

PROSERVEIT
MAKING TECHNOLOGY TRANSPARENT

A Complete Guide to Microsoft Teams

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The Heart of Teams is... Teams!

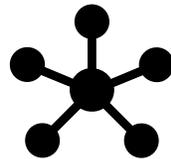
An introduction to the Teams tab

So, you want to learn a little bit more about Microsoft Teams!

Microsoft Teams is your ultimate workspace - think of it as your go-to hub for teamwork and collaboration within your organization. **Part of your Office 365 Business Essentials, Business Premium, Enterprise E1, E3, or E5 licenses, Microsoft Teams is available to you at no additional cost**, and you can take advantage of it by simply logging into your Office 365 environment and clicking on the Teams logo!



Teams can manage **document collaboration in real time.**



Teams can help you manage **conversations, files, and tools.**



You can **communicate with your team through chat capabilities.**



Pair Microsoft Teams with *Phone System, Calling Plan, or Direct Routing* and host meetings, **make phone calls, or voice chat with colleagues.**



In your first Teams lesson, we're going to dive right into [the heart of Microsoft Teams - the Teams tab](#). Read along for more information on the Teams tab and what it can do for your organization.

The [Teams tab](#) is where you can create various teams, like "Marketing Team", "Sales Team", "Leadership Team", etc. From these new teams, you can [invite specific people within your organization to join](#), share documents, OneNote notebooks, and valuable information with the members of that team, hold conversations, and [much more](#). Anyone that's part of that team will be able to interact with the rest of the team members.

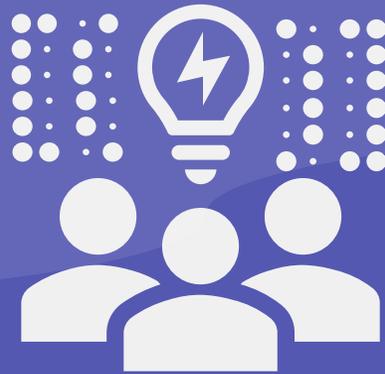


So, let's talk about creating a new team.

When you go to create a team in Microsoft Teams, you will see that **you have two options available to you**. Either you can create a new team from scratch, or you can use an existing team as a template.

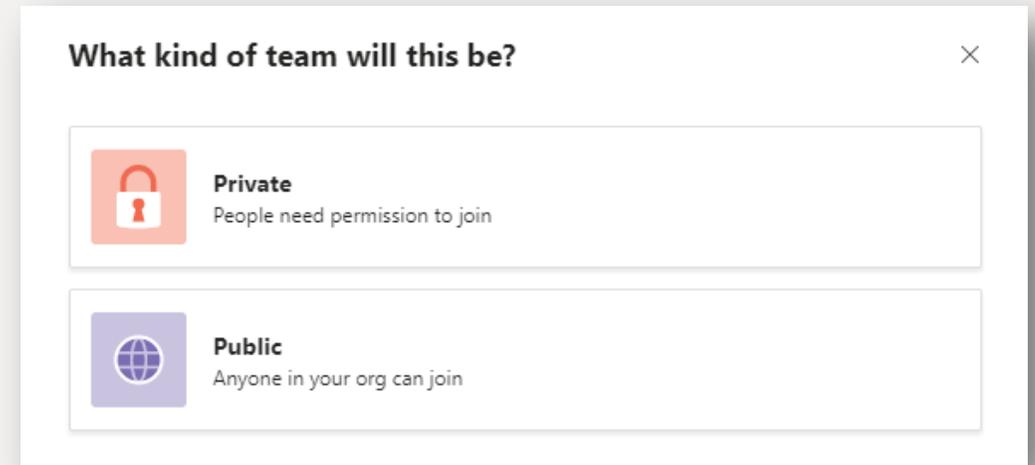
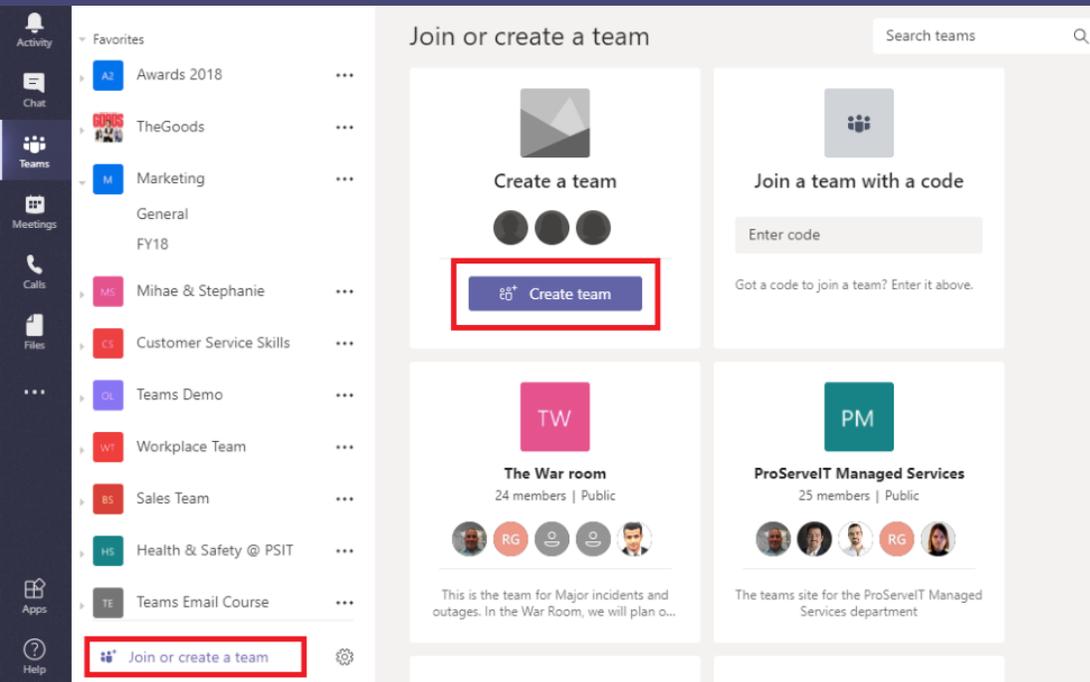
[Here is the process for creating a team through both of these options.](#)

1. Creating a New Team from Scratch



Follow these steps to create a new Team from scratch!

1. Click on **"Join or Create a Team"** located in the bottom left side of the screen.
2. Click the **"Create Team"** button.
3. Select **"Build a Team from Scratch"**.
4. Select what kind of team you want this to be.
 - Is it going to be a [private team](#) (people will need permission to join this team), or a [public team](#) (anyone in your organization can join





5. Give your team a name and include a description of the team, letting people know what the team is all about, then click **"Create"**.



6. Add members to your newly created team. Begin typing a person's name or group name in the field. Once done, click the **"Add"** button.

Some quick details about your private team ×

Team name

Sales & Marketing Team ⌵

Description

A place for the sales and marketing teams to connect and collaborate.

< Back Create

Add members to Sales & Marketing Team

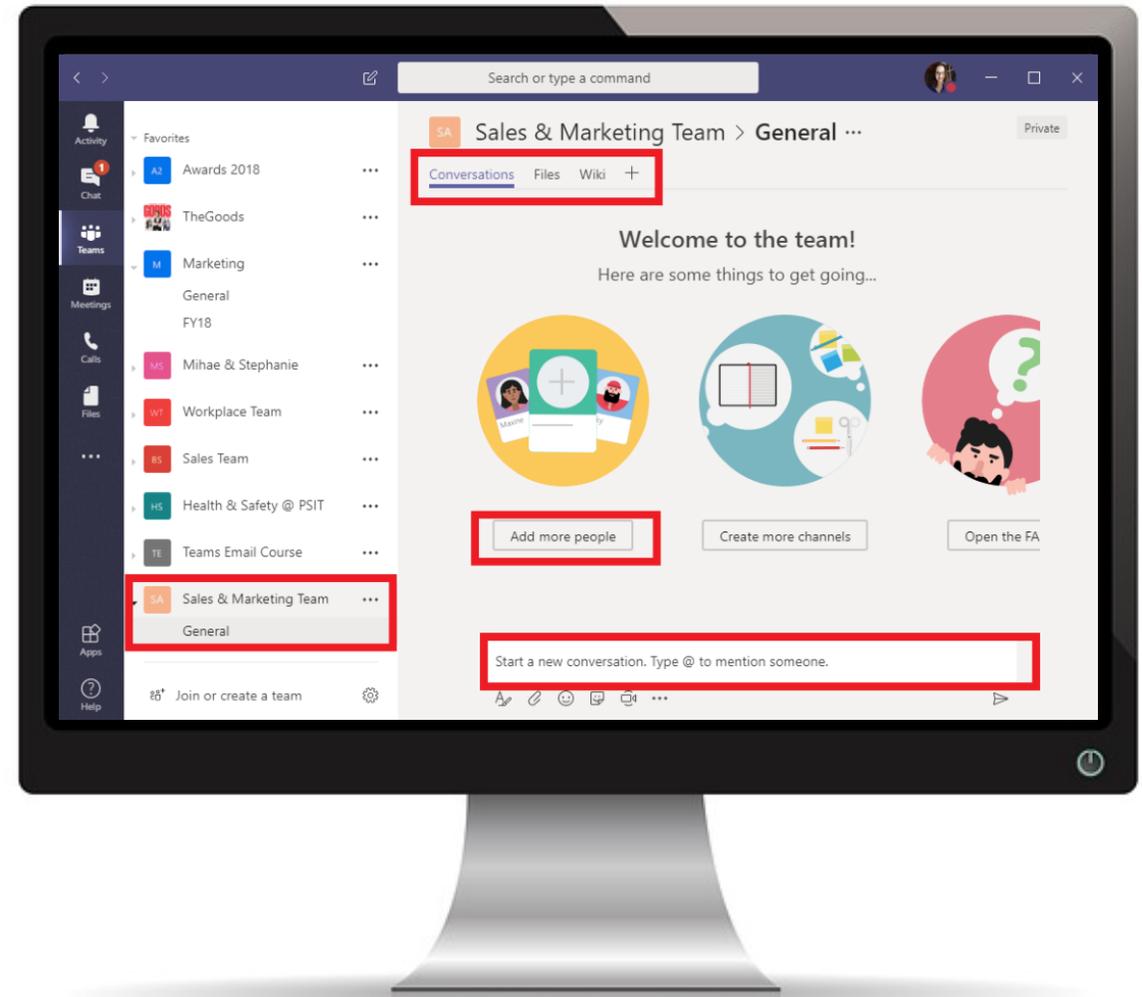
Start typing a name, distribution list, or security group to add to your team. You can also add people outside your organization as guests by typing their email addresses.

HB Holly × MS Marina × a Add

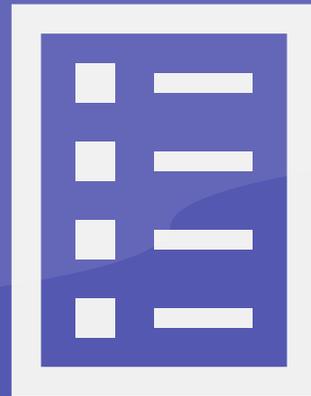
- Mihae A
Marketing Manager
- Abbas
Principal Consultant
- Alfero
Director, Software Development
- AA Annie

9

You'll now be taken to your new **team's page**, where you can **start a conversation**, **add files** that you want to share with the other team members, **add a OneNote**, **Power BI dashboard**, or other **add-in**, and more!



2. Creating a New Team from an Existing Team Template



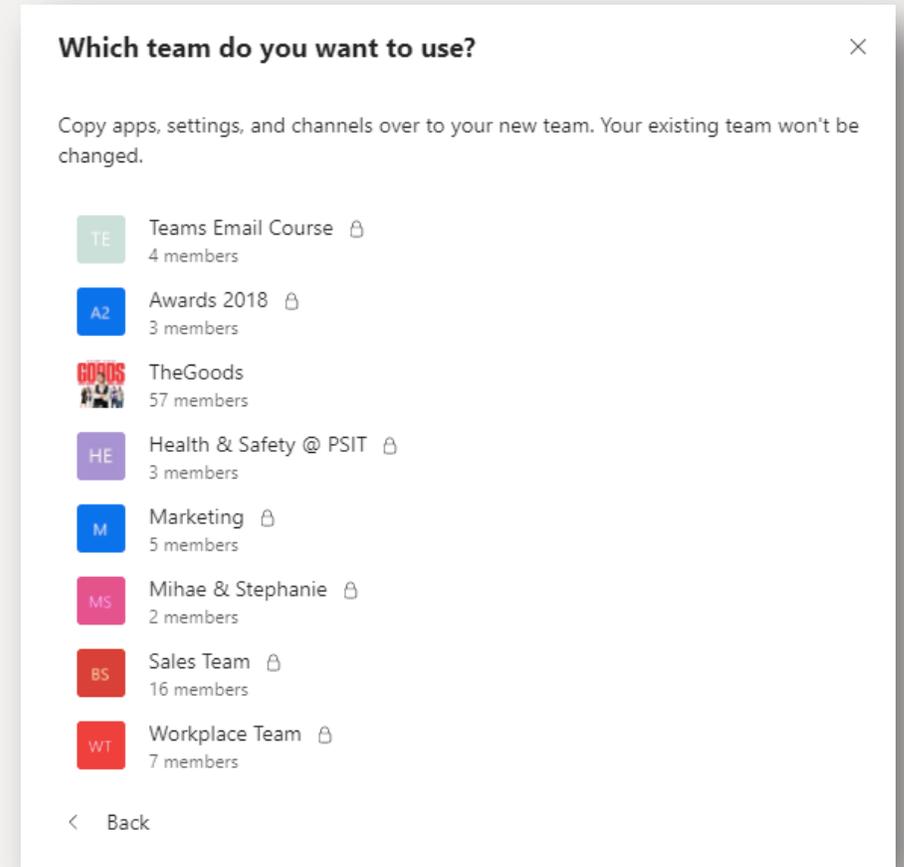
Sometimes, you may want to **copy an existing team template**.

Let's say that you have a sales team set up, but you want to create a joint sales and marketing team in your organization. Rather than manually creating the new team from scratch and then manually entering all the people on the sales team, **why not just clone the sales team, rename it, and then add only the marketing people?**



Here's how to clone an existing team:

1. Click on **"Join or Create Sales Team"** located in the bottom left side of the screen.
2. Click the **"Create Team"** button.
3. Select if you'll be creating from an existing Team or an existing Office 365 group. For this particular demonstration, we're going to use an existing team, so we're going to choose **"Team"**. A list of current teams will populate.



You are using "Sales Team" as a template for a new team ×

Team name

Sales Team [copy] ✓

Description

Let people know what this team is all about

Choose what you'd like to include from the original team

Messages, files and content won't be copied. You'll need to set up tabs and connectors again.

Channels Apps

Tabs **Members**

Team settings

< Back **Create**

4. Choose the **Team or Group** that you'd like to mirror. In this case, let's choose the "Sales Team". Select it from the list.
5. You'll see that this team name has been automatically populated to **"Sales Team [Copy]"**. Rename the team to what you want, and add a description of the new team.
6. At this time, select what you want to include from the original team - **note, messages, files, and content won't be copied over**, and any tabs or connectors you have will need to be set up again. You'll see that Channels, Apps, and Team Settings are already selected - since we're creating the team this way because we don't want to have to add everyone manually, make sure you also select **"Members"**, too. Then click **"Create"**.

Add members to Sales & Marketing Team

Start typing a name, distribution list, or security group to add to your team. You can also add people outside your organization as guests by typing their email addresses.



Sales Team

A chance for the sales & marketing team to connect and collaborate on

8 members were added.

- Now, you'll see a place where you can **add new members to the team**. However, what's different from adding members from scratch is that **you'll see a note underneath that tells you how many members were already added to the team**.
- Start **typing the name or group members** that you still have to add (i.e., in this example, the members of your marketing team) and **click "Add"**.

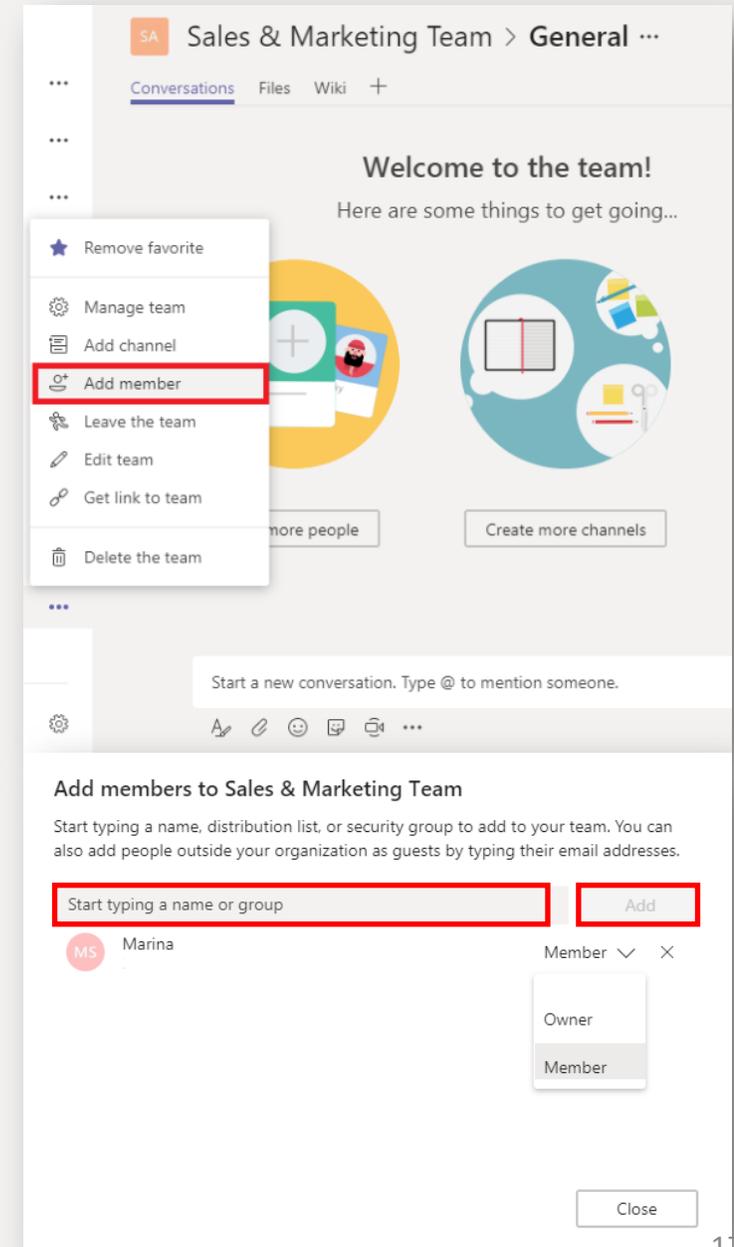
You'll now be taken to your new *team's page*, where you can **start a conversation, add files** that you want to share with the other team members, **add a OneNote, Power BI dashboard**, or other add-in, and more!

Adding People to a Team



So, let's say you've had **a new sales associate join your organization** and you want to add them to your Sales & Marketing Team so that they can **get up to speed** on what's been happening, maybe **access those files** you've been sharing, etc.

1. To add people to the team, click on the **"three dots"** after the team name.
2. Click on **"Add Member"**.
3. Start typing the name of the person that you want to add to the group and **click "Add"**. You can now choose the permissions you want the person to have. When you're done, **click "Close"**.



