

Instructional Design Storyboard

Introduction to Teams

Learning Objectives & Outline

What is the learning path or module outline, and the associated learning objectives?

MODULE/ LESSON #	TITLE	LEARNING OBJECTIVES
#1	Subscriptions and Licensing	<ul style="list-style-type: none">• Define Teams.• Identify the different M365 subscription plans that include Teams.• Given a list of specific business pain points, devise the best-fit option for Teams licensing and subscription.
#2	Overview of Teams	<ul style="list-style-type: none">• Identify available platforms for Teams.• Provide a high-level description of each tab on the Teams dashboard.
#3	The Teams Admin Center	<ul style="list-style-type: none">• Navigate the Teams Admin Center.• Describe the functionality of each primary tab on the Teams Admin Center's left navigation panel.
#4	Teams in Microsoft Teams!	<ul style="list-style-type: none">• Create a new team with or without using a template.• Organize teams on the teams dashboard.• Manage teams as a teams owner.• Differentiate between guest and external access to Teams.
#5	Channels	<ul style="list-style-type: none">• Describe the relationship between teams and channels.• Differentiate between types of channels.• Create and organize channels within a team.• Describe the functionality of the basic features in channels, including integration with M365 and Apps.
#6	Chats and Call Features	<ul style="list-style-type: none">• Leverage commonly used features of Teams Chat to collaborate.• Differentiate between channels and chat.• Describe the functionality of the Teams Call feature.
#7	Teams Phone system	<ul style="list-style-type: none">• Define the Teams Phone System.• Compare the Teams Phone System and Teams Call features.• Identify features of the Teams Phone System.• Define license requirements for the Teams Phone System.• List three options to connect to the PSTN.

		<ul style="list-style-type: none"> • Set up Teams phone system in a simulated environment. • Customize auto attendant in a simulated environment.
#8	Meetings in Teams	<ul style="list-style-type: none"> • Schedule, start, and join meetings in Teams. • Identify meeting features used most often to manage meetings. • Describe the process of recording Teams meetings. • Identify accessibility features available in Teams meetings.
#9	Customer-Based Scenarios	<ul style="list-style-type: none"> • Assist with Teams customer issues in a simulated environment. •
#10	Cumulative Assessment and Summary	

Storyboard Design

Outline the learning path modules' audio narrations, on-screen scripts, and learning interactions.

Course Objective(s):

- Define Teams.
- Identify the different M365 subscription plans that include Teams.
- Describe the impact licensing has on Teams functionality and accessibility.
- Given a list of specific business pain points, devise the best-fit option for Teams licensing and subscription.

Lessons	Content Description	Learning Interaction Type
Module Overview (Rise landing page)	<p>Teams is where people can actively connect and collaborate in real-time to get things done. Within Teams, people inside and outside an organization can plan projects, work together on shared files, hold meetings, call one another, and chat. In this module, we will define what Teams is and be introduced to the various subscriptions offered by Microsoft that include Teams.</p> <p>Upon completion of this module, you will be able to:</p> <ul style="list-style-type: none"> • Define Microsoft Teams. • Identify the different M365 subscription plans that include Teams. • Choose an appropriate Teams subscription given specific business pain points. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid – Subscription Plans That Include Teams	

What is Microsoft Teams?

Since its introduction in 2017, Teams has grown in popularity as the go-to collaboration platform to help businesses streamline their workflows and increase productivity. Before we dig into Teams and all its features, let's take a poll!

How would **you** describe Teams?

Which of the following statements describe Teams? Select all that apply.

- Teams is is part of the MS 365 suite.
- Teams is a software as a service solution that supports interactive meetings and webinars.
- Teams is an email service.
- Teams keeps onsite and remote teams connected.
- Teams is only useful for messaging through chat.
- Teams enables greater productivity in businesses of all sizes.

Defining Teams

Teams is a cloud-based collaboration service that allows groups of people to work together effectively. In Microsoft Teams, you can:

- Communicate via audio or video calls, messaging, and chat.
- Share and collaborate on files in real-time
- Host video conferences and webinars that allow screen-sharing.
- Download and use a variety of third-party apps.
- Sync with your Outlook calendar to schedule and join meetings.

It is the ultimate messaging app for your organization—a workspace for real-time collaboration and communication, meetings, file and app sharing, and even the occasional emoji! All in one place, all in the open, and all accessible to everyone. As a software as a service (SaaS) platform, Teams enables greater productivity to help businesses of all sizes run smoothly.

Watch the video below to learn more!

```
<iframe src="https://www.microsoft.com/en-us/videoplayer/embed/RE1LGec?pid=ocpVideo1-innerdiv-oneplayer&maskLevel=20&market=en-us"></iframe>
```

[Video: What is Microsoft Teams? - Microsoft Support](#)

Check for Understanding:

Where can you learn more about how to use MS Teams?

- [portal.office.com](#)
- [office.com/training](#)
- [teams.microsoft.com](#)

	<ul style="list-style-type: none"> • teams.com/microsoft/training <p>In a team, members can work together using channels instead of file folders.</p> <ul style="list-style-type: none"> • True • False 	
<p>Subscriptions versus Licensing</p>	<p>Do you wonder what the difference is between a subscription and a license? Aren't they the same thing?</p> <p>Nope!</p> <p>In fact, you can have one subscription with multiple licenses. In the Microsoft 365 technology arena, a subscription affords you access to a specific set of applications and services, often for a set amount of time, like an annual commitment. When the subscription is purchased, the admin can select how many licenses they will need to license their users. Each user requires their own license to access the subscription features. Depending on user needs for separate applications and services, additional licenses can be purchased outside the general subscriptions.</p> <p>Bookmark me! Save this link for future reference:</p> <p>Understand subscriptions and licenses in Microsoft 365 for business Microsoft Docs</p> <p><u>Access to Teams</u></p> <p>Now that we've reviewed the difference between subscriptions and licenses, let's look at how organizations get access to Teams. Teams is bundled into Microsoft 365 subscription packages. For customers who opt out of subscription packages, Teams is also available as a stand-alone subscription.</p> <p>Subscription packages were covered in the Introduction to Microsoft 365 learning path. In the upcoming lessons, we will take another look at what's included in these packages as they relate to Teams. Let's start with M365 Business and Enterprise Subscriptions.</p>	
<p>M365 Business and Enterprise Subscriptions</p>	<p><u>Who Uses This Subscription Type?</u></p> <p>As you may recall from the Introduction to Microsoft 365 learning path, small and mid-size businesses use the Microsoft 365 Business subscription type. Teams service is available with all Business subscriptions except for Microsoft 365 Apps for business.</p>	

Note, even though the Teams mobile and computer application is a free download, users still need to be licensed in their organization to communicate and collaborate in Teams.

Check out and bookmark the link below to view Business subscriptions that include Teams. When you're finished reviewing the information return to the course.

Bookmark me! [Compare All Microsoft 365 Plans | Microsoft](#)

Check for Understanding

Drag and drop each Microsoft 365 Business subscription plan into one of two categories: *Plans that offer Teams* or *Plans that do not offer Teams*.

Plans that offer Teams:

Microsoft 365 Business Basic

Microsoft 365 Business Standard

Microsoft 365 Business Premium

Plans that do not offer Teams:

Microsoft 365 Apps for Business

MS 365 Enterprise Subscriptions

A number of M365 subscriptions are available for enterprise businesses (300 or more users and devices). All Enterprise subscriptions include Teams except for Microsoft 365 Apps for enterprise.

Check out and bookmark the link below to view Enterprise subscriptions that include Teams. Make sure to scroll down to and expand the *Meetings and voice* section and take note of the different features offered through Teams for each subscription.

When you're finished reviewing the information, return to the course.

Bookmark me! [Compare Office 365 Enterprise | Microsoft](#)
[The Microsoft 365 F3 Subscription Plan](#)

<image on right, text on left>

Microsoft also offers a subscription-based productivity platform designed specifically for employees who don't have a desk or office and need access to various collaboration and communication tools.

	<p>The Microsoft 365 F3 plan, also known as the "frontline worker plan," is geared toward frontline workers!</p> <p>Check out and bookmark the link below to review the Microsoft 365 F3 subscription plan. When you're finished reviewing the information return to the course.</p> <p>Bookmark me! Microsoft 365 F3, Microsoft 365</p> <p><u>Check for Understanding!</u></p> <p>Drag and drop each Microsoft 365 Enterprise subscription plan into one of two categories: <i>Plans that offer Teams</i> or <i>Plans that do not offer Teams</i>.</p> <p>Plans that offer Teams:</p> <ul style="list-style-type: none"> Office 365 E1 Office 365 E3 Office 365 E5 Microsoft 365 F3 <p>Plans that do not offer Teams:</p> <ul style="list-style-type: none"> Microsoft 365 Apps for enterprise <p>Continue on to the next lesson to learn about education and government subscription packages that include Teams.</p>	
<p>M365 Business and Enterprise Subscriptions</p>	<p><u>Microsoft 365 Education Subscriptions</u></p> <p><image on the left, text on the right></p> <p>Microsoft builds education plans with educators and students in mind. When a plan is purchased for faculty and staff, students get access at no extra cost.</p> <p>Check out and bookmark the link below to view Education subscriptions that include Teams.</p> <p>Make sure to scroll down to the <i>Discover the Microsoft Education solution that's right for you</i> section and select the <i>Compare Microsoft 365 Education Plans</i> link to note any differences offered for each Teams subscription.</p> <p>When you're finished reviewing the information, return to the course.</p> <p>Bookmark me! Free Microsoft 365 Education - Microsoft Education</p>	

	<p><u>Check for understanding!</u> Only the Microsoft 365 Education plans A1 and A5 include Teams.</p> <ul style="list-style-type: none"> • True • False <p><u>Microsoft 365 Government Subscriptions</u> <image on the right, text on the left></p> <p>The Microsoft 365 Government plans are built with enhanced security and compliance requirements. As a result, many U. S. public sector employees use this subscription,</p> <p>Check out and bookmark the link below to view Government subscriptions that include Teams.</p> <p>Make sure to expand the <i>Voice, video & meetings</i> section to note any differences offered for each Teams subscription.</p> <p>When you're finished reviewing the information, return to the course.</p> <p>Bookmark me! Microsoft 365 Government</p> <p><u>Check for understanding!</u> Teams is included with both the Microsoft Government G3 and G5 subscription plans.</p> <ul style="list-style-type: none"> • True • False <p>What about those who want to use Teams, but don't have a subscription or have a subscription that doesn't include Teams? Continue to the next lesson to find out!</p>	
<p>Microsoft Teams Essentials and Teams Free</p>	<p><u>Microsoft Teams Essentials</u></p> <p>Microsoft Teams Essentials is a cost-effective, standalone version of Teams designed for a small business in need of an affordable, professional, easy-to-use meeting solution with video and audio calling. Essentials offers the same core features as other subscriptions, such as high-quality meetings with video and voice, screen and content sharing capabilities, and access to web applications such as Microsoft Word, Excel, and PowerPoint. In addition, Teams Essentials provides the following features:</p> <ul style="list-style-type: none"> • Unlimited group meetings for up to 30 hours. • Meetings with up to 300 people. • 10 GB of cloud storage per user. <p>The image below outlines the features offered by Microsoft Teams Essentials in comparison to other Microsoft Teams subscriptions.</p>	

