee. And now what I've got is a list of messages where Ben Lee is mentioned. But if I click on the People tab, it's also going to show me Ben Lee the person. If I click on Files, it hasn't found any files with Ben Lee in the title. Now if I want to search for a specific file, so let's type in Sales Presentation and hit enter.

Again, you can see any conversations where I've mentioned Sales Presentation. And in this case, if I click on this one, it's going to show me that Sales Presentation file that I actually sent through to the Team. Now what if I type in another file that I've sent through so we're going to say Trade Reports.

Again, here you can see every time I've mentioned Trade Report in a message. If I click on Files, it's going to show me the Trade Report and also the feedback report that I sent through.

And again, if I click on these Files, it's going to actually open that document for me. You can also search for specific Channels. So if I search for Marketing, it's going to jump me directly to that particular Channel. I could also jump to Leadership Team, and there we go, I'm now in the Leadership Team Channel.

So, extremely simple just to use that very basic Search command. Type in what it is that you are looking for, and then you'll either find it in the Messages, People, or Files tab. That's it for this module, I will see you in the next one.

Video: Quick Commands

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. This is still Deb, and we are in the last module of Section 5, a very short section this time. And in this section, I just want to show you a really cool, useful little feature called Quick Commands. Now you can access Quick Commands in that Search box at the top.

So in the previous module, we were utilizing the Search box just to type in our search term in order to find Messages, Files, or People. But there's a cool little trick that you can also do up here, which will enable you to trigger Quick Commands. So, let's click in the Command box at the top.

Now, what you'll see when I'm clicked up there, it says type / or the @ symbol for a list of commands. So if I type in /, this is what opens up. So I get a whole host of different Quick Commands that I can use in order to perform a task very quickly.

So for example, if I wanted to set my Status to Busy, maybe I'm about to rush off to a meeting, I have an option to do that here. I can select it from the list, or I can just type /busy, I hit Enter, you can see now if you look at my profile picture, it's now set my icon to busy.

If I want to change that back, I can say / and I can say Available. And you can see my icon is now Available. And there are a whole host of these in here, you might want to utilize. So let's do our / again.

If I want to quickly see what all of my Keyboard shortcuts are in Microsoft Teams, I can type in / keys, and it's going to open up those Keyboard shortcuts. So, so much quicker than trying to find where that is amongst the menu system.

Let's do one more, let's type in our / and if I want to start a quick private message with someone, I can do forward /chat. It’s then asking me for the person, I can say Ben.

I can type the message; “Hi, Ben”, and it's now gone off and sent that message. So if I jump across to my Chat stream, you can see at the top, there is my conversation. So, it's a real quick way of doing different things. So don't forget that /. You also can type in the @ symbol.

So for example, if I want to send some praise to somebody, so if I type in @praise, I'm going to select the leadership badge, and I'm going to send that to Adam. I can preview it, and then I can send. So again, just a really quick way of being able to do certain tasks. And you can see I have all of the Apps that I have installed listed here.

But I could go in and add more Apps. And then whenever I want to interact with that App, I just press that @ symbol. So if I say @weather, it's going to ask me for location, I'm going to say London. There we go. I can select it, and it's going to show me the weather for London.

So, a really nice way of quickly being able to carry out tasks and trigger specific information. That's it for this module, and that's it for this section. I will see you over in Section 6, where we're going to be discussing and running through some of your User Settings. So, please join me for that.

Section 6 – Adjust User Setting

Video: Adjust User Setting

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. This is still Deb, and we are now down in Section 6, where we're going to be taking a look at the wonderful world of User Settings.

Now, I will say it's always important just to quickly run through all of your settings before you really start getting into conversations in Teams. Because you might get into three months plus of using Teams and then realize that you've got your Setting set up correctly, or that you could have had them set up better to keep you better informed as to what is going on within your Teams.

So, I always like to review these fairly on in my usage of Teams. And there aren't too many User Settings within Teams, but we're going to look at them so you understand what everything is, and the things that you can change. So, to go up to your User Settings, you need to click on your profile picture in the top corner just here.

Now some of these we've already taken a look at and some of these are fairly self-explanatory. So for example, if you want to change your picture, you can just jump into Change picture and upload a new one. We can also change our Status. Again, we've looked at this in a previous module, mine is set to Available and I'm currently happy with that. Now one thing to note here is if you remember previously, I said Do not disturb if you have this set as your status, it's going to block any incoming communications until you come off of Do not disturb.

Now, I'm just highlighting that again, because there's another little setting which we're going to look at in a moment, which relates back to this Do not disturb status. But for now, I'm happy to leave mine on Available. I can set a Status Message. So if I want to elaborate a little bit as to what I'm doing, then I can definitely do that there. I have my Saved Area. So again, remember that any messages that you saved, you can access from here. And then we get to our Settings. So let's jump into our User Settings.

Alright, so just four different tabs in here. As I said, not a vast amount of information that you can customize, we do have some useful things in here. So the first one, your Theme. Now I have mine set to the default. But there is a dark theme and also a high contrast theme. So just to give you an idea as to what these look like, I'm going to change mine to dark. I'm going to close that down, and that is what my Teams looks like in dark.

Now normally, I'm quite a fan of dark backgrounds in my applications, but I for some reason not so much in Teams. But again, this is very much personal preference. Now I'm going to set that back to the default. And then underneath we just have our Language so you can choose what your language is. So I've got mine set to English, United States, and also my keyboard language English, United States. So, please set that as you wish.

The next tab is Privacy. Now, as I said, if you set your status to Do not disturb, then all communication is going to be blocked. However, you can set up Priority access from here. So anybody you add into Priority access, it means that even though you're on Do not disturb, you can still receive messages from this particular person or people that you specify in this section just there. So, that can be quite a useful little option.

You can create a Blocked contacts list. So Blocked contacts will be unable to call you or see your presence. So, they won't be able to see if you're Available, if you're Busy, if you're on Do not disturb and they won't be able to send you any messages. So you could choose to set Blocked calls with no caller ID. And you also have an Edit Blocked contacts list in here. Now I don't have anyone blocked, which is why I have nothing in there. But if you did, you could go in and you could edit your Blocked contacts.

Read receipts. Now I'm sure a lot of us particularly if you use things like WhatsApp for messaging, you're probably fairly used to Read receipts; the dreaded to blue ticks, as I like to call them. Now you can choose if you want Read receipts turned off or on in your Teams. Now I have mine turned on, and that just means that other people know when I've seen their message and I know when they've seen mine. And finally at the bottom I also have toggled on so that if I receive any Surveys from Microsoft Teams, I can participate.

The next section to customize is the Notifications area. Now there's loads and loads of different types of Notifications in Teams and they are divided helpfully down into categories. And basically what you can do is you can customize how you want to receive that Notification. So for example, in this Mentions area for Personal mentions, so what they mean by that is anybody who sends me an @mention. So if I receive an @mention, how do I want to be notified of that?

Now currently, I've set it to Only show in my feed. So I'm not getting any pop up boxes or anything like that. But I will be able to see that I've been at mentioned in my feed. Now I could change that, I could change that to Banner and email. So if somebody mentions me, if I have this option selected, I'll get a little pop up Banner in the corner of my screen, and I'll also receive an email. Now for me, I find that a bit overkill, I don't want an email every time somebody @mentions me. But I do quite like the Banner. So, I might want to change that to Banner only. And you basically have similar options for all of your Notifications.

So again, for Channel mentions, whenever the Channel gets @mentioned, how do I want to receive that notification? Maybe I'm not interested in that at all, I might want to turn it off entirely, or I have those same three options. So, definitely worth running through all of these and selecting how you want to be notified of those alerts. And finally, at the bottom, I'm going to point this one out again, because we did touch on it earlier.

If you remember, when I was having a conversation with Adam, I turned on the setting to be notified when he comes back online. So maybe I have something super important to discuss with him, and as soon as his status changes back to Available, I want to be notified. Now I set that option just on that particular conversation that we were having. But if Adam is a very, very important person, and I always want to be notified when he comes back online, I could set that up under this Status area at the bottom.

So I can say Manage Notifications. And you can see that I have Adam already added into there. But I could choose to do the same for Ben, like so. So now, if these guys are offline, which currently they are, when they come back Available, I'm going to get notified of that.

