



# Microsoft Teams

Demo Guide

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## Prerequisites

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### Demo home page and login

You will need a **Microsoft Office Demo (MOD)** Office 365 tenant to complete this demo. You can obtain a demo environment at <https://demos.microsoft.com>.

**Note:** The click steps in the **Calling** section of this demo guide require the optional PSTN calling demo tenant add-on (available only to internal Microsoft users). External Microsoft partner users can complete this section using the talking points and bypassing the click steps.

### User Accounts

Megan Bowen (alias MeganB) is the typical account used in MOD Hero demo modules. If this MOD Hero module requires a different logon account, or if additional accounts are needed, the information is provided in the Pre-Demo Setup Steps.

- Office 365 tenant: <https://<Tenant>.sharepoint.com/>
- User name: MeganB      TenantMeganB@<Tenant>.onmicrosoft.com
- Password:              Obtain the tenant password from your demo card on [demos.microsoft.com](https://demos.microsoft.com).

Isaiah Langer (alias IsaiahL) is the support user and will be used for the mobile section of this demo.

- Office 365 tenant: <https://<Tenant>.sharepoint.com/>
- User              IsaiahL@<Tenant>.onmicrosoft.com
- Password:              Obtain the tenant password from your demo card on [demos.microsoft.com](https://demos.microsoft.com).

### First-Time Post-Install Steps


If this is the first time you are using the demo environment, complete the **Error! Reference source not found.** at the end of this document.



## Pre-Demo Setup Steps

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Complete the following steps before each presentation of the demo:


### **Demo Hero**

1. If the Microsoft Teams client is not already installed on the demo machine, follow these steps:
  - a. Open a new browser session and navigate to **teams.microsoft.com**.
  - b. Sign in as **Megan Bowen** using the credentials from the **User Accounts** section above.
  - c. When prompted at the top of the screen, click to download Microsoft Teams client.
2. Start the **Microsoft Teams** client application and connect to the demo environment using the **Megan Bowen** credentials.
3. In the **X1050 Launch Team**, navigate to the **Go-to-Market Plan** channel.
  - a. Click each tab in the top navigation and sign in to any if prompted.
4. In the top left, click **Chat**.
5. Click the **New chat** icon (  ).
6. In the **To:** field, type and select **AlexW**, **JohannaL** and **LeeG**.
7. In the **Type a new message** field, type the following message.

**Hi everyone! I'd love to chat a bit about some current process items.**
8. Start a new browser session and navigate to **portal.office.com**.
9. Sign in to your **Office 365 tenant** as **Isaiah Langer** using the credentials provided in the **User Accounts** section.
10. Click **App Launcher** , and then click **Outlook**.
11. In the top right, click the **Skype for Business**  icon.
12. Search for **Megan Bowen** and send the following message.

**Hi Megan, I am ready to discuss the replicator part. Let's meet when you have a chance.**
13. Minimize the **Office 365 -Outlook** browser window.

### **Enable Audit Log (OPTIONAL)**

1. Click **App Launcher** , and then click **Security & Compliance**.
2. Click the **Service assurance** section, then click **Audited controls**.
3. Enable Auditing.
4. Select the **Region** and **Industry** desired.
5. Click **OK**.
6. Refresh the screen to see the **Status of audited controls**.

***Demo buddy (for Mobile and meetings experience)***

1. On the **iPhone**, install the **Microsoft Teams** app from the **Apple or Google Play Store**.  
**Note:** If the app is already installed, tap the **Microsoft Teams** icon on the **Home** screen and proceed to step 2.
  - a. On the **Home** screen, tap the **App Store** icon.
  - b. At the bottom of the screen, tap the **Search** icon.
  - c. In the search field, type **Microsoft Teams**, and then tap **Search**.
  - d. In the search results, tap **Microsoft Teams**.
  - e. Tap the **GET** button.
  - f. If prompted, tap **Use Existing Apple ID** and type your Apple ID and password. If you do not have an Apple ID, tap **Create New Apple ID** and follow the steps to create a new ID and password.
  - g. After the download is complete, click the **Open** button. You can also tap the **Microsoft Teams** icon on the home screen.
2. Sign in as **Isaiah Langer**.

## Microsoft Teams Post-Install Steps

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Complete the following post-install steps **ONCE** for your demo environment:

1. Enable Guest Access:
  - a. Navigate to portal.office.com.
  - a. Log in as meganb@<TENANTNAME>.onmicrosoft.com using your tenant credentials.
  - b. In the top left, click App Launcher.

- c. Click Admin.
  - d. In the left navigation, click Settings.
  - e. Click Services & add-ins.
  - f. At the bottom of the screen, click Microsoft Teams.
  - g. In the Settings by user/license type section, click on the dropdown menu and select Guest.
  - h. Next to Turn Microsoft Teams on or off for all users of this type, click the toggle to On.
  - i. Click Save.
2. Set up News app:
- a. In the top of Teams, click **Search or type a command**.
  - b. Type **@News**, select the first option.
  - c. In the Add to a team section, click **Select a team**.
  - d. Click **X1050 Launch Team**.
  - e. Click **Install**.
  - f. Then select the **General** channel to use the app in.
  - g. Click **Set up**.
3. Set up Wikipedia app:
- a. In the top of Teams, click **Search or type a command**.
  - b. Type **@Wikipedia**, select the first result.
  - c. In the add a team section, click **Select a team**.
  - d. Click the **X1050 Launch Team**.
  - e. Click **Install**.
  - f. Then select the **Legal and Compliance** channel.
  - g. Click **Set up**.