	<p><EssentialsImage.png></p> <p>Check out and bookmark the link below to view Teams Essentials subscriptions. When you're finished reviewing the information, return to the course.</p> <p>Bookmark Me! Compare Office 365 Teams Essentials</p> <p><u>Check for understanding!</u></p> <p>How many hours of meeting time are available in Microsoft Teams Essentials?</p> <ul style="list-style-type: none"> • 100 • 30 • 300 • 60 <p><u>Teams Free</u></p> <p><_NOPROCESS_TeamsFree image on right, text on left></p> <p>Microsoft offers a free version of Microsoft Teams for anyone with a Microsoft personal account or a work or school account that is not licensed with a Microsoft 365 Business or Microsoft 365 Enterprise subscription.</p> <p>The Teams free version allows access to the Teams online collaboration tools and interaction with other Microsoft 365 tenants.</p> <p><u>What Does Teams Free Offer?</u></p> <p><_NOPROCESS_TeamsFreeInfo2 image on left, text on right></p> <p>Teams Free is part of the Teams For Home line of products, along with the M365 Personal and M365 Family plans. Teams Free is also a good choice as a standalone Teams option for small businesses that don't need more than 60 minutes per meeting and have less than 100 employees.</p> <p>Check out and bookmark the link below to compare Microsoft Teams free version to Teams Essentials and Teams included in subscription-based services. When you're finished reviewing the information, return to the course.</p> <p>Bookmark me!</p> <p>Small Business for Teams for Free (microsoft.com)</p>	
<p>Setting Up Teams: A</p>	<p>Part of your role as an agent is to help customers make decisions about products and services that best meet their business needs. In the following scenario, you will help a customer choose a Teams</p>	

<p>Customer Scenario</p>	<p>subscription that best addresses their needs. Refer to the Job Aid - Microsoft 365 Subscription Plans That Include Teams, which is available in the Resources lesson of this module.</p> <p><Rise Scenario></p> <p>Title screen: Image of bookstore in the background and a happy Sarah.</p> <p>Title:</p> <p>Description: Sarah owns a local bookstore and has recently opened a second store. She is interested in purchasing a Teams subscription, but needs help choosing the best option. Let's see how you can help.</p> <p>Just text: Sarah would like a Teams subscription in which her team can hold weekly virtual meetings and share files through the chat.</p> <p>Sarah: In addition to sharing files in the chat, I'd like to have online meetings with screen sharing and customizable backgrounds.</p> <p>You:</p> <p>Only M365 Business Basic can provide those features. Let me send you information on that plan.</p> <p>I'm surprised only one plan includes those simple features!</p> <p>Those features come with Teams free, essentials, and the business basic plans. How many people will be at these meetings?</p> <p>Great! We are a small business just starting out.</p> <p>Most plans don't include customizable backgrounds.</p> <p>Really? I thought that was a standard feature in Teams.</p> <p>Dialogue:</p> <p>Sarah: We have about 15 employees. These meetings don't need to be recorded.</p> <p>All of our plans offer meeting recordings. How long are your meetings?</p> <p>That's odd! I'd think there would be some cheaper plans that don't.</p> <p>That narrows it down to either Teams Essentials or Teams Free. Typically, how long are your meetings?</p> <p>Roughly 30 - 45 minutes. Never longer than an hour.</p>	
---------------------------------	---	--

	<p>With 15 employees, you could choose either Teams Essentials or Microsoft Apps for Business. How long are your meetings?</p> <p>My co-worker said that apps for business doesn't include Teams!</p> <p>Sarah: One other thing, my co-worker used to work in IT, so I don't need a plan with tech support.</p> <p>Looks like Business Basic would be the best option.</p> <p>Microsoft Teams Essentials would best meet your needs.</p> <p>Teams Free is the one to go with, it covers everything you need.</p>	
Knowledge Check	Please see Assessment List with Answers Jan 2023.xlsx	
Module Summary	<p>Let's Review</p> <p>This module defined what Microsoft Teams is and provided an overview of the Teams features included in various Microsoft subscription options.</p> <p>Up Next</p> <p>In the next module, you will learn about the different platforms on which Teams is available, get an overview of the functionality of each tab on the Teams dashboard, and be introduced to the Teams Admin Center.</p> <p>Your Opinion Matters</p>	

Course Objective(s):

1. Identify available platforms for Teams.
2. Provide a high-level description of the main communication and collaboration features in Teams.

Module #2 Module Title: Teams Overview		
Lessons	Content Description	Learning Interaction Type
Module/Item Description (for SFs)	<p>Why is this important?</p> <p>Duration: XX minutes</p>	
Module Overview (Rise landing page)	<p>Teams is available on more than just your desktop! This module describes the different clients for Teams, and introduces you to the main communication and collaboration features Teams has to offer.</p> <p>Upon completion of this module, you will be able to:</p> <ol style="list-style-type: none"> 1. Identify available platforms for Teams. 	

	<p>2. Provide a high-level description of the main communication and collaboration features in Teams.</p> <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid - Microsoft Teams Features	
Multiplatform Accessibility to Teams	<p>Access Teams anywhere, any time. With mobile, web, and desktop platforms, people can stay connected and informed anywhere the internet is available. Select each flashcard to learn more!</p> <p><Flip cards - include image and title on front, description on the back></p> <p>Desktop Client (image of desktop monitor): A standalone application that provides real-time audio, video, and content sharing for team meetings, group calling, and private one-to-one calls and chats.</p> <p>Web Client (image of browser window): A full, functional client that can be used from a variety of browsers without the need for plug-ins or downloads to run.</p> <p>Mobile Client (image of mobile phone): Teams mobile apps are available for Android and iOS for on-the-go users participating in peer-to-peer calls and chat-based conversations.</p> <p>Bookmark me! Save this links for future reference:</p> <p>Get clients for Microsoft Teams - Microsoft Teams Microsoft Docs</p> <p>Teams features by platform - Microsoft Support</p> <p><u>Use Case:</u> View the video below to see highlight how the Multiple Platform Accessibility feature works in a real-world scenario.</p> <p><Powtoon video 1611594887.mp4></p>	
Introduction to Features offered through Teams	<p>Microsoft Teams offers several features that support collaboration, engage team members, and drive productivity. Let's take an overall look at some of the major features offered through Teams. In later modules, we will dive deeper into the details and functionality of each. Watch the introductory video below!</p> <p>What is Microsoft Teams? - Microsoft Support</p>	

<iframe src="https://www.microsoft.com/en-us/videoplayer/embed/RE4FyUf?pid=ocpVideo1-innerdiv-oneplayer&maskLevel=20&market=en-us"></iframe>

Check for understanding!

What are Teams made up of?

- Calendars
- Chats
- Files
- **Channels**

Sharing a file in a channel conversation allows you and your team to edit it at the same time.

- **True**
- False

Chats can only be used for private one-to-one conversations.

- True
- **False**

Communication and Collaboration Features in Teams

<Process interaction containing an image of screen with tab opened and brief high-level description of the tabs on the left nav panel of the landing page>

The left navigation panel of the Teams landing page provides quick access to the major communication and collaboration features of Teams. Select Start to learn about each feature.

Activity – Find and catch up on any unread messages, @mentions, replies, and reactions here.

Chat – Use chat to privately message someone or a group to talk about anything.

Teams – Teams are dedicated spaces to collaborate with others on specific projects and share ideas. Access your list of Teams here!

Calendar – Use your calendar to schedule and join meetings and connect with people before, during, and after meetings. The best part? It syncs with your Outlook calendar!

Calls – Make calls, see your call history, review your voicemails, and manage your call settings here.

Files – Teams fully integrates with Microsoft 365. Here you will find all files that have been uploaded and shared within your teams.

The Ellipses – Select these to quickly search for Apps.

	<p>Apps – the apps feature provides integration with a variety of MS and third-party tools to help you simply, customize, and manage your work.</p> <p><u>Check for understanding!</u></p> <p>What are Teams made up of?</p> <ul style="list-style-type: none"> • Calendars • Chats • Files • Channels <p>Sharing a file in a channel conversation allows you and your team to edit it at the same time.</p> <ul style="list-style-type: none"> • True • False <p>Chats can only be used for private one-to-one conversations.</p> <ul style="list-style-type: none"> • True • False 	
Knowledge Check	Please see Assessment List with Answers Jan 2023.xlsx	
Module Summary	<p>Let's Review</p> <p>Up Next</p> <p>Your Opinion Matters</p> <p>Middle module summary</p>	

Course Objective(s):

1. *Navigate the Teams Admin Center.*
2. *Describe the functionality of each primary tab on the Teams Admin Center's navigation panel.*

Module #3	Module Title: The Teams Admin Center	
Lessons	Content Description	Learning Interaction Type

Module/Item Description (for SFs)	Why is this important? Duration: XX minutes	
Module Overview (Rise landing page)	<p>The Teams admin center is the hub for managing all aspects of Teams and how users interact with the platform. This module provides an overview of the Teams admin center to help you navigate and identify the different features available for managing an organization's Teams platform.</p> <p>Upon completion of this module, you will be able to:</p> <ol style="list-style-type: none"> 1. Navigate the Teams Admin Center. 2. Describe the functionality of each primary tab on the Teams Admin Center's left navigation panel. 3. Identify which Teams Admin Center tabs best address a variety of customer issues when using Teams. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid – The Teams Admin Center	
The Teams Admin Center	<p>Customers who are assigned Global and/or Teams Administrator roles can manage Teams through the Teams Admin Center. The ability to access and navigate the Teams Admin Center is essential for your success as an agent, as an understanding of how to manage Teams from an admin's perspective will allow you to provide the best support for our customers.</p> <p><u>How to Access the Teams Admin Center</u></p> <p>Follow the steps below to access the Teams Admin Center on your test tenant.</p> <p>There are two ways to access the Teams Admin Center: <tab interaction with GIFs for each></p> <p><u>From the Microsoft 365 Admin Center</u> To access the Teams admin center from the Microsoft 365 Admin Center:</p> <ol style="list-style-type: none"> 1. Go to at admin.microsoft.com. 2. Select Show all on the left navigation panel. 3. Scroll down and select the Teams icon. <p><u>From Microsoft 365 Home Page</u></p>	

