

Advanced Microsoft Teams

Instructor: Jeremy Nathan





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About Me

Advisor

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Ask Questions!

Type questions in the chat
for everyone or in Q&A; I
will answer them live

Schedule

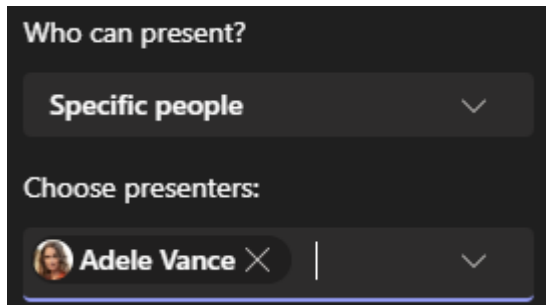
- **Teams communication (60 minutes)**
- Group discussion: Who has created meetings before?
- Presentation: Meetings tips and tricks; whiteboard, wiki, and OneNote; spotlighting attendees; content from camera; breakout rooms; meeting recap (live transcription, notes, and attendance); Microsoft Stream recordings
- Hands-on exercises: Explore meeting options, Q&A, polls, and PowerPoint Live
- Q&A
- Break
- **Teams setup (65 minutes)**
- Group discussion: Is the pace just right, too slow, or too fast?
- Presentation: Keyboard shortcuts; detailed search and filters; pinning channels and chats; sending Teams invites; joining teams; creating private teams
- Hands-on exercises: Add Outlook Calendar; email inside Teams; create a private channel; email an entire channel; explore Teams for project management; organize tasks with Planner
- Q&A
- Break
- **Teams integration (55 minutes)**
- Presentation: Team and channel analytics; using cloud storage in Teams; Power Platform (Power BI, Power Apps and Power Automate); Dataverse for Teams; Microsoft Lists; integrating third-party apps; retention policies; admin settings, analytics, and usage reports
- Hands-on exercises: Make a file and collaborate with your team; work with SharePoint and OneDrive; access files shared in chats
- Q&A

What can Teams do?

- Meetings, Chat and Email
- Work on files together with your colleagues
- Access SharePoint
- Work on most apps in one place

Meetings Tips and Tricks

- Check audio and video before joining a meeting and do sound check
- Send an invite to a team by typing in team name
- Customize Meeting options before and during a meeting (join early to edit options)
- Choose presenters (must send an invite to each presenter individually)



Breakout rooms

Assign participants to breakout rooms

- 1) During a meeting click on rooms on the top menu
- 2) Assign people automatically or manually

Create breakout rooms

Choose the number of rooms you want to create.

2

Assign participants

You can assign people to rooms, or let Teams assign people for you.

☒ Automatically

Teams will assign 0 - 1 people to each room.

☐ Manually

Choose the people you want to put in each room.

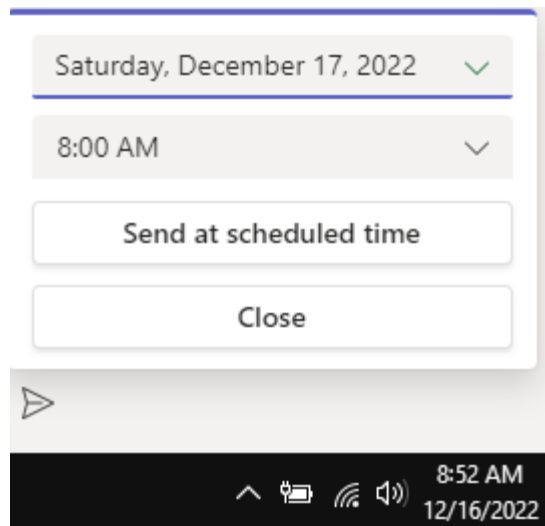
Create rooms

Teams Tips and Tricks

- Pop-out chat, apps, screen share in new windows
- Ctrl E to go to search bar
- Ctrl . to show all shortcuts