Modifying Permissions Within The Team



The screenshot displays the Microsoft Teams interface for a team named "Sales & Marketing Team". The top navigation bar includes "Members", "Pending Requests", "Channels", "Settings", and "Apps". A red box highlights the "Add member" button in the top right corner. Below this, a table lists team members:

Owners (1)			
Name	Title	Location	Role
Stephanie	Marketing Assistant		Owner

Members and guests (2)			
Name	Title	Location	Role
Holly			Member
Marina			Member

Below the members list, the "Settings" tab is highlighted with a red box. Under "Member permissions", a checklist of activities is shown, all of which are checked:

- Allow creating and updating channels
- Allow members to delete and restore channels
- Allow members to add and remove apps
- Allow members to create, update, and remove tabs
- Allow members to create, update, and remove connectors
- Give members the option to delete their messages
- Give members the option to edit their messages

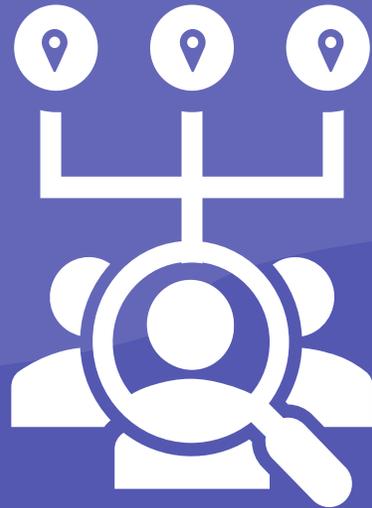
Under "General Channel:", the following options are visible:

- Anyone can post messages
- Anyone can post: show alert that posting will notify everyone (recommended for large teams)
- Only owners can post messages

Speaking of team permissions, what happens if you want or need to modify them?

1. If you want to **modify permissions within the Team, you need to be the team's owner** (or have received owner permission on the team). If you are an owner, click on the **three dots** after the team name.
2. Click on **"Manage Team"**. You'll be taken to a page where you can **manage the admin side of your team**; members, pending requests, settings, etc. This is the page where you can see the members and guests who are part of this team and their particular role.
3. Click on the **"Settings"** tab and look for the **"Member Permissions"** section. When you click on this, you'll see a **checklist of activities** that your members are able to do - this is where you select what your members are able to do in the team. Once set, anyone with "Member" status will be governed by what you've checked off here.

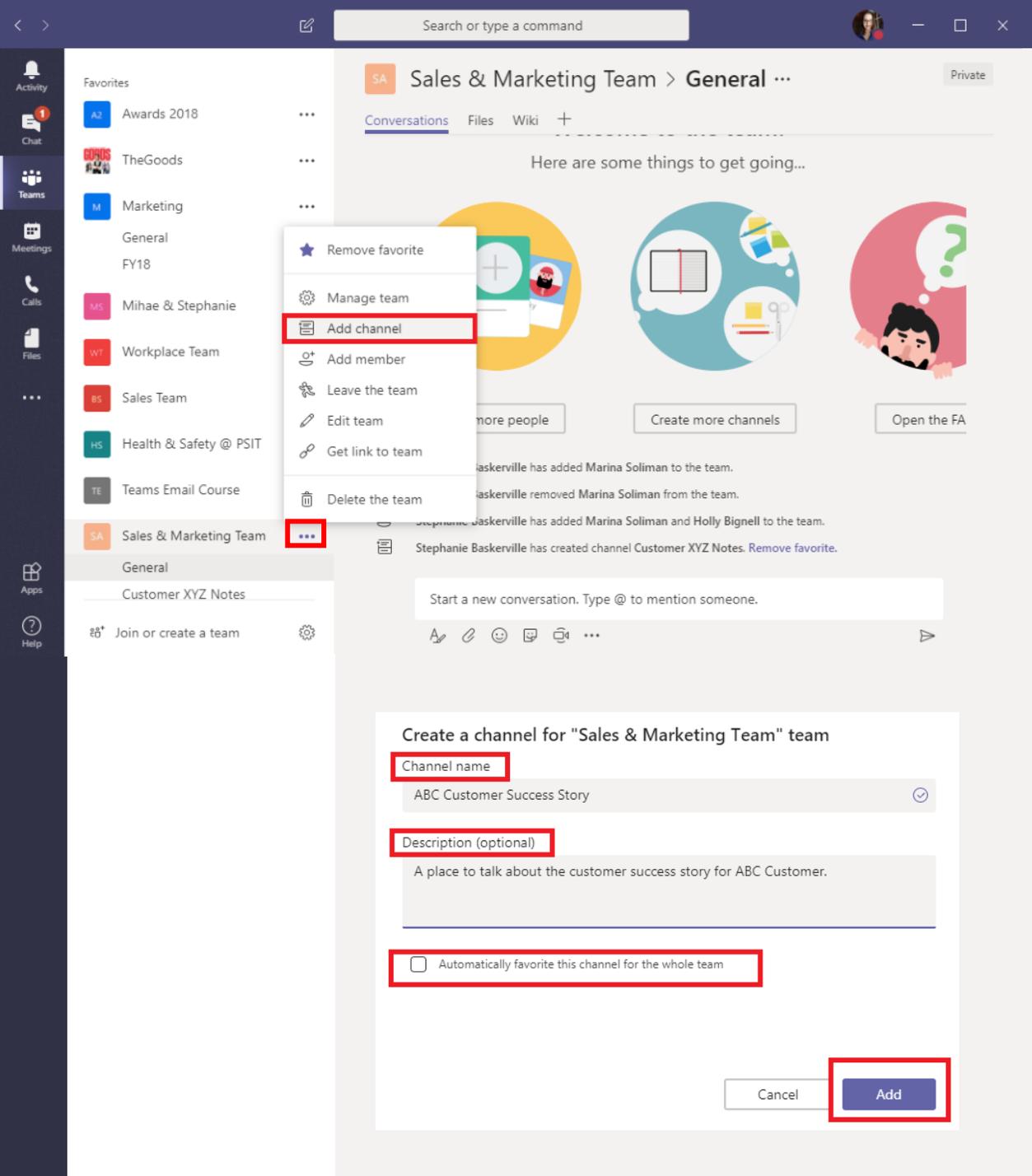
Creating a Channel



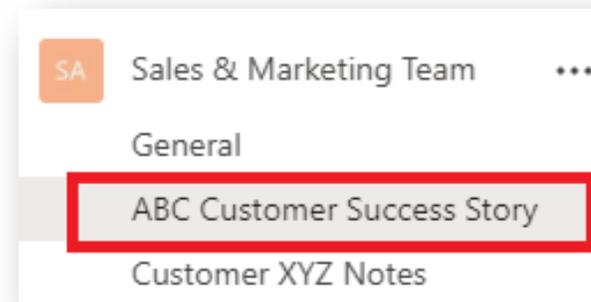


You shouldn't be creating a new Team for every project, every customer, etc. - you'd have far too many teams to sort through and you might not be able to keep up on what's happening. So, in the interest of saving your sanity, **its recommended that you create new channels within Teams.**

For instance, let's say that your sales and marketing team is collaborating on a few customer success stories. **Rather than creating a new Team for each project, you can simply create a channel** within the Sales & Marketing group instead!



1. Click the **three dots** beside the name of the team.
2. Click on **"Add channel"** in the drop-down that appears.
3. Type in a **new channel name and a description** of the channel. At this time, you can also click off whether or not you wanted to automatically favourite this channel for the team. Then, **click "Add"**.
4. You will now be able to see the channel listed under the folder name on the left-hand side:



Microsoft Teams for Office 365 Workshop

Microsoft Teams for Office 365 is a part of your Office 365 Business Essentials, Business Premium, Enterprise E1, E3, or E5 licenses, and is **available to you at no additional cost**. So, if you have one of these licenses, and you're not currently using Microsoft Teams, the question is, why not?

Don't know the features and benefits that Microsoft Teams has to offer your organization? Not sure how to get started using it? ProServeIT's Microsoft Teams Workshop is for you!

Why the Workshop?

Empower Your Employees

Your employees need new tools to support their unique workstyles. Give them a new tool that will empower them!

Improve Teamwork

Want to have a more effective team? Microsoft Teams helps improve teamwork by giving your employees better ways to communicate and collaborate!

Establish Realistic Goals

Working with a team of experts, you'll be able to map out your Microsoft Teams journey & establish realistic goals you can meet.



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In our next eBook, **we're going to walk you through the "Chat" tab**. Stay tuned for more great visuals and step-by-step instructions!

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[Contact us to get started with Teams >>](#)

The Heart of Teams is... Teams!

An introduction to Chat capabilities in Teams

Matthew D.
Available

Home
New

Contacts
Isabella, Emily K, Anthony

Emily K.

Isabella

Anthony

Adrew

Jayde

Ava

Name:
Tel:
Address:
Etc.

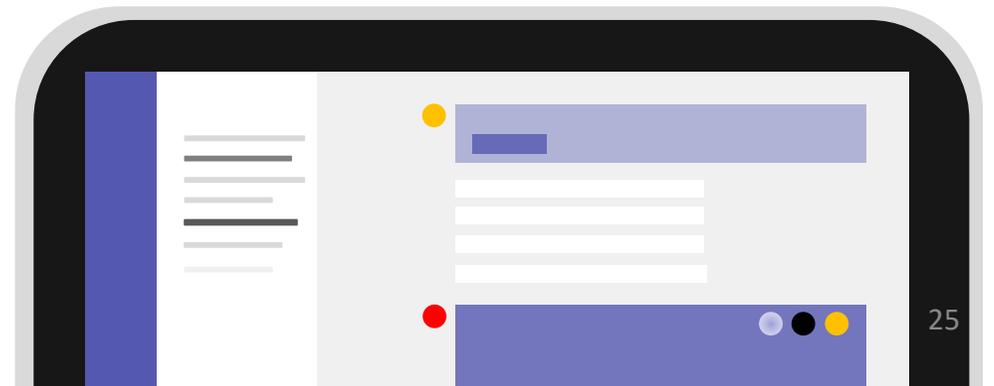
Did you know that it takes 2 minutes to process an email? These 2 minutes do not include the time you spend to respond to that email or doing the action items that the email has asked for. It is literally the time that it takes for your brain to understand what the email is conveying.

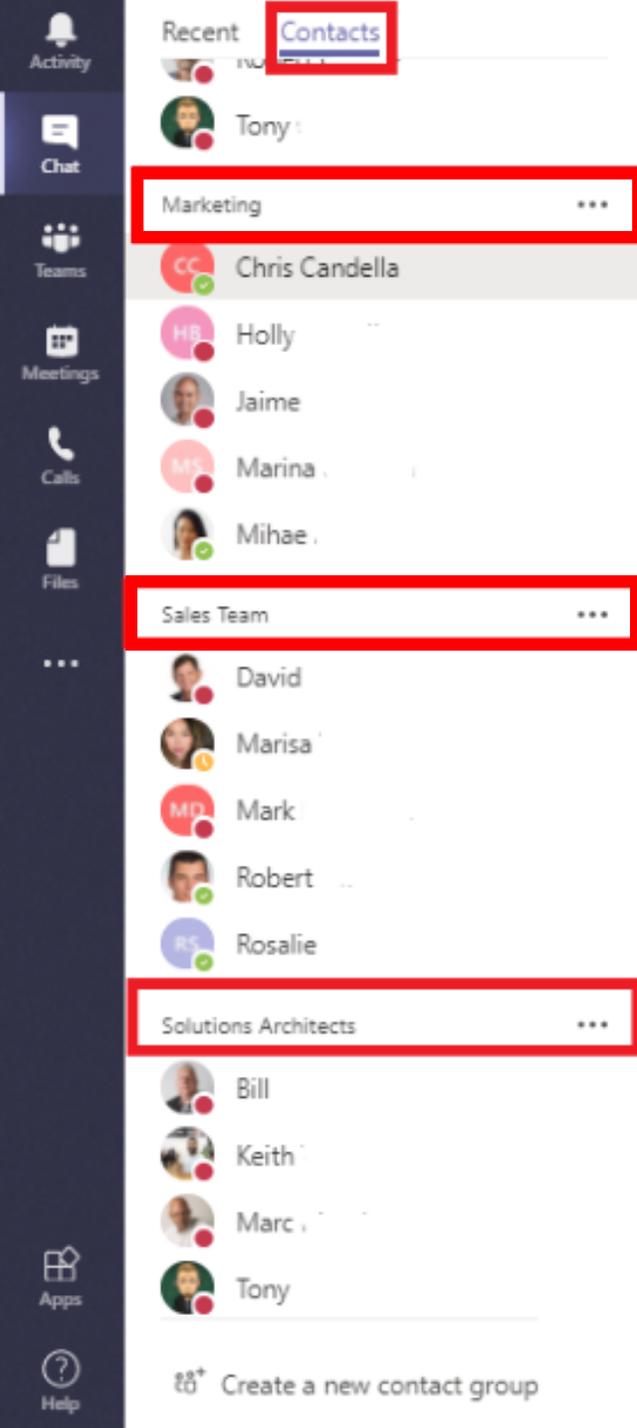
So, if you're a person who gets a hundred emails a day, **you are spending 3 hours and twenty minutes of your 8-hour work day just understanding emails!** Talk about counterproductive!

In this eBook on Microsoft Teams, we're going to introduce you to the **Chat tab**.

The "Chat" tab in Microsoft Teams lets you send a quick message to someone, **without having to send an email.** By doing so, you enhance your productivity, because you're replacing that point-in-time communication of email with instant or synchronous communication instead.

The great thing about this, is that this will also create a **searchable chat thread**, so you'll always have a record of the conversations you've had, and, if necessary, you can go back and search for content that you were discussing.



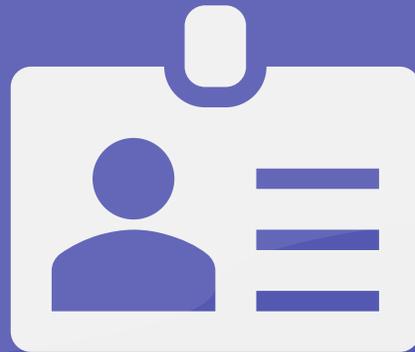


Let's dive a little deeper into the **"Chat" tab**.

This "Chat" tab also allows you to separate those you frequently communicate with, and you can also **create contact groups** so that you can separate or easily find people that you need to communicate with on a frequent basis. When you **click on the "Contacts" link**, you'll see an opportunity to create a new contact group.

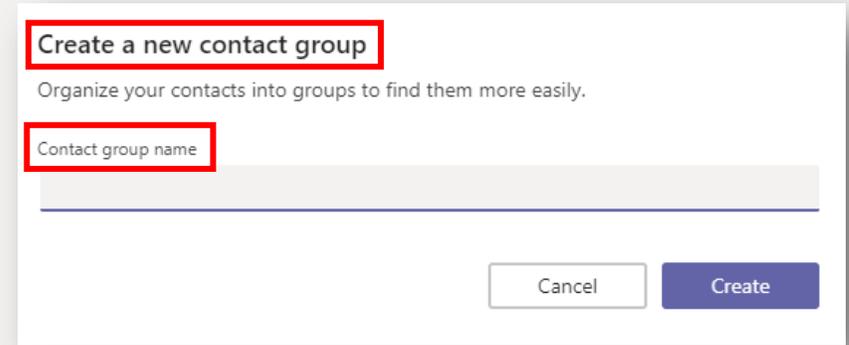


Creating a New Contact Group

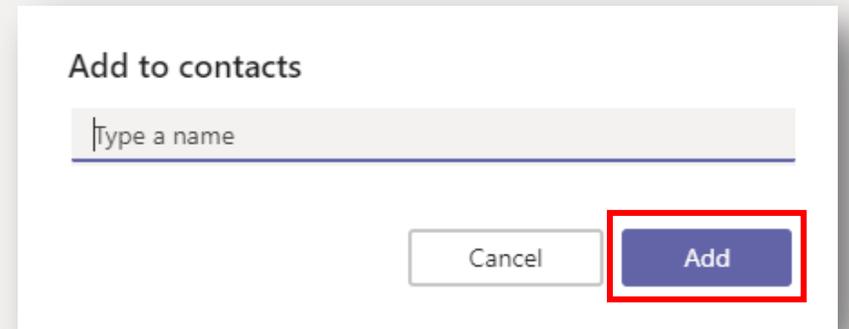
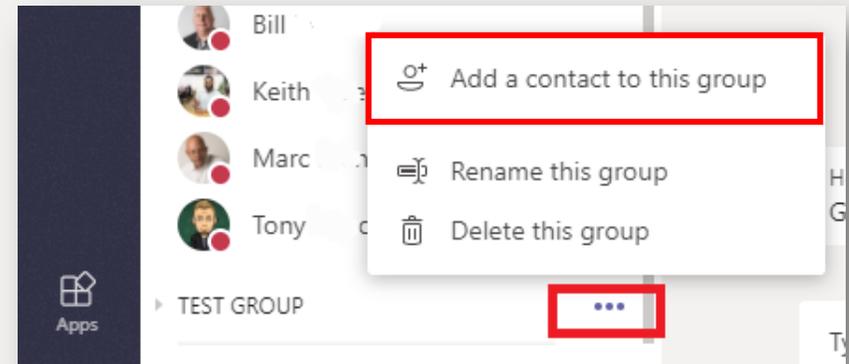


Maybe you want to keep track of your sales team, or maybe you want your lunch buddies close together so you can figure out what you're doing for lunch. So, let's show you how to **create a new contact group**.

1. Click on the **"Create a new contact group"** button at the bottom of the page.
2. In the pop-up, type in your contact group name, i.e., "Sales Team", "Marketing Team", etc.
3. Once you've created the group, you'll see it in your list of contacts.
4. Click on the **three dots** beside the name of the group.
5. Click on **"Add a Contact to this Group"**. A new pop-up will show up.
6. Type in the name of the person you want to add to the group and click **"Add"**. These steps can be repeated as many times as needed.



The screenshot shows a dialog box titled "Create a new contact group" with a red box around the title. Below the title is the instruction "Organize your contacts into groups to find them more easily." There is a text input field labeled "Contact group name" with a red box around the label. At the bottom right, there are two buttons: "Cancel" and "Create".



The screenshot shows a dialog box titled "Add to contacts" with a text input field labeled "Type a name". At the bottom right, there are two buttons: "Cancel" and "Add", with a red box around the "Add" button.

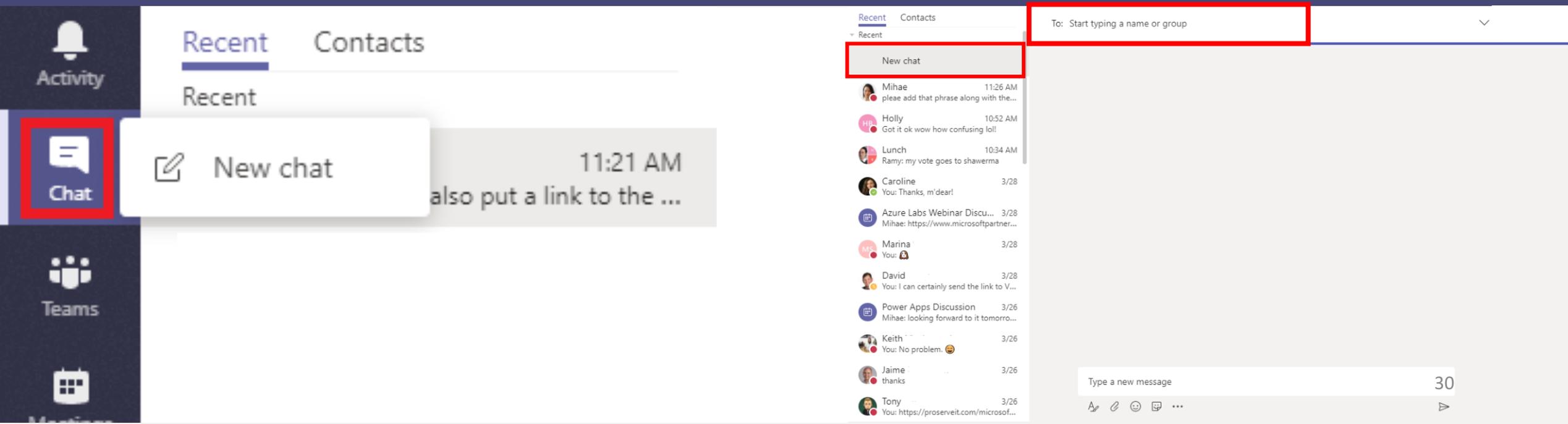
Creating a New Chat



One thing that can be tricky - unlike, say, your phone, there doesn't appear to be a button that's hovering in plain sight to begin a new chat with someone. You know, typically, you'd see a plus sign, or maybe an arrow or something that would signify you want to start a new chat.