4. Trello Connector:

- a. In the left navigation, under **X1050 Launch Team** to the right of **General**, click the ellipsis (...), and then click **Connectors**.
- b. Search for **Trello**.
- c. Click **Add**, then **Install**.
- d. Click **Login**.
- e. Open a new browser window.
- f. Navigate to <https://trello.com/signup>.
- g. In the name field, type Megan Bowen.
- h. In the email field, type [MeganB@<Tenant>.onmicrosoft.com](mailto:MeganB@<Tenant>.onmicrosoft.com).
- i. In the password field, type the tenant password.
- j. Click Create Account.
- k. Back in Teams, enter your Trello account information you just created in the pop up window.
- l. In the next window, click Allow.
- m. Scroll down and click Save.
- n. In the top right corner, click the X to exit the window.

5. Bing Connector:

- a. In the left navigation, under X1050 Launch Team to the right of General, click the ellipsis (...), and then click Connectors.
- b. Find Bing News and click install, then click Add.
- c. In the Name of digest field, type 3D Printing.
- d. In the Select topics field, type 3D printing and wait until the 3D printing option resolves in the field.
- e. Select 3D Printing.
- f. Click Save.

6. Growbot Bot:



- a. In the top navigation, Click the Command box
  - b. Click the Discover bots option that appears.
  - c. In the Command field, type Growbot.
  - d. Click the Growbot option.
  - e. Next to the My private chats option, click the down arrow.
  - f. Click X1050 Launch Team.
  - g. Click Add.
7. Make a voicemail:
- a. Log into Teams mobile app from your device.
  - b. In the bottom right corner, tap Calls.
  - c. In the top navigation, tap the search icon.
  - d. Type Megan, then tap on Megan Bowen from the results.
  - e. Under her personal information, tap the phone icon.
  - f. Wait for the call to go to voicemail and say, "Hi Megan, please call me back when you get this".
  - g. Hang up.

## Microsoft Teams Demo Steps

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### Introduction

This section provides an overview of the primary messaging pillars for Microsoft Teams. You may start with some of these pillars to introduce the demo, or incorporate them as talking points into the demo at appropriate places.

### A changing modern workplace

The way in which organizations work has evolved. Both work styles and the workforce are becoming more and more diverse. As business becomes increasingly global and cross-functional, silos are breaking down, connectivity is increasing, and teamwork is becoming a key to organizational success. Employees are on twice as many teams as 5 years ago. The amount of time that employees spend in "collaborative" work – in meetings, on phone calls or answering emails – has increased by about 50%. Even more

significantly, this kind of work now takes up 80% or more of employees' time. In addition, teams are increasingly a mix of employees and outside vendors. Teams have remote members, either working from home, on the road, or in different geographical regions **We built Microsoft Teams in response to these communication and collaboration trends in the modern workplace.**

### **Introducing Microsoft Teams**

Microsoft Teams is a hub for teamwork, a chat-based workspace that enables teams to be more productive by giving them a single and secure location that brings together everything a team needs: chats, meetings, calls, files, and tools. Microsoft Teams is one place for all the needs your teams have.

Microsoft Teams delivers on four core promises to create a digital workspace for high performing teams.

#### **1-Communicate through chat, meetings and calls**

Microsoft Teams solves for the communication needs of a diverse workforce.

Since preview, Microsoft Teams has evolved to include a complete meetings experience, as well as chat, voice and video -

You can use Teams for informal 1:1 or group chats – directly on your phone if you're on the go. Or you can have an open conversation in a channel. This enables people to share information in a transparent way to accelerate decision making. And it's super easy to move from a chat into a face to face meeting, helping you to bridge geographical barriers.

#### **2-Collaborate with deeply integrated Office 365 apps**

When it comes to **collaboration**, the deep Office integration enables today's multigenerational workforce to use the Office apps they are familiar with and love - Word, Excel, PowerPoint, OneNote, SharePoint, Planner, even Power BI - right within the context of Teams. Teams is unique in how we enable collaboration.

Today, when you want somebody's feedback, you send them the file via email, they store it locally with comments, you store it again..... it's a vicious cycle that results in v2, v3, v4 versions – and you have to jump between email and other apps to get the work done. Teams brings all the Office 365 services together – so that you can easily share and co-author files without the need for email attachments.

#### **3-Customize and extend with 3<sup>rd</sup> party apps, processes and devices**

Many users use other services than Office 365 as well which results in you having to jump between and spend time in disparate experiences. We built Teams to not only be the hub for Office 365 services, but for all the services and tools teams use on a day to day basis. So, you can **customize** Teams with tabs, connector and bots to include the apps and services you need, like Trello. We have integrations with over 150 partners. For our developer community, we have also created an **extensible platform**, to enable building apps and to integrate with business processes.

#### 4-Work with confidence with enterprise level security, compliance and manageability

Microsoft Teams comes with the enterprise grade security, compliance and manageability that you expect from Office 365 which customers tell us is a huge value add for them. Microsoft Teams was designed with compliance, authentication, and privacy in mind with support for industry standards, strong security measures including two-factor authentication, hard passwords, and access policies. Microsoft Teams also offers secure guest access for collaboration with others outside your organization. Teams data is always encrypted, whether it is chat, notes, or files. In short, it's your data; you own it, and you control it.

#### High-level Overview

##### Note to presenter:

You should be able to complete the entire demo in the **Microsoft Teams desktop client and on the Microsoft Teams App for your mobile device**. Optionally, depending on your presentation needs(multi-user functionality), you can do this section in the **Web client**.