And the final tab that we have here is the Calls tab. So this just allows me to set up some call answering rules. So here, I can choose how I want to handle my incoming call. So currently, I have it as Call rings me. And then if unanswered, it's going to go to my voicemail. And, I'll let it ring for 20 seconds before it redirects to my voicemail. And if you don't have your voicemail configured, this is also the place you can come in order to do that. You can also choose just to forward your calls directly to your voicemail if you want to.

Finally at the bottom we have a Ringtone. I've just got the default but we have a few different ones in there. And finally at the bottom, we have an Accessibility option. So it's asking me to turn on TTY to use text to communicate over the phone line. So if you do have any Accessibility issues, this might be an option that you want to turn on as well.

So, that is pretty much it. As I said, there's not a great deal of Settings to change but there are some useful ones in that. That's it for this module, I will see you in the next one.

Video: Admin Setting

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. This is still Deb, and we are now at the end of Section 6, another very short little section. And in this section, this is really aimed at Team Administrators. So if you're set up as a Team Administrator, I just want to very quickly show you some of the Settings that you have access to change within the Admin Area.

Now, in order to change any of the overall Admin Settings, you can't actually access that from within Teams itself, you need to go back out to Office 365, and jump into the Admin Area. So, I'm going to click on these dots, my app launcher, and I can't see it in there. So I'm going to jump across to Office 365. So it's going to open up a new web browser. And because I am an Administrator, I have the Admin tile. So, let's click and jump in there.

Now it's worth noting this first screen that you come to isn't just controlling the Access or the Settings for Teams, this really controls the overall Microsoft 365 settings for all of your Users. But I will highlight one thing in here because I think this can be quite useful if you are an Administrator.

Now in the menu on the left-hand side, you can see we have a little Users drop down. And if I click on Active Users, that's going to show me all of the Active Users, not just of Teams, but of Microsoft 365 in my organization, and I can see all of my Active Users there. Now the reason I'm showing you this is because if you want to do something like reset a password, which is a fairly common occurrence, I can't tell you how often people forget their passwords.

So if you are the Admin, then you can come in here, you can select the User and you have a Reset Password button just there. So I just very quickly wanted to show you that just because it's such a common request. Now, if we're talking about customizing the Admin Settings, specifically for Teams, if we click on this Show all link at the bottom of this left-hand menu, and scroll all the way down, you'll see we have different Admin Centers for different things. So I have Admin Centers related to Exchange. So controlling Outlook, SharePoint, but there's also one for Teams.

Again, it's going to open up a new browser window. And I'm now specifically looking at the Admin Settings for Teams, as opposed to Microsoft 365. Now again, I'm not going to go through all of these, you're very welcome to have a little browse through yourself. But if we expand this Teams one at the top, I can say Manage Teams. And that's going to show me a list of all of the Teams that I have set up. I can select them, and then I have various different things I can do utilizing this menu at the top. I can even add a new Team from here if I wanted to.

We have a lot of information here related to various different policies. So if you want to see what the policies are, that are set up surrounding your Teams, you can definitely do that as well. Now, if I jump into Users just here, again, this is where you can see all of your Teams Users. And you can see the policies that that particular user has assigned to them. Same thing with Meetings. So we have policies surrounding Meetings, and we also have a Meeting Settings area as well, where you can customize some General Settings related to your Meetings.

If we expand Team Apps, again, this is where you will find all of the Apps that you have installed for your Teams. And a lot of these are fairly similar. We can set up Phone Numbers for Voice Calling, Direct Routing, we can look at our Calling Policies, all of those kinds of things. Now the final one I really want to highlight to you here is Org-wide Settings. Because this is useful if you want to allow Guest access. So if you remember, I had one person that was external and that was Dasha. And I was only able to add her to my Team as a member after I'd enabled Guest access.

Now, a lot of the time Guest Access is disabled by default. So if you do want to enable Guests to join your Team, if you jump into Org-wide Settings, click on Guest access, and make sure you have this button toggled on. And again, remember, it does take between 2 and 24 hours for Teams to update with those Settings. So, if you toggle this to on and then immediately try and add that external person as a Team member, you're probably going to find you're going to have to wait at least a couple of hours.

And in this section, you can customize various other Settings, things that your guests are or aren't allowed to do. So, lots of different things in here. As I said, this is really just a brief look at some of the things that you can change. I would suggest that if you are an Admin, you do go through all of these sections, and make sure that everything is set up to your liking.

But that's it, a very quick overview of the Admin Settings. We're now going to move on to the final section where I'm going to show you how you can use the Teams Mobile App. So, please join me for that.

Section 7 – Working with Teams Mobile App

Video: Working with Teams Mobile App

Deb: Hello everyone, and welcome back to our course on Microsoft Teams. In this module, I'm going to give you a quick whizz around the Teams Mobile App. And I'm using iOS, so this demo will be related to that.

So on your mobile phone, if you go into the App store, and just search for Microsoft Teams or Teams, select it from the list, and you should find the application there. Just click on the download button to download that application. And once it's downloaded, you can click on Open to jump into Teams.

You'll need to log in so, type in your email address, and then also enter your password and then click on the Sign In button when you're done. This will sign you into Teams. And I'm just going to allow notifications and also access to my microphone, and you'll get to the Teams Home screen.

So you can run through these little informational screens just by clicking Next. And then it's going to present me with Teams and I'm currently in my Activity feed where I can see all the activity for my team. By jumping across into Teams, this should look reasonably familiar, I can see all of those Teams that I've set up. I'm going to jump into the General channel in Northwind Traders, and there is the conversations that we were having earlier. So everything is nicely integrated.

If I move across to the Files tab, I can see all of the files that have been shared. And if I click on More, those of those Apps that I added, so I'm quickly going to jump into FTSE 100, it will take me to that website, and I can then jump back to Teams. If I click on the Chat button at the bottom it's going to take me into those private chat areas. And I can go into that conversation I was having with Adam and send him a new message simply by typing at the bottom. I can send that through nice and simple.

Click the back arrow to go back. And if I jump into Calendar, you can see any meetings that I've got set up. I'm going to give Teams access to my Contacts. And if I had any calls that would be listed there. I can also search within the App by typing in my search terms. So first of all, I'm just going to do a quick search on Trading Places. And you can see there where it's found that text. And if I jump across the Messages, that's the specific message. I'm going to do another search. And this time, I'm going to search for the Trade Reports. And you can see where it's found that in the Messages.

And also if I jump across to Files, I can see the file there. If I click on the file, it's going to open it in Word Online. So I can read that document, click the cross to close to come back. If I click on the three lines at the top, it's going to take me into my Profile area. So I can do things in here like change my status. So I might want to set that to something like Do not disturb. And I can also from here, jump into my Settings. And I can change that theme to dark as we did in the Desktop App, and I need to close and reopen in order for that to take effect.

Jump back into my profile, and I can go into Notifications. And those are all those Notification Settings that I can toggle on or off. And I'm going to go back into Teams. And the button in the top corner will allow me to create a Team, browse Teams, or join a Team. So I'm going to create a new Team. I'm going to give my Team the team name of Project Delta. And I'm not going to add a description, I'm just going to say Done to add that Team to my Teams list.

I can add Members. So I'm going to add Ben, I'm going to add Adam, let's add Vicki as well and also Ryan and click Done. I want to post a new message, I just click New Post, and I can say; “Hi everyone, this is a new team”, and press the Enter button to get that to go through. Now if I want to create a new channel, let's click on the three dots and go into the Manage Channels option.

I click on the plus in the top right-hand corner, I can enter my channel name, which in this case is Q2 Targets. I'm going to say Done, and that new channel is now added. So if I go back and scroll down, you can see that channel underneath the Team. And that's it for this module, and that is it for the course. All that's left to do is go to our closing module, so I will see you over there.

Section 8 – Course Close

Video: Course Close

Deb: Hello everyone, and welcome to this closing module of Microsoft Teams. I very much hope that you've enjoyed this training course as much as I've enjoyed hosting it for you.

I hope you feel that you've got something out of it, and you've gained a lot more knowledge in Microsoft Teams. But for now, on behalf of myself and the team, we'd like to say thank you for choosing us. My name is Deb, and I hope to see you again sometime in the future. Bye now.