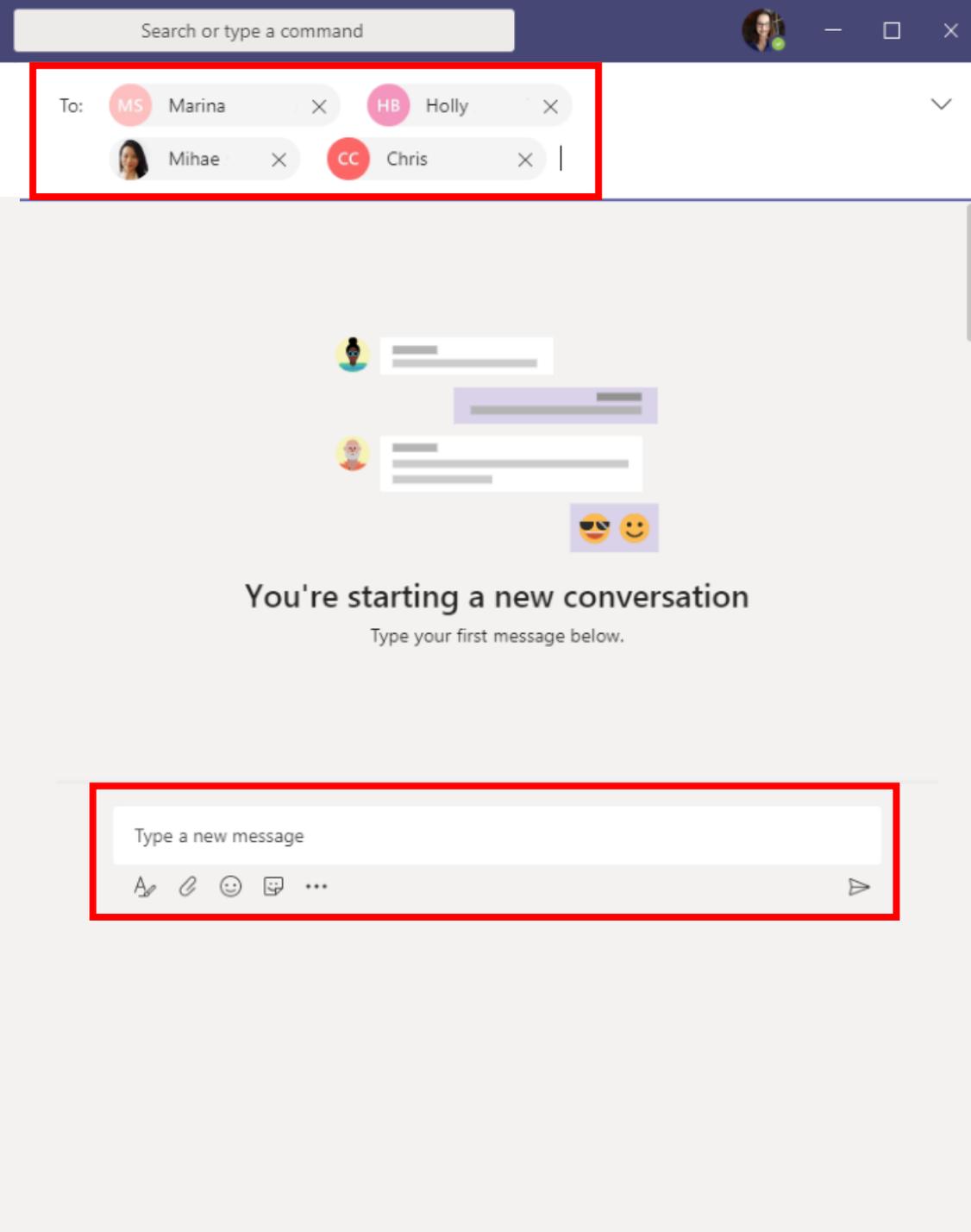
On Teams, **if you want to start a new chat with someone**, you need to right-click on the chat tab in the left-hand menu:

When the **"New Chat"** bubble pops up, click on it. A new chat will begin, and you can start typing the name of the person that you want to start a chat with in the **"To: Start typing a name or group"** field:



Creating a Multi-Person Chat





The last thing we'll mention is that you can **create multi-person chats**. If you want your whole team to be able to chat together, create a new chat using the method above, but **type in all the names of each person in the group into the "To" field**. You'll see something that looks like this:

Then, **type a new message using the chat box**, and you're all set!



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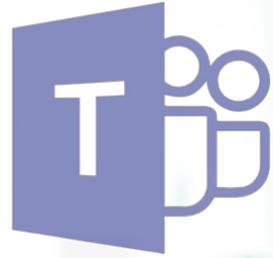
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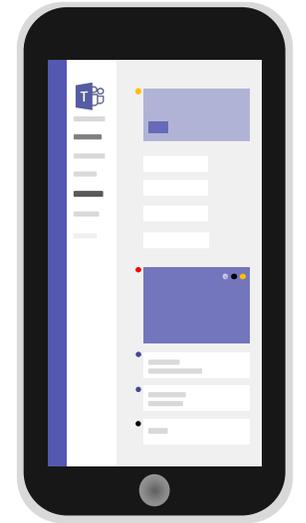
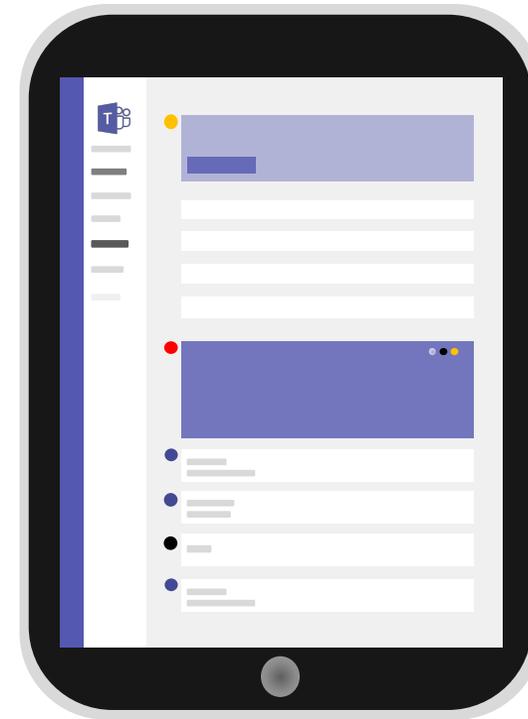
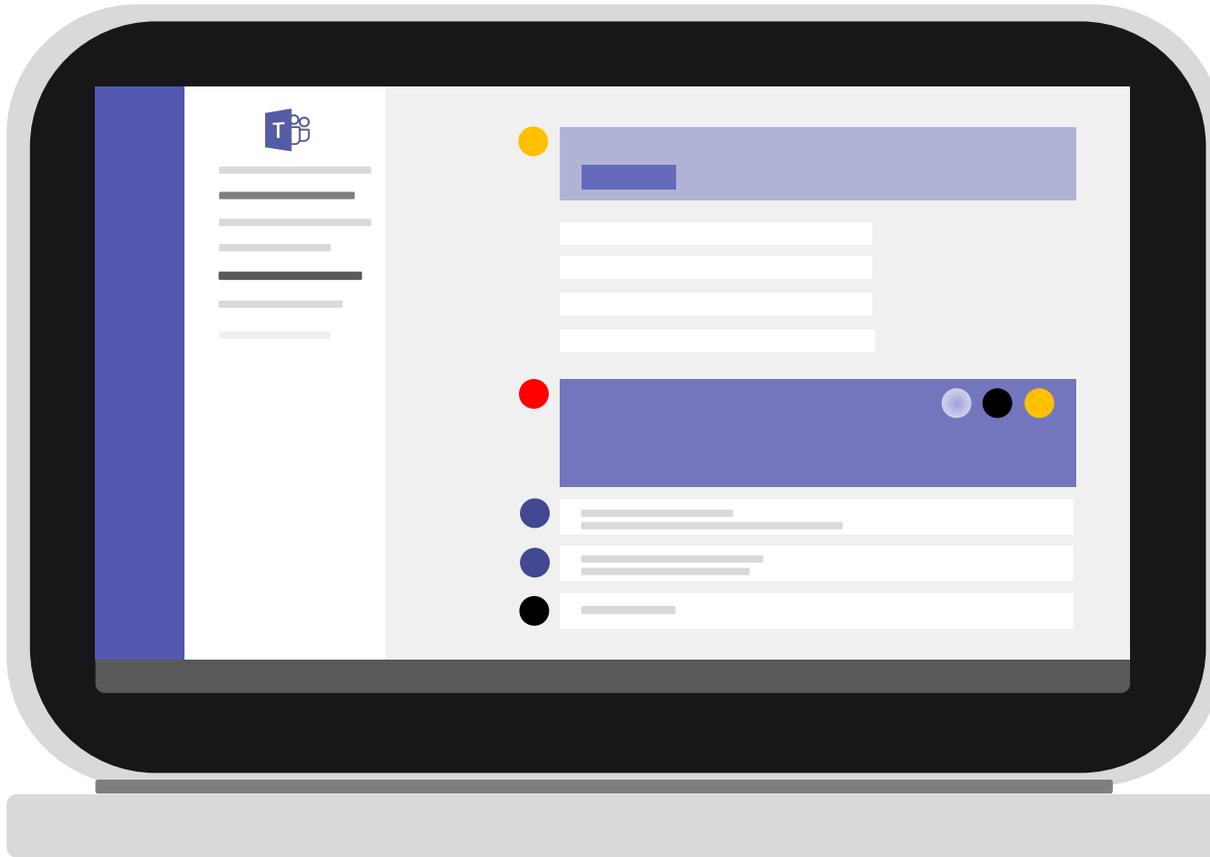


PROSERVEIT
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The Heart of Teams is... Teams!

An introduction to the [Activities & Calls tabs](#) in Teams

At ProServeIT, Microsoft Teams is our telephony system. So, one of the things that we want to show off is the call and voicemail capabilities of Microsoft Teams. In this eBook, we're going to thoroughly explore the **"Calls"** and **"Activities"** tabs!

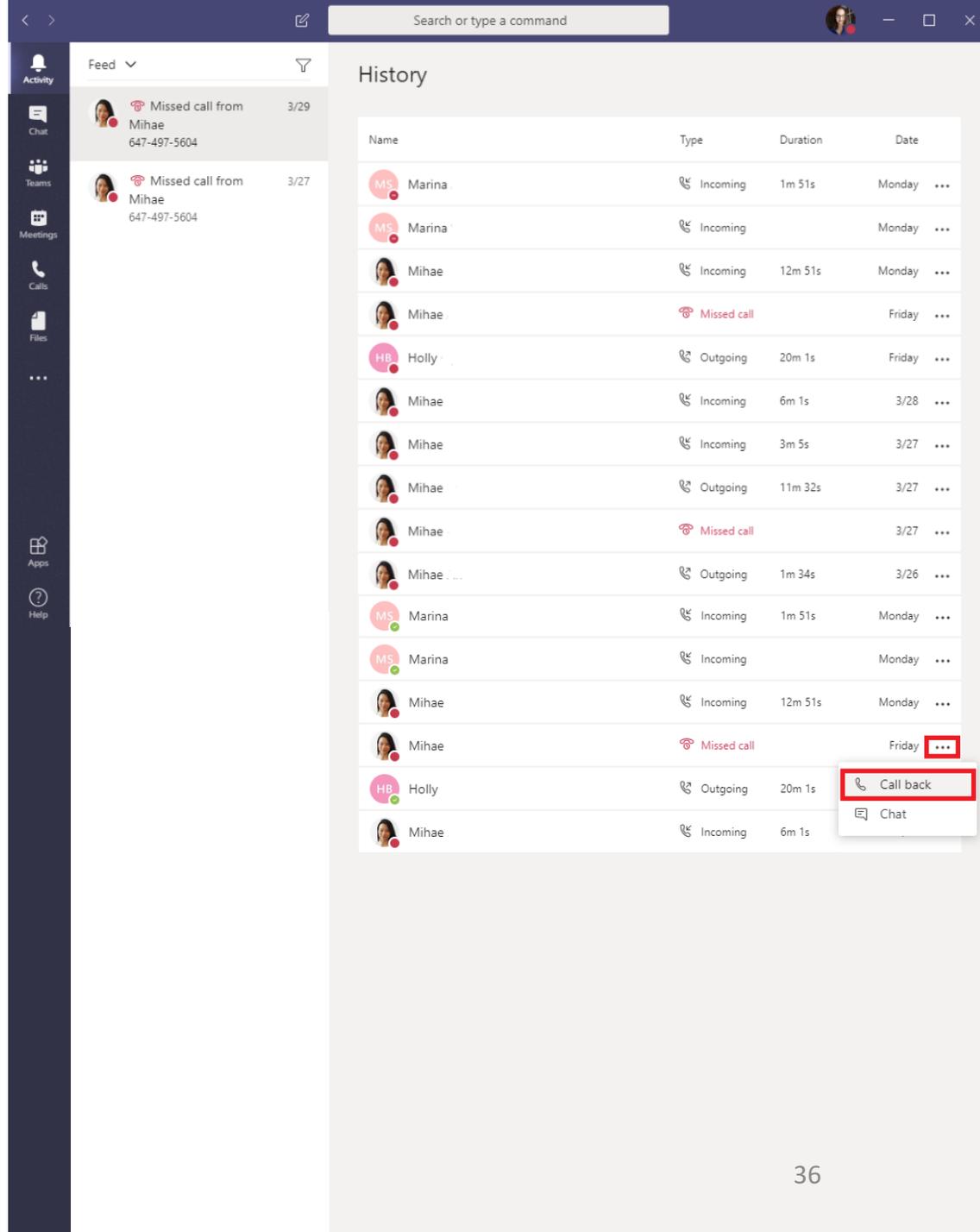


Let's start with the Activity Tab.

The Activity tab shows you a list of all recent activities, including calls you've made or calls you've received and conversations that you've had.

Let's say you got to the Activity tab and you notice that you've missed a call from someone in your organization. Calling them back is as simple as hovering your mouse over the person's name and clicking on the **"Audio Call"** option. Or, even more simple, click the **three dots** beside the date they called and selecting **"Call Back"**.

If the person has a red dot beside their name, that person is in a meeting. You may, therefore, want to begin a new chat with them. Simply click the **"chat"** option and it will open up a new chat with that person, or, if you've recently chatted with them, it'll open up your previous chat conversation.



The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Meetings, Calls, Files, and Help. The main area is divided into two panes: 'Feed' and 'History'.

The 'Feed' pane shows two missed call notifications from 'Mihae' (647-497-5604) on 3/29 and 3/27. The 'History' pane shows a list of call events with columns for Name, Type, Duration, and Date. A context menu is open over the 'Friday' date of a missed call from Mihae, showing options for 'Call back' and 'Chat'. The 'Call back' option is highlighted with a red box.

Name	Type	Duration	Date
MS Marina	Incoming	1m 51s	Monday ...
MS Marina	Incoming		Monday ...
Mihae	Incoming	12m 51s	Monday ...
Mihae	Missed call		Friday ...
HB Holly	Outgoing	20m 1s	Friday ...
Mihae	Incoming	6m 1s	3/28 ...
Mihae	Incoming	3m 5s	3/27 ...
Mihae	Outgoing	11m 32s	3/27 ...
Mihae	Missed call		3/27 ...
Mihae ...	Outgoing	1m 34s	3/26 ...
MS Marina	Incoming	1m 51s	Monday ...
MS Marina	Incoming		Monday ...
Mihae	Incoming	12m 51s	Monday ...
Mihae	Missed call		Friday ...
HB Holly	Outgoing	20m 1s	
Mihae	Incoming	6m 1s	

Speed dial

Contacts

History

Voicemail

Microsoft Teams is available as part of several of the Office 365 Business and Enterprise licenses. However, depending on what license you have, you may have to pay additional costs to turn on some of the functionality of Microsoft Teams. The Calls tab is one of these functions that is only available with an Office 365 Enterprise E5 license, or if you enable Phone System and Calling Plans.

It's important to note that if you're using the basic Teams version that comes with your Office 365 license, and you haven't enabled Phone System and Calling Plans, you won't see this tab. **The "Calls" tab will only appear if you've signed up for an Enterprise Voice, and enabled Calling Plans.**

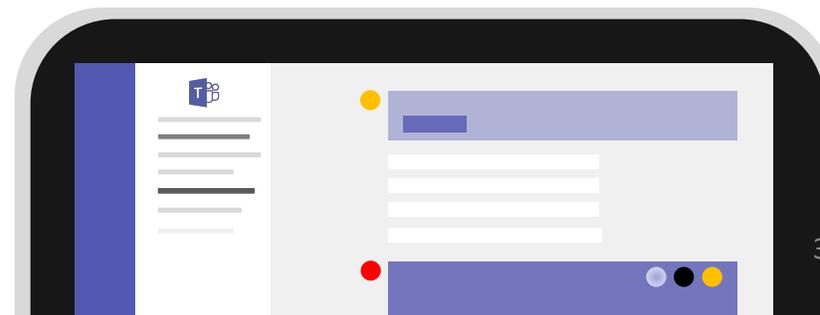
But, with a Calling Plan, you'll get an easy way to give your employees full calling capabilities in Teams.

(For more information on Phone System and Calling Plans, check out [this blog](#)).

For the purpose of today's lesson, we're going to talk about what you'll get with [Enterprise Voice](#) - that is, we'll be assuming that, like ProServeIT, you've made Microsoft your telephony systems provider.

When you first [click on the "Calls" tab](#), you'll see [four options](#): Speed Dial, Contacts, History, and Voicemail.