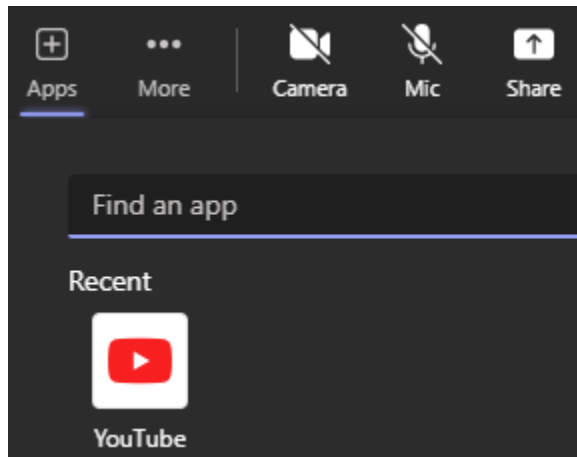
New Feature - send a message in the future

- 1) Right-click on the airplane icon
- 2) Select a future date and time and click Send at scheduled time
- 3) Click on airplane icon to send



Teams Meetings

- Schedule a new Teams meeting with a personal email to work along with me and join from another device to practice
- Practice using the meeting options before meetings
- Add apps like YouTube, Asana, Miro, etc. in a meeting
- Don't forget to stop sharing an app



Microsoft Teams meeting

Join on your computer, mobile app or room device

[Click here to join the meeting](#)

Meeting ID:

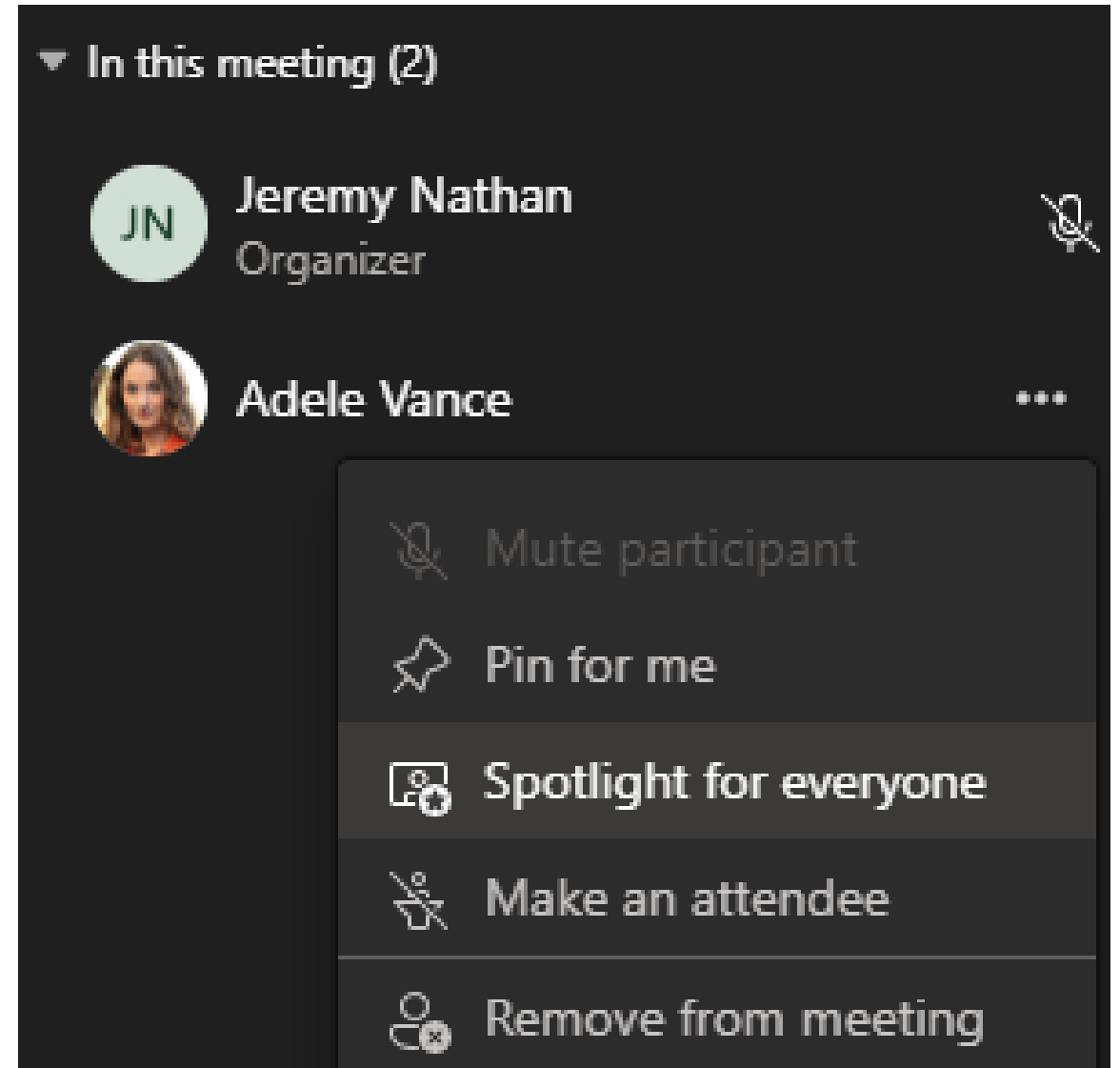
Passcode:

[Download Teams](#) | [Join on the web](#)

[Learn More](#) | [Meeting options](#)

Spotlight Attendees Video

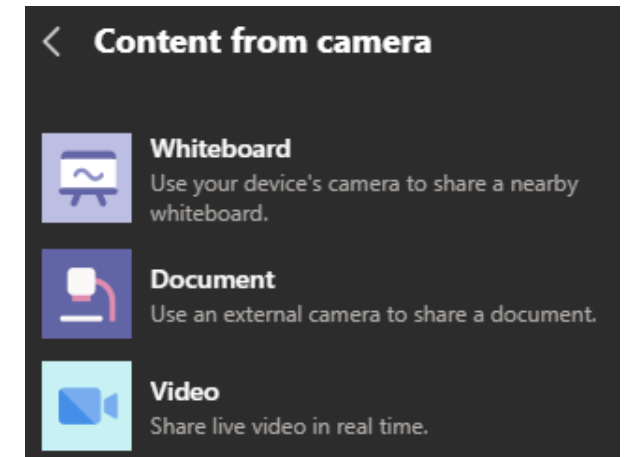
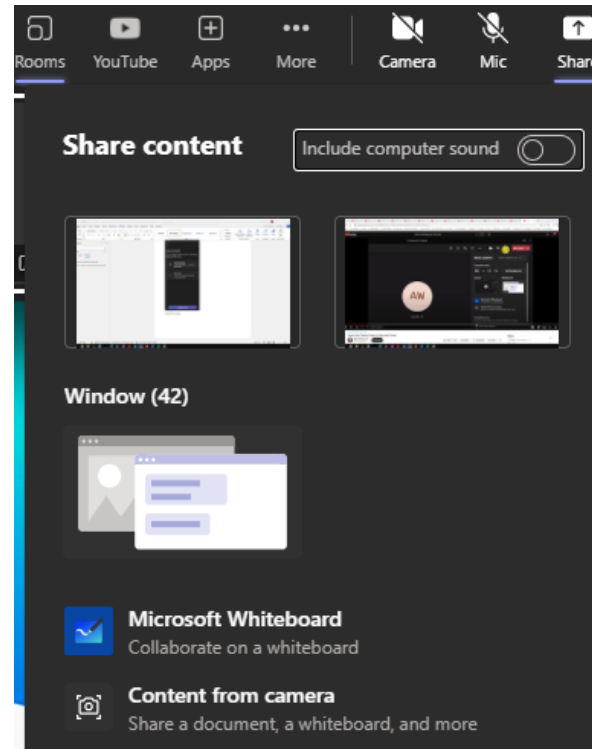
- Schedule a new Teams meeting with a personal email to work along with me and join from another device to practice
- Click on ellipsis next to a participant's name to make their camera size larger for everyone
- You can also spotlight yourself