Section 2021-01 – Out of Office

Video: Out of Office

Deb: Hello everyone, and welcome back to the course. In this section, we're going to cover Teams Updates. Because, Teams is one of those applications that is constantly changing at the moment. So Microsoft are always adding new things and improving the features. So much so that it's virtually impossible to keep up with it all.

Because in general, the courses tend to go out of date fairly quickly. So, we want to keep on top of that, and just have a section where we can post any updates since this course was published. And the first update I'm going to go through with you in this section is how to set your Out of Office from Teams. So, most people are very familiar or have used Out of Office or Automatic Replies in Outlook.

This basically allows you to do exactly the same thing, but you don't have to jump across to Outlook in order to set you're Out of Office if you're going to be going on holiday, or if you're going to be away from your desk for a while. We can now do it from directly within Teams. So in order to set our Out of Office from directly within Teams, all we need to do here is go all the way up to the top right-hand corner of the screen where we have our profile picture.

If we click on the profile picture, you'll see that we can Set a status message. So let's click this little link. So what I could do in here is just set a status message. But we're interested in setting an Out of Office. So maybe I'm about to go on holiday tomorrow, lucky me. Instead of jumping across to Outlook, what I can do is come down to this Schedule Out of Office link at the bottom. And when I click that, it's going to take me to the Out of Office screen.

And you can see there it says; "Set up a message so that others know you're on vacation or not available to reply. Your Out of Office status will also sync with your Outlook Calendar". So if you set your Out of Office in Teams, you don't then it need to go across to Outlook and set it there, it's going to synchronize across both applications. So all we need to do here to set our Out of Office is toggle on Turn on Automatic Replies, and then we can type out an Out of Office message.

So, I've quickly typed in a message. And if you hover your mouse over the i icon, which is just some information, it says; "Your message will appear when people contact you in Teams, or open your profile. And it's also going to be sent as an Automatic Reply in Outlook". So we're kind of killing two birds with one stone just here. Underneath the message, we can then choose if we want to send replies outside of my organization. So if I don't select this box, it means that this message is only going to be sent to people inside my organization.

Now, I want to send this to everybody who tries to send me a message so I'm going to tick this box. And once again, I can say Only to my contacts or All external senders. So I'm going to say

All external senders. And then what you'll notice is underneath there, I then have another field where I can type a second Out of Office message.

So, this is similar to the dual message that you get in Outlook. So, it might be that I want this default message at the top here to go to everyone inside my organization, but maybe I want a completely different message for people outside of my organization. So, maybe this relates to things like friends or family members, something like that. And then right at the bottom, I have a final checkbox that says Send replies only during a time period.

So, this is where you can set a Start and End Date and Time. So if I want these to go tomorrow, because that is when I'm out of the office, I can just select the Date from the Calendar picker. I'm happy to keep this on 9am. And maybe I am back in a week's time, so let's pick the third of June. And again, I'm going to keep this time at 9am. Once I'm happy with all my settings, I can click on Save and my Out of Office will start sending tomorrow at 9am.

And of course once you're back from holiday, it will automatically disable your Out of Office on the end day that you've set. But if say you come back a couple of days early and you want to manually disable your Out of Office, again, just click back on your profile picture, and go to Set status message, go into Schedule Out of Office, and then we can just simply turn off Automatic Replies and click on Save.

Section 2021-02 – Notifications

Video: Notifications

Deb: So, let's talk about the next update to occur to Teams, and that is related to Notifications. So if you're using Teams on Windows as I am here, you now have the option to choose between Teams' built-in Desktop Notification style, which are the purple ones, which appear in the bottom right-hand corner when you get a Notification come in, or you can select your PC's Windows Desktop Notifications.

And one thing to know is that with Windows Notification styles, you do have a little bit more control, such as the ability to Mute Notifications, while you're in Focus Assist mode. So if you want to check or even change your Notification style, you'll need to jump into your Settings within Teams. So to go to Settings, you can click the three dots in the top right-hand corner and go to Settings.

But if you're interested in using a shortcut key, the Keyboard shortcut to jump directly to Settings is Ctrl +, and from the Settings window, we want to go down to Notifications. And this is where you'll find your Notification style. It's under the Appearance and Sound heading. So you can see that currently I have mine set to Teams built-in, which is why I got that purple Notification in the bottom right-hand corner when Adriana sent me a message.

But if I wanted to, I could switch this to the Windows built-in Notifications. And you can see here now that I've changed that, I'm getting a message that says; "Double check your Windows Notification settings to ensure you're able to receive Teams Notifications". And that's exactly what we're going to do in a moment. So now we've set that, let's close down the window by clicking the cross in the top right-hand corner.

So now, I'm going to do exactly what that message was advising me to do. I'm going to jump into my Settings on my PC, and take a look of the options that I have set. So let's go down to our Search bar at the bottom, and I'm going to type in settings and hit Enter.

And let's dive in to our System settings and then jump straight into Notifications and Actions. And the thing you want to check here is underneath Notifications where it says; "Get Notifications from apps and other senders", you want to make sure that you have this toggled to on.

If you have this turned off, and it's basically going to disable any Windows Notifications from coming through. And if you're wondering what a Windows Notification is, well again, if we go down to our Taskbar at the bottom and jump into our Action Center to open that up, you can see here the last Notifications that I've received. And if you remember, the last one came in as a little purple Notification because I still had it set to use Teams in-built Notifications.

Now I've switched this to Windows, the next time a Notification comes in, not only is it going to appear in that Action Center, I'm going to get the Windows style Notification message. So, make sure you have this toggled on if you'd like to use that option.

Section 2021-03 – Lobby Settings

Video: Lobby Settings

Deb: The next update that Microsoft have released for Teams is a small change to the Lobby Settings. Now, hopefully by now, you are familiar with exactly what the Lobby is. But if you need a refresher, when you start a meeting, or when you join a meeting, and you are the host, you have control as to who is essentially held in the Lobby prior to the meeting commencing.

So, you might choose in your Settings to hold certain groups of people in the Lobby until the meeting begins. But now, Microsoft have added a new Lobby setting that lets people invited to the meeting to bypass the meeting Lobby.

So basically, anyone who receives an invitation and that includes a forwarded invite will join the meeting directly, they won't have to be held in that Lobby. Now, it's worth noting that this doesn't include a distribution list, people must be invited individually. And another thing that's important to know, because you might be confused, if you can't see the setting when we jump into a meeting is that this isn't available for Channel meetings.

So in order to see this setting, it must be a meeting that's been started from the Calendar. And that's exactly what I'm going to do here. So you can see that I have a Project Meeting scheduled, I'm the host, I'm going to join this meeting. And I'm just going to mute my microphone and click on Join now. So I am now in my meeting. And in general, if I want to use a setting like this, I'll log in maybe 10 minutes before the meeting start time, and I'll jump in here and I will change my Settings.

So if we click on the three dots for More Actions, and go into Meeting Options, this is the setting you need to change, so where it says Who can bypass the Lobby? What you'll notice is that in this drop down, we now have an additional menu item which we can choose. And that is this one here, People I invite. So if I set this option, and then click on Save. So what this means is that anybody that I've sent a direct invite to, will completely bypass the Lobby and come directly into the meeting.

Now, as I mentioned there, that option will only be available if you start your meeting from your Calendar, it's not available in Channels. So just to make that abundantly clear, let me show you what I mean. If I jump back to Teams, and let's go into the Q1 Planning Channel, for example, and I'm going to say Meet now. And let me just mute my microphone and just join this meeting. So this meeting has essentially been created in the Q1 Planning Channel for Northwind Traders.

So now if I jump up to those three dots for More Actions, and go into Meeting Options, if I click the drop down underneath who can bypass the Lobby, you'll see that I don't have that option that we had when we were joining from the Calendar, okay? So that is the difference between the two. You don't have access when you're creating the meeting from the Channel, but you do if it's from the Calendar.