Dial a number



The Speed Dial Sub-Tab

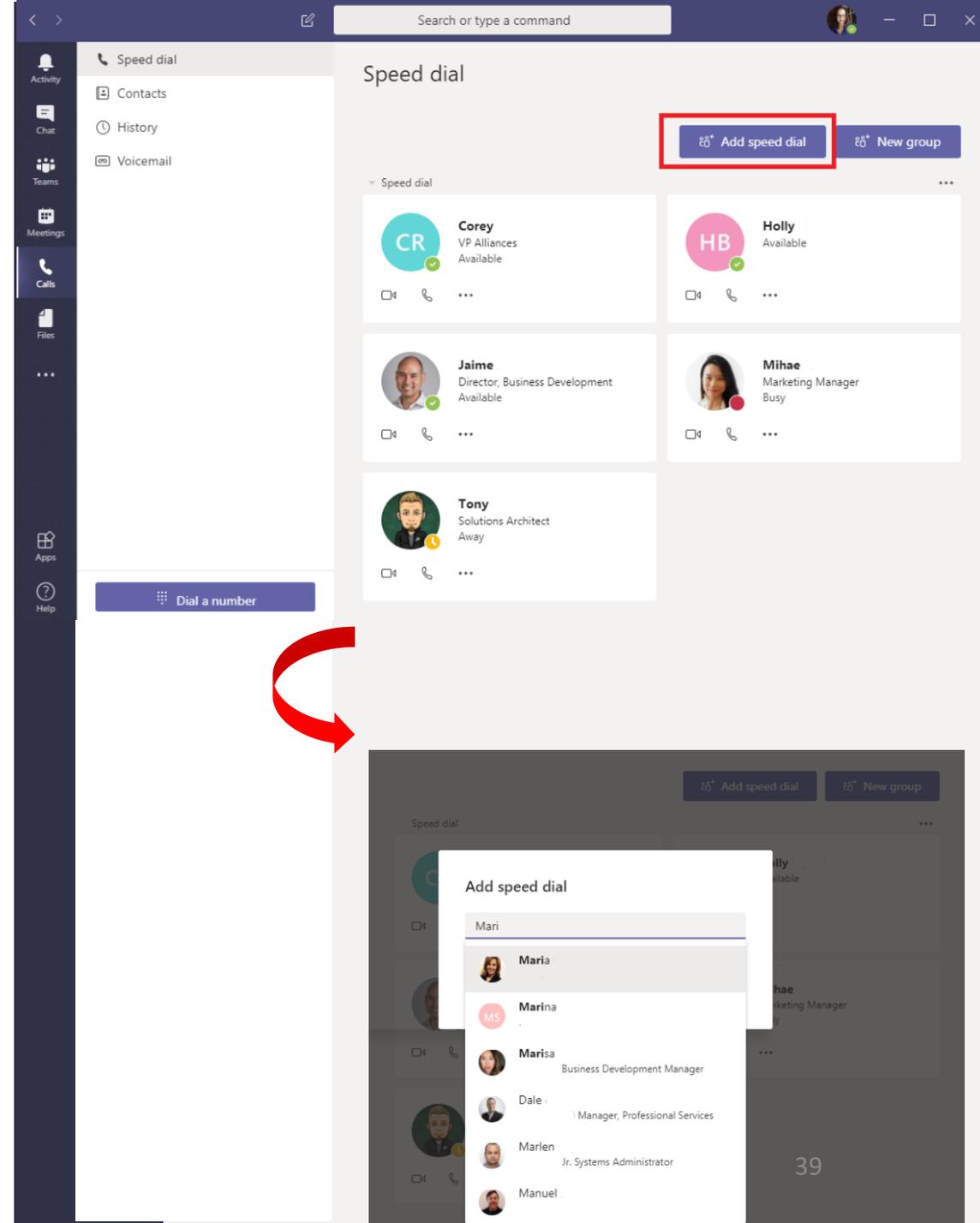


The Speed Dial Tab helps you to prioritize those people that you talk to on a regular basis. This is customizable, and you can add or remove people with a few quick steps.

Before we jump into that, there is one important thing to point out. If you have created any contact groups in the **"Chat"** tab, you'll see those same groups, with those same people, mirrored under this **"Speed dial"** sub-tab in your **"Calls"** tab. This works both ways - if you create a group in your speed dial tab, it will show up under the **"Chat"** tab, too.

Let's start by adding a new person to our Speed Dial list.

1. Click on the purple **"Add Speed Dial"** button in the speed dial sub-tab.
2. Start typing in the name of the person that you want to add to your speed dial list. Teams will auto-populate all members of your organization for you, and you can just select the person off the list. Then, click **"Add"**.



3. You'll now see that person on your speed dial tab.



Let's create a new Speed Dial group, "Sales" and add our team to it.

1. Click on the purple **"New Group"** button on the right-hand side of the tab.
2. Add the name of the new contact group that you want to create - in this case, "Sales" - then click the **"Create"** button.

Speed dial

Speed dial

Corey
VP Alliances
Available

Holly
Available

Jaime
Director, Business Development
Available

Marina
In a meeting

Mihae
Marketing Manager
Busy

Tony
Solutions Architect
Away

Dial a number

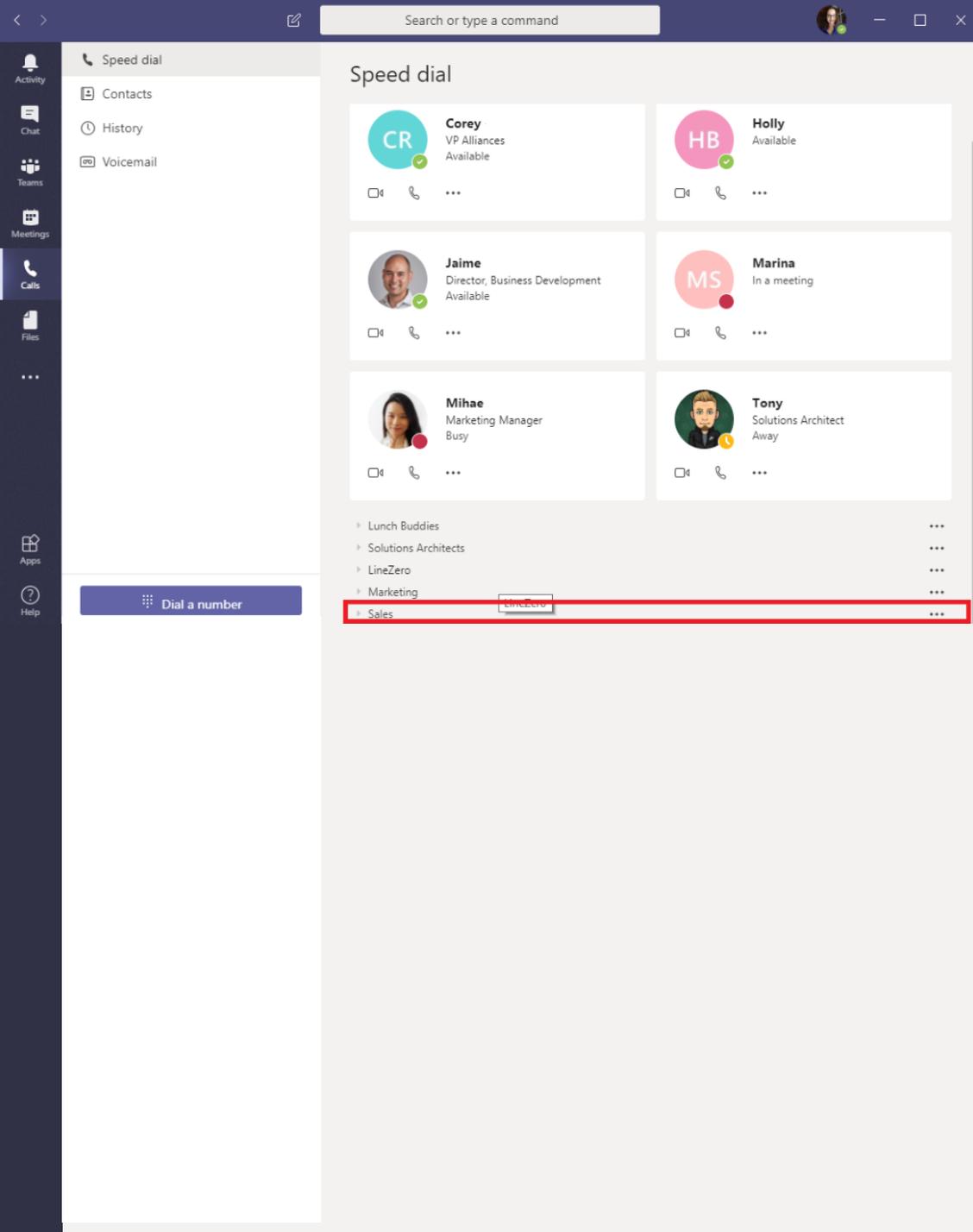
Create a new contact group

Organize your contacts into groups to find them more easily.

Contact group name

Sales

Cancel Create



3. You will now see the group added to the bottom of your list.
4. Click on the **three dots** beside the name and click on **"Add a contact to this group"**.
5. As for the instructions on **adding a person to your speed dial**, start typing in the name of the person that you want to add to the group. Teams will auto-populate all members of your organization for you, and you can just select the person off the list. Then, click **"Add"**.
6. Repeat these steps as many times as you need to in order to build out your group.
 - **A FRIENDLY REMINDER: this group you've created will also be replicated in the Chat tab.**

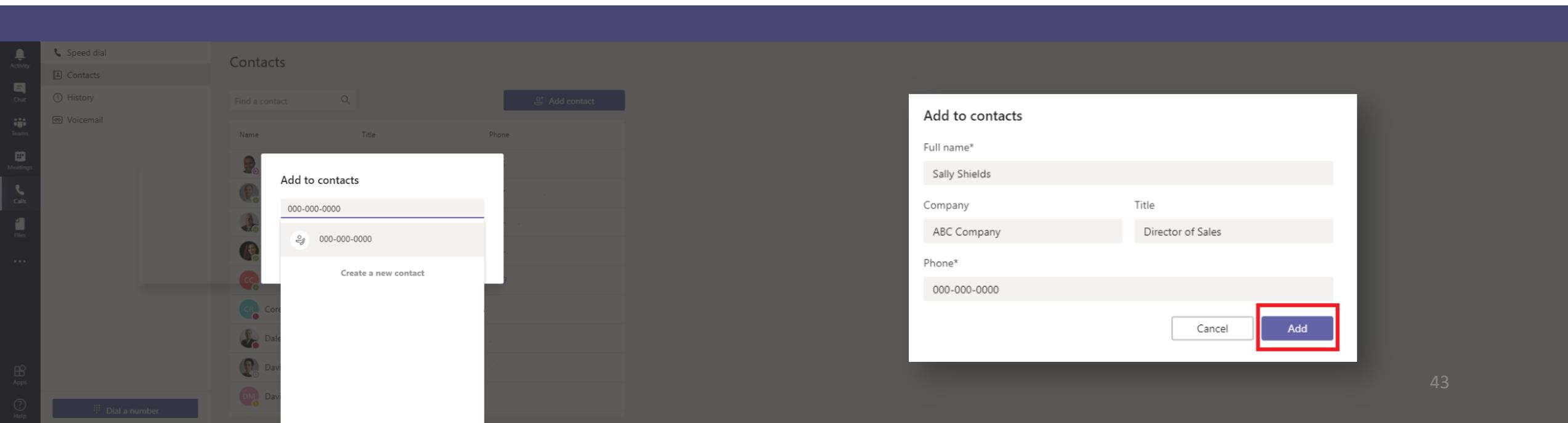
The Contacts Sub-Tab



Your contacts tab is, quite simply, the same content that you might normally see in a directory. It shows the name, title, and phone number of the various people that are either in your organization or that you have already manually added.

Let's take a look at how to add an outside number:

1. Click on the **"Add Contact"** button.
2. Type the name or phone number you want to add into the box that pops up.
3. Click on **"Create a New Contact"** and fill out the form that comes up. Then click **"Add"**.



The History Sub-Tab





Similar to the "Activity" tab that was discussed previously, the **History Sub-Tab** allows you to see a list of your incoming and outgoing calls that you've made, and whether or not you've missed any calls. You can then determine how you'd like to interact.



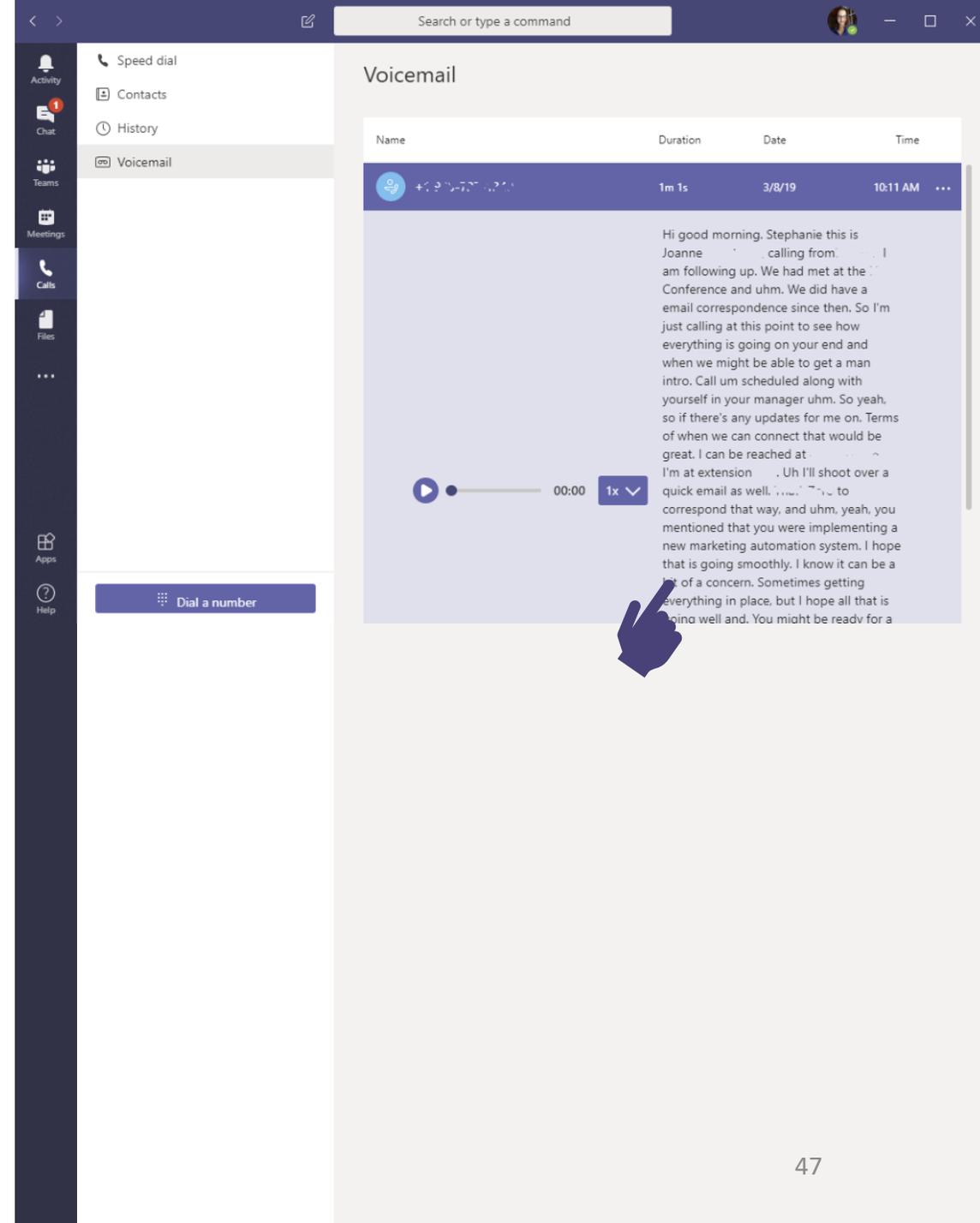
The Voicemail Sub-Tab



The Voicemail Sub-Tab lets you see people who have left you a voicemail.

This can also let you see and interact with messages that people leave you – you can play back any messages that are left, or, better yet, if you've integrated your Microsoft Teams into your Telephony system, **Microsoft Teams has transcribing capabilities** that will convert your voice messages into text. This is especially great when you're in a situation where listening to your voicemail may not be feasible – at a coffee shop where it's too loud, for instance.

Click on the number to interact with the voicemail. As you can see, Teams has automatically converted the call into text, so you can read it, or, if you'd prefer to hear it aloud, you can play it from here, too.

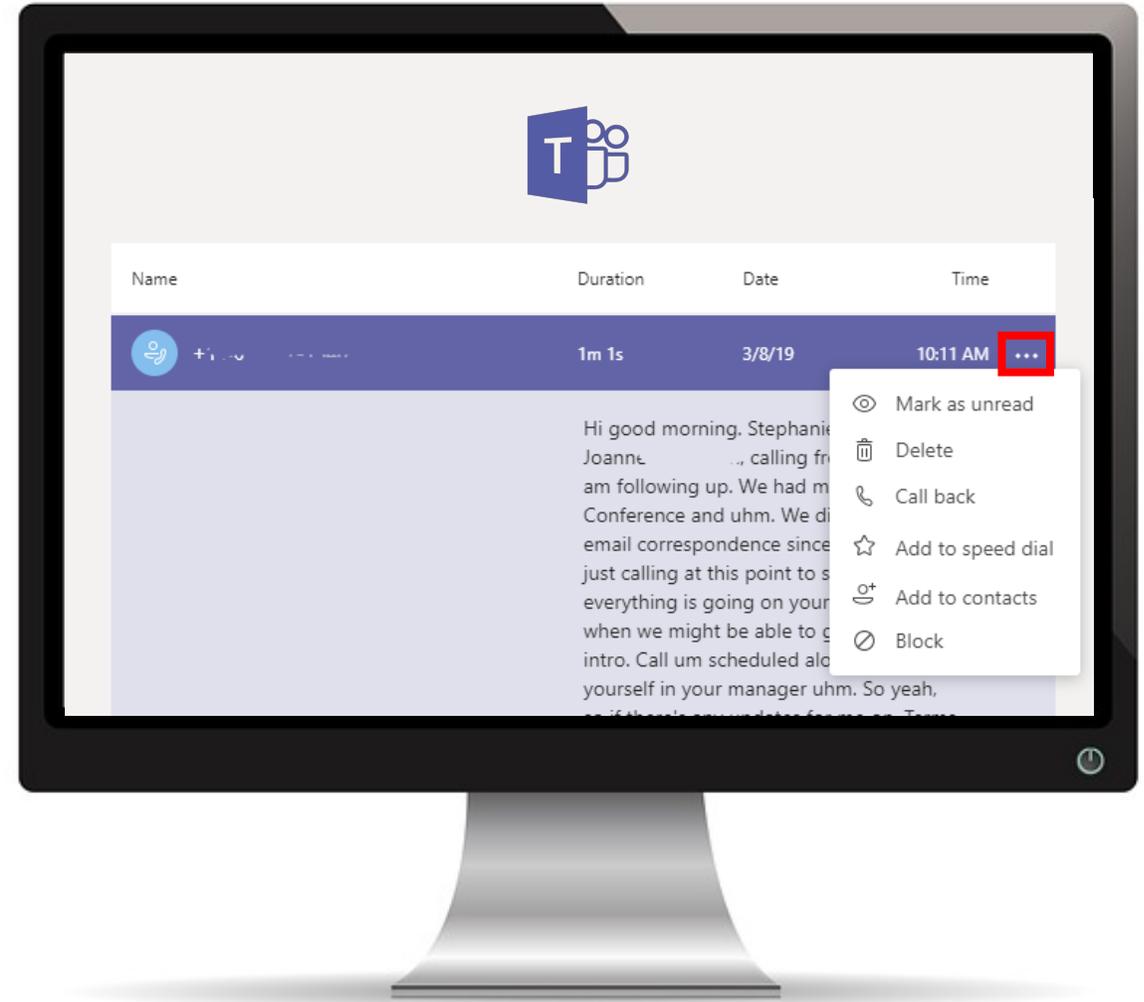


The screenshot shows the Microsoft Teams interface with the Voicemail sub-tab selected. The left sidebar contains navigation options: Activity, Chat (with a notification badge), Teams, Meetings, Calls, Files, and Help. The main content area displays a list of voicemails. The selected voicemail is from a contact named 'Joanne' and has a duration of 1m 1s, dated 3/8/19 at 10:11 AM. The voicemail content is transcribed into text, and a playback control is visible below the transcription. A blue hand icon points to the '1x' speed control button.