Content from Camera

You can write on a whiteboard in the room during a meeting

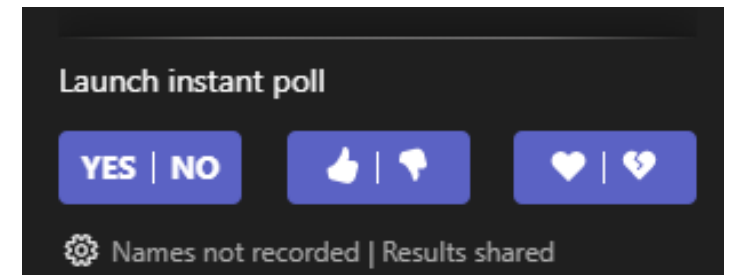
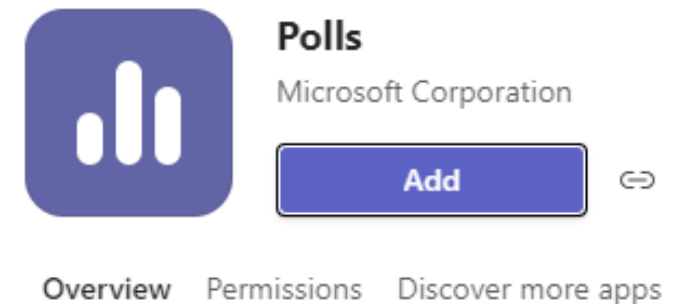
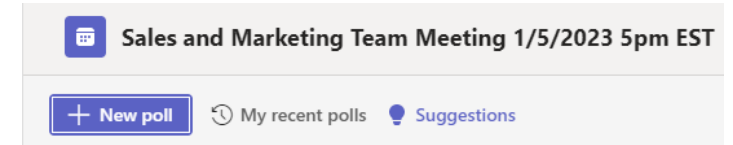
- 1) Click share button and Content from camera
- 2) Click on Whiteboard



Polls

Write questions ahead of time to ask during a meeting as polls

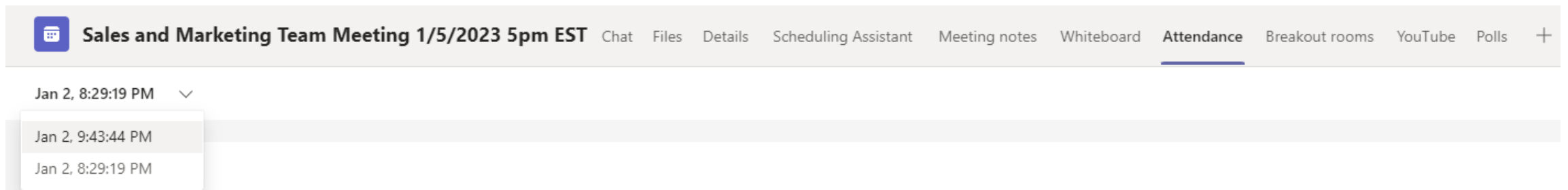
- Before the meeting, in Teams, in meeting options, click on the + tab and search for poll, click Add, click save



Attendance

See who and when people attended a meeting

- 1) After the meeting, go to edit meeting and click on Attendance
- 2) On the top on Date and time, change to previous times when meeting stopped and started
- 3) Click on Download on the top-right to download results to your Downloads folder



The screenshot shows the Microsoft Teams interface for a meeting titled "Sales and Marketing Team Meeting 1/5/2023 5pm EST". The "Attendance" tab is selected in the top navigation bar. Below the navigation bar, a dropdown menu is open, showing a list of times: "Jan 2, 8:29:19 PM", "Jan 2, 9:43:44 PM", and "Jan 2, 8:29:19 PM". The first time is currently selected.