	<p>To access the Teams admin center from the M365 Homepage:</p> <ol style="list-style-type: none"> 1. Go to portal.office.com. 2. Select the Admin Center icon from the left navigation panel to take you to the M365 Admin Center. 3. Select Show all on the left navigation panel. 4. Scroll down and select the Teams icon. <p>Now that you can access the Teams Admin Center, continue on to the next lesson for a tour!</p> <p><u>A Tour of the Teams Admin Center</u></p> <p>The following activity provides a tour of the Teams admin center along with an overview of the functionality of each tab on the left navigation panel. Enjoy!</p> <p><Camtasia video with call outs OR SL Tour></p>	
Customer Scenarios	<p>Let's practice navigating the Teams Admin Center. In this activity, you will identify which tabs on the left navigation panel of the Teams Admin Center best address a variety of customer issues with Teams. Complete the scavenger hunt below to provide a successful customer support experience.</p> <p><Scavenger hunt SL></p>	
Module Summary	<p>Let's Review</p> <p>In this module, you learned how to access and navigate the Teams Admin Center. The functionality of each tab on the left navigation panel was also described.</p> <p>Up Next</p> <p>Continue on to the next module to learn how to create, organize, and manage teams in Microsoft Teams.</p> <p>Your Opinion Matters</p>	

Course Objective(s):

- *Create a new team with or without using a template.*
- *Organize teams on the teams dashboard.*
- *Manage teams as the teams owner.*
- *Differentiate between guest and external access to Teams.*

Module #4 Module Title: Teams in Microsoft Teams!		
Lessons	Content Description	Learning Interaction Type

Module/Item Description (for SFs)	Why is this important? Duration: XX minutes	
Module Overview (Rise landing page)	<p>Teams are the foundation of Microsoft Teams! They are collaboration spaces for people insider and outside an organization to work closely together towards a common outcome. In this module, you will learn how to create, organize, and manage teams.</p> <p>Upon completion of this module, you will be able to:</p> <ul style="list-style-type: none"> • Create a new team with or without using a template. • Organize teams on the Teams dashboard. • Manage teams as the tams owner. • Differentiate between guest and external access to Teams. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid – Microsoft Teams Features	
Creating and Organizing Teams	<p>In Microsoft Teams, a team is a dedicated online space for people to gather and connect for work, projects, or common interests. Using teams to organize projects and collaborate through file-sharing, chat communications, and video conferencing leads to efficient and effective workflows. When you create a new team, you are its owner, and can manage the team settings and permissions. Managing teams will be covered in a later module of this learning path.</p> <p>To get your team up and running, you can choose to create a basic team (create from scratch) or use a template.</p> <p><u>Create a Basic Team</u></p> <p>To create a team without using a template:</p> <ol style="list-style-type: none"> 1. Select Teams from the left navigation panel. 2. Select Join or Create a team. 3. Select Create a team. 4. Select From scratch. 5. Choose a privacy level for your team. <p>Private – limits content and conversation to a specific set of people.</p> <p>Public – allows anyone in the organization to join.</p> <p>Org-wide – a team in which all employees in an organization are automatically added. This option is only available to global admins.</p> <ol style="list-style-type: none"> 6. Name your team and add a brief description. 7. Select Create. 	

Click on the GIF below for a closer look!

<GIF>

Create a team from a template

You can also create teams for specific scenarios, such as managing a project or onboarding employees, by using a team template. Watch the video below for more information.

[Create a team with team templates - Microsoft Support](#)

Check for understanding!

Teams created from a template come with added channels and apps that can be renamed to customize them for your team.

- True
- False

Once you create a basic team from scratch or use a template, your team is ready to go! Teams come with a General channel, an area for posting messages, and a tab for Files, as well as a corresponding SharePoint site and OneDrive. These features will be covered in detail in later modules.

Organizing Teams

One of the benefits of Microsoft Teams is that you can create a team for any project or group. However, that could lead to a long, unorganized list of teams. Let's look at three ways to organize your teams!

A list of all teams in which you are a member can be viewed by selecting Teams from the left navigation panel of the Teams landing page. There are several ways to organize your teams list. You can...

- Reorder your teams.
- Hide and show teams in the list.

Watch the video below for more details!

<Camtasia video with call outs - resequencing teams, show/hide a team>

Bookmark [Show, hide, or pin a team or channel in Teams - Microsoft Support](#)

Check for Understanding!

Which of the following actions can you take to organize your teams list? Select all that apply.

	<ul style="list-style-type: none"> • Hide a team • Reorder team in the list • Merge teams • Pin a team • Show a hidden team <p>A customer calls to ask if there is any way to change the order of their teams and place the most important ones on top of their list. How do you respond?</p> <ul style="list-style-type: none"> • Select more options, then select manage team. • Select the team you want to move and drag it to the top of the list. • Only a Teams admin can change the order of teams in the Teams admin center. • Select more options, then select hide teams. <p>(need teams in team rise scenario??)</p>	
<p>Managing Teams</p>	<p>You are the owner of any team you create, whether it be from scratch or from a template. As a team owner, you can add or remove members and guests, change member roles, and manage team settings.</p> <p>Watch the video below to learn more! Manage team settings - Microsoft Support</p> <p><u>Check for understanding!</u></p> <p>Which of the following can you do under the Settings tab? Select all that apply.</p> <ul style="list-style-type: none"> • Grant permissions for guests • Add a team picture • Add members • Set @ mention options • Hide the team • Change members' roles • Allow members to share GIFs <p>Archiving a team marks a team inactive while keeping its mailbox, calendar, site, and files.</p> <ul style="list-style-type: none"> • True • False 	

Security and Compliance mostly from older course, some re-wording

Security is a primary concern for many customers. With teams, parameters can be set to ensure data encryption at rest and in transit, enforced multifactor authentication, single sign-on, and advanced auditing and reporting to secure sensitive information. Organizations can control who has access to teams in the Teams admin center. There, admins can set parameters for guest access (allows calls, chats, and access to internal resources), external access (allows calls and chats), and can also allow external users to join anonymously.

With data encryption at rest and in transit, enforced multifactor authentication, single sign-on, and advanced auditing and reporting, our customers can rest assured their information is secure.

Guest Access

Guest Access allows users from outside the organization to become nearly full-fledged team members who can make calls, participate in chats, set up meetings and access shared files. Team owners can add guests on an individual basis.

Check out and bookmark the link below to read more about the most common access points for security and compliance while using Teams. When you're done reviewing the information return to the course.

Bookmark me! Save this link for future reference:

[Guest access in Microsoft Teams - Microsoft Teams | Microsoft Docs](#)

Check for understanding (middle two are correct)

Which statement is true about guest access? Select all that apply.

- Guest access is most commonly used when a team has users in different domains who need to collaborate.
- Guest access provides access to teams, resources, chats, and applications to people outside your organization.
- A guest is someone who isn't an employee, student, or member of your organization.
- Guest access is enabled by default in all teams except those that are private.

External Access

External access allows Teams users in **specified external domains** to find, chat, call, and send meeting invitations to people in your organization. Use external access when you want to enable collaboration with an external user or to prevent external users from accessing Teams content.

Select the link below and bookmark for future reference. After reading the article, return to the course and complete the check for understanding question.

Bookmark me! Save this link for future reference:

[Manage external access \(federation\) - Microsoft Teams | Microsoft Docs](#)

Check for understanding!

Which statements are true about external access? Select all that apply.

- Use external when you have users in different domains who need to collaborate.
- With external access, you can provide access to teams, documents in channels, resources, chats, and applications to people outside your organization.
- Use external access when you want the people in your organization to use Teams to contact people in specific businesses outside of your organization.
- External access is a way for Teams users from an entire external domain to find, call, chat, and set up meetings with you in Teams.

SUBMIT

Compare External and Guest Access

To see the difference between external and guest access, select the link below and bookmark for future reference. After reading the article (specifically the *Compare external and guest access section*), return to the course and complete the check for understanding question.

Bookmark me! To compare Guest to External Access, read the following article on your own time.

	<p>Use guest access and external access to collaborate with people outside your organization - Microsoft Teams Microsoft Docs</p> <p><u>Check for understanding</u></p> <p><Card sort></p> <p>Each card below has an action that only guest access to a team allows, only external access to a team allows, or both guest and external access to a team allows. Drag and drop each action into <i>guest access only</i>, <i>external access only</i>, or <i>both guest and external access</i>.</p> <p>Categories:</p> <p>External Access Only</p> <ul style="list-style-type: none"> • Search for people in other organizations <p>Guest Access Only:</p> <ul style="list-style-type: none"> • Access Team resources • Share files <p>Both:</p> <ul style="list-style-type: none"> • Use @ mentions • Make private calls • Use screen sharing 	
Putting it all together	<p>You try it!</p> <p><SL where learner creates a team from scratch, adds members, changes member role, allows for sharing of stickers, selects manage teams icon and archives/restores a team.> COMBINE THE CREATE A TEAM FROM SCRATCH SIM WITH THE GO TO GUIDE FOR TEAM OWNERS SIM</p>	
Knowledge Check	<p>Please see Assessment List with Answers Jan 2023.xlsx</p>	
Module Summary	<p>Let's Review</p> <p>In this module, you learned and practices how to create, organize, and manage teams – dedicated spaces for people to communicate and collaborate.</p> <p>Up Next</p> <p>Teams have been set up and members have been added! Now what? In the next module, learn all about channels, which are groups within the team where the work gets done.</p> <p>Your Opinion Matters</p>	

	Middle module summary	
--	-----------------------	--

Course Objective(s):

- Differentiate between types of channels.
- Create and organize channels within a team.
- Describe the functionality of the basic features in channels, including integration with M365 and Apps.

Module #5 Module Title: Channels		
Lessons	Content Description	Learning Interaction Type
Module/Item Description (for SFs)	Why is this important? Duration: XX minutes	
Module Overview (Rise landing page)	<p>Channels are the collaboration spaces within a team where the actual work is done. They are where you hold meetings, have conversations, and work on files together. In this module, you will learn what channels are all about!</p> <p>Upon completion of this module, you will be able to:</p> <ul style="list-style-type: none"> • Differentiate between types of channels. • Add, organize, and manage channels within a team. • Describe the functionality of the basic features in channels, including integration with M365 and Apps. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid – Microsoft Teams Features	
Overview of Teams and Channels	<p><u>Overview of Teams and Channels</u></p> <p>Text on left, image on right:</p> <p>Now that you are able to create, organize, and manage teams, let’s talk about channels! Teams are made up of channels, each of which can be dedicated to a specific department, topic, or project. Channels are collaboration spaces where members communicate, share ideas, and work effectively with one another.</p> <p><image: _NOPROCESS_TeamsAndChannels></p> <p>Watch the video below to learn more!</p> <p>Overview of teams and channels - Microsoft Support</p> <p>First things to know about teams and channels - Microsoft Support</p>	

	<p><u>Check for understanding!</u></p> <p>Channels are made up of teams.</p> <ul style="list-style-type: none"> • True • False <p>The tabs at the top of each channel link to which of the following? Select all that apply.</p> <ul style="list-style-type: none"> • Files • Other channels • Apps • Other teams • Services 	
Types of Channels	<p>Channels help to focus the work of specific teams within an organization and can be related to projects, departments, or fun topics to share with others. They are collaboration spaces within a team where team members communicate, share ideas, and collaborate effectively with one another.</p> <p><u>The General Channel</u></p> <p>By default, every team gets a General channel. This channel is good for any and all communication involving everyone in the team, such as announcements, whole team discussions, and file sharing. The General channel cannot be renamed, hidden, moved, or deleted.</p> <p><image on right _NOPROCESS_GeneralChannel next to text on left></p> <p><u>Standard, Private, and Shared Channels</u></p> <p>The General channel is an example of a standard channel, one of three types of channels available in teams: the other two being Private and Shared channels. Once a channel of one type is made, it cannot be converted into a channel of another type.</p> <p>Select each tab to learn more about each channel type.</p> <p><Tab interaction> OR <image of channels to see symbols of each type, select markers to see info></p> <p>Standard Channels:</p> <ul style="list-style-type: none"> • Good for day-to-day communication and file sharing within a team. • Includes all team members automatically. • Open to and searchable by all team members. • Can be created by any team member, unless the team owner changes permissions to limit those who can create channels. 	