Name	Duration	Date	Time
Joanne	1m 1s	3/8/19	10:11 AM

Hi good morning, Stephanie this is Joanne calling from [redacted]. I am following up. We had met at the [redacted] Conference and uhm. We did have a email correspondence since then. So I'm just calling at this point to see how everything is going on your end and when we might be able to get a man intro. Call um scheduled along with yourself in your manager uhm. So yeah, so if there's any updates for me on. Terms of when we can connect that would be great. I can be reached at [redacted]. I'm at extension [redacted]. Uh I'll shoot over a quick email as well. [redacted] to correspond that way, and uhm, yeah, you mentioned that you were implementing a new marketing automation system. I hope that is going smoothly. I know it can be a bit of a concern. Sometimes getting everything in place, but I hope all that is going well and. You might be ready for a

You can also interact with the voicemail by clicking on the three dots beside the time stamp. When you do, **a pop-up will provide different options**: you can mark the voicemail as unread, delete it, call the person back, add that person to speed dial, add them to contacts, or block the number.



Microsoft Teams for Office 365 Workshop

Microsoft Teams for Office 365 is a part of your Office 365 Business Essentials, Business Premium, Enterprise E1, E3, or E5 licenses, and is **available to you at no additional cost**. So, if you have one of these licenses, and you're not currently using Microsoft Teams, the question is, why not?

Don't know the features and benefits that Microsoft Teams has to offer your organization? Not sure how to get started using it? ProServeIT's Microsoft Teams Workshop is for you!

Why the Workshop?

Empower Your Employees

Your employees need new tools to support their unique workstyles. Give them a new tool that will empower them!

Improve Teamwork

Want to have a more effective team? Microsoft Teams helps improve teamwork by giving your employees better ways to communicate and collaborate!

Establish Realistic Goals

Working with a team of experts, you'll be able to map out your Microsoft Teams journey & establish realistic goals you can meet.



Join us on a journey!



STEP 1. DISCOVER

Work with our Microsoft Teams experts to understand what Teams can do for your organization



STEP 2. SOLVE

With a security lens to everything we do, we will help you explore organizational technology or process challenges and find corresponding solutions that are perfect for your needs.



STEP 3. PROVE

Work with ProServeIT to implement a pilot of this solution in your organization. With two pilot programs to choose from:

1. PRODUCTIVITY PILOT

We'll help you improve your personal productivity. You'll learn how to use Microsoft Teams technology to be faster & more efficient.

* Including 10 Microsoft 365 E5 trial licenses for 90 days, and 10 users deployed to Teams.

2. VOICE PILOT

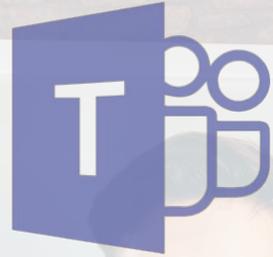
You'll learn how Microsoft Teams technology can act as your perfect phone system for internal and external meetings and communication.

* Including 10 Microsoft 365 E5 trial licenses for 90 days, and 10 users enabled for unified communications via Microsoft Teams.

In our next eBook, **we're going to walk you through the "Meetings" tab**. Stay tuned for more great content!

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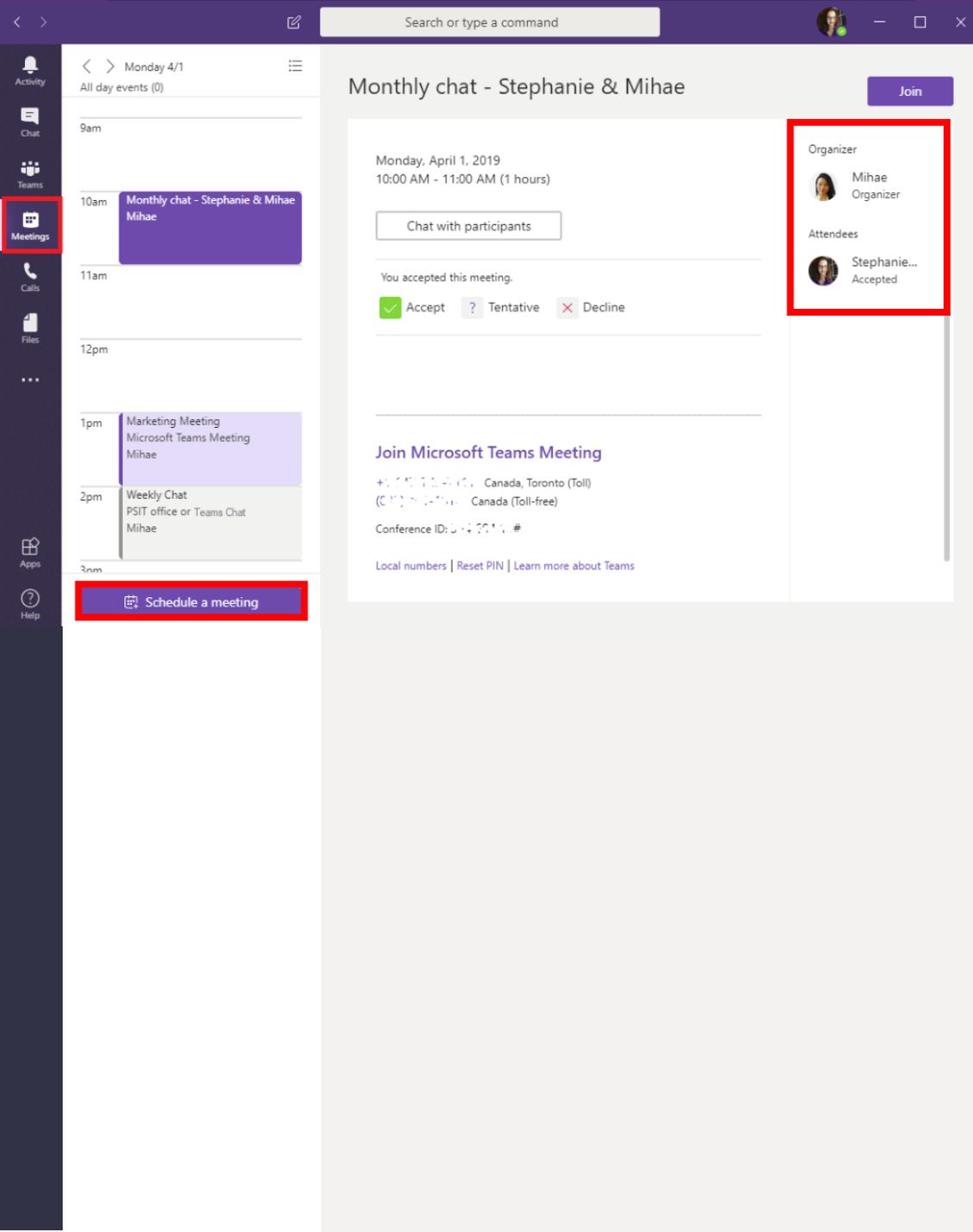
[Contact us to get started with Teams >>](#)



PROSERVEIT
MAKING TECHNOLOGY TRANSPARENT

The Heart of Teams is... Teams!

An introduction to [hosting meetings in Teams](#)

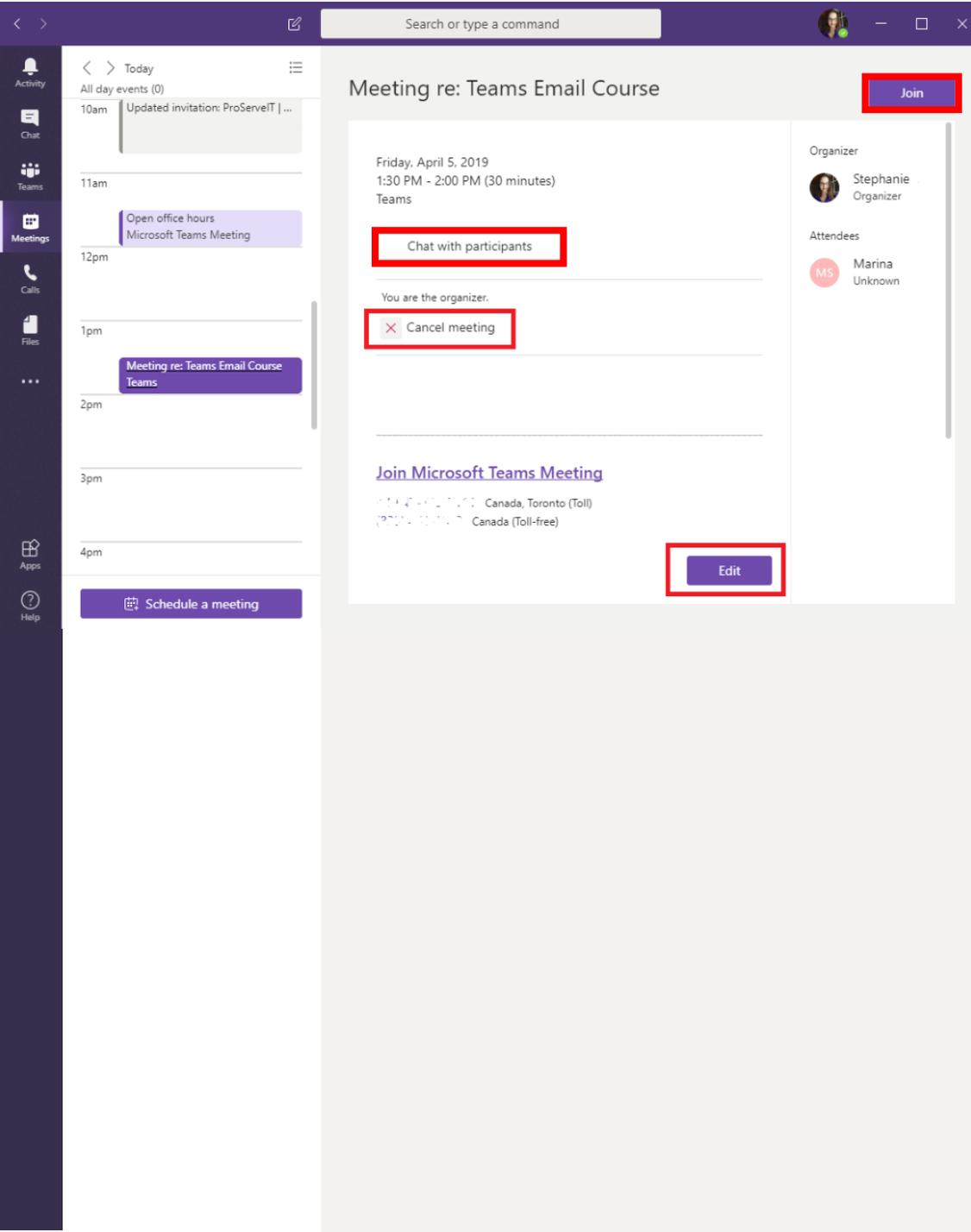


The "Meetings" tab in Microsoft Teams provides you with a place where you can connect with your colleagues. So, in this eBook, we're going to explore this tab in greater detail.

When you first click on the tab, you'll see a copy of your daily calendar showing all the meetings you have in a given day down the left-hand side of the screen. The closest upcoming meeting will show in the bulk of the screen, as the example below shows.

From this tab, you'll see quite a lot of options open to you:

- You can schedule a new meeting using the purple "Schedule a Meeting" button at the bottom of the calendar.
- You can view who has been invited to the highlighted meeting and who has responded to the invitation.

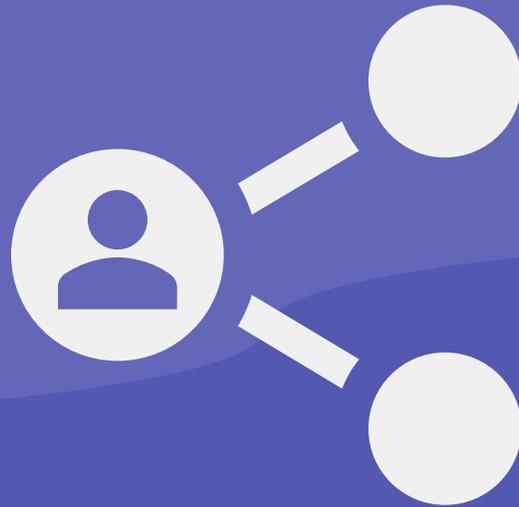


- You can join the highlighted meeting using the **"Join"** button at the top of the screen.
- You can **chat with the participants** of the meeting – a new chat will be created where you can chat with the participants, share files, or record meeting notes.
- If you're the organizer of the meeting, you can **cancel it**, or you can **edit the meeting details** as needed.

All of this can be done right from the Teams app!

***Note*:** You can use Microsoft Teams internally, regardless of the license you have. However, if you haven't enabled **Audio Conferencing** or **Enterprise Voice**, you won't see the local or toll-free numbers listed below the **Join Microsoft Teams Meeting** link. Those numbers only appear if you have **Audio Conferencing** enabled.

Booking a Meeting



Let's dive into the features of Microsoft Team's in greater detail.

To Book a Meeting:

Booking meetings can, as mentioned, be done right from the Teams app, or, alternatively, you can book a Microsoft Teams meeting from Outlook, too. And, even cooler, you can book a Teams meeting from an email that someone has sent to you!



Booking a Meeting from Teams



1. Click on the **"Schedule a Meeting"** button at the bottom of the screen.
2. Create a title for the meeting and enter all pertinent information.

Note - If you don't specify a location, it will show up as a Microsoft Teams meeting, so you can leave this field blank.

3. Invite your attendees by beginning to type their name into the **"Invite People"** section.

Note - you can use the scheduling assistant to see if the person you're inviting is available at this time.

4. Click **"Schedule"**.
5. A new pop-up will appear with the details of your meeting. From here, you can join the meeting, chat with participants (which will open a new chat window), cancel the meeting, edit the meeting information, or just close the window and return to Teams.

New meeting

Title: Teams Email Course

Select a channel to meet in: None (optional)

Location: [Blank]

Invite people: Invite someone

Start: Apr 5, 2019 11:00 AM

End: Apr 5, 2019 11:30 AM

Repeat: [Unchecked]

Time Zone: (UTC-05:00) Eastern Standard Time

Organizer: Stephanie Baskerville (SBaskerville@proserveit.com)

Details: Let's talk about the Teams Email Course.

This is a Microsoft Teams online meeting. Everyone can join online.

Close Schedule

Teams Email Course

Friday, April 5, 2019
11:00 AM - 11:30 AM (30 minutes)
Microsoft Teams Meeting

Organizer: Stephanie Baskerville

Attendees: Marina

Join Chat with participants

Cancel meeting

Let's talk about the Teams Email Course.

Join Microsoft Teams Meeting

Canada, Toronto (Toll)
Canada (Toll-free)

Close Edit

Booking a Meeting through Outlook

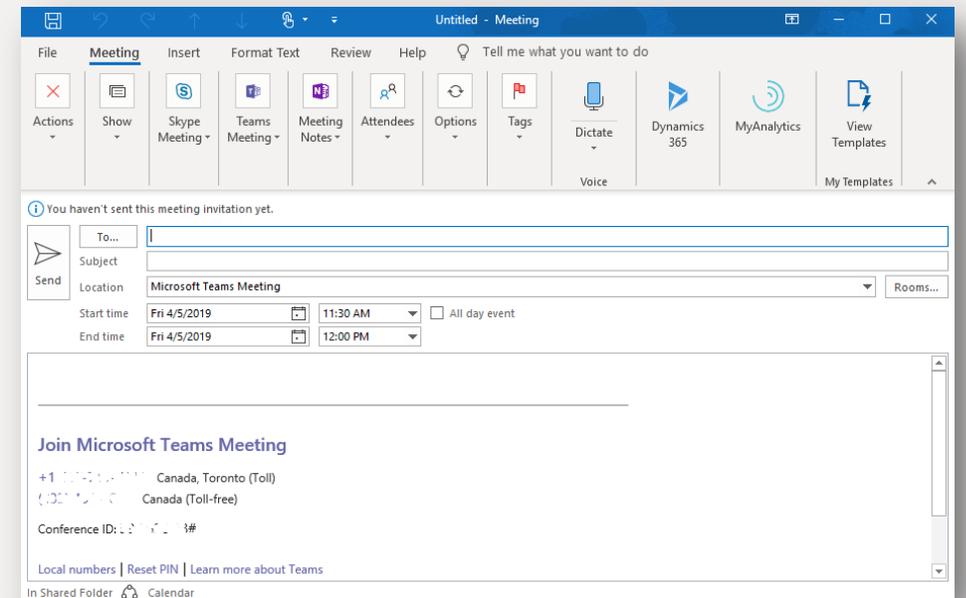
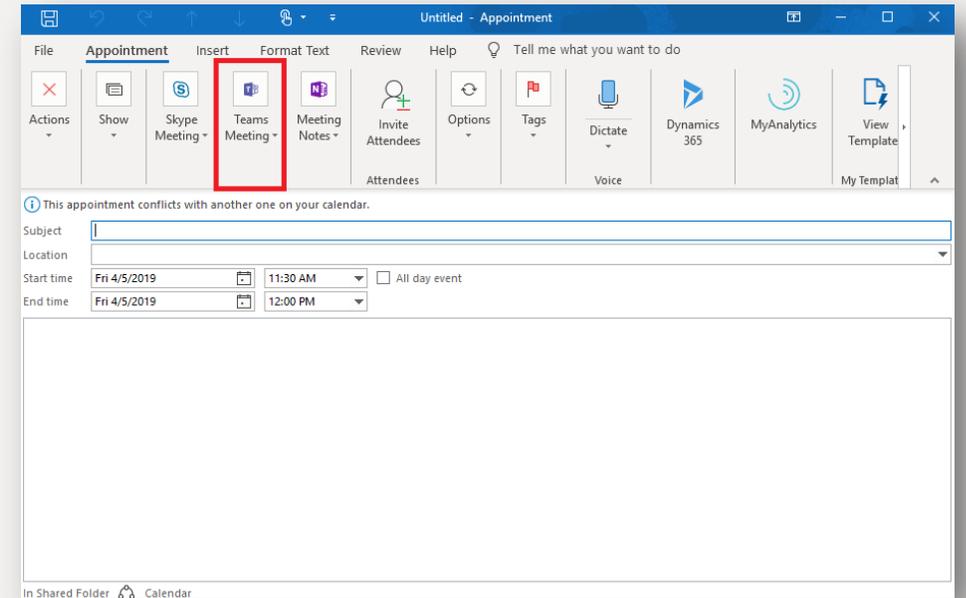


1. From your Outlook client, click on **"New Items"**, then click on **"Meeting"**. You'll see your usual meeting invite pop up. If you have Teams installed, and you're using either Office 2013 or Office 2016 on your desktop, you'll see the **"Teams"** add-in at the top of the invite.

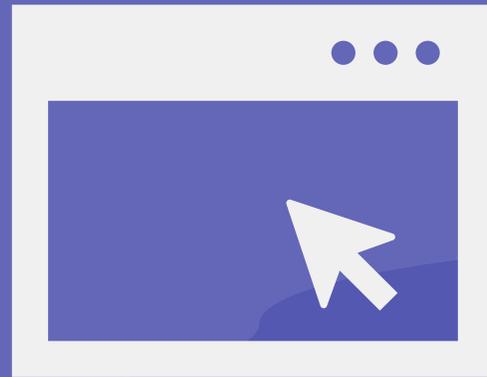
2. Once you've selected the Teams meeting, you'll see a link will be added to the body of your invitation where your attendees can join.