#### OVERVIEW



| Speaker Script  | Click Steps   |
|---|---|
| <b>GETTING STARTED</b><br>Marketing Manager Megan Bowen recently joined a major product launch initiative. To organize everyone working on the launch, she and her colleagues are using Microsoft Teams to <b>have a single and secure location that brings together everything their team needs: chats, meetings, calls, files, and tools.</b>               |   |
| When Megan comes to the office in the morning, she starts her day in the <b>"Teams" section</b> of Microsoft Teams. Here, she can see all the various teams that she is part of.<br><br>A <b>team</b> can exist within an organization, a project or even an interest group. For the product launch, she has created a team called <b>X1050 Launch Team</b> . | <ol style="list-style-type: none"><li>1. Log into Teams desktop client</li><li>2. In the left navigation, click on the <b>"Teams" icon</b>.</li><li>3. Point to the <b>X1050 Launch Team</b>.</li></ol> |





| Speaker Script   | Click Steps  |
|--|--|
| <p>Within that team, she has also created several <b>channels</b>. Channels are dedicated sections within a team to keep conversations organized by specific topics or projects. Megan has created channels for her team to communicate and collaborate on <b>Design, Digital Assets</b> and the <b>Go-To Market plan</b>.</p> <p>The app bar on the left gives Megan access to all main areas in Teams. From here, she can access her activity feed, chat and the store. Megan can also use the command box at the top to query apps or search Teams.</p>   | <p>4. Point to the channels <b>Design, Digital Assets</b> and <b>Go To Market Plan</b>.</p>  |
| <p><b>Command apps, and take quick actions, and search – —all from the command box</b></p> <p>Megan has several options how to navigate Teams. She can use the left navigation or she can use the command bar. at the top of the screen which integrates commanding with search.</p> <p>In addition to searching across people, messages, files, and apps, from here, she can command apps to search for information in an app, such as a news article, and easily insert a specific result into a chat or channel conversation.</p> <p>She can also take quick actions right from the box with slash commands.</p> <p>Slash commands are shortcuts that allow her to quickly perform tasks or navigate Teams; such as setting her status, adding a user to a team, or calling somebody. To get started with slash commands, she simply types "/" to see a list of currently available commands.</p> <p>Here she uses a slash command to jump to the Design channel.</p> <p><b>Adding somebody to a team</b></p> | <p>5. In the very top of the Teams window, click in the <b>command box</b>.</p> <p>6. Type <b>launch</b>, and hit <b>enter</b>.</p> <p>7. In the left results menu, at the top, click through messages and files to see all of the content associated with the word "launch".</p> <p>8. Click back into the top search bar and type / then pause.</p> <p>9. Finish typing <b>goto</b>, then type <b>a space</b>, and select the <b>Design channel</b>.</p> |

| Speaker Script   | Click Steps   |
|--|---|
| <p>When somebody new joins the team, Megan can easily add them. A team can have up to 2,500 members across the organization, and even include external members though <b>secure guest access</b>. Here, she adds a trusted vendor to her team.</p> <p>When Megan adds a new person, they automatically get access to all conversations, information and files that have been shared in the team making it easy for them to ramp up to the project. And making it easy for Megan as she does not have to think about which files, emails or other information she needs to forward.</p> | <p>10. In the left navigation, click the <b>ellipsis</b> next to the <b>X1050 Launch Team</b>.</p> <p>11. In the dropdown menu that appears, click <b>Manage team</b>.</p> <p>12. Click Add member.</p> <p><b>NOTE:</b> Do not add him as a guest user, you will receive an error message.</p> <p>13. In the name field, enter "<b>bobk@tailspin.com</b>".</p> <p>14. Pause on Add BobK@tailspin as a guest.</p> <p>15. Click <b>Close</b>.</p> |



## COMMUNICATE THROUGH CHAT

| Speaker Script  | Click Steps   |
|---|---|
| <p><b>In Teams, Megan can choose how to communicate.</b> She can engage in private 1:1: chats, in group chats or in channel conversations that are visible to the entire team.</p>  |   |
| <p><b>CHANNEL CONVERSATIONS</b></p> <p>Microsoft Teams enables people to communicate without effort through chat. Megan has some updates around design that she wants to share with the team. She will use the <b>Design</b> channel for that.</p> <p><b>Persistent and open chat</b></p> | <p>1. In the left navigation, click <b>Teams</b>.</p> <p>2. Under the X1050 Launch Team, Click the <b>Design</b> channel.</p> |

| Speaker Script  | Click Steps   |
|---|---|
| <p><b>Chats</b> are persistent and stored in their entirety, so Megan can quickly catch up while away or revisit decisions made in an earlier conversation. This adds a lot of value for new people coming into the team, or for current team members looking to re-visit the context of the conversation.</p> <p>By default, <b>team conversations are visible</b> to the entire team making it easy for everybody to stay in the know and to share information in a transparent way to accelerate decision making. The @sign shows that Megan is specifically mentioned, so she can easily find conversations she needs to respond to. The red bang shows high importance, so she can get straight into items or topics that are most important.</p> <p><b>Threaded Messages</b></p> <p>When you have many members in a team or when you have chats about multiple topics, it can become hard to follow a conversation. To help with that, Microsoft Teams <b>conversations are threaded</b> so that Megan can reply directly in-context to specific conversations keeping relevant chats grouped together.</p> <p>Further up in the <i>Design channel</i>, Megan sees a conversation addressing the team. She clicks to expand all previous replies, allowing her to view the entire thread.</p> | <ol style="list-style-type: none"> <li>3. Scroll up to view conversations and find the red notification indicators.</li> <li>4. Point to the @ mention (  ) next to Pradeep's conversation.</li> <li>5. Point to the Important (  ) next to Megan's conversation.</li> <li>6. Scroll to the <b>Excellent Meeting everyone</b> conversation started by Megan.</li> </ol> |