Section 2021-04 – Attendee Mic Setting

Video: Attendee Mic Setting

Deb: When hosting a meeting in Teams, particularly if it's a very large meeting, it's important that you as the host can keep control of the microphone and video settings. So for example, I host a lot of meetings where we have over 100 participants. And if I allowed everybody to have their microphone turned on when they join the meeting, we'd have a lot of noise from people talking. And also, the microphones will pick up any background noise that they have going on.

So, this can kind of make your meeting start to feel a little bit chaotic and out of control. Fortunately, there's been a couple of new features added into Microsoft Teams that help you keep better control over your meeting. For example, when people join the meeting, you can choose to have everyone's microphones disabled. So you'll notice at the moment, currently, I am in a meeting, and Adriana is an attendee. And if you take a look at my little microphone icon, you can see that it's showing in white, it doesn't have a line through it.

So currently, my microphone is active, and everybody can hear me speaking. But take a look at Adriana’s microphone. Not only is it shaded out, it has a little warning cross through it, which means that her microphone is currently disabled. So it doesn't matter if she's muting, or unmuting from her side, because I've disabled microphones, it's not going to take any effect at all. So essentially, the only person who can be heard in this meeting is myself.

So how do we disable microphones for all attendees? Well the way that I like to do this is if I am hosting a meeting, in general, I’ll login maybe 10 minutes prior to that meeting commencing. And once I get into here, I'll click the three dots, and jump into Meeting Options. And what you'll notice is towards the bottom of this list, we have a little option for Allow mic for attendees. And currently, I have this option toggled off. If I have this option toggled on, it means that as people join this meeting, their microphones are going to be enabled. And if they want to unmute and start talking, they can.

So in order to maintain a bit of control, I'm going to disable all of the microphones and click on Save. And once I've done that, when I go back to my participants list, you'll see that everybody will have this faded out microphone icon next to their name. Now, you might be thinking to yourself, well, okay, that's fine. But what if, whilst you're presenting, somebody needs to ask a question, or they need to get your attention? How can they do that if you've disabled their microphone, and they no longer have any control over it?

Well this is where I would advise the people attending the meeting to utilize the Raise hand feature in Teams. So for example, if Adriana wants to ask me a question, I can see that she's raised her hand. And that's a little notifier to me, and I can now go in and just unmute her mic only. And to do that I just hover over her name, click on the three dots, and I can say Allow mic. So now you can see the icon is white again, it has a line through because she is currently muted from her end.

So what I might want to say to Adriana is, “Hey, Adriana, your microphone is muted. If you'd like to unmute and ask your question”, and there we go. She can now ask that question, and then once she's done, she can either mute her own mic, or I can say Mute All. And if I want to go back in and just disable her mic again, so she can't accidentally come off of unmute and start talking, I can click the three dots next to her name and say Disable mic.

What you'll also notice in here is that I can disable the Camera for individual participants as well. Now currently, you'll notice if I jump back into my Meeting Options, I only have the option to Allow mic for attendees, I can toggle this off or on. Now, depending on how up to date your copy of Microsoft Teams is, I know that for people who have the most up to date version of Teams with the very latest up to the minute updates, you might see that you have Allow camera for attendees in here as well. So you can choose to toggle off or on cameras as well as mics.

Now, I don't currently have that so I'm waiting for my final little update to come through. But just be aware of that, you might see an additional option in here as well. So, that is how you can maintain some kind of control over microphones and cameras when participants join your meeting.

Section 2021-05 – New Outlook Integration

Video: New Outlook Integration

Deb: If you have an important email come into your Outlook email account that you'd like to share to a channel in Teams, Microsoft have added a useful button that makes this process really simple. So, if you take a look at my Outlook account, you can see that currently I have selected an email from Adriana regarding Northwind Sales.

So, maybe I think to myself that this information would be really useful for other people to see, so I want to send it to the Northwind Sales Channel in Teams. So this is now a very straightforward process. With the email selected, if we jump up to the Home tab, you'll see that towards the middle, we have a Teams group. And we have a big old button just here that says Share to Teams. It's also worth noting that if you double-click to open the email, you have exactly the same button on the ribbon in the new window.

So, let's click Share to Teams and see what we get. So now, the Share to Teams dialog box opens, and we can select the name of the person, the group, or the channel that we want to share this email with. And you can see underneath, it's just showing me some recent locations in Teams that I've shared to, so the General Channel in the Social Committee Team. So I want to share this email in the Northwind Traders Sales Team Channel. So, all I need to do now is type in the name of the channel that I want to share this email with.

So, I'm going to type in Sales, and you can see that I have a couple of channels called Sales in different Teams. One of the ones that it's picked up is the Northwind Traders Sales Channel. So I'm going to select that to add it. And if I wanted to, I could send this to multiple channels across multiple Teams. I then have a choice of typing in a quick message along with the actual email. And of course, if this email had any attachments, or maybe Word documents, PDFs, anything like that, you can see there's a link at the bottom to include those attachments in the foreword to Teams as well.

Now, I don't. This is just a plain old email hence why mine is currently grayed out. Once you're happy click on the Share button, you're going to get a message saying your email is on its way to Teams so I can now safely close this down. And let's go back to Teams and I'm going to click on the Sales Channel for Northwind Traders and you can see there is the email sitting in the channel ready for others to review.

Section 2021-06 – Meet Now or Later

Video: Meet Now or Later

Deb: As we've been working through this course, every time we've wanted to either start a meeting on the fly, or even schedule a meeting, we've been used to having a button in that New Conversation area. So if I click New Conversation at the bottom here, up until this point, we've had a little Camera icon in here, which allows us to quickly start a meeting.

But with the latest Teams update for 2021, it appears that Microsoft has now removed that button from the Conversation area. What we have instead is a larger button at the top of the screen. And you'll find this button in both Team Channels and also in the Calendar as well. So if you cast your eyes to the top right-hand corner of the screen, this is where you'll now find your Meet Now button. So if I want to just very quickly start an ad hoc meeting, an unscheduled meeting, I can click on the Meet button.

Alternatively, if I click the drop down next to it, again, I can choose to Meet Now or I can schedule a meeting in my Calendar. If we jump across to the Calendar, you'll also see that in the top right-hand corner, we have a Meet Now button here as well. So if I click Meet Now, I get a couple of different options. I can choose to start my meeting immediately. Or, if I want to, I can get a link to share. When I click that button, Teams is going to create me a shareable meeting link which I can then copy and paste into maybe an email or another Teams channel.

I also have an option here to share directly via an email. If I click this, it's going to create an email for me in Outlook that contains this link. And, just to carry on this theme of Outlook Integration, if we jump across to Outlook, what you'll also notice is that if we go to the Calendar, we have a couple of new buttons in here as well. So on that Home tab, we have a Teams Meeting group. And you can see that we can choose to Meet Now from here to start an instant Teams Meeting, or we can schedule a meeting ahead of time.

So if I click Meet Now from Outlook, it's pretty much gonna do exactly what you would expect it to do, the same thing as it does if you're working from within Teams. I can give my meeting a name, I can choose if I want my Camera turned off or on, and then I can click Join now to jump straight into an ad hoc meeting.

If we go back to Outlook again and click the other button, which is New Teams Meeting, that's basically going to create me a new email. I can give it a title, I can type in who I want to send it to with the start and end times. And you'll see in the body of email, it's created a link that participants can just click on to jump straight into that meeting. So, a couple of changes there with regards to where the Meet Now button is located, and also, we have those additional Outlook Integration options.

Section 2021-07 – Recap of Meeting

Video: Recap of Meeting

Deb: Microsoft Teams now provides a recap of Teams Meetings, so participants, and maybe those who couldn't attend, can review a completed meeting. And the recap includes the meeting recording, the transcript, any chat that's occurred, and also shared files. And these are automatically shared in the meeting chat tab and viewable in the details of the meeting invite. You'll also find that if you're an organizer, there will be an Attendance Report as well.

So, you can see currently I am in a Teams Meeting. And I am recording this meeting. And we can see that indicated by the recording icon in the top left-hand corner. And just a side note, if you want to start recording your meeting, click the three dots in the middle. And you'll have a Start recording button where I currently have Stop recording. What I've also done is I've turned on Live Captions.