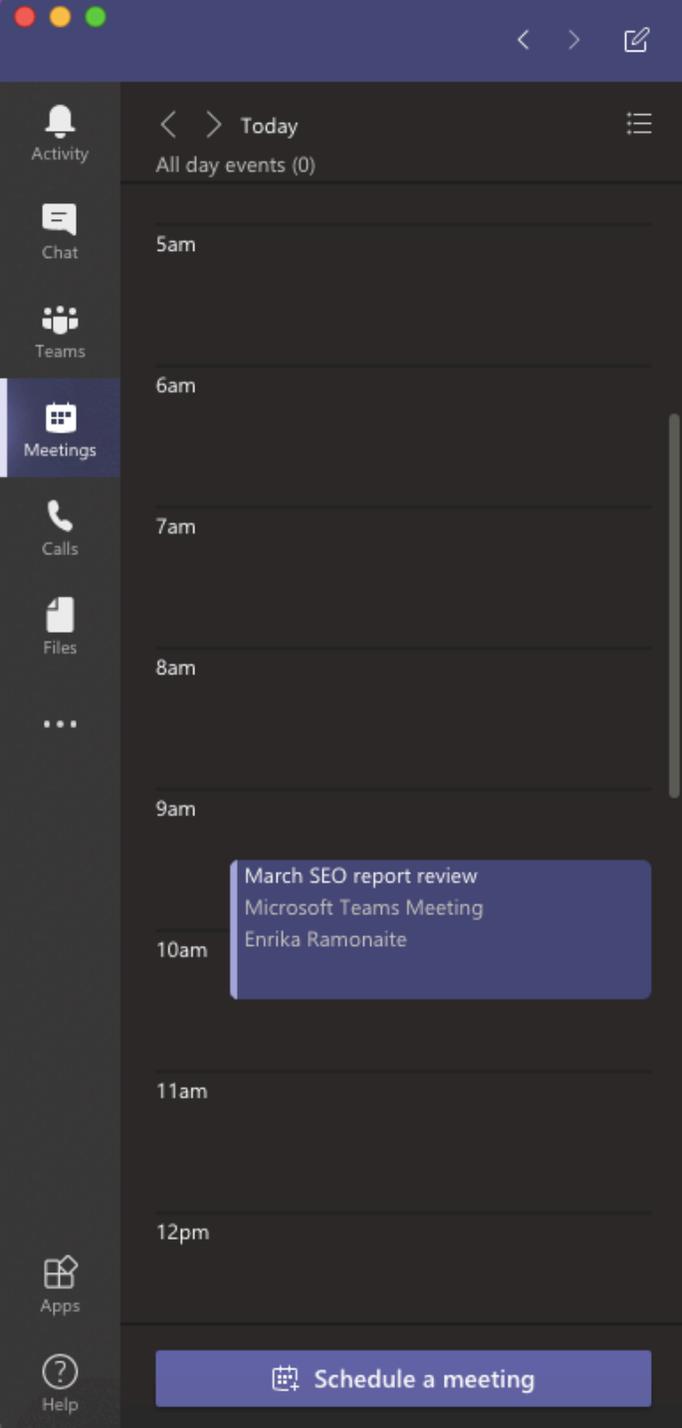
○ ***Reminder***: If you have not enabled Audio Conferencing or Enterprise Voice, you can still use the Teams feature, but you will not see those local or toll-free numbers below the Teams meeting link, like you see in this screenshot.

3. Fill out the **"to"** information, per usual, and click **"Send"**.

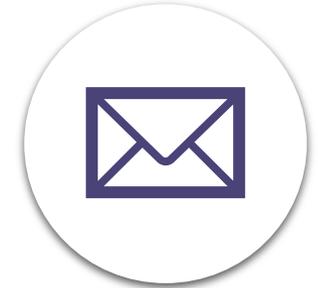


Joining a Meeting





You can choose to join the meeting from your Outlook calendar or from your Teams **"Meeting" tab**. From the Outlook calendar, simply click on the **"Join Microsoft Teams Meeting"** link, or, if it's enabled, dial either the local or toll-free number and enter your conference ID number when prompted.



If you choose to join directly from Teams, simply navigate to your **"Meetings" tab**, click on the meeting, and then click the **"Join" tab** in the top right corner.

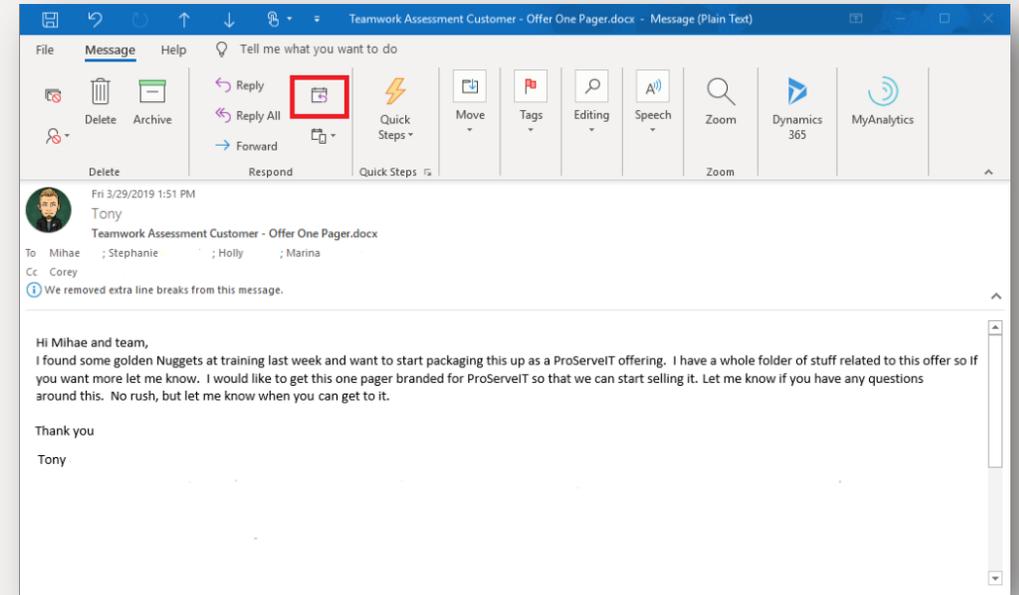
Exploring the Outlook-Teams Integration

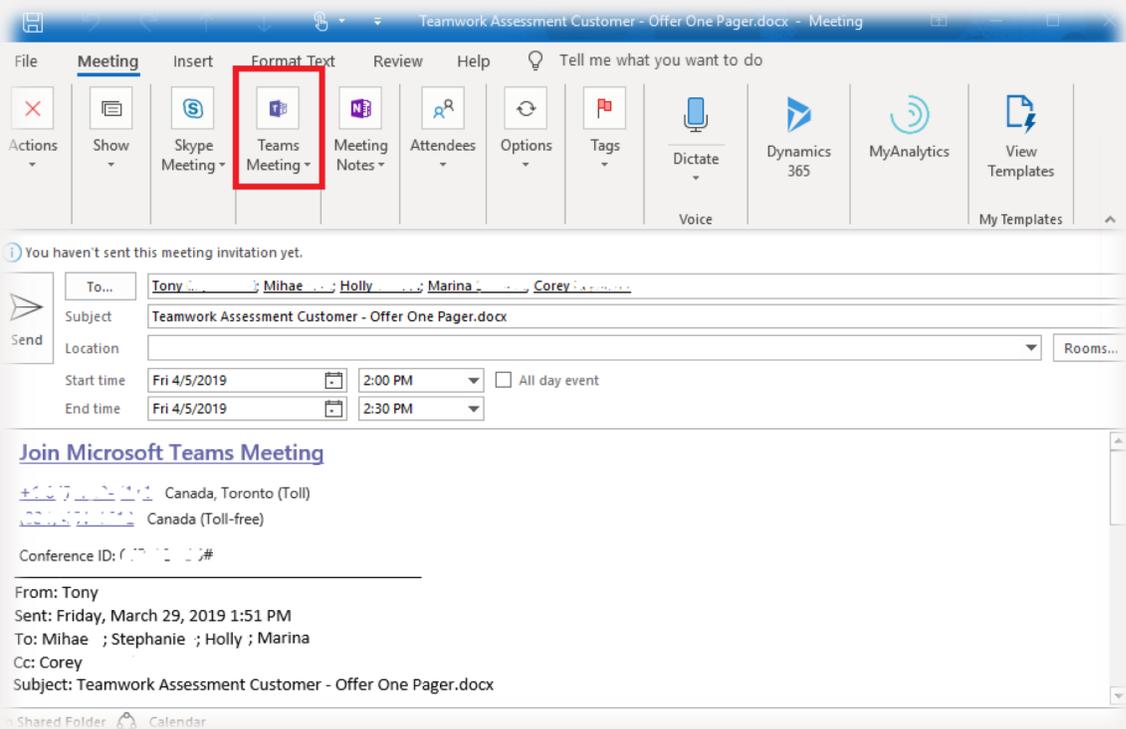


One of the really cool things about having Outlook and Teams integrated together is being able to [schedule a Teams meeting FROM an email](#).

So, let's say Tony, who's on your sales team, has sent you an email, and you want to schedule a follow up call.

1. From Outlook, [click on the email that Tony has sent you](#) and [click on the "Reply with Meeting" button](#).





2. A new meeting request will pop up, and, as you'll see, the "To" field and the "Subject" field has already been auto-populated for you based on the people this email was sent to. Simply select the desired date and time of the meeting, select the room you want to meet in, or, if you would prefer, you can create a Teams meeting using the steps we described above. Then, click **"Send"**.

***Note*:** The good news about scheduling a meeting this way is that you will have the original email content or the original email trail right in the meeting invitation, so you will know exactly what this meeting is about and can reference the content of the email without having to go searching for it.



Frequently Asked Questions around the Meetings tab on Microsoft Teams



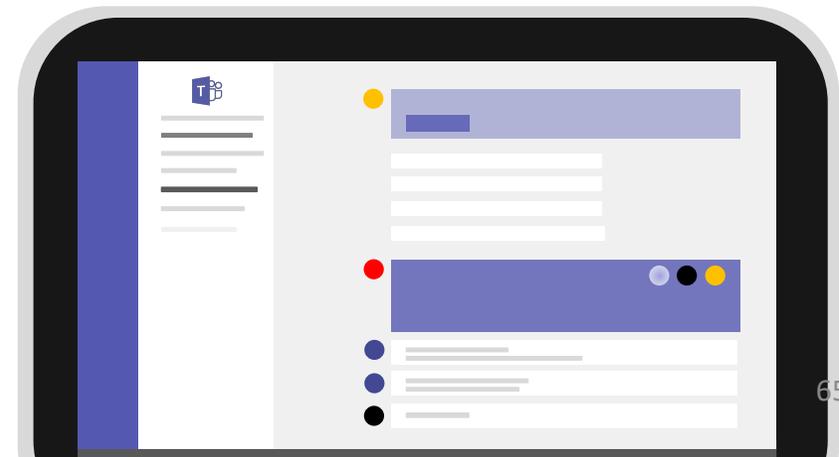
1. Can you create a Teams meeting for a group of people outside of your organization?

The answer to this question is, yes, you can create a Teams meeting for a group of people outside your organization, provided you have Audio Conferencing or Enterprise Voice capabilities.

2. What resources are available through a Teams meeting? Is there always a call-in number, screen-sharing capabilities, etc.?

Even the most basic version of Teams allows screen-sharing capabilities, in-meeting chat capabilities, recording capabilities, and more. These features are available no matter what license you have.

If you want call-in numbers, you will need to enable Audio Conferencing or Enterprise Voice capabilities. In fact, **Audio Conferencing and Enterprise Voice could be a cost-effective replacement for your current conferencing solution**, because you're already paying for most of the infrastructure of a traditional system with your Office 365 license. [Talk to us](#) if you'd like to explore this option further.



3. My organization is using Skype for Business, which I understand is going to be phased out by Microsoft. Can the contacts be migrated from Skype to Teams?

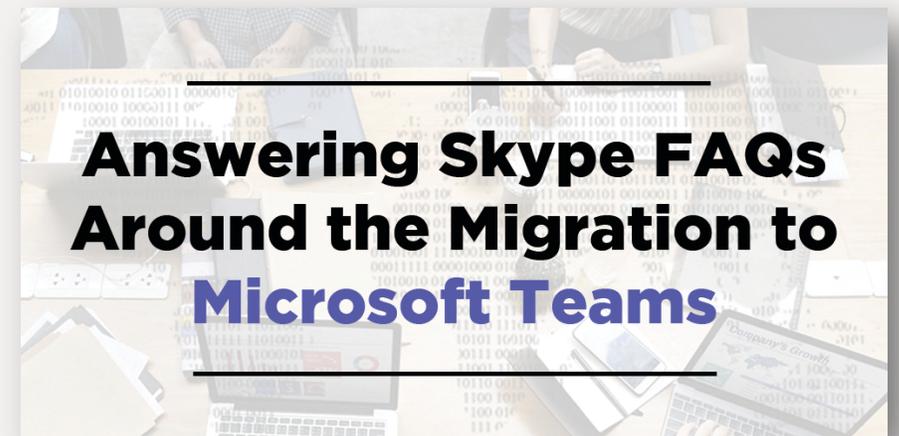
Absolutely! In fact, ProServeIT has written a few blogs about the migration from Skype to Teams - you can click the blog image or check them out here:



[The Future of Skype for Business: Moving Skype to Teams](#)



[Answering Skype FAQs Around the Migration to Microsoft Teams](#)



Microsoft Teams for Office 365 Workshop

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In our next eBook, **we're going to walk you through the "Files" tab** and show you how you can collaborate on documents without ever having to leave your Teams environment. Stay tuned for more great content!

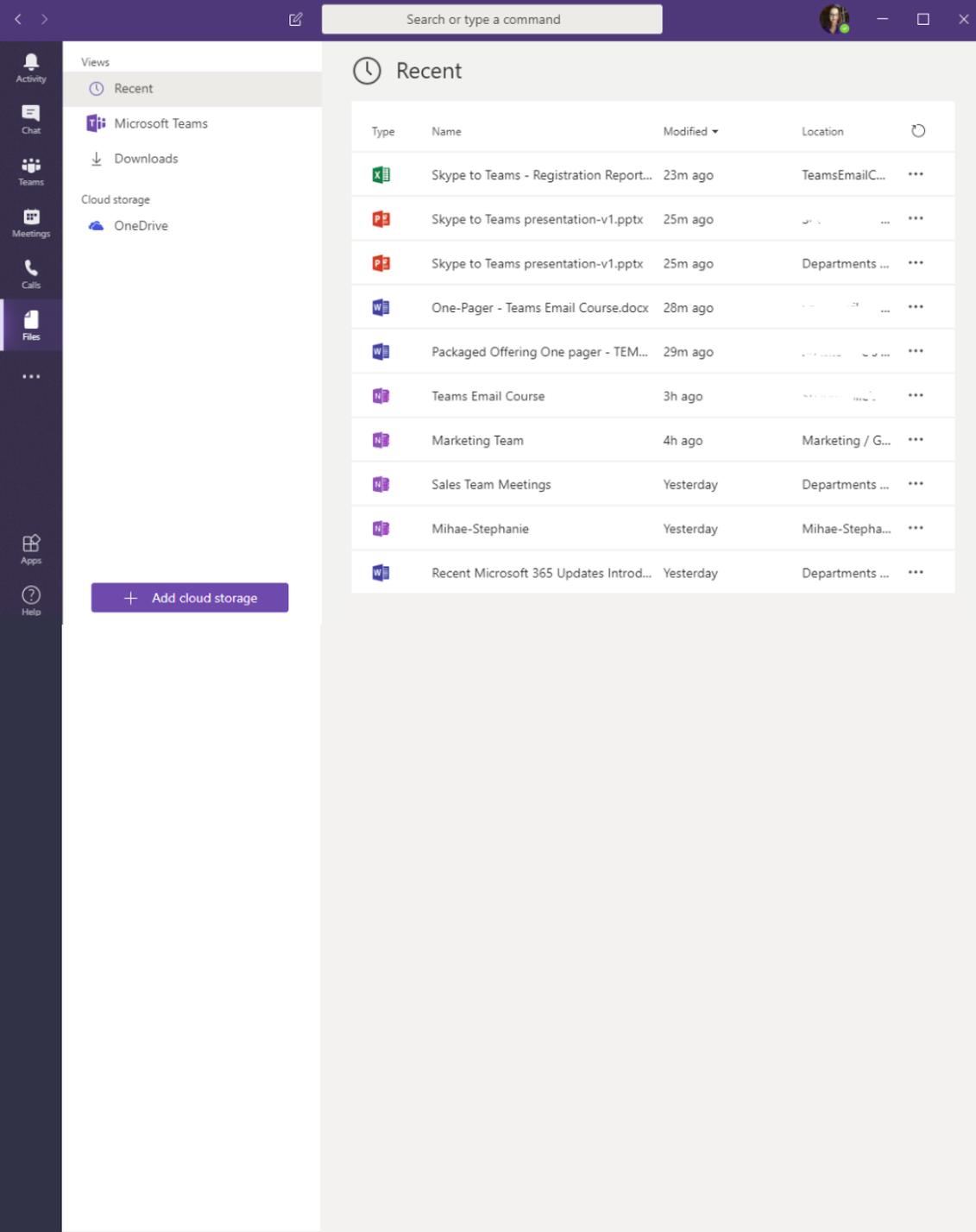
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[Contact us to get started with Teams >>](#)



The Heart of Teams is... Teams!

An introduction to document collaboration through the [Files Tab](#) in Teams



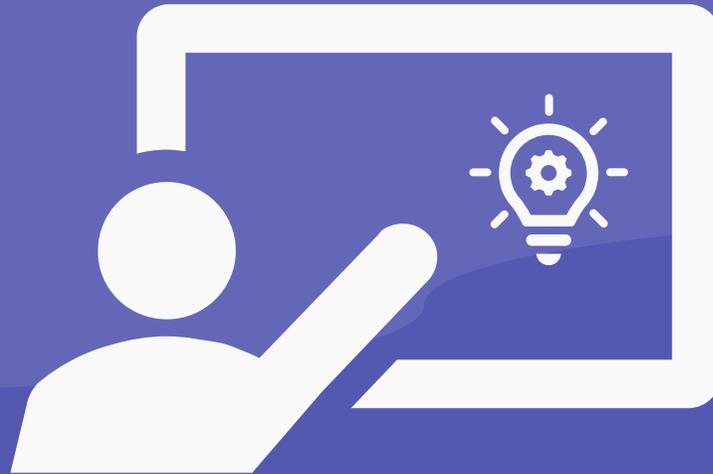
Whether you're accessing them from the "Files" tab, the "Teams" tab, or someone's shared a document through a chat conversation, **one of the key functionalities of Microsoft Teams is the ability to share and edit Office 365 documents**, like Word, Excel, or PowerPoint, directly from the Microsoft Teams client. In other words, you don't need to leave Teams to work on a document with your colleagues.

So, in this eBook, we're going to show you how you can access and work on your documents through the "Files" tab.

Here, you'll be able to **see all recent files** you've worked on, or you'll be able to **open files** from various folders that you have access to.

So, let's do some role-playing here and show you how these features work.