| Speaker Script  | Click Steps  |
|---|--|
| <p><b>Rich Formatting</b></p> <p>Within the channel, Megan can participate in existing conversations, or compose a new message.</p> <p>Today, as she wants to share an update on design work, she starts a new conversation.</p> <p>Megan can either send a simple quick chat with just text or expand the compose box to leverage rich formatting tools. As it is an important update, she <b>adds a subject line</b> "January milestone reached" to her message and highlights it as important.</p> <p>She would like to specifically thank Alex for his input, so she adds an <b>@mention</b>. This way, Alex will receive a notification and the conversation will show up in his activity feed.</p>  | <p>7. Click the <b>compose box</b> at the bottom to start a new message.</p> <p>8. Click the <b>Compose</b> icon () to access the rich formatting menu.</p> <p>9. Click Add a subject and type <b>January milestone reached</b>.</p> <p>10. Click in the body of the message and type <b>@Alex</b> then select the Alex Wilber.</p>   |
| <p><b>Emojis, Stickers and Giphys</b></p> <p>The culture of the team is very casual, so she decides to add a sticker. Features like this allow teams to have fun together. Successful collaboration is based on relationships, Teams provides built in emojis and integration into Giphy. Teams also supports creating or uploading memes and other stickers.</p> <p>Megan decides to add an Office Drama sticker, as it usually gets a great reaction from her team. She creates a custom sticker by adding a caption "You guys rock!" <i>[if possible, use a string that is unique to you or your customer]</i>.</p> <p>This makes it easy for Megan to show her personality and humanize or soften her messages. Changing the communication style has changed the style of Megan's team. They can focus more on the substance, and less about formalities.</p> | <p>11. At the bottom of the text field, click  to open the Emoji menu.</p> <p>12. Click  to show Giphy integration.</p> <p>13. Click  to show available stickers.</p> <p>a. Click the <b>Meme</b> tab to show integrated memes.</p> <p>b. Click <b>Office Drama</b>.</p> <p>i. Click the <b>High Five</b> sticker.</p> <p>ii. Type the caption, <b>You guys rock!</b></p> <p>iii. Click <b>Done</b>.</p> <p>14. At the bottom right, click the <b>send icon</b> to post the message.</p> |



| Speaker Script  | Click Steps   |
|---|---|
| <p><b>Emailing a channel</b></p> <p>Channel conversations also support the ability to email a channel directly. Emailing a channel is useful for forwarding an important email that you want to share with the team or to move a conversation from email to Teams. To get a channel's email, just click the ellipsis next to the channel name to access the email address.</p>  | <p>15. In the top navigation, click the ellipsis  beside the channel name.</p> <ul style="list-style-type: none"> <li>a. Click <b>Get email address</b>.</li> <li>b. Point out you can <b>Copy</b> the channel email address.</li> </ul> <p>16. Click <b>Close</b>.</p>  |
| <p><b>PRIVATE 1:1 OR GROUP CHATS</b></p> <p>For conversations that don't require the entire team Megan can use a private, one-on-one chat or a group chat.</p> <p>In the <b>chats section</b> of Microsoft Teams, Megan will only see private conversations that she has created or to which she has been added to.</p> <p>She has some <b>1:1 chats</b> with her team members. For example, Isaiah wants to run a new idea by Megan, so he started a 1: 1 chat to see if she is available and whether she is currently online.</p> <p>She also has a <b>group conversation</b> with various team members – Alex, Johanna, and Lee. Megan can easily add more people to this conversation. She adds Nestor to her group chat because he will probably have something to contribute to the conversation.</p> | <p>17. In the left navigation, click on <b>Chat</b>.</p> <p>18. In the left navigation, click the chat from <b>Isaiah Langer</b>.</p> <p>19. In the chats list, click into the group chat with <b>Alex, Johanna, and Lee</b>.</p> <p>20. On the top right, click the add icon .</p> <p>21. Type <b>Nestor</b>, then select <b>Nestor Wilke</b> from the options.</p> <p>22. Click <b>Add</b>.</p> |





## Mobile Experience

Log into mobile Teams app

| Speaker Script  | Click Steps   |
|---|---|
| <p>In Teams, users have a frictionless experience no matter which device they work from. Teams is available across mobile, desktop and browser.</p> <p><b>Microsoft Teams on the go</b></p> <p>When team members are out of the office or away from their desks, they can keep up with the team's activity in Microsoft Teams through the iOS, Android, and Windows Phone mobile apps.</p> <p>Isaiah is traveling on business and uses his phone to check in on the latest team activities. He can check, compose messages, view documents, join meetings and make calls, just like on the desktop or web apps.</p> | <ol style="list-style-type: none"><li>1. Switch to the iPhone mobile app on behalf of the demo buddy, e.g. Isaiah Langer.</li><li>2. Tap <b>Activity</b>.</li><li>3. Swipe to scroll through alerts.</li><li>4. Tap the first message that says <b>Megan Bowen mentioned you</b>.</li><li>5. Swipe to scroll to the top of the conversation, then swipe back to the bottom.</li><li>6. On the reply with Isaiah mentioned, tap <b>More Items (...)</b>.</li><li>7. Tap <b>Like</b>.</li><li>8. On the bottom of the screen, use the navigation bar to click into the various assets of teams: Activity, Chat, Teams, Meetings, and calls.</li></ol> |
| <p><b>Back at the desk</b></p> <p>Isaiah's chat appears in the Teams desktop app. If Megan wants to, she can reply and talk to Isaiah in real time.</p>   | <ol style="list-style-type: none"><li>1. Switch back to MeganB persona on the desktop.</li><li>2. In the left navigation, click <b>Chat</b>.</li><li>3. Click on <b>Isaiah Langer</b>.</li></ol>  |