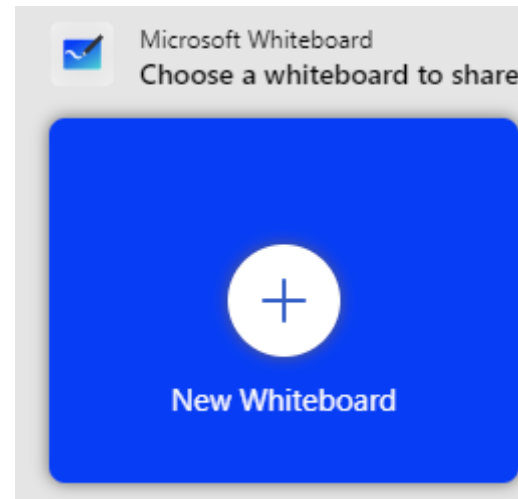
Sales and Marketing Team Meeting 1/5/2023 5pm EST Chat Files Details Scheduling Assistant Meeting notes Whiteboard Attendance Breakout rooms YouTube Polls +

Jan 2, 8:29:19 PM ▼

- Jan 2, 9:43:44 PM
- Jan 2, 8:29:19 PM

Whiteboard

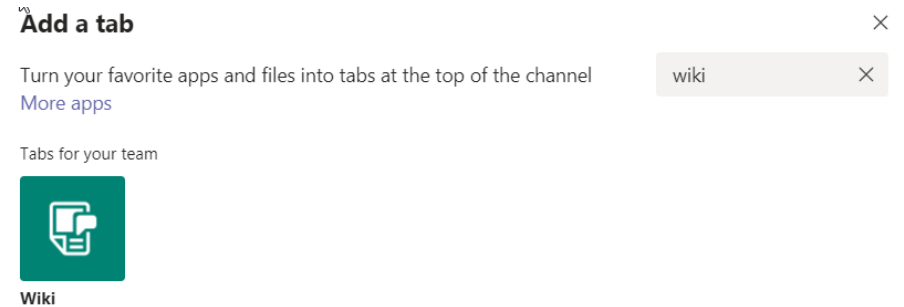
- A place to collaborate by typing, drawing, or writing
- Click share button and Microsoft whiteboard to share
- Click on New Whiteboard to make a new whiteboard
- Access whiteboard online:
<https://app.whiteboard.microsoft.com/>



Wiki

Wiki is a way to take notes during meetings

- 1) Click on + add new tab in the Channel
- 2) Search for Wiki and click on icon
- 3) Change Tab name, such as Monthly Meetings Agenda
- 4) Click on hamburger (3 horizontal lines) to see sections

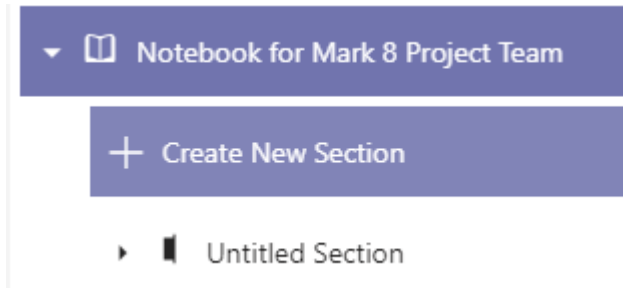


OneNote

OneNote is a place to take group notes

Add OneNote to a Teams Channel

- 1) Click on plus tab at the top of a channel to add a tab, search for OneNote
- 2) Use default Notebook, create a New Notebook, or add a section from another notebook