The Scenario



Tony and Stephanie are on your sales team, and they're in the process of working on creating a one-pager for a new offer. **Using the co-authoring capabilities of Office 365**, Tony and Stephanie are able to **work on the document at the same time**, but, since they want to have a call about it and work on the document together, they're going to use the multi-function capabilities available in Microsoft Teams.

1. From the **Files tab**, Stephanie and Tony both locate the "One Pager - Teams Email Course.docx".



Stephanie and Tony can now see a preview of the document in question:

Microsoft Teams Files view showing a list of documents. The document "One-Pager - Teams Email Course.docx" is highlighted with a red box.

Type	Name	Modified	Location	
XLSX	Skype to Teams - Registration Report...	18m ago	/sites/TeamsE...	...
PPTX	Skype to Teams presentation-v1.pptx	20m ago	/sites/TeamsE...	...
DOCX	One-Pager - Teams Email Course.docx	24m ago	/sites/TeamsE...	...
ONE	Resources.one	25m ago		...
ONE	Weekly Marketing Meeting.one	1h ago		...
PPTX	Workplace-by-FB- packages - draft v...	1h ago		...
DOCX	MASTER - LineZero - Workplace Lau...	1h ago		...
ONE	Hubspot.one	3h ago		...
ONE	OneNote_DeletedPages.one	Yesterday		...
DOCX	FY17 - SOW WORK SCOPE - Nume...	Yesterday		...

One-Pager - Teams Email Course.docx

Packaged Offering One-Pager Elements – Teams Email Course

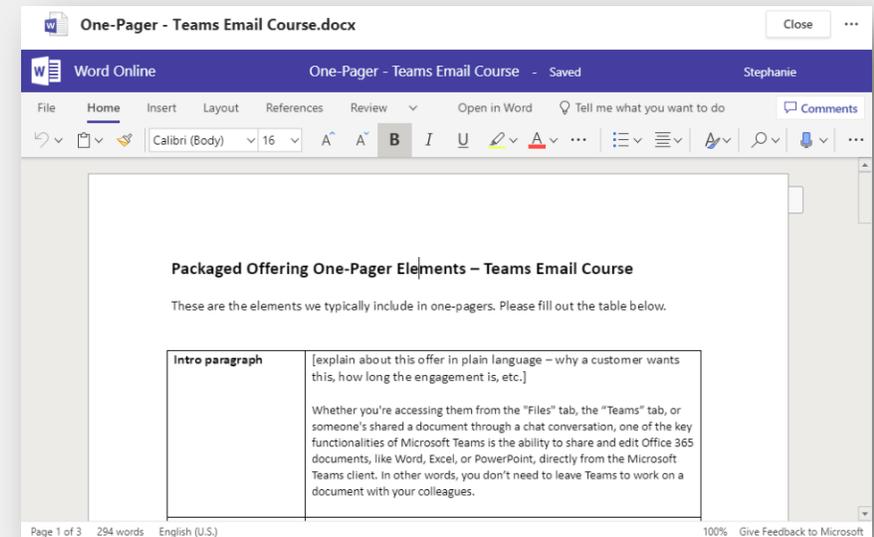
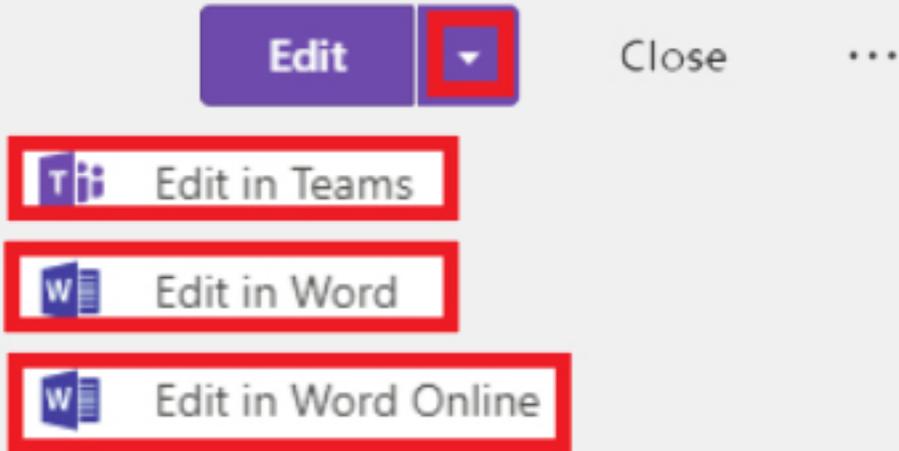
These are the elements we typically include in one-pagers. Please fill out the table below.

Intro paragraph	[explain about this offer in plain language – why a customer wants this, how long the engagement is, etc.]
What is ...	[explain about this offer in more detail – including features (bullet point form works good)]
Target audience	[what this engagement is for, whom are we speaking to – IT]

2. From here, Stephanie and Tony have a few different options. They can choose to edit the document, and, more specifically, choose how they want to edit it. By simply clicking on the "Edit" button, Stephanie and Tony can edit the document from the Teams client. If they click on the arrow beside it, a drop-down will appear, which allows them

to select whether they want to edit the document in Word, or in the Word Online client.

3. For the sake of this demo, let's suppose that Stephanie wants to edit this document in Teams, while she and Tony are on a call. So, she clicks "Edit". This is what she sees:



Search or type a command

One-Pager - Teams Email Course.docx

Word Online One-Pager - Teams Email Course - Saved Tony

File Home Insert Layout References Review Open in Word Tell me what you want to do Comments

Calibri (Body) 12

Packaged Offering One-Pager Elements – Teams Email Course

Stephanie
These are the elements we typically include in one-pagers. Please fill out the table below.

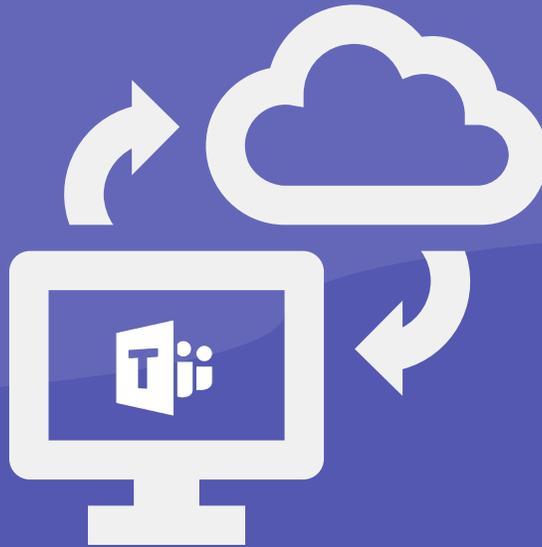
Stephanie is editing this document right now... AAA

AAA
BBB

Intro paragraph	[explain about this offer in plain language – why a customer wants this, how long the engagement is, etc.] Whether you're accessing them from the "Files" tab, the "Teams" tab, or someone's shared a document through a chat conversation, one of the key functionalities of Microsoft Teams is the ability to share and edit Office 365 documents, like Word, Excel, or PowerPoint, directly from the Microsoft
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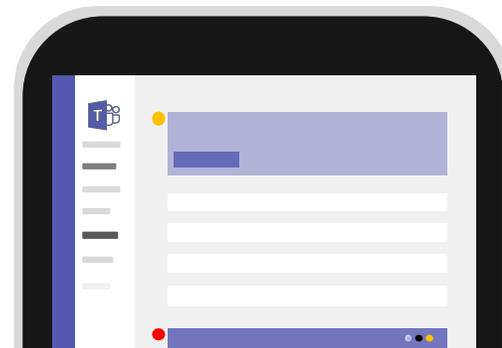
- From here, Stephanie can work on the document and use all the functionality of Microsoft Word - without leaving the Teams client. She can type into the document as if she was using Teams, she can change the font, she can insert links, etc. **And, because Word Online is automatically saving this document, she doesn't need to worry that any of her content is going to be lost.**
- Now, let's say that Tony also needs to work on the document. **Rather than having to worry about saving multiple versions of the same document** (which, let's be honest, leads to its own set of headaches!), Tony can easily jump into the same document that Stephanie is in and they can both edit the document together.
 - *Note*:** The blue cursor shows Tony where Stephanie is on the page.

Sharing Documents via Teams

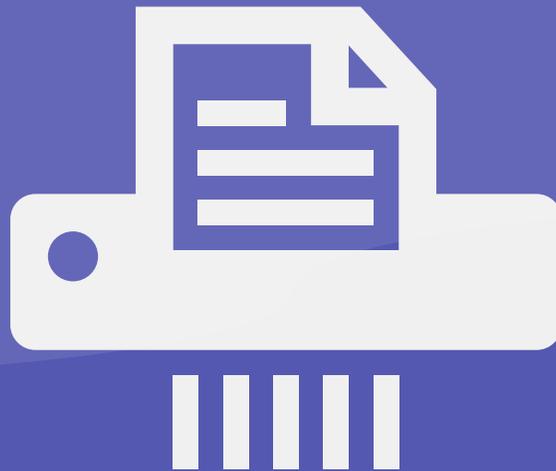




Going along with document collaboration, you can also **use Microsoft Teams to share documents with others**. Microsoft Teams, through its **integration with Word, Excel, PowerPoint**, or other **Office 365 tools**, also allows you to share documents back and forth, and, **like SharePoint**, you can use **Teams as a kind of document repository** for those documents that you and your team are most frequently using. In these subsequent sections, we'll show you how to share documents in a variety of ways.



Sharing Documents from the Files tab

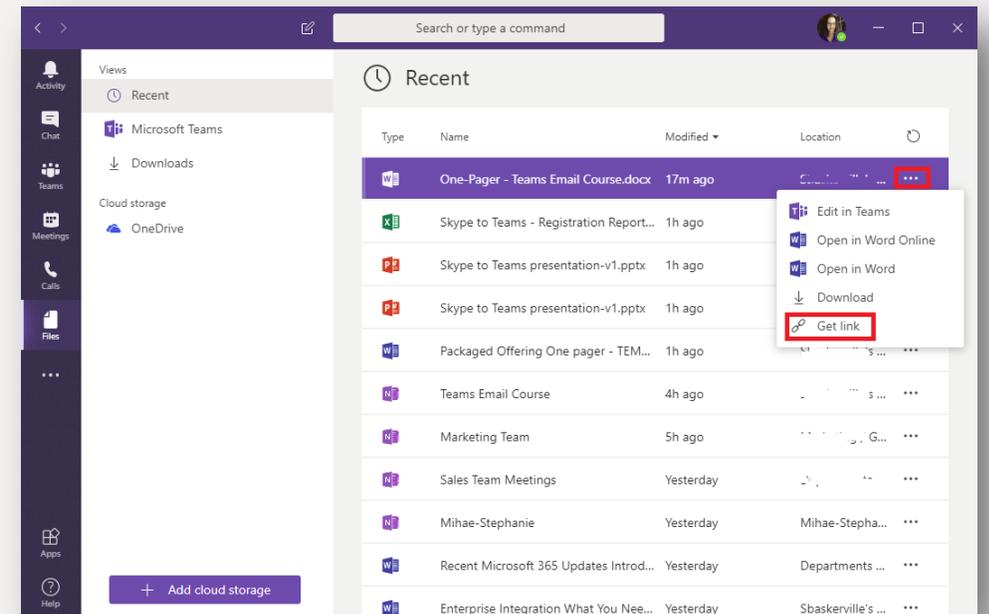
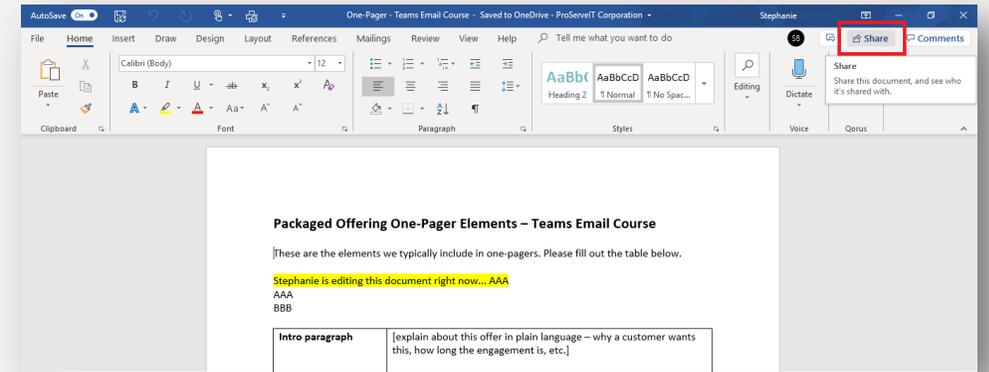


1. There are **two ways that you can share a document via the "Files" tab on Teams.**

First, you can open the document in Word or Word Online, and use the "share button at the top right-hand side of the screen".

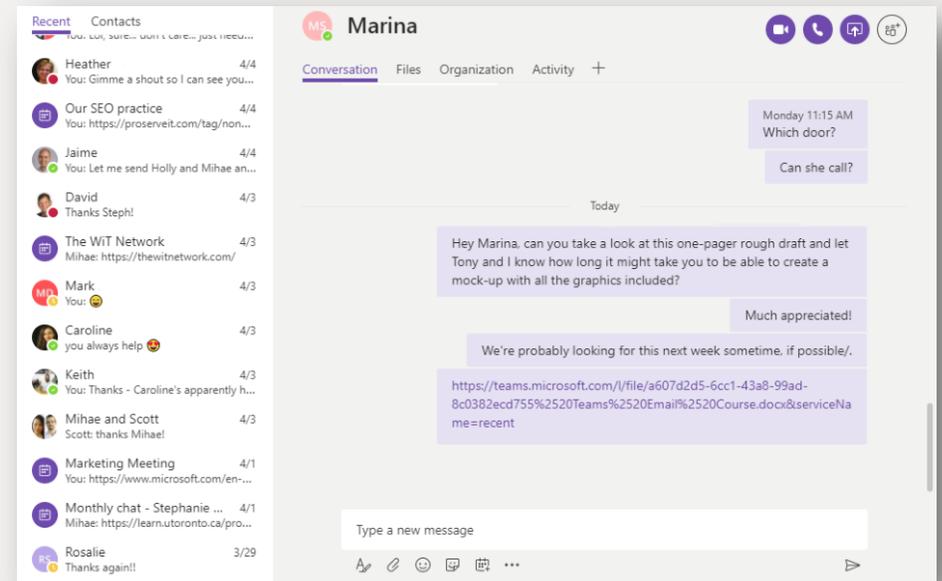
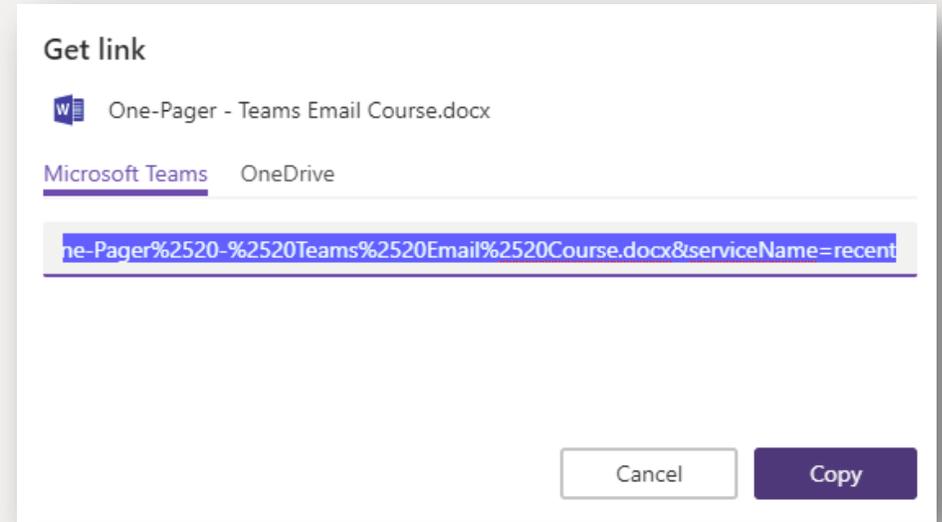
OR, you can get a link to the document and share it through a chat.

2. Click on the **three dots** beside the name of the file you want to open. A drop-down menu will appear - click **"Get link"**.

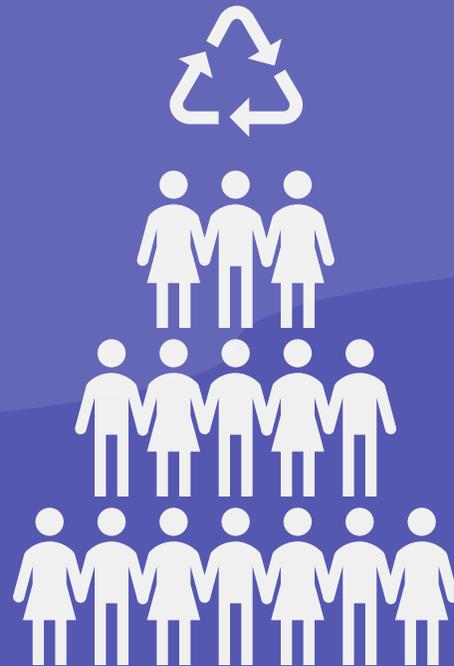


3. Make sure the link is highlighted, and **click "Copy"**.

4. Open up a new chat with someone, and paste the link into the chat window.



Sharing Documents in a Team



From the Teams tab, you do have the capability of storing files, which gives you a central place from which to work. In this section, we'll teach you how to **upload and share documents within Teams.**

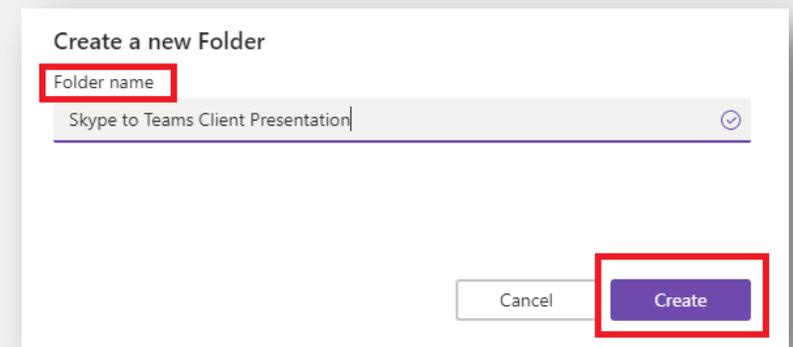
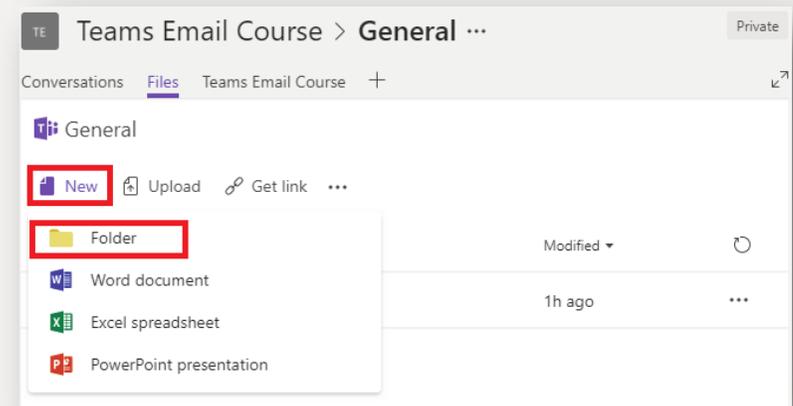
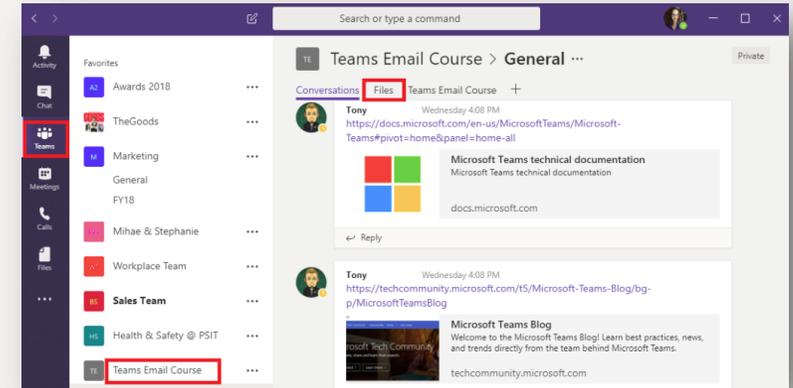
So, again, let's do some role-playing, and let's say that Tony and Stephanie are part of the sales team, and they frequently give presentations to their clients about the Skype to Teams migration. Rather than trying to **locate the document** in their SharePoint environment each time, Stephanie decides that it's more efficient to just **share the document** through the "Teams Email Course" team that they both belong to.