## COMMUNICATE THROUGH MEETINGS AND CALLS


| Speaker Script   | Click Steps   |
|--|---|
| <p><b>MEETINGS</b></p> <p>Sometimes it's most efficient to jump on a quick call to resolve an issue or answer a question.</p> <p>Teams offers a complete meeting solution supporting sharing, video and audio conferencing. Meeting and calling capabilities are all built into Teams, so Megan can easily <b>start a meeting</b> directly from a chat conversation without having to sign in and out of multiple applications.</p> <p><b>Spontaneous Meetings</b></p> <p>To start a meeting, Megan can click <b>Audio Call or Video Call</b> to instantly turn a chat into an online call. Megan can also have a call within a channel. During the call, she can attach various documents and external data that can contribute to what the conversation is about.</p> <p><b>During a meeting</b></p> <p>During a meeting, participants can use rich meeting capabilities, including video and screen sharing, file sharing and chat to make the meeting engaging and productive.</p> | <ol style="list-style-type: none"> <li>1. In the left navigation, click <b>Teams</b>.</li> <li>2. If not already there, click the <b>X1050 Launch Team</b>.</li> <li>3. Click the <b>Legal and Compliance</b> Channel.</li> <li>4. Near the bottom of the channel, find Joni's conversation mentioning copyright infringement, click <b>Reply</b>.</li> <li>5. In the bottom of the text box, click the <b>video icon</b>  to start the meeting.</li> <li>6. Click the <b>Meet Now</b> button.</li> </ol> <p><b>OPTIONAL:</b> Join meeting from your mobile device as Isaiah to view interacting during a meeting.meganb</p> <ol style="list-style-type: none"> <li>7. Once it loads, in the upper right navigation, click the <b>Show Conversations</b> icon  .</li> </ol> |

| Speaker Script  | Click Steps  |
|---|--|
| <p><b>After the meeting</b></p> <p>After a meeting, all conversations from the meeting are posted to the channel or – for private meetings – to the chat conversations of each participant. This is helpful for team members who were unable to attend the meeting, or for if Megan herself wants to read up the context of the meeting.</p> <p><b>Schedule a meeting</b></p> <p>For more formal meetings, Megan can schedule a meeting in the “<b>Meetings</b>” section. In an experience similar to Outlook, Megan can enter information for the meeting such as title and details. She can also select the channel for hosting the meeting, which will include all members of that channel. Or, she can select individual users to be invited to the meeting.</p> <p>Meetings in Teams are integrated with Exchange calendar, so the Scheduling Assistant feature suggests times that are optimal for all attendees.</p> <p><b>CALLING</b></p> | <p>8. In the bottom of the chat window, click the ellipsis to view more attachment options..</p> <p>9. Click <b>Wikipedia Search</b>.</p> <p>10.Click <b>Enter a search term</b>.</p> <p>11.Type <b>copyright infringement</b>.</p> <p>12.Once it’s finished uploading, click the first option.</p> <p>13.In the bottom right of the chat window, click the <b>Send</b> icon.</p> <p>14.To end the meeting, click the <b>Hang Up</b> button.</p> <p>15.In the copyright infringement conversation, click <b># replies from [user names]</b> to view all replies.</p> <p>16.Point out that the article is now available in the channel.</p> <p>17.In the left navigation, click <b>Meetings</b>.</p> <p>18.Click <b>Schedule a meeting</b>.</p> <p>19.Under <b>Select a channel to meet in</b>, click the down arrow.</p> <p>20.Scroll to show options, and then click out to close.</p> <p>21.Under <b>Meeting Title</b>, type <b>Launch Update</b>.</p> <p>22.Under <b>Invite People</b>, type <b>Isaiah</b>, and then select <b>Isaiah Langer</b> from the results.</p> <p>23.Point out the scheduling assistant.</p> <p>24.Click <b>Schedule a meeting</b>.</p> |

| Speaker Script  | Click Steps   |
|---|---|
| <p>Teams also offers cloud-based telephony and calling solutions. With the <b>Microsoft Calling Plan</b>, users can have a dedicated phone number for placing and receiving both domestic and international calls (available in 8 countries currently).</p> <p>Advanced features include voice mail which are also being transcribed.</p> | <p><b>NOTE:</b> The following steps require a demo tenant with PSTN calling feature enabled. If your demo tenant does not have this feature, please use this section as talking points.</p> <p>25. In the left navigation, click <b>Calls</b>.</p> <p>26. In the bottom left of the <b>Calls</b> panel, point to but do not click on the dial pad.</p> <p>27. Above that, click on <b>History</b>.</p> <p>28. Then click on <b>Voicemail</b>.</p> <p>29. Click on the individual voicemail and show the transcript of a voice mail.</p> |

## COLLABORATE WITH DEEPLY INTEGRATED OFFICE APPS


| Speaker Script   | Click Steps   |
|--|---|
| <p>Information often lives across expansive services today – like mail, files, meetings, PowerBI/ data, other SaaS services.</p> <p>Teams is a hub both for communication and collaboration that brings all these services together in one single workspace resulting in more time for productivity as you do not have to toggle between apps.</p> | <ol style="list-style-type: none"> <li>1. In the left navigation, click <b>Teams</b>.</li> <li>2. If not already there, click <b>the Go to Market Plan channel</b>.</li> <li>3. Click the <b>Files</b> tab in the channel.</li> <li>4. Click the <b>ellipsis</b> next to any recent file.</li> <li>5. Click anywhere on the screen to exit.</li> </ol>        |
| <p><b>OFFICE INTEGRATION</b></p> <p>When it comes to <b>collaboration</b>, the deep Office integration enables Megan to use the Office apps she is familiar with and loves. Word, Excel, PowerPoint, OneNote, SharePoint, Planner, even Power BI – they are all built-in and available right within the context of Teams.</p>                      | <ol style="list-style-type: none"> <li>6. In the top navigation, click <b>Conversations</b>.</li> <li>7. At the bottom of the screen, click in the <b>Start a new conversation</b> field.</li> <li>8. Click the <b>paperclip icon</b> , to attach a document.</li> </ol> |