PowerPoint Live

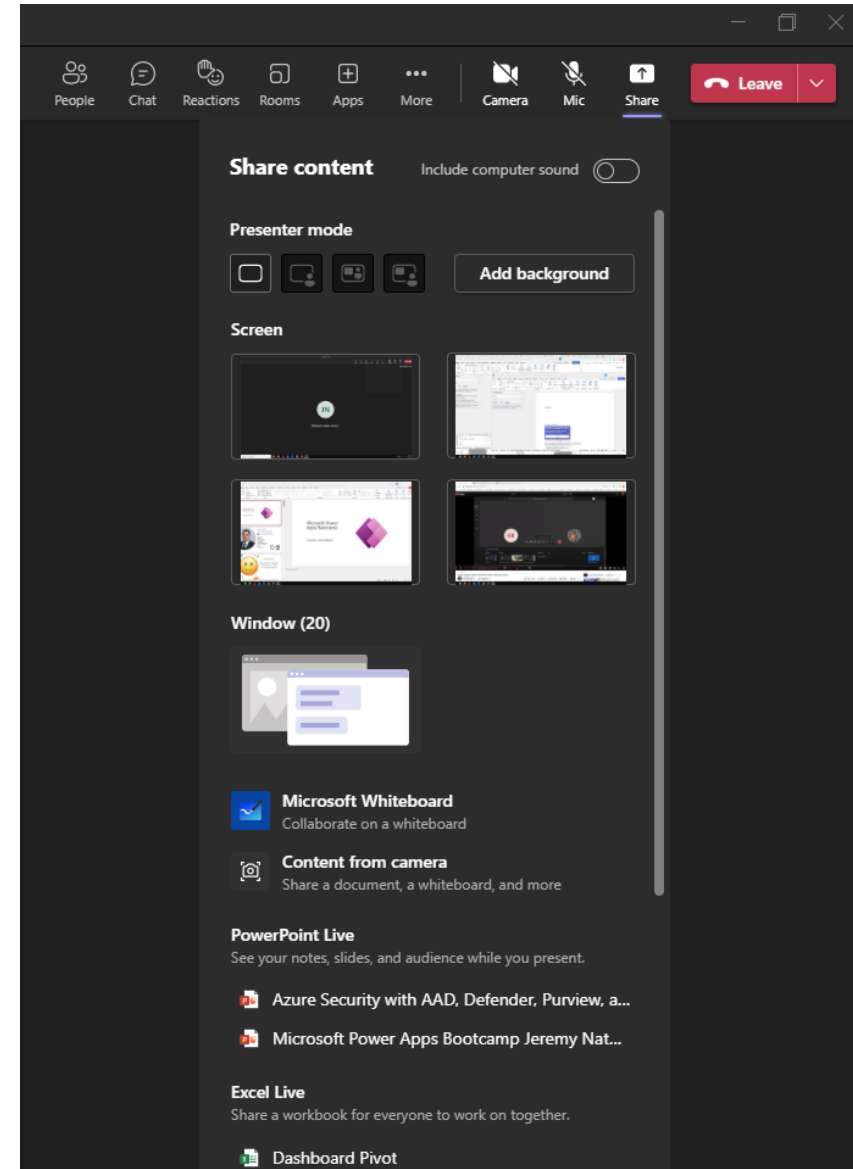
While sharing your screen in a meeting, you can share PowerPoint

Participants can flip through slides on their screen

1) Click on Share

2) Click on a PowerPoint file in your recent list

*The file can be open, or it could have been open on your computer recently



 Channel notifications

 Pin

 Hide

 Manage channel

 Get email address

 Get link to channel

 Edit this channel

 Connectors

 Delete this channel


Email a Channel

- 1) Go to the Channel in Teams
- 2) Click on the ellipsis and click on Get email address
- 3) Copy email address
- 4) Go to Outlook, Compose a New message, paste the email address in the To section, put in a subject, message, add an attachment, etc. and click Send


Create a Private Team and Private Channel

- Private Team means specific people are on a team
- Public Team means anyone can join a team
- Private Channel means specific people who are on the Team are on the Channel


What kind of team will this be? ×



Private
People need permission to join



Public
Anyone in your org can join



Org-wide
Everyone in your organization automatically joins

Create a channel for "Advanced Teams" team

Channel name

Teams Training Channel

Description (optional)

A channel for Microsoft Teams trainers

Privacy

Private - Specific teammates have access



Cancel

Create

Add Outlook Email to a Channel Tab

Each member can access their Outlook Email

- 1) Click on plus tab at the top of a channel to add a tab, search for Website
- 2) Type in a name like Email and put in <https://outlook.office.com/mail/>
- 3) Sign into your email

Add a tab

Turn your favorite apps
[More apps](#)

Recent ▾

Tabs for your team



Website



Website

Tab name

Outlook Email

URL*

<https://outlook.office.com/mail/>

*Make sure you're only linking to sites that start with 'https://'
That way, you and your team can stay secure.