So basically everything that I'm saying is showing in a Caption bar at the bottom of the screen. And this is also being recorded and will be available to me after the meeting. And the final thing that I'm going to do here is, you can see that in the chat panel, I have a document that I'd like to share with the other meeting participants. So I'm just going to click on the little paper plane to send that through.

Because again, what you'll find with this new Recap feature is once we finished this meeting, all of this information is going to be available for us to see. So, we can basically see every single detail of the meeting that has occurred, which is particularly useful if there are people that were unable to attend the meeting, because it's going to allow them to really get a feel of what was discussed and catch up.

So now that we've done all of those things, let's pretend that this meeting is now over. And we are going to first of all, stop the recording, and I'm going to end the meeting. So now if I go back to my Teams Northwind Traders Sales Channel, you can see what I have in here. And it's worth noting that depending on how long your meeting is, how long that recording is, this can sometimes take a few minutes to come through. So just be patient, and it should eventually all come into the channel. And what you'll notice now is that I can basically view or download any element of the meeting that's just occurred.

So you can see here that automatically, it's sent to this particular channel, which is where I started this meeting from. A copy of the document that I shared in the chat panel within the meeting, I then have the meeting recording, which is going to include the chat transcript, and then finally, at the bottom, I have an Attendance Report. So if I click on this Attendance Report, you can see that it's currently downloading. And once that's finished downloading it’s going to go into the Downloads folder on your PC.

So if I just pull up my Downloads folder, I can see there it is at the top. And if I double click to open it, it's just a CSV file so it's going to open in Outlook, I can see some of the details of my meeting. So it's telling me that there were two participants, we've got the meeting title, the start time and the end time. And then we have details of the participants. So I can see when they joined, when they left, the duration of the call, their email address, and then what their role is within Teams.

So this can be particularly useful if you have a lot of attendees. And of course, because it creates this as a .csv, and you can open it in Excel, it then opens up all of Excel’s rich functionality. So if you want to Sort, Filter, perform Calculations, you can do all of that with this report. Now, aside from having all of this information populate in the channel where the meeting was started from, you can also go to other places within Teams to find these files.

So for example, if we take a look at the top of the screen, where we have the title Sales, currently I'm clicked on Posts, but if I go across to Files, you can see there is the Northwind Sales Report that I shared in the meeting. So, I could also access it from here. If I go across to the left-hand menu and click on Files from over here, this is basically going to show me all of the files that I've shared across Microsoft Teams. And what can we see here at the top? Well we can see again, that Word document that I shared; Northwind Sales Report, but also I have a copy of the meeting recording in here as well. And you can see that that is just an mp4 file which I can click on and listen back to.

Now I will say that if we jump across to Chats in the left-hand menu, if we choose to start a meeting from here, any files that you share within that meeting, also the Attendance Report, and any chat transcripts and the recording, you'll find here underneath this Chat heading. And the final thing that's really worth mentioning is that meeting recordings and transcripts are only available if somebody in the meeting turns them on. So, if you're in a meeting and you're not recording it, then obviously you're not going to receive a copy of that recording into your Teams channel.

So you need to make sure you start recording. And the same applies to things like transcripts, you need to make sure that you have Live Captioning turned on. And currently within Teams, transcription is only available in English.

Section 2021-08 – Grid View

Video: Grid View

Deb: When you're presenting a PowerPoint slide deck from the Teams Desktop or Web App, you now have the option to skip to certain slides, or even go back to previous ones with the new Grid View for presenters. So let's jump into a meeting and see how this works.

Now again, I'm currently clicked on the Sales Channel in the Northwind Traders Team. And I'm going to start a very quick ad hoc meeting by clicking the Meet button at the top. I'm going to leave the title as the default and just click on Join now. And straightaway, I'm going to add a participant, let's invite Adriana, I'm going to request her to join. And there she is.

Now you can see that Adriana is showing as a guest because she is an external participant. So what I'm going to do to give Adriana some extra permissions so she has the ability to do things like Share, I'm going to click the three dots next to her name, and I'm going to make her an Attendee.

Now currently, I'm still the organizer of this meeting. And I'm going to share with Adriana a PowerPoint presentation. So, let's jump up to our icons running across the top. And I want to select this one here that Share content. And just for your reference, if you're somebody who likes using Keyboard shortcuts, a quick way of sharing is to press Ctrl + Shift + E. So let's click the Share content button. And you can see here that I get a few different options, I can share my entire screen, I can share a specific window, but I also have the option to share a PowerPoint live.

And if you want to use Grid View, this is the option that you need to select. So, I'm just going to browse my computer for a PowerPoint file that I have. And let's just choose this one here and click on Open. So it's going to open my PowerPoint presentation. And I'm currently sharing this so Adriana is going to be able to see this and take a look at how my screen is laid out. So, I'm in basically Presenter View. And this is very similar to Presenter View that you might find in PowerPoint if you're used to using that application.

And the cool thing about this is that I can see the slide that I'm currently on, I can make my points about this particular slide, but I can also see the slides that I have coming up underneath. What's also good is that I have a Notes section just here. So if I want to make some notes to remind myself of the talking points when I'm on this slide, I can add those in as well.

And the cool thing is that the other people in the meeting that I'm currently sharing this content with, only see the PowerPoint presentation in full screen. So, they don't see the Presenter View that I'm looking at, they just see the PowerPoint presentation. So now that we are presenting, let's take a look at Grid View.

Just underneath where we have the main slide. If I hover over this button, you can see it says Grid View. And again, we have a Keyboard shortcut there, we can just press G to switch to that view. And what that basically does is it removes that main slide, and it allows me to see all of the slides in my presentation.

Now, I only have three slides in this presentation, it's fairly short. But what it means is that I can pretty much jump around the slides that I'm currently presenting. Previously, in order to maybe jump to slide 3 or maybe slide 7, you'd have to use your arrow keys or click your mouse to move through those slides. So, it wasn't a particularly slick or smooth transition.

Now, I can basically click and show whatever slides I want to show. Once you've finished presenting, just click the Stop presenting button in the middle just there, and that's just going to take me back into the meeting and close down that presentation for all participants.

Section 2021-09 – View History

Video: View History

Deb: Just a follow on from the last lesson where we started a meeting and I shared a PowerPoint presentation in Grid View, I just want to take this opportunity to highlight an important difference to you.

So if you take a look, we're currently in the Northwind Traders Team Sales Channel. And if you recall, we started a meeting a while ago, where I shared the Northwind Sales Reports. And you can see that sitting here in this particular channel along with the recording of the meeting and the Attendance Report. Now look below at the meeting that we just attended, the one where we shared that PowerPoint presentation, you can see here that I only have a copy of the Attendance Report. So why is that? Why aren't I getting the same information as I did previously?

Well, as I mentioned briefly, in order to receive a recap of the meeting, you need to make sure that you're first recording it and I didn't record the meeting that I've just attended. So that is why I don't have a meeting recording there. But why aren't I seeing that PowerPoint presentation that I shared because Teams logs everything that you share with other people, right? Well, it's not showing because of the different way that I shared the file. So with the Northwind Sales Report, I actually attached that and shared it in the chat in the meeting.

And so I can see it shared just here. Whereas with the PowerPoint presentation, I didn't actually attach it and upload it into the meeting, I just shared my PowerPoint screen. Now, if you did want to go back and see that PowerPoint file, you will find it somewhere else. And that is underneath the Files heading at the top. And you can see there is the file that I shared along with that Northwind Sales Report that I uploaded to chat previously. And something else that's new that's been added to Teams is a very small little feature, but it's something that can be very useful. And this is particularly useful if you want to revisit where you've been in Teams.

So now with the latest update, you can basically view your Activity history. And this quickly and easily allows you to get back to areas that you've recently been into in Teams. And you'll find the History menu simply by hovering over the two arrows in the top left-hand corner. So right up here in the corner, you'll see as I hover over that left facing arrow, it's going to pop up a little menu that shows me my last 12 locations that I visited. So if I need to backtrack at all, all I need to do is click on where I want to go, and it's going to jump me to that specific area.

Now you don't necessarily have to hover over the arrow and then select, what you could do if you just wanted to go back one or maybe go back two, you can just click on the arrow, and it's kind of going to scroll you through your most recent locations that you visited. And if you want to make this process even quicker, then of course there is a Keyboard shortcut to access History. And that is Ctrl + Shift + H and that will pull up that little menu.