	<p>Private Channels:</p> <ul style="list-style-type: none"> • Good for private conversations and document sharing between two people or among small groups within a team. • Visible and accessible only to selected members or guests of the team. • Team members must be invited to join private channels. • Can be created by any team member, unless the team owner changes permissions to limit those who can create channels. • Have dedicated SharePoint sites for secure files sharing. <p>Shared Channels:</p> <ul style="list-style-type: none"> • Good for collaborating with people outside of your organization or team. • Can be shared with other teams inside your organization. • People must be invited to join shared channels. • Can be created only by team owners. • Have dedicated SharePoint sites for secure file sharing. <p><u>Check for understanding:</u></p> <p>Drag and drop the description onto the type of channel to which it applies: <i>Standard Channels</i>, <i>Private Channels</i>, or <i>Shared Channels</i>.</p> <p><Card sort. The three categories are the three types of channels. Cards are the features of each.></p> <p>Use case in motion: Channels <Powtoon> (baby shower one)</p> <p>Watch the video below to see how channels work in a real-world example!</p>	
<p>Adding and Organizing Channels</p>	<p><u>Adding Channels</u></p> <p>Once you've created and added members to a team, it's time to set up some channels to house your conversations.</p> <p>To add a channel to a team;</p> <ol style="list-style-type: none"> 1. Select More options (...) next to the team. 2. Select Add channel. 3. Add a name and description. 4. Choose a privacy level for the channel. 	

1. *Standard* - Everyone on the team has access
2. *Private* - Specific teammates have access
3. *Shared* - People you choose from you org or other orgs have access
5. **Select** the **checkbox** so the channel automatically shows up in everyone's channel list.
6. Select **Add**.

Watch the video below to see how to create and add specific members to a private channel.

[Create and use private channels - Microsoft Support](#)

Check for understanding!

Place the steps for creating a private channel in the correct order.

Step 1: Select the ellipses next to the Team name.

Step 2: Select Add channel.

Step 3: Give the channel and name and description.

Step 4: Under the Privacy drop-down, choose Private – Specific teammates have access.

Step 5: Select Create.

Step 6: Add members to the channel.

People must already be members or guests of a team to be added to a private channel.

- True
- False

Tabs in Channels

At the top of each channel are tabs which link to channel posts, files, apps, and services. Select each tab below to learn more about tabs in the General Channel!

<tab interaction each has an image of an arrow pointing to it>

Posts – This is where you can see conversations that are taking place in the channel. All conversations are stored in the channel and accessible any time.

Files – All files shared within the channel will appear here. You can also upload, share, open, and download files from this location.

The + Sign – Select the + sign to add additional tabs that link to apps or services the entire channel can use.

Organizing Channels

	<p>By default, channels are sorted in alphabetical order, with the General channel at the top of the list. Recall that you can change the order of your teams on the teams list by selecting the team you wish to move and dragging it to its new location. This cannot be done with channels. The easiest way to sort channels other than alphabetically, is to number your channels (except the General channel, which cannot be renamed or moved).</p> <p><GIF call out channels in alpha order, select edit channel and rename two with numbers to show re-ordering></p> <p><u>Pin/Unpin Channels</u></p> <p><Text on left, GIF on right - Pin a channel, highlight its new position on Teams list, unpin channel ></p> <p>If you find you are always having to hunt a specific channel down or need quick access to a channel, pinning keeps it at the top of your channels list. To pin a channel, select the More options (...) next to its name, then select pin. Do the same to unpin. Feel free to click on the GIF for a closer look!</p> <p><u>Hide/Show Channels</u></p> <p><Text on right, GIF on left - hide a channel, highlight '1 hidden channel', show channel ></p> <p>You can also hide channels within a team, which is useful if there are channels in which you are not active. To hide a channel, select the more options ellipses next to the channel's name, then select Hide. Unhide the channel by selecting Show.</p>	
<p>Managing channels</p>	<p><u>Manage Channel Notifications</u></p> <p>Teams offers different ways to access, receive, and manage channel notifications by allowing you to choose how, when, and where notifications appear for each of your channels. There are three options:</p> <ul style="list-style-type: none"> • Select All activity to never miss a message. • Select Off to be notified only when you receive a reply or an @ mention. • Select Custom for the most control over channel notification settings. <p><Image on right, text on left></p> <p>Bookmark me!</p>	

Select the link below and bookmark it for future reference. After reading the article, select continue to complete a check for understanding question.

[Customize channel notifications in Teams - Microsoft Support](#)

Check for understanding.

Which of the following are settings you can choose when customizing channel notifications? Select all that apply.

All new posts

Deleted posts

Pinned posts

Include all replies

Channel mentions

Management Options for Each Type of Channel

Standard, private, and shared channels have different purposes within a team, as was discussed in an earlier lesson. They also differ with regard to how they are managed, as each type has its own set of management options.

1. Select More options (...).

2. Select Manage channel.

<timeline, one slide for each type of channel>

Standard channels:

For standard channels, including the General channel, this is where you can set preferences and permissions for channel moderation.

<image>

Private Channels:

In private channels, this is where you can add members, change their roles, change their roles, and set member permissions.

<GIF>

	<p>Shared Channels:</p> <p>In shared channels, this is where you can share the channel with specific people, a team, or a team you own. You can also set member permissions and view your invite list.</p> <p><GIF></p> <p>Next, let's look at some of the ways channels can be used to collaborate.</p>	
<p>Collaboration in Channels</p>	<p>Conversations in Channels</p> <p>In Microsoft Teams, team collaboration happens in channels. In a channel, members can:</p> <ul style="list-style-type: none"> • Start a conversation. • Reply to a message. • React to a message. • Save a message. • Edit a message. <p>Select the GIF for a closer look.</p> <p><GIF on right, text on left></p> <p><u>@Mentions</u></p> <p>Include an @mention before your message to ensure the specific members of the channel see it. You can @mention people individually or use tags to quickly reach a group of people all at once. You can also @mention an entire channel or the entire team. Once you've sent the message, everyone who is mentioned receives a notification <GIF on left, text on right></p> <p><u>Email the Channel</u></p> <p>Each channel within a team also has its own email address. This means that someone can send an email to the channel, and it will appear in the feed as a conversation. Channel members have the option to download the email, or reply to the message right in the feed. <GIF on right, text on left></p> <p><u>Check for understanding</u></p> <p>For which of the following can you use @mention? Select all that apply.</p> <ul style="list-style-type: none"> • An individual teammate • A different team • A small group of people within the team 	

	<ul style="list-style-type: none"> • A channel within the team <p>Once you have posted a message in a channel, you are not able to edit it.</p> <ul style="list-style-type: none"> • True • False 	
<p>Integration with M365, Apps, and Bots</p>	<p>Teams integrates fully with the Microsoft 365 suite of products to enable productivity across the business through either real-time collaboration or remote collaboration on project files.</p> <p>Every version of Teams comes with access to the web versions of Word, Excel, and PowerPoint to keep teams productive anywhere, anytime.</p> <p>There are a couple of ways to upload files to Teams. Once you upload a file, you can also share a link to it. That way, you don't have to upload multiple copies of the same file to share it in different places.</p> <p>Watch the video below to learn more! Upload and share files - Microsoft Support</p> <p><u>Check for understanding</u></p> <p>Where can you easily find all the items that have been uploaded to a channel in one location?</p> <ul style="list-style-type: none"> • Resources tab • Posts tab • Channel notifications • Files tab <p><u>Microsoft and Third-Party Apps</u></p> <p>The ability to integrate third-party apps helps Teams empowers users with specific business needs the tools they need without ever leaving the Teams platform. This improves business workflows and centralizes content for quick access.</p> <p><u>Accessing Apps</u></p> <p><Text on left, image on right></p>	

Apps let you do more in Microsoft Teams. They can show up in several places, depending on what they do and how they're built. Apps are accessible from:

- The **left navigation panel**.
- The **manage teams** option for a team.
- The **plus icon** tab in a channel.
- The **more options ellipses** under a post.

Select the GIF for a closer look

<GIF on right, text on left>

Watch the video below to learn more about using apps in Teams

[Find and use apps - Microsoft Support](#)

Check for understanding

What are connectors?

- Apps that allow one team to @mention another.
- **Apps that send notifications to a channel.**
- Apps that are used org-wide.
- Apps that send messages during a meeting.

You can post updates from social media in a channel.

- True
- False

Bots:

Bots are native tools in Teams to enable conversational interactions using your web service through text, interactive cards, and task modules. They're incredibly flexible.

What are Conversational Bots?

Conversational bots can be scoped to handle a few simple commands or complex, artificial-intelligence-powered and natural-language-processing virtual assistants.

They can be one aspect of a larger application, or completely stand-alone. done reviewing the information return to the course.

[Bots in Microsoft Teams - Teams | Microsoft Docs](#)

	<p><u>Check for understanding</u></p> <p>Identify the ways a bot can interact with a user in Teams. Select all that apply.</p> <ul style="list-style-type: none"> • Speech • Text • Interactive cards • Phone 	
Putting it all together	<p>Complete the following activity to practice creating a channel, adding an app, and uploading a file in Teams.</p> <p><Storyline simulation> Create a channel (standard), add an app, upload a file, use @mention.</p>	
Knowledge Check	Please see Assessment List with Answers Jan 2023.xlsx	
Module Summary	<p>Let's Review</p> <p>This module covered channels and everything that comes with them! You also saw how Teams integrates with Microsoft 365, Apps, and Bots, and practiced communication and collaboration tasks in channels.</p> <p>Up Next</p> <p>Teams offers many other features that provide a vast array of functionality and end-user benefits. Two of these features are chat and calling, which we will cover in the next module.</p> <p>Your Opinion Matters</p> <p>Middle module summary</p>	

Course Objective(s):

- Leverage commonly used features of Teams Chat to collaborate.
- Utilize call features in Teams.