| Speaker Script  | Click Steps   |
|---|---|
| <p><b>Share files</b></p> <p>In a conversation, Megan can upload a file such as a PowerPoint document. Every time someone creates a team, a corresponding SharePoint team site is provisioned as well. When Megan shares a document, it automatically gets uploaded to that SharePoint site and all members of a team can easily access it through the <b>Files tab</b>. The Files tab is included by default for every channel and provides an easy way for team members to share and store content. By default, all members of a team can edit and view any file that has been shared within a team.</p> <p>No longer is information like this locked away in Megan's e-mail inbox but her team can <b>communicate and collaborate in one single place</b> changing how her team works and making them more productive.</p> <p>Megan can also share files from third party storage services like Dropbox or Google drive.</p> <p><b>Edit and co-author files</b></p> <p>Here, she reviews a file that Johanna has shared with her. Megan can co-author and edit the file right in the app. As all files are stored on SharePoint, the latest version of the file is always accessible to any member on the team – without the need for email attachments.</p> <p>Before, Johanna would have shared this file via email, then somebody would add their comments, re-share it etc. Now, she can simply click on the file to access the latest version.</p> <p>She can also review comments from other team members making it easy for her to understand the full context of the file and to continue the conversation right in place.</p> | <p>9. Click <b>OneDrive</b>, then the <b>Contoso Electronics</b> folder.</p> <p>10. Click the Excel file, <b>Contoso Monthly Report</b>.</p> <p>11. Click <b>Upload a copy</b>.</p> <p>12. Click the <b>send icon</b>, in the bottom right corner.</p> <p>13. In the top navigation, click the <b>+</b>.</p> <p>14. Scroll to see all options.</p> <p>15. Click out of the window to close it.</p> <p>16. Click <b>Files</b> tab.</p> <p>17. Click <b>+Add cloud storage</b>.</p> <p>18. Point to all the different cloud storage options.</p> <p>19. Click the <b>X</b> in the top right.</p> <p>20. Click the <b>Design</b> channel.</p> <p>21. Scroll up to find Johanna's conversation about <b>Usability Testing</b>.</p> <p>22. Click <b># replies from [user names]</b> to view all replies.</p> <p>23. Click the word document, titled <b>XT1050 Usability test 2.3</b>, to view it in Teams.</p> <p>24. Once that loads, in the top right, click the <b>conversation bubble icon</b> , to view the comments about the document.</p> |

| Speaker Script | Click Steps   |
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|                | 25. At the top of the screen, click <b>Close</b> to exit. |



## CUSTOMIZE AND EXTEND


| Speaker Script   | Click Steps  |
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| <p>As every team is unique, Megan can tailor her team and <b>customize</b> it with tabs, connector and bots to include the apps and services which are relevant to the launch project – Teams has integrations with over 150 partners.</p> <p><b>TABS</b></p> <p>Tabs are one of the ways how to customize a team and can be added for files, notes, websites, and apps – both from Microsoft and 3<sup>rd</sup> parties. This makes it very easy for team members to access frequently used content or services with just one click.</p> <p><b>Office documents and services</b></p> <p>Megan can <b>pin important Office documents</b> – like a Word, PowerPoint, Excel file – directly to the tab bar. Creating a new tab is easy; all Megan needs to do is click the ellipsis next to the file and select <i>Make this a tab</i>. Here, she has pinned the monthly project overview presentation.</p> <p><b>Power BI</b></p> <p>This afternoon, Megan has a weekly team planning meeting. Part of Megan's role on the team is to track the opportunity pipeline for the new product line. This <b>Power BI</b> dashboard offers a visually rich view of current and projected opportunities and revenue. Megan opens the Power BI tab and sees several</p> | <ol style="list-style-type: none"> <li>1. Click the <b>Files</b> tab in the channel.</li> <li>2. Click the <b>ellipsis</b> next to any recent file.</li> <li>3. Click <b>Make this a tab</b>.</li> <li>4. Scroll through the doc to view it in the Teams app.</li> <li>5. In the left navigation, click the <b>Go to Market Plan</b> channel.</li> <li>6. In the top navigation, click the <b>Power BI</b> tab and ensure you are in the <b>Website &amp; Social Analytics</b> report (reports are accessible via tabs at the bottom of the Power BI window).</li> </ol> |

| Speaker Script   | Click Steps   |
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| <p>reports, including opportunity count, revenue, and upcoming opportunities, which she wants to review in the meeting.</p> <p>Power BI reports are interactive. Megan can pause on any of these data points and get more information.</p>   | <p><b>NOTE:</b> You may need to expand the channel list in the top navigation to see the <b>Power BI</b> tab.</p>  <ol style="list-style-type: none"> <li>7. Pause on one or more data points in the report and point to the popup.</li> <li>8. Click on <b>any of the data points</b> to show interactivity.</li> <li>9. In any graph, pause your mouse over the graph and click the <b>More</b> menu (...).</li> </ol>  |
| <p><b>Planner</b></p> <p>Megan's team uses Microsoft Planner to organize their work and keep on track. The plan has buckets for organizing tasks for this project.</p> <p>Megan adds a new task: <b>Analyze Power BI Data</b>. She sets a due date and assigns this task to herself. Since she has already started, she sets the status to <b>In progress</b>.</p> | <ol style="list-style-type: none"> <li>10. At the top of the screen, click the <b>Product Launch Event</b> tab.</li> <li>11. In the <b>Planner</b> pane, at the top of the <b>To do</b> bucket, click the <b>+</b> icon.</li> <li>12. Add the following task by clicking in the related fields: <ol style="list-style-type: none"> <li>a. Task Name: <b>Analyze Power BI Data</b> <ol style="list-style-type: none"> <li>i. <b>Due Date:</b> select date for 2 days from now</li> <li>ii. <b>Assigned to:</b> Megan Bowen</li> <li>iii. Click <b>Add task</b>.</li> </ol> </li> </ol> </li> <li>13. Click the newly created <b>Analyze Power BI Data</b> card.</li> <li>14. Under <b>Progress</b>, click <b>Not Started</b>.</li> <li>15. Point to available status options, then click <b>In progress</b>. Close the task window.</li> </ol> |