Now incidentally, if you are somebody who likes using Keyboard shortcuts when working with Teams, and you want to see a full list of all of the shortcuts that you have, if you press Ctrl + period or dot as we tend to say in the UK, this is going to show you a big long list of all of the different Keyboard shortcuts. And if we scroll down, you'll see that just here Open history menu, Ctrl + Shift + H. So, definitely worth having a little look through here and maybe committing to memory some of the ones that are going to be most useful to you.

Section 2021-10 – Together Mode

Video: Together Mode

Deb: When you join a Team Meeting, or even if you're hosting a meeting, the default view is Gallery View. And what I mean by that is that as new people join this meeting, they're all going to show a little squares at the bottom of the screen. Now currently, there's just myself and Adriana on this call. And she's the one currently highlighted, and I'm in a smaller square at the bottom.

Now, it's worth knowing that this isn't the only view that you have. If we click the three dots to open up the More Actions menu, you can see I have two options in this menu, which have currently grayed out for me. So it's showing me that I'm currently in Gallery View, which is the default. But I also have a Large Gallery View and also something called Together Mode. And you might be wondering to yourself well why are these two grayed out. And this is a really important point.

If you want to use something like Together Mode, you have to have at least five participants in the meeting. Otherwise, this option isn't going to be available to you. And currently, because there is only two of us, that is why I can't select Together Mode. You might be thinking to yourself, well what actually is Together Mode. Well, it's just a different way of viewing your meeting participants. And I'm going to insert a very short clip from the Microsoft website so you can really see this in action.

The idea behind Together Mode is that it kind of brings people together in one room. So it is a little bit of an illusion. Because obviously in reality, we're spread out across all different offices. But it is quite nice, particularly if you're presenting or hosting to be able to see the participants sitting in what appears to be a virtual auditorium, or maybe something a little bit more fun like under the sea.

There are numerous different custom backgrounds that you can use when working in Together Mode. And aside from injecting a little bit of fun into your meetings, psychologically, it gives you more of a feeling that you're actually together with your colleagues. The main takeaway here, which you need to remember, is that there must be more than five participants on the call for this mode to be enabled.

Section 2021-11 – Background Effects

Video: Background Effects

Deb: If you're currently working from home, as many of us have been particularly over the last year, then you're probably familiar with using Teams Meetings. So what I'm going to do here is I'm just going to click the Meet button and jump into a quick meeting. Because there's a couple of settings in here related to your Background that I just want to demonstrate.

Now as you can see, currently, I am sitting in my bedroom at home and you can kind of see the background, it's a little bit dark. And I'm sure many of us have been in the situation where possibly we haven't had the time to tidy up and it kind of looks a mess behind us. And we don't really want our team members and our colleagues to see that mess.

Fortunately, Teams has thought of this, and it's given us some options to change our background. And we have a few different options, we can choose to blur out our background to disguise whatever it is that we have behind us. Or we can select a custom background effect to inject a bit of fun and interest into our Team Meetings. Now there's two places where you can go to turn on these backgrounds, and the first one is as you join the meeting.

So currently, I haven't joined the meeting just yet. This is where I can adjust my meeting settings prior to entering the meeting. And you'll notice underneath where my video is, I have an option for Background filters. So if I click this, it's going to pop open a panel at the side. And currently the one that I have ticked is None. So it's showing my actual background. But you'll notice that we have a gallery of different Background effects that we can choose. And the first one is Blur Background.

So if I click this, take a look at what happens. You can see now that Teams has applied a blur effect to my Background, so it's a bit harder to see what's behind me. So now that I have my Background blurred, I'm going to join my meeting by clicking the Join now button. Now once I'm in the meeting, if I decide that I want to change the background that I'm using, once again, I can click on the three dots to open up that More Actions menu. And I can choose Apply background effects.

And that's going to open basically the same panel on the right-hand side. And you can see I have a gallery of custom backgrounds that I can choose to add a little bit of interest to my background. So let's click this one, I could choose to preview it or apply it. And note here that if I preview the background, I get a preview of it just above where I'm currently clicked. Only I can see this, none of the team members can actually see it. So if I want to test out a few Backgrounds, see which one I like best prior to applying it, then I can definitely do that.

Once I'm happy I can say Apply. And now I have my background. What you'll notice here is that it kind of I'm blending into the background a little bit and I have found that particularly if you have lighter hair, if you have blonde hair, you might find that your hair starts to disappear into the background. But hopefully, you get the idea.

If I want to switch to something else, so maybe let's try something darker like this, I can just select the background I want, click on Apply, and then I have a completely different Background.

You can even add your own custom background. So if you have a particular picture or image you'd like to use as your background, you can definitely add to that as well simply by clicking the Add New button at the top. I'm going to go in and I think I have an image saved off in Downloads that I can use. Yes, let's try this one. Let's open that up. And there you can see it at the bottom of the list. So let's select this one and click on Apply. And now I have a Background of my own choosing.

So, definitely consider adding a Background to conceal whatever it is you have in the background of your environment.

Section 2021-12 – React to Conversations

Video: React to Conversations

Deb: In addition to raising your hand in Team Meetings, it's now possible to express yourself in other ways to make your meetings more inclusive and fun. And that is by using Live Reactions.

And again, we have Live Reactions in a couple of different places within a Teams Meeting. So currently I have my hand raised. And if you take a look at our little Menu bar running across the top, in order to add a Live Reaction, it's this icon that we want here. And when we hover over, we get a small selection of different emojis.

So the first thing I'm going to do here is I'm going to lower my hand, maybe the question that I wanted to ask has now been answered, so I'm going to lower it. And you can see the Keyboard shortcut there is Ctrl + Shift + K. But what I can also do is I can send a Live Reaction. If you keep your eyes on my little video window at the bottom, if I send a heart, you'll see that I get a heart flash up over the top of my video just for a couple of seconds just to register that I like whatever is currently going on.

And one thing that's worth noting with these is if somebody is presenting something like a PowerPoint presentation, and I choose to apply an emoji, you're gonna get this emoji kind of float up from the bottom of the screen. Now, Live Reactions are only available in the Desktop Version of Teams. So if you're using Teams through a browser, then you won't find those in there. And you also have the ability to control if participants have access to these Live Reactions as well.

So if I click the three dots, and go into Meeting Options, you can see right at the bottom here, I have Allow reactions toggled on. So, if you don't want those to be available, just come in here and toggle that setting off. Something else we can do is if we open up the chat panel and hover over another participant, we also have a panel of emojis just here as well.

So, I'm going to give Adriana a quick like, and that's just really registering that I like the message that she sent through. And the final point I want to make about these Live Reactions is that they will appear if you're using Filters or Background Effects, and also in Breakout Rooms as well.

However, they won't work if you're working in Together Mode or Large Gallery View. So just bear that in mind if you're using either of those views. But that's it, fairly straightforward. Add Live Reactions to express yourselves in Teams Meetings.

Section 2021-13 – Publish Task List

Video: Publish Task List

Deb: The Tasks App brings a cohesive Task management experience to Microsoft Teams. It integrates together Individual Tasks powered by Microsoft To Do, which might be an application that you're familiar with, and also Team Tasks powered by Planner.

So for the first time, you can kind of combine together all of your Individual Tasks and your Team Tasks in one place. Now, the first thing you need to do here is you need to add the Tasks App to Teams if you haven't already. So using the left-hand menu, I'm going to click the three dots at the bottom. And I'm going to type in the Word Planner. And it's worth noting that the name of this particular App has gone through quite a few changes as Teams updates have been rolled out.

So, depending on the current version of Teams that you're using, you might find Tasks by Planner and To Do underneath the Planner key word, you might find it under Tasks, or you might still find it underneath To Do. So, you might have to hunt around for this a little bit. Mine comes up when I type in the word Planner. And it's this one that you're looking for; Tasks by Planner and To Do. So I'm going to click to add this App to the left-hand menu.

Now remember, with these little Apps, if you don't essentially pin them to this left-hand menu, then they will disappear when you click away. So the first thing I'm going to do here, so I'm going to make this a permanent feature of this left-hand menu simply by right clicking on the icon, and I'm going to say Pin. And as I said, if you've ever used something like Tasks or Planner previously, then this is probably going to look reasonably familiar to you. So let's first deal with Individual Tasks; so Tasks that I create that are assigned to me.