Module #6 Module Title: Chat and Call Features		
Lessons	Content Description	Learning Interaction Type
Module/Item Description (for SFs)	<p>Why is this important?</p> <p>Duration: XX minutes</p>	

<p>Module Overview (Rise landing page)</p>	<p>Upon completion of this module, you will be able to:</p> <ul style="list-style-type: none"> • Identify commonly used features of the Teams chat feature. • Differentiate between channels and chat. • Describe the functionality of the Teams call feature. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
<p>Resources</p>	<p>Job Aid – Microsoft Teams Features</p>	
<p>Chat Feature</p>	<p>Teams Chat</p> <p>In addition to communicating on channels within a team, you can communicate with colleagues through the chat feature. From individual chats with just one other person to group chats, the chat feature has you covered. Private chats are great for one-on-one communication, while group chats work well for collaborations that may not be persistent or structured enough to warrant a channel in Teams. In addition, you can initiate a chat with anyone in your organization, even if you aren't on a team together.</p> <p>Watch the video below to see how to start individual and group chats in Teams.</p> <p>Start and pin chats - Microsoft Support (start a chat, name a group chat, pin/unpin)</p> <p><u>Chat with yourself</u></p> <p>Teams gives you a private chat with your most important teammate...you! Use this as a space to take notes, write drafts, or send files to yourself!</p> <p>For times when you want to draft messages, send files from one device to another, or get to know features a little better, you can start a chat with yourself. Everything you do in a regular chat you can also do in a chat with yourself. You'll see it pinned to the top of your chat list by default.</p> <p>Once you have a private or group chat set up, you can send, reply, and react to messages, share files, and place an audio or video call to teammates. See how in the video below!</p> <p><Camtasia video : post, schedule, reply, react, share file, record and send video clip, hide, mute, call></p> <p>Teams even gives you a private chat with...yourself! Use this as a space to take notes, write drafts, or send files to yourself!</p> <p><GIF></p>	

Chat versus Channel – <Process interaction with image on each slide>

Introduction

Teams offers multiple ways to communicate rapidly with internal associates. But when is it best to communicate in channels, and when is it best to communicate in chat?

Private Chats

Private chats are great for:

- One-to-one communication.
- Getting urgent information to a single person.
- Staying connected.

Group Chats

In group chats, you can:

- Communicate with select members of a team.
- Useful for communication that is not structured or persistent enough for a channel.
- Set standard, important, and urgent delivery options.

Channels

Channels are best for:

- Whole team collaboration on specific topics and projects.
- Collaboration in a predefined team.
- Sharing and working on files together, with access to a SharePoint site assigned to the team.

Summary

Chats and Channel are two different messaging environments in Microsoft Teams. Chats are more informal spaces to keep in touch with specific people on your team, while channels are team-based collaboration spaces for entire teams to share ideas, information, and work together.

Check for understanding

Chat/Channel/Both card sort

<Powtoon use case from course: boss happy with work.>

<p>Call Feature</p>	<p><u>Calls</u></p> <p>Calls are a quick way to stay connected in Teams. With the call feature, you can have one-on-one conversations or a call with several people. Calls are great for directly connecting with others to complete specific tasks or get questions answered quickly.</p> <p>The Teams call feature connects users within the organization regardless of geographical location. Because the call feature involves internal calls that never go to the Public Switched Telephone Network (PSTN), there are no local or long-distance charges associated with these calls.</p> <p>NOTE: Making and receiving external calls requires the Teams phone system license, which will be covered in detail in the next module of this learning path (link out to it here).</p> <p>Calls can be made to anyone inside your organization from several places within Teams. You can make a call from the:</p> <ol style="list-style-type: none"> 1. Calls tab on the left navigation panel 2. Call icon on a teammate’s contact card. 3. Call icon in the top right corner of a chat. <p>Select the image below for a closer look.</p> <p><image></p> <p>Watch the video below to see how to make and answer internal calls, see your call history, access voicemail, set up speed dial, manage contacts, and manage call notifications.</p> <p>Overview of Teams calls - Microsoft Support</p> <p><u>Collaborate with Calls</u></p> <p>There are many ways to collaborate when you are on a call in Teams. Watch the video below to learn how to transfer, merge, or park a call. You can also turn on live captions during a call, or use Cortana, Microsoft’s virtual assistant, when on your mobile device.</p> <p>Tips for Teams calls - Microsoft Support</p> <p><u>Check for understanding</u></p> <p>Your call history can be filtered by name or number.</p> <ul style="list-style-type: none"> • True • False 	
---------------------	--	--

	<p>What does it mean to park a call?</p> <ul style="list-style-type: none"> Place a call on hold while you take another call. Merge that call with another call. Place a call on hold on one device and pick it up on another. Place a call on hold to transfer it to another team member. <p>Before talking about the Teams Phone System in the next module, let's check your understanding of the Teams chat and call features with a knowledge check!</p>	
Knowledge Check	Please see Assessment List with Answers Jan 2023.xlsx	questions
Module Summary	<p>Let's Review</p> <p>Up Next</p> <p>Your Opinion Matters</p> <p>Middle module summary</p>	

Course Objective(s):

- *Define the Teams Phone System.*
- *Compare the Teams Phone System and Teams Call features.*
- *Identify features of the Teams Phone System.*
- *Define license requirements for the Teams Phone System.*
- *List three options to connect to the PSTN.(tab interaction with image and list of info)*
- *Set up Teams phone system in a simulated environment.*
Customize auto attendant in a simulated environment.

Module #7 Module Title: Teams Phone system		
Lessons	Content Description	Learning Interaction Type
Module/Item Description (for SFs)	<p>Why is this important?</p> <p>Duration: XX minutes</p>	
Module Overview (Rise landing page)	<p>While the Teams call feature allows you to make and receive calls within your organization, you need the Teams Phone System in order to make and receive calls outside you organization. This module describes the features, licensing requirements, and setup of the Teams phone system, allowing you to make and receive calls directly from Microsoft Teams.</p> <p>Upon completion of this module, you will be able to:</p> <ul style="list-style-type: none"> Define the Teams Phone System. 	

	<ul style="list-style-type: none"> • Identify features of the Teams Phone System. • Compare the Teams Phone System and Teams Call features. • Define license requirements for the Teams Phone System. • List three options to connect to the PSTN.(tab interaction with image and list of info) • Set up Teams phone system in a simulated environment. • Customize auto attendant in a simulated environment. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid – The Teams Phone System	
The Teams Phone System Defined	<p><image of cell phone with dial pad and teams logo on right, text on left></p> <p>The Teams phone system is a cloud-based system in which Microsoft Teams is the client app through which users make and receive external calls. Calls can be made on multiple devices such as regular desk phones, computers, mobile devices, and conference phones. The Teams phone system is an easy-to-use service that allows an organization to replace its existing Private Branch Exchange (PBX) with a set of features directly from Microsoft 365. Since the Teams phone system is a cloud service, it is always up-to-date.</p> <p><u>Features</u></p> <p>The Teams phone system enhances user experience by providing additional collaboration and communication features beyond the basic functions of Teams Call (as covered in the previous module). Teams phone system supports regular phone numbers, which can be migrated from an organization’s current provider or supplied by Teams. It is an end-user-friendly product with several unique features.</p> <p>Select each card below for details on popular features exclusive to the Teams Phone System. <Flipcards></p> <p><u>Auto Attendant</u> → Allows you to set up menu options to route calls based on caller input. Calls can be directed to the right department, a call queue, a person, voicemail, or an operator.</p> <p><u>Call Queues</u> → These are waiting areas for customers. Callers are greeted then put on hold with music until an agent assigned to the queue can take the call in first in, first out order.</p> <p><u>Emergency locations</u> → Establishes an emergency address for each phone number or Teams user within the organization so that emergency services know where to go if called.</p>	Obs 1,2,3

	<p><u>Direct Dial Phone Numbers</u> → Users have their own phone number they can use to make and receive calls from any device that has Teams installed.</p> <p><u>Access to Meetings</u> → Participants that are unable to join meetings from a Teams client can call in and join using a regular phone.</p> <p><info block>_To read more about all of the features the Teams Phone System has to offer on your own time, bookmark this link for future reference.</p> <p>Here's what you get with Phone System - Microsoft Teams Microsoft Learn</p>	
<p>Licensing Requirements and PSTN connection options</p>	<p>Before setting up the Teams Phone System, an organization must have the following requirements in place.</p> <p><u>Teams Phone System License</u></p> <p>To access and manage the Teams phone system, users must be assigned a Teams phone system license. Teams Phone System licenses are included with Office 365 E5 subscription plans, but must be purchased as an add-on for all Business and Office 365 E1/E3 subscription plans.</p> <p><u>PSTN Connectivity Options</u></p> <p>In order to make and receive external calls through Teams, the phone system needs to be connected to the PSTN. This can be done in several different ways:</p> <p>Bullet points</p> <p>Microsoft Calling Plan: Whether you choose a domestic, international, or pay-as-you-go calling plan, Microsoft becomes your PSTN carrier and service provider.</p> <p>Operator Connect: Allows your existing carrier to manage PSTN calling, as long as they participate in the Microsoft Operator Connect program.</p> <p>Teams Phone Mobile: With this option, a user's SIM-enabled phone number is also their Teams phone number.</p> <p>Direct Routing: Enables you to choose your own PSTN carrier and gives you the option to configure and manage it as well.</p> <p>You can also choose a combination of the above options, enabling you to design a solution for a complex environment or manage a multi-step migration.</p> <p><Info block>To learn more about the Teams Phone System and PSTN Connectivity options on your own time, bookmark the following links for future reference.</p>	<p>Obs 4, 5</p>

	<p>Plan your voice solution in Microsoft Teams - Microsoft Teams Microsoft Learn</p> <p>PSTN connectivity options - Microsoft Teams Microsoft Learn</p> <p>The remainder of this module focuses on the Teams phone system with Calling Plan option for small and medium sized businesses. This all-in-one cloud solution makes Microsoft the service provider and allows a business to have:</p> <ul style="list-style-type: none"> • Auto attendants to route calls where they need to go. • Call queues for high-traffic phone numbers. • Users with their own phone numbers. • Toll and toll-free numbers. <p>The next lesson will go through the steps to set up the Teams Phone System with Calling Plan for users in an organization.</p>	
<p><i>Setting up</i></p> <p>Teams Phone System User Set Up</p>	<p>Your customer’s organization has made the decision to use the Teams phone system with Calling Plan, a complete phone system designed for small and medium-sized business and enterprise customers. Now it’s time to show their Global Admin how to set it up.</p> <p>Before starting the process, make sure your customer has as many teams phone system and calling plan licenses as needed. These can be purchased through the Microsoft Admin Center, as shown in the GIF below.</p> <p><GIF> with caption: This customer has an Office 365 E3 subscription plan and is buying Teams Phone with Calling Plan bundle licenses.</p> <p><u>Bookmark</u>: Select the link below and bookmark it for future reference. Set up Microsoft Teams Phone System with Calling Plan emergency locations - Microsoft Teams Microsoft Learn</p> <p><u>User Set Up</u></p> <p>There are four major steps in setting up users with the Teams phone system that must be carried out by a Global Admin in the Teams and Microsoft 365 Admin Centers:</p> <ol style="list-style-type: none"> 1. Set up emergency locations. 2. Set up user phone numbers. 3. Assign phone system and calling plan licenses to users. 4. Assign phone numbers to users. <p>Once completed, users will be able to make and receive calls from any Teams device. They will also be able to call in to meetings from a regular phone if unable to join from a Teams client. Let’s begin! <Timeline with steps and videos for each step above></p>	<p>Obs 6, 7</p>

ER locations>set up user phone numbers>user licenses (phone system and calling plan)>assign user phone numbers

(process interaction OR timeline? Hard to add the check for understandings in though)

Step 1: Add an Emergency Location

The primary emergency location is the address to which emergency services will be sent when called. It is also the location that will be associated with an organization's main phone number in a later step of this process.