| Speaker Script   | Click Steps   |
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| <p><b>Third party Apps and websites</b></p> <p>In addition to pinning Office services, Megan can also pin websites or third-party Apps like <b>Trello</b> for task management, Hootsuite for social media, or even the Adobe Creative Cloud to bring designers and creatives together. Here, Megan uses Trello to manage activities within her team.</p> <p>Megan can also add a connector for Trello. When you assign a task to somebody in Trello, then the connector sends a notification to a channel about that.</p> <p><b>Connectors</b></p> <p>Microsoft Teams is integrated with a wide selection of project management apps, social feeds, and data visualization tools via Connectors (examples: Twitter, RSS, Asana).</p> <p>Megan can use <b>Connectors</b> to quickly add these apps to Microsoft Teams and get updates and notifications from them. For example, the X1050 Launch Team has a dedicated media channel for external news and social media feeds.</p> <p>This channel includes a Bing News connector to show relevant news items discovered by Bing Search.</p> <p><b>Include information from an app in a conversation</b></p> <p>Megan can also bring information from apps into a chat or channel message with a simple click. Here, she wants to share the latest news for AI in a message to her team. In the past, she had to go to the News tab, copy the link or a screenshot of the article, and then share it as part of the message. Now, she can click on the 3 dots or use the command box, choose the respective app and then include information from the app in her message without having to switch context.</p> | <ol style="list-style-type: none"> <li>1. Click the <b>General channel</b> under the X1050 Launch Team.</li> <li>2. In the tab navigation, click <b>Welcome Board</b> to view your Trello Board.</li> <li>3. Click <b>a tile</b> to show it interacting in the tab.</li> <li>4. In the top right corner, click the <b>X</b> to close that task.</li> <li>5. Scroll up in the channel to see Trello notifications.</li> <li>6. Point to Bing News items in the conversation pane.</li> <li>7. In the top of the window, next to the channel title, click <b>More items (...)</b>.</li> <li>8. Click <b>Connectors</b>.</li> <li>9. Under Bing News, <b>click 1 configured</b>.</li> <li>10. Point to the configured connector.</li> <li>11. In the top command box, click <b>Search or type a command</b>.</li> <li>12. Type <b>@news</b>, and select the first result.</li> <li>13. Next, type in <b>AI</b>, and select the first result.</li> <li>14. In the top right corner of the result, click <b>the copy icon</b> .</li> <li>15. In the bottom of the window, click <b>Start a new conversation</b>, then Ctrl + V to paste the information.</li> <li>16. In the right corner, click the <b>Send icon</b>.</li> </ol> |




| Speaker Script   | Click Steps   |
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| <p>She could also include a card with information about a task from the Trello board she created.</p> <p><b>[OPTIONAL]</b></p> <p><b>Access a personal view of your apps</b></p> <p>In Teams, Megan can also access a personal view of many apps by clicking on "..."" in the left navigation menu. Here, she can easily access the apps she cares about and see all the items that she has been assigned to across apps like tasks in Planner, bugs in Jira Cloud.</p> <p><i>For example, in the personal <b>OneNote</b> experience, you can view recently accessed notebooks, notebooks you have added and notebooks you can access across your teams. The personal <b>Planner</b> experience shows you a view of your personal tasks across teams and allows you to keep track of tasks you have been assigned.</i></p> <p><b>Bots</b></p> <p>Megan can also add intelligent bots to interact with Microsoft Teams. Bots can answer natural-language questions and perform lightweight tasks such as FAQs.</p> <p>She has pinned <b>Growbot</b> to the tabs bar so that she can acknowledge the team for their contributions. All she has to do to give the team kudos is @growbot and then type the word 'kudos' and @ mention the person who she wants to</p> | <p>17. In the far left navigation, at the bottom of the list, click the ellipsis(...)  for more apps to choose from.</p> <p>18. Point out the various list of apps.</p> <p>19. Click outside of the menu to exit.</p> <p><b>[OPTIONAL]</b></p> <p>20. In the far left navigation, at the bottom of the list, click the ellipsis(...)  for more apps to choose from.</p> <p>21. From the selection, click the <b>Planner</b> App.</p> <p>22. When it loads, point out the various tabs at the top and that they are all assigned to you.</p> <p>23. In the left navigation, click <b>Teams</b> to exit.</p> <p>24. In the Teams list, under the X1050 Launch Team, click the <b>Go-to-Market Plan</b> channel.</p> <p>25. In the tab menu, click <b>conversations</b>.</p> <p>26. Click the <b>conversation box</b>.</p> |

| Speaker Script  | Click Steps   |
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| <p>acknowledge. She can also see a leaderboard by @ mentioning Growbot and then typing the word 'leaderboard'.</p> <p><b>Store</b></p> <p>Megan can search and discover apps and services in the Store. Here, she can search can search for apps by name, category (such as Project management or Analytics and BI), or integration type (such as Bots, Tabs or Connectors), Megan knows what she is looking for, so rather than scrolling the list, she searches for Hootsuite directly. With one simple click she can add the app to a team, and choose which channels to add it to as a tab.</p> | <p>27.Type <b>@growbot kudos @isaiah</b>, then select <b>Isiaiah langer</b>, then finish typing, <b>great job this week working overtime to finish by our deadline!</b> Press <b>Enter</b>.</p> <p>28.Wait one minute, then type <b>@growbot leaderboard</b>.</p> <p>29.In the far left navigation, at the bottom of the screen, click the <b>Store icon</b>, .</p> <p>30.Scroll up and down to see the various apps and services.</p> |