Now you'll see over on the left-hand side, currently, I have a few different folders essentially. So I can view all of my Tasks, I can view any Tasks that I've marked as Important, I can view my Planned Tasks. So those are Tasks that have a due date assigned to them. And then I can view all of the Tasks that are assigned to me. And this becomes particularly important when we're combining Individual Tasks along with Team Tasks.

Now, let's not get too far ahead of ourselves here. Let's start by adding in our own Individual Task list. So let's add our new Task; Recruit New Sales Team Member. I can then click the tick all the way over on the right-hand side to create that as a Task. My cursor moves to just above so I can add a new Task very quickly. Now, I haven't really given this Task much detail. So let's edit it by clicking on the Link, which is going to open up a little window allowing me to set things like the Priority, the Due date and any Notes.

So I'm going to say that this is an Important Task, and the Due date, let's say I have a week to do this, I can add any important notes to this Task if I want to. And I can also add Checklist items. So the best way to think about these Checklist items is that they are kind of subtasks of the main

Task. So it might be that I have a few different steps to complete this particular Task. So maybe I need to review CVs, I'm going to set up interviews, I'm going to book a meeting room, and maybe I'm going to discuss with my Team. Once I'm happy with this, I can simply close this window down, and those settings will update.

So you can see now it's telling me that this Task has four subtasks, the priority is important and the due date is June the third. And as I complete those subtasks, I can keep this updated simply by clicking on the main Task, and I can go in and I can check off the items as they're completed. Now that I've marked a Task as Important, if I go back over to the left-hand side and click on the Important Link, it’s going to show me that Task in there. So this acts as a Filter so I can see very quickly the most important Tasks that I still need to complete.

You'll notice that this Task also falls underneath the Planned section as well because I've set a Due date. And if I click on assigned to me, I don't have anything because I haven't actually assigned this Task to myself, I've just created it. A couple of other features on here. If we go all the way across to the right-hand side, you can see that we have three dots just there. And this enables me to quickly see the Progress so you can see that this is not started as yet. I can see the Priority, I can change the Due date, I can move the Task elsewhere, and I can also delete the Task. And then, we have some Filters at the top here as well.

So if you have a very long list of Tasks, you can choose to display all the Active Tasks or just see the ones that are Completed. And then in the Filter, we have lots of different options in here. So again, we can choose to view Tasks that are due today, tomorrow, next week, or we can even filter them by their Priority. So I'm quickly going to go in and just add a few more Tasks in exactly the same way.

So I have a few more Tasks added in there, and it makes this a lot easier to use this Filter. So aside from filtering by Due date, and Priority, I can also filter by Keywords. So if I type in the keyword Starter, you can see it's going to look through the Tasks and just pull back any of the Tasks that have the word Starter in the Task title. So really nice and simple to find specific Tasks.

Now once you've completed a Task, you might want to mark it as complete. So for example, this bottom one here, Order Laptop for New Starter, I'm just going to place a tick in the little circle next to it. And that's going to mark that Task as complete and it's going to remove it from my Task list. Now, don't forget, if you also want to see all of the Tasks that you've marked as Complete, you can use your filters at the top of the screen.

So if I click the drop down next to All Active, I can choose to look at my completed Tasks, and there they are. And if maybe I decide that I want to move them back to the main list, I can just mark them as Incomplete, go back and view All Active, and that Task is now back in my main Task list. So all of this here is essentially the same as To Do in Office 365, or Microsoft 365. These are my personal Tasks to keep track of the things that I need to do. So, nobody else can see these, these Tasks aren't shared with anyone, and I don't have the ability to assign Tasks to other Team members.

Now if I want to set up some kind of Shared Task list in Teams, I can definitely do that by clicking this little link at the bottom where it says New list or plan. So I'm going to give my New list or plan a name. And I'm just going to call this Team Tasks. And I can choose where I want to create it. So, I can create in my Tasks, but I can also choose a Team Channel to create this in. And this Task list will then be shared to that particular Channel, and other people can contribute towards it. So I'm going to create this in Northwind Traders, I'm going to select the Channel, so let's say Sales, and then click on Create. So now you can see what we have here.

I now have a second group called Shared Plans. It says Northwind Traders, I'm in the Sales Channel and there is the name of my Task list Team Tasks. So I can now go in and add some Tasks. And I have some slightly different options for Shared Plans. So let's add a quick Task. And let's just say Organize Team Meeting. So now that I've added this Task in I'm going to go in and make some changes. So let's click on it to open it up, and you can see that the screen we get here is a lot more detailed than the one that we had when we were adding our own Individual Tasks.

The first option I get is I can choose to assign it to somebody else in my Team. So I'm going to assign this Task to Adriana. Now as soon as I do that, Adriana is going to get a notification letting her know that a new Task has been assigned to her. I could also choose to add a label. And when I click that, it's basically you can color-categorize your Tasks. And of course, currently, these have fairly generic looking labels, you can go in and customize all of these by clicking on the pencil. So I'm going to go in and let's call this one Meetings.

So anytime I organize a Task that's related to a meeting, I'm going to assign it to this particular category. So let's choose this category. And you can see here that I could go in and add multiple labels to one Task. I then get to choose a Bucket to assign it to. And again, this is another way of grouping your Tasks together by Type. So currently, the only Bucket I have available is To do so this is basically things that need to be done. And you'll see in a moment, we can add other Buckets and then assign Tasks directly to those Buckets.

But currently, we just have one, so we're going to keep that as it is. I can change the Progress. So let's say that this is In progress, and I can set a Priority. So let's say that this is Urgent. I'm going to choose a Start Date and Time. So let's say tomorrow, and this is due by Monday. I can then type in some notes and add any Checklist items much like we did previously. I also have the ability here to add any attachments.

So if I have a Word document, PowerPoint presentation, maybe an Excel file, or a PDF that I want to add into this Task, I can add that from there and I can also choose to add any Comment. Now one important point to note here is that if you haven't completed all of these fields, so I've just gone in and added something to the Notes and Comments section, then the Send button is going to be grayed out. So basically, you have to complete all of these fields in order to be able to send this and essentially assign it to Adriana.

Once you're happy with all of the details, click on Send. And there we go. So now, a lot more information related to this Task, and I can see that it's assigned to Adriana. So this is a lot better way of managing all of your Tasks. Previously, we had to put our own Individual Tasks, our own things that we needed to do in the To Do App, and then we had Team Tasks in Planner. So this kind of combines both. And you get an overview of all of the Tasks related to yourself and other Team Members in one place.

The final thing I'd like to show you in here is just to run through some of these buttons running across the top. So we've seen that we can filter by All Active or Completed, we can use our Filters to search for specific Tasks. Currently, I'm displaying my Tasks in a list, but I do have some other options. So if I click on Board is going to display these as cards. And if you remember, I mentioned earlier about different Buckets. So currently, we only have a To do Bucket, which is the default. But I can choose to add a new Bucket as well. And you can call these Buckets whatever you want.

So maybe I want to have a Bucket that says Assigned to Others. And maybe I want to have another Bucket called Completed. And then what you can do to help yourself stay organized is when you add Tasks, you can drag and drop these or assign them to specific Buckets. So you don't just have one big long list of all of your Tasks. So if I want to move this specific Task, because this is assigned to Adriana, I'm going to move it to Assigned to Others, I can just simply drag it and drop it to move it into that list.

We also have a Charts Link just here, which will basically just show us some statistics on our Tasks. So you can see that I only have one Task and it's currently in progress, and it's assigned to others. So there's some useful analytical information down here. Obviously, this is going to become a lot more useful, the more Tasks that you have in here. And then finally, we have a Schedule Area. So this is going to show a Calendar view, and you can also add your Tasks from here.

So maybe you find this little bit easier to understand. And it also allows you to see what you currently have coming up on your Schedule and Assign Tasks accordingly. So, that is it for Tasks in Teams.

Section 2021-14 – Approvals

Video: Approvals

Deb: There are definitely times when we are working where we need to get Approval, or we need to approve something that's been sent to us by another Team member. So maybe it's some kind of project proposal, or maybe you just need something simple like a holiday request signed off.