To add an emergency location in the **Teams admin center**:

1. Expand **Locations** in the left navigation panel.
2. Select **Emergency addresses**.
3. Select **Add**.
4. Enter a **name** for the location.
5. Select the **country or region**.
6. **Enter the address**. Turn on *Edit the address manually* if the address can't be found.
7. Select the **checkbox** to acknowledge the disclaimer.
8. Select **Save**.

Watch the video below to see how to add an emergency location.

<Video>

Step 2: Set Up Phone Numbers For Users

You cannot set up users before you get phone numbers they can use to make and receive phone calls from Teams devices. This step is necessary even if using existing phone numbers for your users. In that case, the numbers created in this step that can be replaced with existing numbers.

To set up user phone numbers in the **Teams admin center**:

1. Expand **Voice** on the left navigation panel.
2. Select **Phone numbers**.
3. Select **Add**.
4. Enter a **name and description** for the order.
5. Select a **country or region**.
6. Select **User** (subscriber) as the Number type.
7. Under **Quantity**, enter the **number** of user phone numbers needed.

8. To search for numbers by area code, select **Area code**. (You can also search by location if preferred by selecting *Search by city name* or *search by postal code*).
9. Enter the **area code** to search.
10. Select **Next** to reserve the number.
11. Select the **number** you want.
12. Select **Place order**, then **Finish**.

NOTE: It may take several hours for the new phone numbers to become available in Teams.

Watch the video below to see how to set up phone numbers.

<Video>

NOTE: It may take several hours for the new phone numbers to become available in Teams

Step Three: Assign Licenses to Teams Users

Both the Teams Phone System and Calling Plan license need to be assigned to each user in the organization who will use the phone system. This is done in the Microsoft 365 admin center.

To assign licenses to users in the **Microsoft 365 admin center**:

1. On the left navigation panel of the Teams admin center, expand **Billing**.
2. Select **Licenses**.
3. Select **Microsoft Teams Phone with Calling Plan**.
4. Select **Assign licenses** on the product details page.
5. Begin **typing a name** in the **Assign licenses to users** pane, then choose if from the list. Up to 20 users can be added at the same time.
6. Select **Assign**.
7. Select **Close**.

Watch the video below to see how to assign licenses to users.

Note: The customer in the video has an Office 365 E5 subscription plan and needs only the Teams Calling Plan license assigned.

<Video>

Step 4: Assign Phone Numbers to Users

In order for users to make or receive external calls, phone number must be assigned to them. After a number is assigned, it will be listed in the dial pad that appears under the Calls tab in Teams.

To assign phone numbers to users in the **Teams Admin Center**:

1. Expand the **Voice** on the left navigation panel..
2. Select **Phone numbers**.
3. Select an **unassigned number** from the list.
4. Select **Edit**.
5. Under **Assigned to** search and select a **user**.
6. Select **Assign**.
7. Search for and select the **Emergency Location**.
8. By default, the **user will receive an email** with their phone number, but you can turn this action off if you choose.
9. Select **Apply**.

NOTE: It may take several hours before newly assigned phone numbers are available in Teams.

Watch the video below to see how to assign phone numbers to users.

Teams Phone Dial Pad

Once a user is set up with the Teams phone system and calling plan, a dial pad is added to the user's Teams call feature. Now the user can make and receive external calls from any Teams device.

<Image of teams call tab open without then with dial pad on right, text on left>

Check for understanding

Customers cannot set up service or subscriber numbers without first establishing an emergency location.

- True
- False

By which of the following can you search for a phone number for users? Select all that apply.

- Area code
- Company name
- City
- Time zone
- Postal Code

Phone numbers cannot be assigned to users until after they are assigned Teams phone system and calling plan licenses.

- True

	<ul style="list-style-type: none"> • False <p>The dial pad will immediately appear after assigning a phone number to a user.</p> <ul style="list-style-type: none"> • True • False <p>In addition to assigning Teams phone numbers to individuals within an organization, the Teams phone system with calling plan allows an organization to set up an auto attendant. Auto attendants provide a menu of options that connect a caller with the appropriate person based on the caller's input. The next lesson focuses on how to set up and customize an auto attendant in Teams.</p> <p>Finished Teams Phone System with Calling Plan setup - Microsoft Teams Microsoft Learn</p>	
<p>Create and Customize Auto Attendant</p>	<p>A popular feature provided by the Teams phone system is the auto attendant. Auto attendants allow organizations to set up menu options to route calls based on caller input. This guides people who call an organization to the right department, person, or operator.</p> <p>This lesson focuses on the process of setting up and customizing an auto attendant for an organization.</p> <p>Before starting the process, make sure your customer has a resource account license available in addition to Teams phone system and calling plan licenses. The resource account license can be purchased through the Microsoft 365 Admin Center (under the Billing > Purchase services tabs).</p> <p><image on left, text on right></p> <p>Bookmark: Select the link below and bookmark it for future reference.</p> <p>Set up Microsoft Teams Phone System with Calling Plan for small to medium businesses - Microsoft Teams Microsoft Learn</p> <p><u>Auto Attendant Set Up</u></p> <p>There are five major steps in setting up an auto attendant that must be carried out by a Global Admin in the Teams and Microsoft 365 Admin Centers:</p> <ol style="list-style-type: none"> 1. Set an emergency location (if one has not been set up). 2. Set up a service phone number. 3. Create a resource account. 4. Assign a license and phone number to the resource account. 5. Set up an auto attendant. 	

During the last step, organizations can customize their auto attendant by recording greetings, setting hours, and determining call routing.
Let's get started!

MIRROR SET UP OF SECTION ABOVE. THIS TIME THE STEPS WILL BE SL SIMS, NOT VIDEOS. NO NEED TO DO THE ER LOCATION ONE – REFER BACK TO PREVIOUS LESSON AND BOOKMARK LINK. THEN SL SIMS FOR REST OF STEPS.

ER locations>set up service phone number>set up a resource account>assign MS Teams resource account license>assign a phone number>set up auto attendant

First, need to set up a resource account and acquire a phone number for that account, setting the foundation for auto attendant or call queue. (Harry's lab sim)

Then customize auto attendant – (daily hours, holiday schedule, options...) Harry's lab sim

Step 1: Add an Emergency Location

The first step to setting up an auto attendant is the same as the first step when setting up the phone system for users: to add an emergency location. Recall that the emergency location is the address to which emergency services are sent when called. If you already have an emergency location set, you do not need to do it again to set up an auto attendant. Below is the process again for you to review.

<Timeline block from setting up user lesson>

Step 2: Set Up a Service Number

This step is similar to setting up a user number in the previous lesson. A service number, however, is a toll or toll-free number used for auto attendants, audio conferencing, or call queues. This number will also become the organization's main phone number.

Complete the simulation below to set up a service number in the **Teams Admin Center**.

<Storyline Sim of Step 2>

Step 3: Create a Resource Account

In Teams, a resource account is required and sets the foundation for each auto attendant or call queue.

To create a resource account in the **Teams Admin Center**:

1. Expand the Voice Tab.
2. Select Resource Accounts.
3. Select Add.
4. Fill out Display name, Username, and the Resource account type in the Add resource account pane. Because we are setting up an auto attendant, we chose auto attendant for the Resource account type.
5. Select Save.

Watch the video below to see how to create a resource account.

<Video with callouts>

Step 4: Assign a License and Phone Number to the Resource Account

While assigning a phone number to a resource account is optional, you must assign both a resource license and phone number to any resource account that supports a call-based auto attendant. This number will be the one outside callers dial to reach the call menu that will direct their calls based on their input.

The process to assign a license and phone number to a resource account is similar to the process of assigning a license and phone number to a user (covered in the previous lesson).

To assign a license and phone number to a resource account in the Microsoft Admin and Teams Admin Centers:

Assign License:

1. Expand the Users tab, then select Active Users.
2. Select the resource account that needs the license.
3. Select the Licenses and Apps tab.
4. Select the Microsoft Teams Phone Resource Account license.
5. Select Save.

Assign Phone Number

1. In the Teams Admin Center, expand the Voice tab.
2. Select the Resource accounts tab.
3. Select Assign/unassign for the resource account that needs a phone number.
4. Choose the type of number you want to use from the Phone number drop-down.
5. In the Assigned phone number drop-down, select the service number previously added.
6. Select Save.

	<p>Watch the video below to see how to assign a license and phone number to a resource account.</p> <p><video with call outs></p> <p><u>Step 5: Set Up an Auto Attendant</u></p> <p>Once a resource account has been established and assigned a license and phone number, an auto attendant can be set up and customized.</p> <p>Complete the activity below to set up an auto attendant in the Teams Admin Center.</p> <p><Storyline Sim></p> <p><u>Check for understanding</u></p> <p>To support a call-based auto attendant, a resource account must have which of the following? Select all that apply.</p> <ul style="list-style-type: none"> • Resource account license • A dedicated dial key • An operator • Caller ID • A phone number <p>Auto attendants can be customized</p> <ul style="list-style-type: none"> • True • False <p>There are several options available when it come to customizing an auto attendant. Continue to the next lesson for an overview.</p>	
<p>Customization of Auto Attendant</p>	<p>The Teams auto attendant does more than provide a menu system for incoming calls. Additional features include customizable after-hours and holiday handling, dial-by-extension or by dial-by-name directory search, and dial scope, the ability to limit the directory search.</p> <p>Let's see how to customize hours, set holiday hours, and limit the directory search below.</p> <p><Carousel GIF of set hours and holiday hours, image of dial scope></p>	
<p>Knowledge Check</p>	<p>Please see Assessment List with Answers Jan 2023.xlsx</p> <p>3.</p>	

Module Summary	<p>Let's Review</p> <p>Up Next</p> <p>Advance to the next module to learn how to schedule, join, and collaborate effectively during meetings in Teams.</p> <p>Your Opinion Matters</p> <p>Middle module summary</p>	
----------------	---	--

Course Objective(s): Meetings

- *Schedule, start, and join meetings in Teams.*
- *Identify video conferencing features used most often.*
- *Identify accessibility features of Teams meetings.*

Module #8	Module Title: Meetings/Video Conferencing	
Lessons	Content Description	Learning Interaction Type
Module/Item Description (for SFs)	<p>Why is this important?</p> <p>Duration: XX minutes</p>	
Module Overview (Rise landing page)	<p>Teams meetings are a integral part of effective collaboration amongst remote groups of people in an organization. In this module, you will be introduced to the key features and best practices of meetings in Teams.</p> <p>Upon completion of this module, you will be able to:</p> <ul style="list-style-type: none"> • Schedule, start, and join meetings in Teams. • Identify video conferencing features used most often. • Identify accessibility features of Teams meetings. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid – Microsoft Teams Features	
Meeting Basics	<p>Messaging, chats, and calling to stay connected through Teams are all features that keep teams connected and businesses informed. But sometimes people need to see one another to build community and engagement. Teams meetings and video conferencing make it easy to meet, share ideas, and work together.</p> <p><u>Using the Calendar</u></p>	

Watch the video below to learn how to view, manage, and schedule meetings from your Calendar.

