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Software Training Plan

CIS 285

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Objectives

The main objective of this manual is to help the user understand and thoroughly learn the functionality of Microsoft Teams. This manual is intended for Starbucks employees who have begun using Teams for the first time, but it is comprehensive enough to benefit users of all technical skill levels, including beginners, intermediate users, and experts.

After completing the software training, the user will be able to do the following tasks -:

- Use Teams efficiently.
- Incorporate various tools offered by Microsoft into Teams.
- Utilizing file storage for better accessibility.
- Schedule meetings.
- Create and assign tasks.

Company Overview

What is Starbucks?

Starbucks is a multinational chain of coffee houses and roasteries. It is the world's largest coffee house chain.

Who is our user?

Our main target audience is the employees who work in the company outlets.

How will the new software benefit the company?

Since Starbucks is a coffee house and requires milk, coffee and other materials regularly, it is important to maintain fresh stock. Hence, using Teams, you can effectively communicate with the supplier and in-between the employees which will help the company.

How will Microsoft Teams benefit the employees?

• Teams can help employees communicate more effectively and share their availabilities as per their shifts and hence coordinate.

- Those employees who regularly give updates on teams will be rewarded since they are seen as giving more input and working harder than others.
- They will also be given bonuses based on their work done. In short, it makes the lives of the employees easier.

Software Overview

What are Microsoft Teams?

Microsoft Teams is a software where employees or group members can come together and collaborate with each other. The whole organization can benefit from using teams, as it boosts your productivity.

Why use Teams?

It can integrate and keep your whole work files organized in a single place. You don't have to bounce from one app to another, all the work can be done on a single application.

Outline

The training will place over a period of 7 days.

- On the first day, installation, logging in and basic overview will be taught
- On the second day, setting up Teams will be taught.
- On the third day and fourth day, basic usage of teams will be covered
- On fifth and sixth day, advanced usage of teams will be covered
- On the seventh day, basic Troubleshooting will be covered

A quiz will be organized for employees to check their knowledge on Teams and their practical skills.

Installation Guide

- How to download Microsoft Teams for Desktop, Laptop, or mobile
- How to Login into Microsoft Teams

Setting up Microsoft Teams

- Creating Teams
- Joining Teams
- Setting up Calander

Basic usage of Microsoft Teams

• Create and join Meetings

- Meeting Controls
- Activity centre
- Chat section
- Calls
- Changing Accounts

Advanced usage of Microsoft Teams

- Creating and Managing Channels
- Setting up apps in Teams
- Configuring usage of apps in Teams
- Integration across Microsoft applications

Training

Quick Installation Guide

In order to download official Microsoft Teams software for your device, you can go to the official Teams and select Download the new Teams app (Teams for work or school) or <u>click here</u> to download the software.

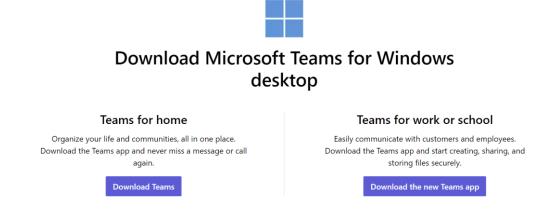


Figure 1. Download Page 1

If you want to download the Teams mobile application then you can open Play Store/App Store depending on your platform (Android or IOS), and search for Teams or <u>click here</u> to download Microsoft Teams for mobile phones.

Once downloaded simply open the file, and a new window will open up.

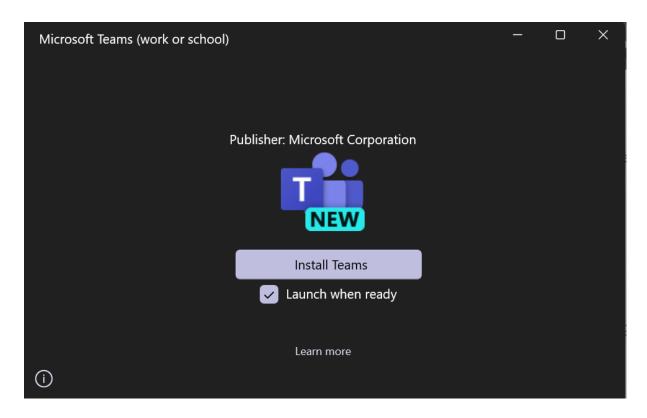


Figure 2. Installation Page

Simply click upon "Install Teams" and the installation will begin.

Once the installation is complete, you will be prompted to select/insert your work mailing address.

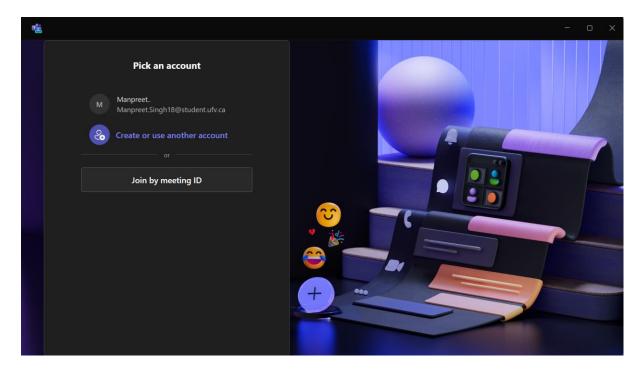


Figure 3. Login Page 1

Simply select your account and login in the application.