Now in Teams, we have an Approval App, which can take all the hard work out of that for us. It enables us to streamline requests and processes with teammates, and partners. So you can create requests, you can view one sent to you, and you can access all pass requests from one place. And much like Tasks, we need to add an App to Teams in order to be able to deal with Approvals. So once again, we're going to go over to the left-hand menu and click the three dots at the bottom, and we're going to search for Approvals. And it's this one here that we're looking for, so let's add it in.

And once again, we want to right click, and we want to pin this to make it a permanent fixture on our left-hand menu. Now this first screen that you get to here is basically what we refer to as the Approvals hub. So this is where you can come to view all of the Approval Requests that you've received and also sent. So let's dive in and create an Approval Request. We're going to click the big New Approval Request button in the top right-hand corner, and it's going to open up the Approvals screen. So this is a new request, and I can select the request type.

Now I'm going to start out by creating a very basic request type, I then need to enter in the name of the request. So I'm going to say this is a holiday request that needs to be approved by my manager. I then need to enter in the name or names of the approvers underneath. And if I enter in more than one approver in here, then this holiday request won't be approved until everybody I've listed down here has actually approved it.

So I'm going to send this to Adriana, and then I can add in some additional details for this request, I can add an attachment if I need to. So some supporting evidence, something along those lines. I can even choose if I want them to be able to send Custom responses. So responses that I've defined, or I can choose to send to another environment. Now, I'm not going to do any of that, I'm going to keep the default settings and click on Send. Teams goes away and it creates my Approval Request.

So you can see here that once that request has been sent, if I click the Sent link at the top of this Approvals hub, I can see all of the Approvals that I've sent through. I can also see the status. So I've sent through two requests for holiday. One of them has been cancelled by Adriana and the other one is still sitting there as requested. If I click on the holiday request, it allows me to go back in and see a little timeline. So it says here status requested and it's pending response from Adriana.

If I now decide that I don't want those five days off anymore, I can choose to cancel the request, which is basically what I did for this other holiday time Approval above. So now all I really have to do here is sit back and wait for Adriana to either approve or reject this request. And you can see there I'm getting a notification from Teams that’s saying that it's been approved. I'm also getting a notification underneath Activities, that's also telling me that this request has been approved.

If I go back to my Approvals, and take a look at my Sent ones, I can see now that status has changed to Approved. So, a really nice, straightforward process. It's also worth noting, when you create a new Approval Request, instead of basic, you can also choose to select a Sign. Now this relies on the fact that you have an account with Adobe Sign. And I would say that if you want to maybe test this out, give it a go, you can start a free trial. And if you use this option, it means that that Approval requires an electronic signature.

And of course, this works in exactly the same way the other way around. So if any Approval Request gets sent to you, you'll find those underneath Received, open them up and click on Approve or Reject.

Section 2021-15 – Breakout Rooms

Video: Breakout Rooms

Deb: Another new feature that's recently been added to Teams is the ability to do group work in something called Breakout Rooms. And this is kind of the virtual equivalent of dividing up your team into groups of people and sending them off to an office to maybe work on some kind of group project.

So if you have a virtual meeting, and maybe you have quite a few participants, maybe you want to set them a task or some kind of exercise that you want them to work on in groups. And that is where you can divide up all of the participants into Breakout Rooms. So I have a couple of participants on the call with me today, I have Adam and Rich. Say hello to everyone guys, hi. And I'm just going to show you very quickly how we can just divide ourselves up into two different Breakout Rooms. And it's super simple with this new functionality in Teams.

So if you want to put people into Breakout Rooms, we now have an icon to do this running across the top. And it's this one just here that looks like a couple of little windows. When I hover over, it says Breakout Rooms. So let's click and see what we get. So now I'm into the Create Breakout Rooms screen. And the first thing I need to do here is just select the number of rooms I want to create. So I'm fairly fortunate, there's just a few of us on the call today. If you've got a larger amount of people, then you may want to work out ahead of time exactly how many people you want to place in each room.

So I have four people on this call, I'm going to create two Breakout Rooms, and I'm going to assign two people to each. So, from this drop down, I'm going to say that I want to create two Breakout Rooms. I then need to choose how I want to assign people to the room. So, I can get Teams to automatically assign people for me. So if I don't mind who goes into which room, I can do that, that's probably the quickest way to do it.

But if I want specific people to go into specific rooms, then I can choose to assign them manually. And that's what I'm going to do here, I'm going to select that manually option and click on Create rooms. Teams goes away, it creates our rooms. And if you look in the right-hand panel, I now have two new rooms. And they kind of have the generic name of Room 1 and Room 2. And currently both of those rooms are showing as closed because I haven't opened them yet.

Now let's start out by dealing with these generic names. Because Room 1 and Room 2, not particularly meaningful, we might want to give these a different name depending on the team that's located in those rooms. So if you hover over Room 1 and click on the three dots, I have an option in that menu to rename the room. So I'm just going to call this, let's call this Adam’s room. There we go, rename the room. And we're going to call the other room, let's rename that one. We're gonna call it Rich's room and rename.

So now that I have my rooms renamed, you can see currently there is zero participants in each room. If I want to add more rooms at this stage, I have an Add room button just above. So now, if I want to assign the remaining participants to each of these rooms, you can see just above it says Assign participants. So if I click the little arrow to the left of that, it's going to show me all of the participants that are currently in this call.

So aside from myself, there is also Adrianna. So I can then choose who I want to assign to which room. So I'm going to grab Rich just there, I'm going to click the Assign button, and then I get a choice of those rooms that I've created. So I'm going to assign Rich to Rich’s room. In he goes, he is now all on his own, wandering around in his virtual Breakout Room. We're going to give Rich a little friend in a moment, but let's just assign Adam to our second Breakout Room.

So I'm going to select Adam from the list, and click on Assign. And I'm gonna put Adam on his own in a different room. Let's take Adriana and I think I'm going to let Adriana join Rich so he's not alone anymore. Let's assign her to Rich's room. And then in a moment, I'm going to jump into Adam’s room as well. So now that I've done that, if you take a look in this panel, you can see the numbers have changed. So it's saying Adam’s Room (1) because there's one participant in there, and Rich's room currently contains two people.

Once you've assigned all of the participants to different Breakout Rooms, you can then choose when you want to open those Breakout Rooms. So in general, if I'm doing this, particularly if I've got a lot of people on this call, I'll do it ahead of time. I'll assign the participants to the rooms so that when I'm ready to do the exercise, all I need to do is click on Start rooms. And that's going to open all of the Breakout Rooms in one go. So, I'm going to do that now.

Again, from this right-hand panel, we have a Start rooms button. So let's click this. And you can see it says it's opening the rooms. And you'll see as it goes through opening them, you'll get a little green message when that room is open. So I can see that Adam’s room is open. So he has left the main meeting, and we're just waiting for Rich's room to open as well. Okay, so when both rooms open, you should be able to see that little green button on the right-hand side.

So now that the people are in the different rooms, they can work on separate projects, they can work on exercises, and then whenever they're ready, they can come back to the main room. So once the participants have finished working on their group task in the Breakout Room, then as the organizer, you can tell them to come back and join the main meeting by making an announcement. And you'll find this option where it says Breakout Rooms on the right-hand side, if we click the three dots, we have a Make an announcement option in the menu.

And what this allows me to do as the organizer is basically send a broadcast message to all of the Breakout Rooms. So maybe five minutes before, I want them to come back, I'm going to let them know that they need to start finishing up what it is that they're doing. “Five minutes to go, please make your way back to the meeting”, and click on Send. And that announcement is now going to go through to all of the rooms.

So once I want people to come back, I then have a Close rooms option. So if I click this, that's going to close the Breakout Rooms and the participants are going to come back and join the main meeting. And once again, you'll see as the rooms close we have a little closed symbol just there and now everyone is back in the main meeting. So, that is how Breakout Rooms work. A really great little feature particularly if you want to just separate off people and get them all working on a particular task or an exercise.

Once you're done, just pull them all back and you can continue on with your meeting. That's it for this lesson. I will see you guys in the next one.