## IT Admin Controls

| Speaker Script   | Click Steps  |
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| <p>Microsoft Teams provides a rich set of admin controls and security measures to help meet security and compliance requirements for any industry. Data is always encrypted, whether in chats, conversations, notes, or files.</p> <p>In the Office 365 Admin Center, an administrator can tailor the Teams experience to the needs of their users, ensuring they meet security and compliance requirements, or even turn Teams on or off for the organization.</p> <p>In the <b>General</b> section, admins can select to show an org chart in each user's personal profile. Admins can set whether the</p> | <ol style="list-style-type: none"> <li>1. Switch to the browser session with <b>Office 365 - Mail</b> open.</li> <li>2. In the top left, click <b>App Launcher</b>, and then click <b>Admin</b>.</li> <li>3. In the left navigation, click <b>Settings</b>, and then click <b>Services &amp; add-ins</b>.</li> <li>4. Scroll down and click <b>Microsoft Teams</b>.</li> <li>5. Point to <b>Turn Microsoft Teams on or off for your entire organization</b>.</li> <li>6. Click the <b>General</b> section to expand it.</li> </ol> |

| Speaker Script   | Click Steps   |
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| <p>organization can use bots to provide help to users, or integrate with other apps.</p> <p>Admins can turn off video and screen sharing in calls and meetings in the <b>Calls &amp; Meetings</b> section.</p> <p>In the <b>Messaging</b> section, Megan's organization can decide if they want to allow various kinds of content, including animated images, memes, and stickers. If animated images are turned on, they can also be limited by content rating.</p> <p>In the <b>Apps</b> section, Admins can turn off support for tabs from Microsoft partners or side-loaded applications. Note that this does not turn off the default tabs, such as files, OneNote, and Planner.</p> <p>Office 365 Groups are used to manage team owners and members. The <b>Teams &amp; Channels</b> section links to the Office 365 Groups control panel. From here, an administrator can control who can create teams or groups.</p> <p>Using these controls, Megan's organization can make sure that they have control over how people are using Microsoft Teams.</p> <p><b>Audit Log</b></p> <p>In the <b>Security and Compliance</b> section of the <b>Admin Control Center</b>, Office 365 provides tools to help you understand and investigate cyber-threats and take action to protect your organization from them.</p> | <p>7. Under <b>General</b>, point to <b>Allow T-bot proactive help messages</b>.</p> <p>8. Click the <b>Calls &amp; Meetings</b> section to expand it.</p> <p>9. Click the <b>Messaging</b> section to expand it.</p> <p>10. Click the <b>Apps</b> section to expand it.</p> <p>11. Click the <b>Teams &amp; Channels</b> section to expand it.</p> <p>12. Click the <b>Use the Groups dashboard in the Office 365 admin center</b> link .</p> <p>13. In the left navigation, click <b>Admin centers</b>.</p> <p>14. Click <b>Security &amp; Compliance</b>.</p> |

| Speaker Script  | Click Steps   |
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| Megan can use the Audit log search section to find activity related to email, groups, documents, permissions, directory services, and much more. This can be used for a variety of services such as finding out if a user deleted a document or if an admin reset someone's password. | <p>15. In the <b>Security &amp; Compliance Admin center</b>, click <b>Service assurance</b>.</p> <p>16. Click <b>Audited controls</b>.</p> <p>17. Under <b>Status of audited controls</b>, click any of the <b>Standard/Regulation</b> listed to see the audit report for that control.</p> |

## Accessibility

| Speaker Script  | Click Steps   |
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| <p>In recent Office updates and now Teams, Microsoft has provided significant accessibility enhancements that make it easy for users with limited dexterity, low vision, or other disabilities to work effectively.</p> <p>High contrast mode, enabled through a keyboard shortcut, allows the reader to better distinguish elements and text, aiding those with visual impairments, such as cataracts.</p> <p>In Teams, high contrast mode draws attention to individual messages, images, and attachments. Messages and message threads are distinct elements making a reply to a thread easy to complete.</p> <p>Team members can also use keyboard shortcuts, the screen magnifier tool, or a screen reader like Narrator. Built into Windows 10, Narrator reads text on the PC screen aloud and describes events, such as notifications, messages, or calendar appointments, so Megan can use her PC without a display. With a screen reader, users can find and read threaded conversations</p> | <ol style="list-style-type: none"> <li>On your keyboard hit the high contrast mode shortcut <ul style="list-style-type: none"> <li><b>Alt, left Shift, and Print Screen</b></li> </ul> </li> <li>Disable high contrast mode by hitting the same keyboard shortcut.</li> </ol> |

| Speaker Script   | Click Steps |
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| in a channel, like or post a message, add attachments, open and view a file, and more. |             |

## Microsoft Teams Reset Instructions

Follow these steps to reset the demo after each presentation:

**Note: You must remove any content you added during the demo within 24 hours or the system will no longer be able to delete it.**

1. Log in to the tenant as **Megan Bowen**:

Delete any new content created during the demo, for example:

- a. In the **X1050 Launch Team, Design** channel:
  - Delete any conversations you added if applicable
- b. In the **X1050 Launch Team**, the **Go-to-Market Plan** channel:
  - Delete any tab added in the context of the demo.
    - Check the box about permanently deleting this plan and all its tasks.
  - On the **Team Planning Prep** tab, delete the **Analyze Power BI** task.
  - Delete any conversations you added if applicable
  - Any content added during the demo.

2. Revert any changes made to a document during the demo.

3. Delete uploaded files:

- a. In the **Go-to Market Plan** channel, go to the chat conversations.
- b. Delete the **European Expansion** PowerPoint file.

4. Sign out of all browser sessions and close the browsers.

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