☒ Post to the channel about this tab



Planner

Organize tasks for team members

Add Tasks by Planner to a channel's tab

- 1) Type in a task name, due date and assign to people
- 2) Click on the task name to put in progress, priority, start date, notes and comments

 Due 01/06/2023

  Jeremy Nathan

Add task

Team and Channel Analytics

Go back 90 days to see what days team members interacted with each other

- 1) Click on the ellipsis next to team name or channel name
- 2) Click on Analytics tab to see analytics
- 3) Click on Last 7 days to select Last 30 days or Last 90 days

Microsoft Lists

Lists track and organize information

- 1) Click on the plus Add a tab at the top of a channel to add Lists to a channel
- 2) Search for Lists and click on it
- 3) Click on Lists to Save the tab to that channel (You can rename the tab “Lists” if you want)
- 4) Create a new list or add an existing list from that channel’s SharePoint site

Add a tab

Turn your favorite apps and files into tabs at the top of the channel

[More apps](#)

Recent ▾

Tabs for your team



Lists



SharePoint

lists

Microsoft Teams Admin

Manage Teams Settings and Analytics

<https://admin.teams.microsoft.com/dashboard>

Most important features:

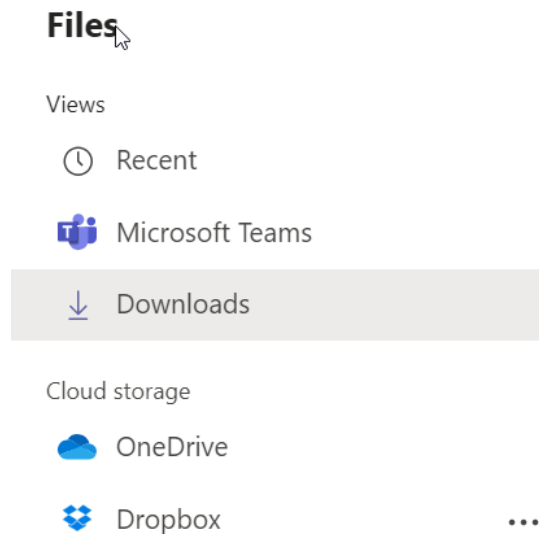
- Teams Policies – disallow all shared channels
- Users, Guest access – you can turn off guest access in Teams
- End-to-end encryption – under enhanced encryption policies (does not apply to recorded meetings)
- Call Quality Dashboard – see number and quality of meetings in organization:

<https://cqd.teams.microsoft.com>

Cloud Storage in Teams

Access OneDrive, Google Drive, Dropbox etc. in Teams

- 1) Click on ellipsis to add Files app in Teams
- 2) Click on Add cloud storage to add other cloud storage apps
- 3) Recent shows all recent cloud files



Add cloud storage

Select your cloud storage provider to add a folder to this channel. Everyone with permissions to the original folder will be able to access it in Teams.



SharePoint

Empower individuals, teams and organizations to intelligently discover, share, and collaborate on content from anywhere and on any device.



Dropbox

Dropbox simplifies the way teams work together with secure, easy-to-use collaboration tools and the fastest, most-reliable file sync platform.



Box

Box is a secure content management and collaboration platform helping teams and organizations easily share, manage, and collaborate on their most important information.



ShareFile

Citrix ShareFile helps people exchange files easily, securely and professionally.



Google Drive

Get access to files anywhere through secure cloud storage and file backup for your photos, videos, files and more with Google Drive.