[Manage meetings - Microsoft Support](#)

Use Case

Watch the video below to see a real-world example of a meeting.

<Powtoon: Calendar>

Add a Shared Calendar to a Channel

Access all events in a given channel by adding a shared calendar. All members, except guests, can add events to the calendar and view event details.

Select the <GIF> below for a closer look at added a shared calendar to a channel (OLD course Calendaring blocks)

Check for understanding

Your Teams calendar is kept in sync with your Outlook calendar.

- True
- False

When scheduling a meeting using the calendar and trying to decide on a time that best fits the other attendees' schedules, you can see everyone's availability in a calendar view by...

- Selecting one of the suggested times that appear under the date.
- **Selecting Scheduling Assistant.**
- Changing the time zone to that of each attendee.
- Open the meeting up to a channel dedicated to the group.

Instant Meetings

Sometimes, you need to meet privately or with a group of people in an instant. Teams has a **meet now** feature that allows you to do so. You can start an on-the-spot meeting by choosing Meet Now from your calendar, a channel, or a chat, then inviting others to join. Watch the video below to see how to start and instant meeting from each location.

<video>

Audio Conferencing

Sometimes, you can't attend a Teams meeting using the Teams app on your computer or mobile device. Audio Conferencing enables users to call in to meetings from their phones, so you never miss a meeting if

your internet connectivity is unstable or if you are travelling. Audio conferencing also enables meeting organizers and leads to bring people into meetings that have already started by dialing out.

To set up audio conferencing, you need a license for users who plan to schedule or lead meetings. Meeting attendees who dial in don't need any licenses assigned to them or other setup. All Business and Enterprise subscriptions need to purchase audio conferencing add-on licenses except those who have the Office 365 E5 subscription plan.

<image of someone dialing phone on left, text on right>

Bookmark: [Audio Conferencing in Microsoft 365 - Microsoft Learn](#)

Inviting People During a Meeting

There will be instances where you need to bring someone into a meeting that has already started. Luckily, there are several ways to do this. Select each tab below and watch the video to learn more.

<horizontal tab>

Share meeting link

To share a meeting link with others,

1. Select Show Participants from the meeting controls bar.
2. Select Share invite.
3. Select Copy meeting link.
4. Share the link in a channel, in the meeting's chat, or email the link to those outside your organization.

Search for a team member

Easily search for and invite a team member by

1. Select Show Participants from the meetings control bar.
2. Type @ and the team member's name in the 'Invite someone or dial a number' field.
3. Select the team member and Teams will call them.

Dial-out

With audio conferencing, the meeting organizer or leader can call anyone inside or outside the organization so they can join from their phone. Here's how:

1. Select Show Participants from the meeting controls bar.
2. Type the phone number into the 'Invite someone or dial a number' field.
3. Select the phone number and Teams will call them. All they have to do is answer their phone!

	<p>Watch the video below to see each of these processes in action. <video showing all three></p> <p><u>Meeting Controls in Teams</u></p> <p>While in a meeting in Teams, you can easily customize your view, participate with others, and more by accessing different functions from the meeting controls at the top of your screen.</p> <p>Select and bookmark the link below After reading about the variety of features available to you during a Teams meeting that enhance the experience, return to the module.</p> <p>Use meeting controls in Teams - Microsoft Support</p> <p><u>Check for understanding</u></p> <p>You can start an instant meeting from...(Select all that apply).</p> <ul style="list-style-type: none"> • A private chat • A channel • A group chat • The calendar <p>Only a meeting organizer can add an app during a meeting.</p> <ul style="list-style-type: none"> • True • False <p>(organizer or presenter can)</p>	
<p>Recording Meetings</p>	<p>Any Teams meeting can be recorded by the meeting organizer or anyone in the same organization, with or without an accompanying transcript. The recording captures all audio, video, and screen-sharing activity that takes place and can be securely shared across an organization.</p> <p>Note: Meeting recordings won't capture whiteboards, annotations, shared notes, and won't include videos or animations embedded in PowerPoint Live presentations.</p> <p><u>Recording Settings</u></p> <p>All settings for recording a Teams meeting are managed in the Teams Admin Center. Here, an admin can set a default expiration date for a recording (days), determine whether to generate a transcript of the meeting, and give attendees the option to turn on live captions.</p> <p>Note: Teams meetings transcript and live captions features are currently only available on the Teams desktop app.</p> <p><image on left, text on right></p>	

Recording and Transcribing a Meeting

To record and transcribe a meeting in Teams:

- 1) Select More actions from the meeting controls bar.
- 2) Select Start recording. Everyone in the meeting will be notified that the meeting is being recorded and transcription has started.
- 3) A transcript of the meeting will be automatically generated as the meeting records if the transcription option is turned on in the Teams Admin Center.
- 4) End the recording by selecting Stop recording, which also stops the live transcription. Otherwise, the recording will end when the meeting does.

<GIF> (transcription only)

Find Recorded Meetings <Process Interaction>

Recordings are available in different places depending on the type of meeting (Channel or Non-Channel).

Channel meetings

For channel meetings, the recording will be stored in a **Recordings** folder in the **Files** tab for the channel. The **Files** tab stores all files in a SharePoint site and document library for the channel. The recording will also appear in the channel conversation. Everyone who is a part of the channel will have permission to edit and view the recording.

<screenshots od GIF to show both>

Calendar Instant Meetings

For all other meetings, the recording is processed and saved to the Recordings Folder in the OneDrive of the person who started the meeting. It will also appear in the meeting chat, and is available to all participants of the meeting there.

<screenshots or GIF to show both>

Scheduled Meetings

The recording and transcript of a scheduled meeting can be found in the details tab of the meetings event on the calendar.

<screenshot or GIF to show how to find it>

Check for understanding

Access to Recorded Meetings <tab interaction, gif for each>

After the recorded meeting ends, it appears in the channel conversation or meeting chat. Select the recording to watch, share, download the meeting, download the transcript, or manage the expiration date.

Select the tabs below to see each of these options in action.

Watch and Share the Recording:

Watch the recording by **selecting Open**, or **generate a link** with which to share the recording. <image>

Download the Recording and the Transcript

Only the person who started the recording and the meeting organizer can download the recording and the transcript. To download the recording:

1. Open the recording
2. Select more options (...)
3. Select Download

To download the transcript, select download underneath 'Transcript'
<image>

Manage the Expiration Date

Your admin's settings determine whether (and when) a recording will expire. If your recording has an expiration date, you'll see a message indicating that when the recording pops into the meeting chat after the meeting ends.

To change the expiration date on a recording:

1. Select View or change the expiration date here from under the recording.
2. Select the current expiration date.
3. Open the drop-down to see your options for changing the date. You can extend the recording's availability for a certain number of days, pick a specific date on the calendar, or choose **No expiration** if you don't want it to be deleted.

<GIF>

	<p>To learn more about managing recordings on your own time, bookmark these links for future reference.</p> <p>Record a meeting in Teams - Microsoft Support</p> <p>Play and share a meeting recording in Teams - Microsoft Support</p> <p><u>Check for understanding!</u></p> <p>Who can download a recorded meeting? Select all that apply.</p> <ul style="list-style-type: none"> • The meeting organizer. • Any participant from the same organization as the meeting organizer. • The person who started the recording. • External users. • Guests. 	
<p>Accessibility</p>	<p>Microsoft Teams has a number of accessibility features available to ensure that all users can participate and have the best possible experience during meetings. Let's look at some of these features.</p> <p><u>Live Captions</u></p> <p>Teams can detect what's said in a meeting and present real-time captions. Meeting participants can turn on their live captions (and change the language of the captions) under the more options menu. The captions generated will include speaker attribution—so you'll see not only what's being said, but who's saying it.</p> <ol style="list-style-type: none"> 1. Go to More options. 2. Select Turn on live captions. 3. You can change the language of the live captions as well. <p><u>Sign Language</u></p> <p>Select the GIF below for a closer look.</p> <p>Sign Language View keeps sign language interpreters and those who use sign language in consistent on-screen locations throughout the meeting. Sign Language View can be enabled on the fly during a meeting or as a setting for all meetings and calls.</p> <ol style="list-style-type: none"> 1. Select More options (...). 2. Select Settings. 3. Select Accessibility. <p>Select the GIF below for a closer look.</p> <p><u>High Contrast</u></p>	

	<p>Participants with low vision benefit from a high contrast setting to make it easier to distinguish between the elements on the screen. To apply a high contrast theme to Teams:</p> <ol style="list-style-type: none"> 1) Select Settings and more next to your profile picture. 2) Select Settings > General. 3) Select the High contrast theme. <p>Bookmark: To read more about accessibility features available in Microsoft Teams on your own time, check out the following articles:</p> <p>Accessibility tools for Microsoft Teams - Microsoft Support</p> <p>Accessibility guide for Microsoft Teams Admins - Microsoft Teams Microsoft Learn</p>	
Putting it all together	Simulation covering many of the actions above.	
Knowledge Check	<ul style="list-style-type: none"> • Please see Assessment List with Answers Jan 2023.xlsx 	
Module Summary	<p>Let's Review</p> <p>Up Next</p> <p>Your Opinion Matters</p> <p>Middle module summary</p>	

Course Objective(s):

Module #9	Module Title: Customer-Based Scenarios	
Lessons	Content Description	Learning Interaction Type
Module/Item Description (for SFs)	<p>Why is this important?</p> <p>Duration: XX minutes</p>	
Module Overview (Rise landing page)	<p>In this module, you will be presented with common issues our customers have in Teams. By applying what you have learned about Teams and its features in previous modules, your goal is to successfully resolve each customer's issue.</p> <p>Learning Objectives</p>	

	<p>Upon completion of this module, you will be able to:</p> <ul style="list-style-type: none"> Assist with Teams customer issues in a simulated environment. <p>To get started, select Resources below or the Start Module button above to download the course job aids.</p>	
Resources	Job Aid – All four	
Jenn’s Issue	<p>You take a call from Jenn...</p> <p><Rise Scenario></p> <p>Title: Sharing Files</p> <p>Intro Jenn is the owner of a retail company and needs her team to document marketing expenditures for critical purchases. After completing the verification process, you scope the issue for more details.</p> <p>My team is entirely remote, and we need a way to share and update expense spreadsheet files so that they are easily accessible to present and discuss in a Teams video call.</p> <ul style="list-style-type: none"> In addition to sharing and presenting, would you also like to collaborate on these files in real-time during the video calls? <ul style="list-style-type: none"> Yes! That's exactly what I'm looking for! SharePoint is your best option. You can put all your files in one location, share with the team, and present any file during a call. <ul style="list-style-type: none"> That could possibly work, but what if we want to quickly call and talk about edits? It would be great to be able to do it from Teams. One option is to use your personal OneDrive to share files individually with each member your team and present files being discussed during a call. <ul style="list-style-type: none"> That's true, but I'd love to be able to work on the spreadsheet and quickly launch a face-to-face meeting in Teams if needed. <p>Also, each line of business has its own expense spreadsheet. Is there a way to upload and organize files by line of business in Teams?</p> <ul style="list-style-type: none"> I recommend SharePoint - it puts all files in one location for the team to access. <ul style="list-style-type: none"> How does that organize files by line of business, and how we will we keep track of conversations about each? 	