Once you are logged in with your work mail, you will see the following interface.

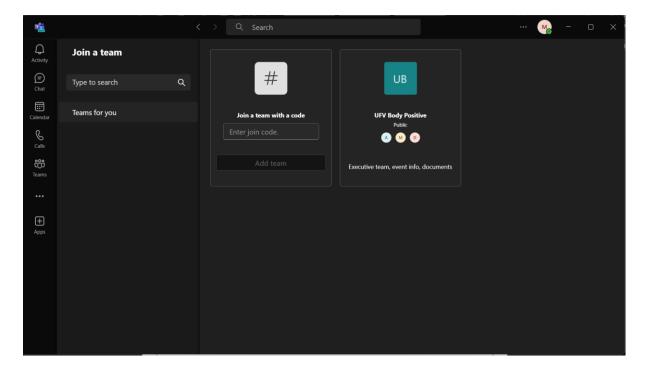


Figure 4. Login Page 2

Creating a new team group

Creating a new team is very crucial, so lets take a look at how to create and manage team.

First, head over to teams section on the left hand side panel.

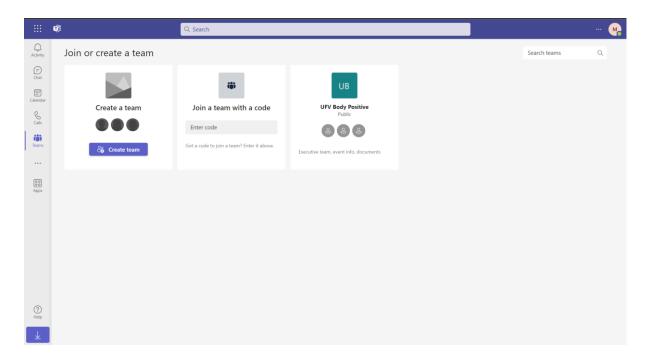


Figure 5. Creating Team 1

Here you'll be able to see a "Create Team" section.

Once you click there, a new window will open up, asking you for the Team Name, description of the group and Privacy option.

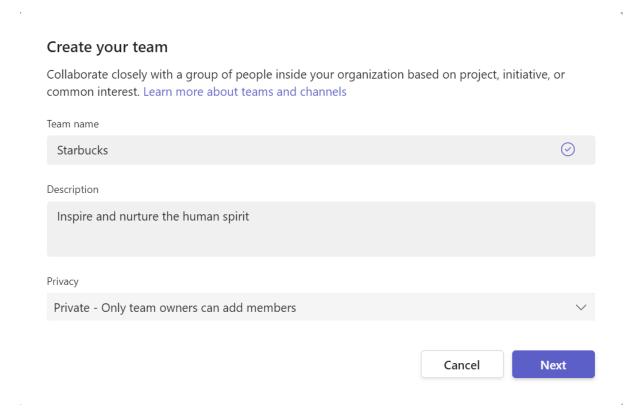


Figure 6. Creating Team 2

Privacy option features 2 options that are as following.

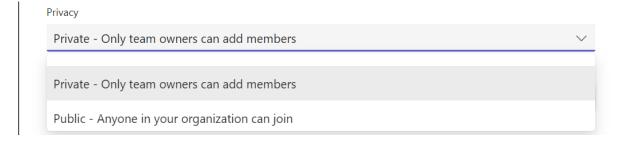


Figure 7. Privacy Options

Private option allows users to create a team in which only the owner of the team will be able to add members.

Public option allows users to create a team in which all the members of that organization will be able to join.

It is to be noted that these options can be changed later on as well.

Once you are done customizing, click on next. You will then be asked to add members to the group.

Add members to Starbucks

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

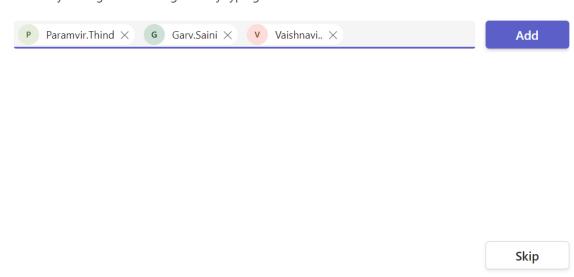


Figure 8. Creating Teams 3

Once you are done adding members to the group, click add.

It is to be noted that you can add members to the group later as well.