Power BI in Teams

Analyze and share Power BI reports in a Team's Channel

<https://app.powerbi.com/>

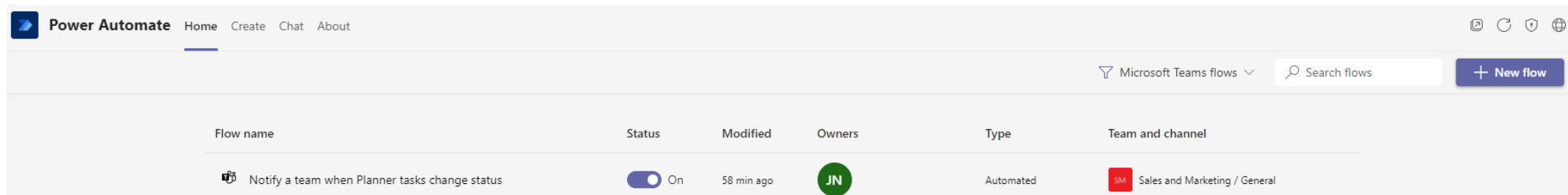
Add Power BI tab to a channel

- 1) Click on + tab at the top of a channel
- 2) Click on Power BI
- 3) Expand a workspace and click on a report (can be "My Workspace" or other workspace)

Microsoft Power Automate in Teams

Automate tasks and get notifications with Power Automate

- 1) Click on ellipsis (find and app) on the left side of the screen, click on Power Automate
- 2) Pin Power Automate to the left-hand menu
- 3) Click on Get started
- 4) Add power automate to a team
- 5) Create a flow (try template “Notify a team when Planner tasks change status”)
- 6) Click on Power Automate, click on flow name and see if it ran successfully

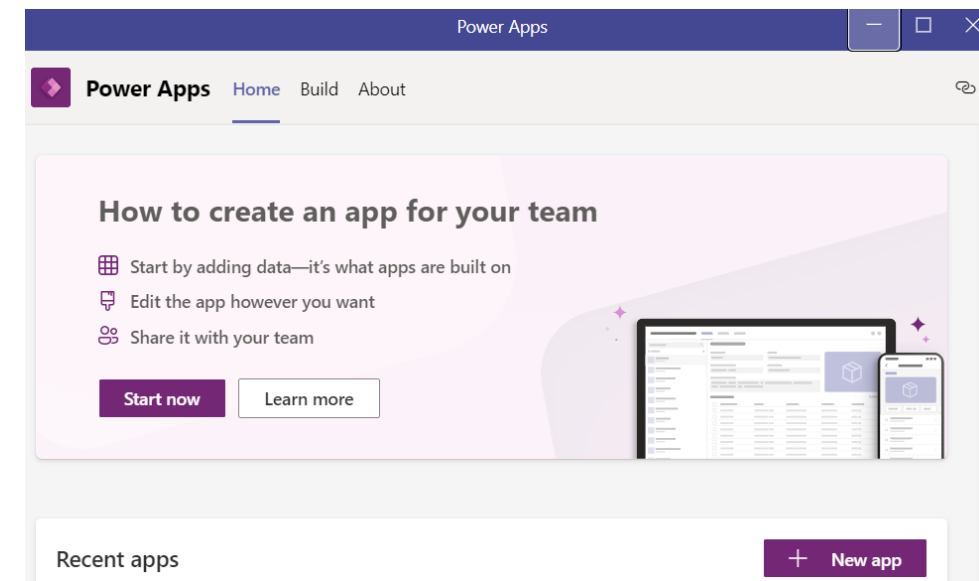


Dataverse in Teams

Dataverse for Teams creates a new Power Apps environment

Key takeaway

- Creating a Power App in Teams creates an environment with the same Team name
- 1) Add Power Apps to Teams by clicking on ellipsis in Teams and add Power Apps
 - 2) Add Power Apps to a team and make a new power app



Retention Policies in Teams

How long will data be retained in Teams

<https://compliance.microsoft.com/informationgovernance>

- 1) Go to Microsoft Purview in Microsoft 365
- 2) Click on Retention policies and new retention policy
- 3) Type in a name for the retention policy and click Next
- 4) Choose static type to choose locations and click Next
- 5) Turn on Teams channel messages and Teams chats and click Next
- 6) Choose Retain items for 10 years and at the end of the retention period choose Do nothing, click Next, click Submit, click Done

Q & A

What questions do you have?

Ask now in the Q & A section or email
Jeremy at
jnathan@jncomputertraining.com

It was great working with you; see you
next time!