1. Clicking on the **"Teams"** tab, Stephanie finds the Teams Email Course that she and Tony both belong to. Clicking on it, Stephanie **clicks on the "Files"** tab at the top of the screen.

2. Stephanie can then choose to create a new folder where she's going to store this, and possibly other documents. Stephanie decides to create a new folder. By **clicking on "New"**, she can **select "Folder"** from the drop-down list that appears.

3. Stephanie types in the new folder name and **clicks "Create"**.



4. Now, Stephanie can see the new folder she's created under the **Files** tab.

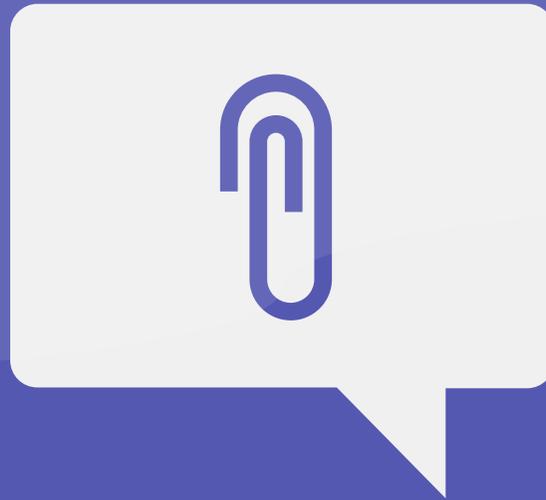
5. Clicking on the folder, Stephanie can now either drag and drop the file she wants share in this folder, or she can upload it using the **"Upload"** function.

○ Now, anyone who has access to this team, like Tony, is able to go into that document and work on it from there.



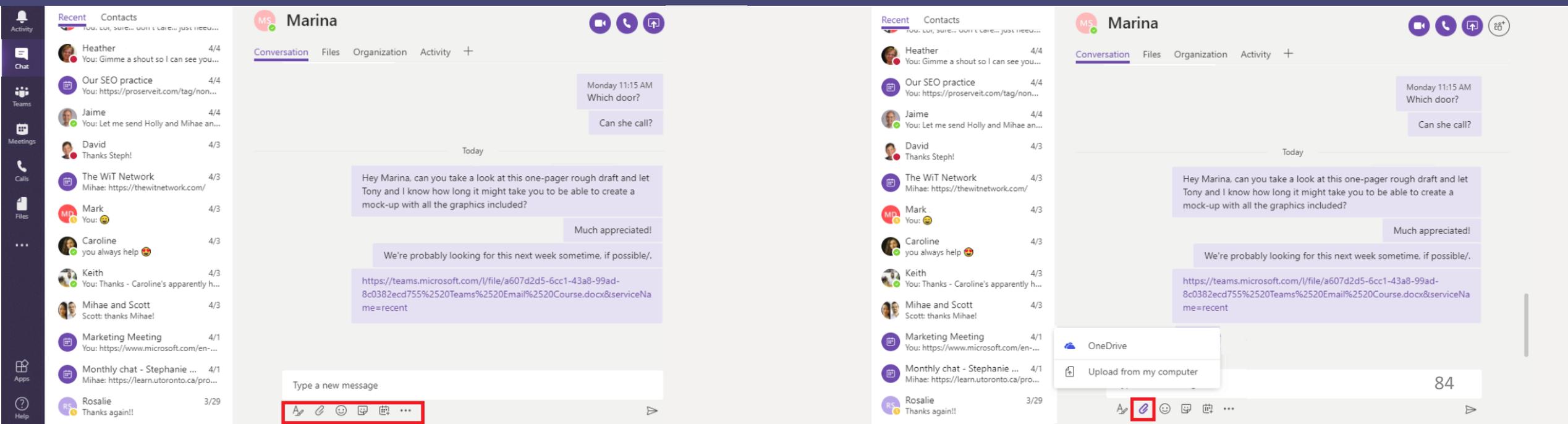
The screenshot displays the Microsoft Teams interface. On the left, the navigation pane shows the 'Files' tab selected. The main area shows a list of folders under the 'Files' tab, including 'Awards 2018', 'TheGoods', 'Marketing', 'General FY18', 'Mihae & Stephanie', 'Workplace Team', 'Sales Team', 'Health & Safety @ PSIT', and 'Teams Email Course'. The 'Teams Email Course' folder is expanded, showing a sub-folder 'Skype to Teams Client Presentation' and another folder 'Demo Content'. A red arrow points from the 'Skype to Teams Client Presentation' folder to a chat window. The chat window shows a conversation with Marina, with a message from Mihae: 'Hey Marina, can you take a look at this one-pager rough draft and let Tony and I know how long it might take you to be able to create a mock-up with all the graphics included?'. The chat window also shows a 'Recent' list of conversations.

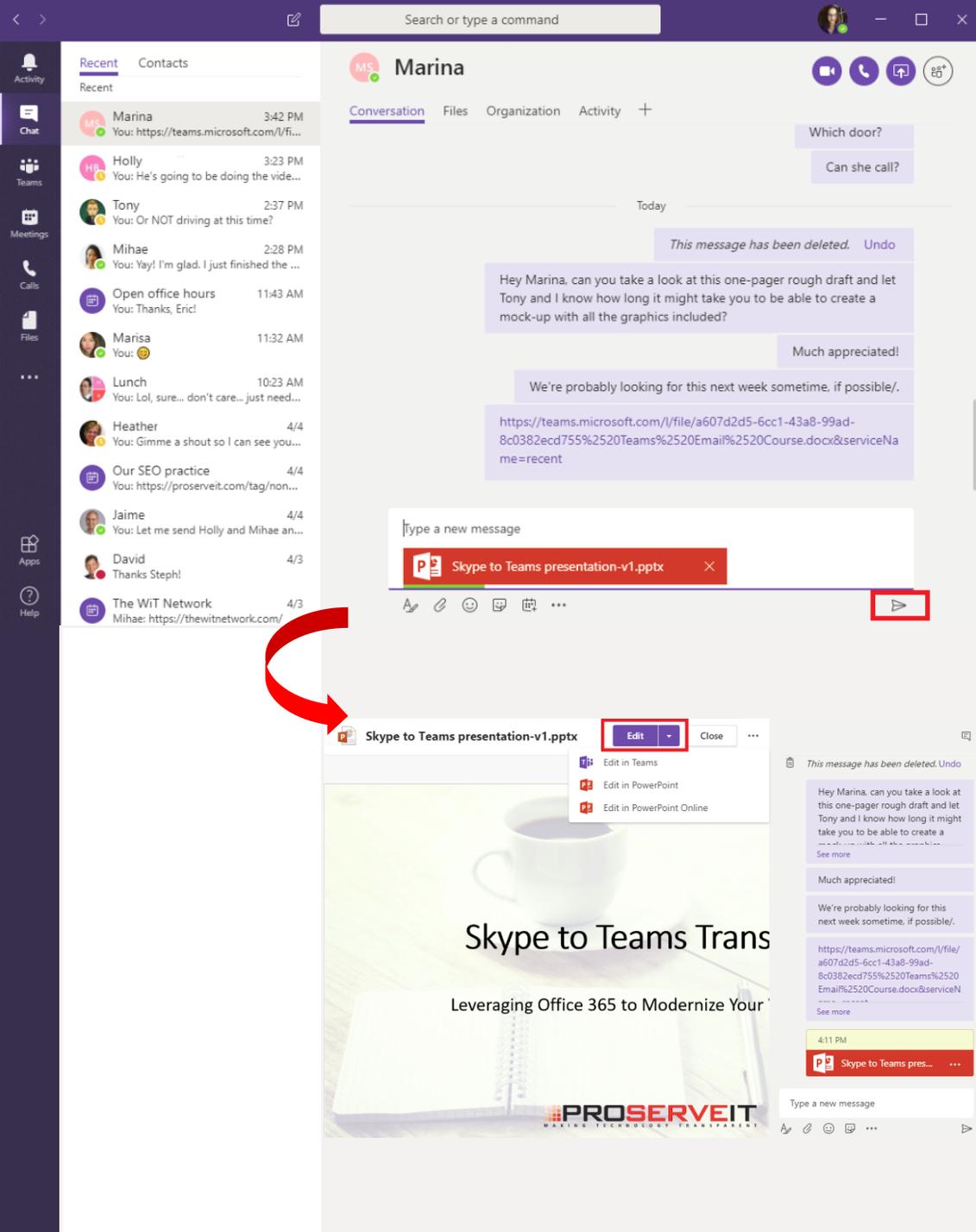
Sharing Documents through a Chat



Last, you can share documents directly through a chat, too!

1. Open up a chat with the person you want to share the document with.
 - Along the bottom of the screen, you'll see a number of actions that you're capable of performing in the chat: Format, Attach, Emoji, Sticker, Schedule a Meeting, and other messaging options.
2. Click on **"Attach"** - you'll see a pop-up that provides you the ability to attach from your personal OneDrive, or from another file on your computer.





- Simply search the document you're looking for and **double-click on it**. The document will upload. Once it's done, **click on the "Send"** button to send the document to your colleague.
- They can now click on the document, and when they do, the document will launch in Teams, but, as you'll see by the screenshot below, your chat window is still open with them, so they can still chat with you while they're looking at the document.
From here, they can edit the document or choose to open it into the online or desktop version of the program.

Microsoft Teams for Office 365 Workshop

Microsoft Teams for Office 365 is a part of your Office 365 Business Essentials, Business Premium, Enterprise E1, E3, or E5 licenses, and is **available to you at no additional cost**. So, if you have one of these licenses, and you're not currently using Microsoft Teams, the question is, why not?

Don't know the features and benefits that Microsoft Teams has to offer your organization? Not sure how to get started using it? ProServeIT's Microsoft Teams Workshop is for you!

Why the Workshop?

Empower Your Employees

Your employees need new tools to support their unique workstyles. Give them a new tool that will empower them!

Improve Teamwork

Want to have a more effective team? Microsoft Teams helps improve teamwork by giving your employees better ways to communicate and collaborate!

Establish Realistic Goals

Working with a team of experts, you'll be able to map out your Microsoft Teams journey & establish realistic goals you can meet.



Join us on a journey!



STEP 1. DISCOVER

Work with our Microsoft Teams experts to understand what Teams can do for your organization



STEP 2. SOLVE

With a security lens to everything we do, we will help you explore organizational technology or process challenges and find corresponding solutions that are perfect for your needs.



STEP 3. PROVE

Work with ProServeIT to implement a pilot of this solution in your organization. With two pilot programs to choose from:

1. PRODUCTIVITY PILOT

We'll help you improve your personal productivity. You'll learn how to use Microsoft Teams technology to be faster & more efficient.

* Including 10 Microsoft 365 E5 trial licenses for 90 days, and 10 users deployed to Teams.

2. VOICE PILOT

You'll learn how Microsoft Teams technology can act as your perfect phone system for internal and external meetings and communication.

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In our next eBook, we're going to go over how all of these great features we've been discussing over the course of this email course can be done **right from your mobile device!** Stay tuned for more great content!

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[Contact us to get started with Teams >>](#)



 **PROSERVEIT**
MAKING TECHNOLOGY TRANSPARENT

The Heart of Teams is... Teams!

An introduction to [mobile capabilities](#) in Teams

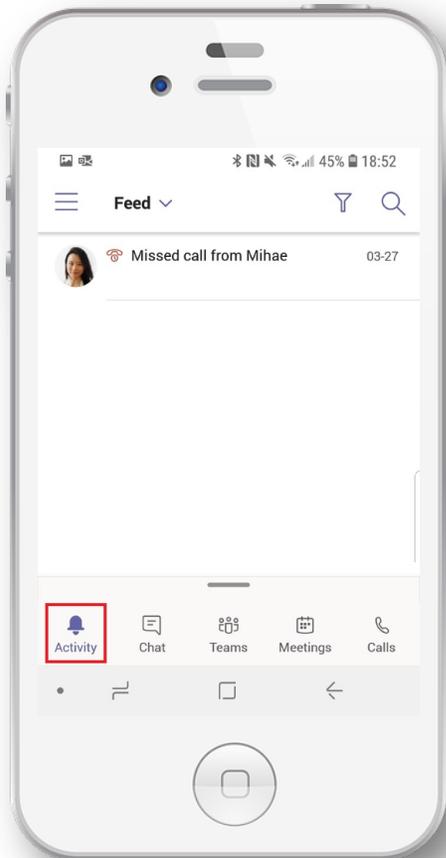


What would a tool be if it didn't have mobile capabilities? At ProServeIT, we're noticing that a number of our customers are **switching to a more mobile workforce**. A laptop or PC might still be the primary productivity tool while people are at the office, but the idea of what it means to be productive is changing. Having to duck out of work early for a doctor's appointment or to pick up the kids from school is no longer a barrier to productivity - with the smartphone in your pocket, you can still communicate and engage with your colleagues with the same type of functionality that you have at your workstation.

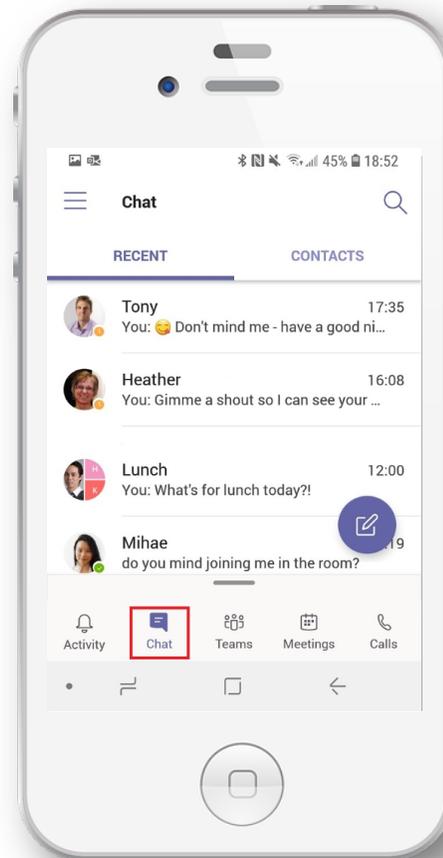
In this eBook, we're going to talk all about the **mobile capabilities of the Microsoft Teams app**.

Microsoft Teams gives you **all the functionality of a laptop – from your Smartphone**. And, all the stuff that you can do from the actual desktop client, you can do on your mobile device.

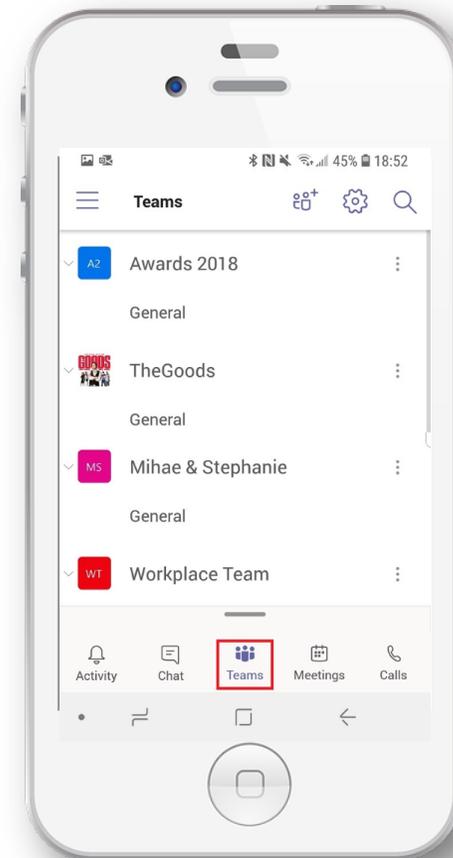
The "Activity" tab:



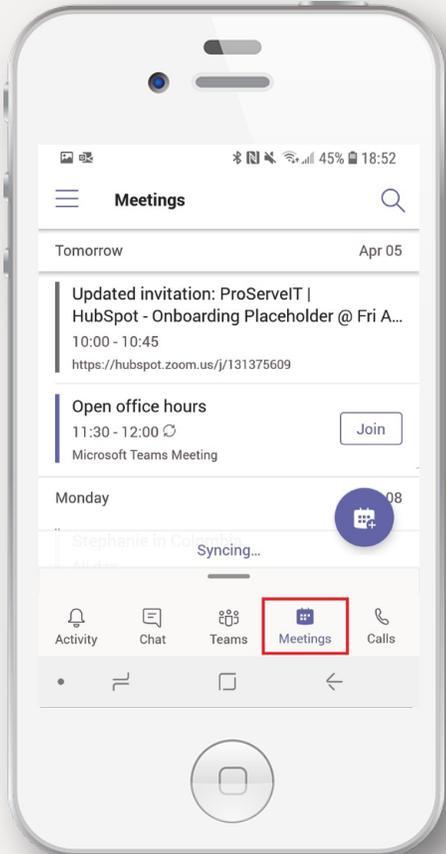
The "Chat" tab:



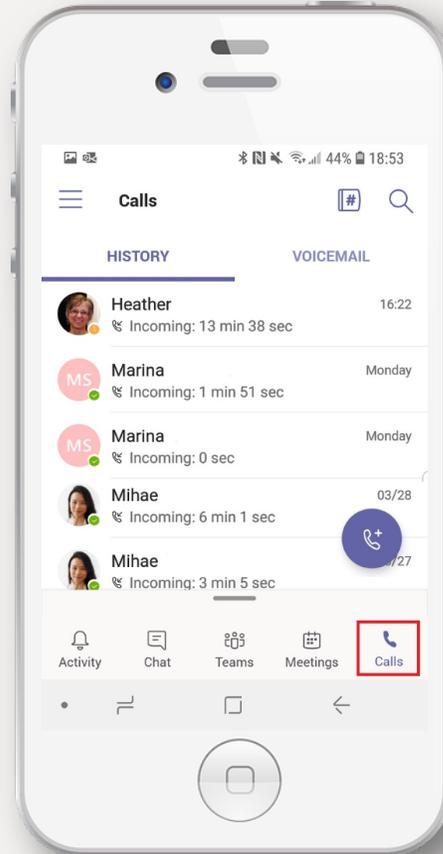
The "Teams" tab:



The "Meetings" tab:



The "Calls" tab:



As these screenshots show, you **have all the same tabs in the mobile app as you do on the desktop version** - Activity, Chat, Teams, Meetings, and Calls. And, just like on your desktop, you **have all the capabilities that you have in the desktop version** - from the Teams app, you can use these tabs and see activities, make calls, join meetings, work on documents, and more!

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Cloud@ProServeIT.com