	<ul style="list-style-type: none"> • Creating a channel for each line of business and uploading files there would provide each line of business with its own conversation thread. <ul style="list-style-type: none"> ▪ Yes! This way we can easily keep track of specific discussions associated with each business line's expense spreadsheet. • Create a folder for each line of business in your OneDrive. This will be easier to find, share, and present that line's specific spreadsheet. <ul style="list-style-type: none"> ▪ Yes! This way we can easily keep track of specific discussions associated with each business line's expense spreadsheet. <p>Jenn says: Ah yes, I'd forgotten that Teams integrates with Microsoft 365! I have already created a channel for each line of business. Can you remind me how to upload the Excel spreadsheets?</p> <p>You say: Of course! Please share your screen, and I can walk you through the process.</p> <p>Complete the activity below to show Jenn how to add files to channels in Teams</p> <p>(20 padding)</p> <p>(no padding)</p> <p><Storyline Simulation - @mention, add file, show files tab></p> <p>(no padding)</p> <p><u>Success!</u></p> <p>By uploading files for each line of business in separate channels, Jenn's team can easily find and collaborate during meetings. You've resolved the case and received 5 stars.</p> <p><image of five stars on the right, text on the left></p>	
<p>Amara's Issue</p>	<p><u>You take a call from Amara...</u></p> <p>Amara is an admin for a medium-sized distributing company and has reported some issues with Teams meetings. After completing the verification process, you scope the issue for more details.</p> <p>Question:</p> <p>Amara is frustrated. She can record a meeting, but does not see the option to start transcribe it as well. Where can Amara change the setting to allow for transcription?</p> <ul style="list-style-type: none"> • During a meeting, under more options • In the meeting invite 	

	<ul style="list-style-type: none"> • In the Teams Admin Center • In the SharePoint site for the team <p>Amara asks if you could show her how to change the setting. She shares her screen and navigates to the Teams Admin Center.</p> <p>Complete the activity below to show Amara how to enable transcription.</p> <p><Storyline simulation - turn on transcription></p> <p>Amara reports that transcripts are being generated for all of her meetings. She then asks if there is a way to request that someone join an ongoing meeting by calling them on their phone.</p> <p>There will be instances where you need to invite someone to join a meeting that has already started.</p> <p>Question:</p> <p>What license will Amara, as the meeting organizer, need to enable her to dial out to others so they can join on their phone?</p> <ul style="list-style-type: none"> • Teams Calling Plan • Audio Conferencing • Teams Phone System • Teams Phone Resource Account <p>Amara has an Office 365 E5 subscription plan in which that license is included. She asks you to show her where she can call people from within a meeting.</p> <p>Complete the activity below to show Amara how the dial out feature works in Teams</p> <p><Storyline simulation></p> <p><u>Success!</u></p> <p>Amara is thrilled that she can accommodate those who need to join by phone, and thanks you for helping her with both of her questions. You've resolved the case and received 5 stars.</p> <p><image of five stars on the left, text on the right></p>	
<p>Leon's Issue</p>	<p>You take a call from Leon...</p> <p><Rise Scenario></p> <p>Title: Large Team</p> <p>Intro Leon is the admin for a coffee supply company. Leon has a question regarding Teams, which the company uses as its primary communication and collaboration tool.</p>	

I suggest creating a separate team for each department and only add the members of that department to ensure it is private

Hmmm...I feel like having the departments be part of the existing Team would make more sense. Let me ask you another question...

One option is to create an email group for each department. That ensures privacy and allows members to communicate and collaborate effectively.

Seems like email groups would be a hassle. And what if they wanted to meet face-to-face? Let me ask you another question...

I see two options; you could create a private channel or a group chat for each department and invite members to join.

That sounds like the way to go. Let me ask you another question...

Each group needs to have access to store documents securely but also access during a meeting. Would a channel or group chat be better for this.

Channels. Each channel has its own SharePoint site in which files can be stored. Only members of that channel can access the SharePoint.

Perfect!! One more question - please remind me how to create private channels, add members, and manage permissions?

Group chats. Members can upload files to chats and keeps them associated with that chat.

Hmmm...I'd rather have a more secure location to store the files.

Actually, setting up a OneDrive is the best option for storing files securely.

Seems like accessing those files for a meeting could take some time.

You say: I can definitely do that. Please share your screen.

Complete the activity below to show Leon how to create a private channel, add members, and manage permissions

<Storyline Simulation - >

Success!

Leon is so happy that each department within the larger team has its own private communication and collaboration space where they can

	<p>easily share and work on files together. You've resolved the case and received 5 stars.</p> <p><image of five stars on the right, text on the left></p>	
<p>Garrison's Issue</p>	<p>You take a call from Garrison...</p> <p><Rise Scenario></p> <p>Title: What Happened?</p> <p>Intro Garrison is one of three admins for an office furniture company. He needs help figuring out a user issue.</p> <p>We have a client who is no longer able to join the monthly meetings that he had been able to join before.</p> <p>Do they have Teams? They can't join a meeting without Teams.</p> <p>But they have never had Teams and have joined previous meetings.</p> <p>That's odd - let's check their guest and external access.</p> <p>That sounds promising!</p> <p>Are they trying to join from a different device or client?</p> <p>No...same device - but how would that make a difference?</p> <p>They need to be able to connect to join meetings, but I don't want them to have access to the team's shared files.</p> <p>They must have been an external user. We need to check the user settings in the Teams Admin Center.</p> <p>Yes, maybe someone changed user access while I was on vacation.</p> <p>That's no problem! Neither guest nor external users ever have access to a team's shared files.</p> <p>Hmm...I'm pretty sure guest and external user access is different.</p> <p>That's not possible, both guest and external users have access to a team's shared files.</p> <p>Really? But guest and external user access isn't the same.</p> <p>Garrison says:</p> <p>Please walk me through how to check user access?</p> <p>You say:</p> <p>Will do! Please share your screen.</p> <p>Complete the activity below to help Garrison check user access in the Teams Admin Center.</p>	

	<p><Storyline Simulation></p> <p><u>Success!</u></p> <p>Garrison thanks you for helping him enable external user access as it was mistakenly turned off. You've resolved the case and received 5 stars.</p>	
<p>Skype's Issue</p>	<p><u>You take a call from Skype...</u></p> <p>Skype is admin for a travel agency that recently started using the Teams that would like to and has reported some issues with Teams meetings. After completing the verification process, you scope the issue for more details.</p> <p>Skype is trying to set up an auto attendant for the agency but is having issues. Which of the following does she need to set up an auto attendant?</p> <ul style="list-style-type: none"> • An audio conferencing license • An Office 365 E5 account • A resource account with license and phone number • User phone numbers <p>Skype shares that she has set up a service number and the correct licenses. Additional questions reveal that she hasn't created a resource account. Let's help her out.</p> <p><Storyline simulation></p> <p><u>Success!</u></p> <p>Skype reports that she was able to set up the auto attendant now that the resource account has an assigned phone number. She confirms the issue is resolved, and gives you 5 stars</p> <p><image of five stars on the left, text on the right></p>	
<p>Module Summary</p>	<p>Let's Review</p> <p>Up Next</p> <p>Your Opinion Matters</p> <p>Middle module summary</p>	

Course Objective(s):

- *Define Teams*

Module #10 Module Title: Cumulative Assessment and Summary		
Lessons	Content Description	Learning Interaction Type
Module/Item Description (for SFs)	Why is this important? Duration: XX minutes	
Module Overview (Rise landing page)	Upon completion of this module, you will be able to: To get started, select Resources below or the Start Module button above to download the course job aids.	
Resources	Job Aid – all four	
Cumulative Assessment	Please see excel assessment spreadsheet	25 questions
Module Summary	<p>Congratulations...</p> <p>You now have a foundational understanding of Microsoft Teams, its features, and how our customers use the application. You are able to help customers identify which Microsoft 365 subscription plan including Teams best fits their needs and are able to navigate the Teams Admin Center and its functions. You have foundational knowledge of the Teams channels, chat, call features, and meetings, and are able to aid in the set-up of the Teams Phone System with Calling Plan. Finally, you have practiced applying what you learned through customer-based scenarios.</p> <p>You are now able to...</p> <ul style="list-style-type: none"> • Define Teams. • Identify the best-fit option for Teams licensing and subscription plans given specific business needs. • Access and navigate the Teams Admin Center. • Describe how to create, organize, and manage teams, channels, and chats. • Explain the functionality of the basic features in teams, channels, and chats. • Leverage Teams integration with Microsoft 365, Apps, and Bots to meet communication and collaboration needs. • Describe the functionality of the Calls feature. • Describe the benefits and functionality of the Teams Phone System with Calling Plan. 	

	<ul style="list-style-type: none">• Set up users and auto attendants in the Teams Phone System with Calling Plan. <p>Final Thoughts</p> <p>Having a foundational knowledge of Microsoft Teams and how it can positively impact communication and collaboration for businesses is a great value-add to our customers. Think about how you can apply this knowledge while supporting your role as an agent.</p> <p>Your Opinion Matters</p> <p>End of course summary</p>	
--	--	--

Job Aids:

1. Job Aid – Defining and Initiating an Assist 365 Diagnostic
2. Job Aid – Choosing the Appropriate Assist 365 Diagnostic
3. Job Aid – Analyzing Assist 365 Diagnostic Results
4. Job Aid – Commonly Used Assist 365 Diagnostics