Add members to Starbucks

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

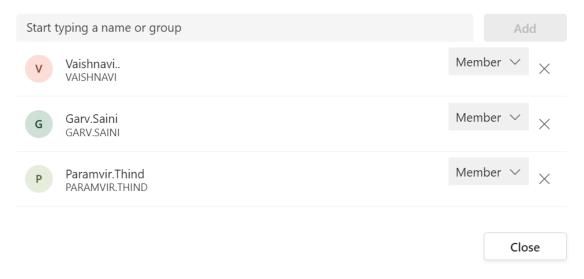


Figure 9. Creating Team 4

You can even change the privilege of each member to owner by click on the dropdown button to the side of their name.

Once that is done simply click on close and you will be able to access this group in the teams section.

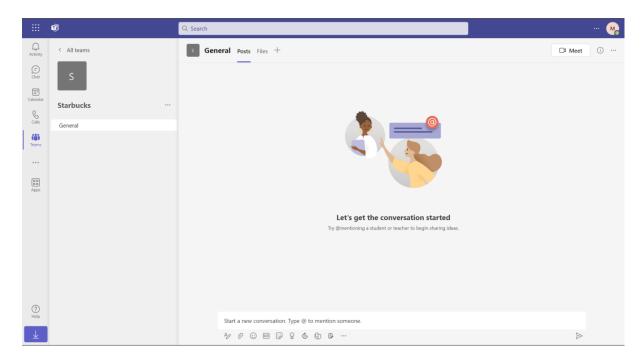


Figure 10. Creating Team 5

Creating Invitation Links and Codes

Invitation Link

To make an invitation link for the team so that other people can join the team, simply go to Teams section and select your team, then click on the three dots on the top right corner of the screen right next to the video call button.

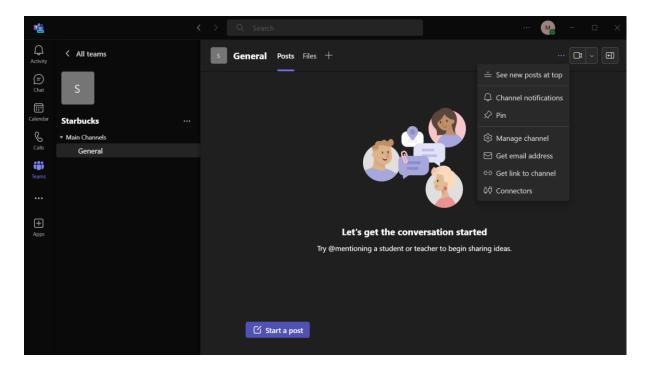


Figure 11. Creating Invitation Link 1

Then click upon "Get link to channel" and then a new window will open.

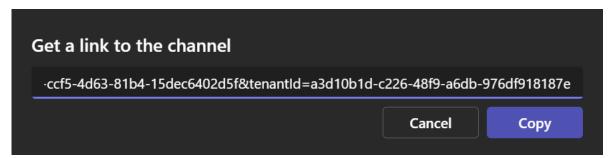


Figure 12. Creating Invitation Link 2

Then click upon copy, to copy the link to your clipboard and then you can paste the link and send the link to anyone.

It is worth noting that you will get join request, and you have to approve that request so that they can join the team.

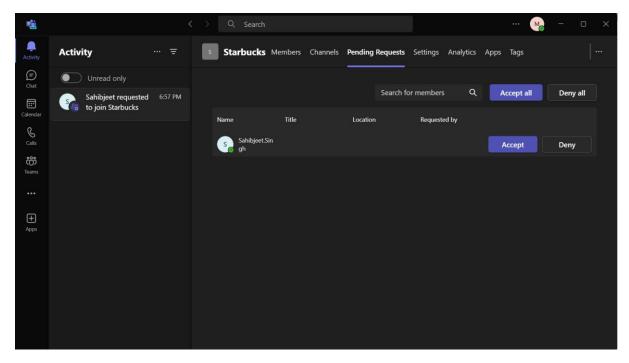


Figure 13. Request for Joining

Creating Code

In order to create codes for anyone to join the team, you to first navigate to teams section on the left hand side.

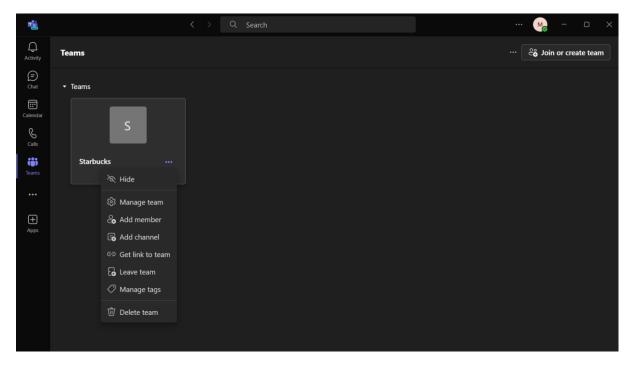


Figure 14. Creating Invitation Code 1

Here you will be able to see three dots right next to the team name. Click on the three dots and a drop-down menu will appear.

Then you have to click upon "Manage team".

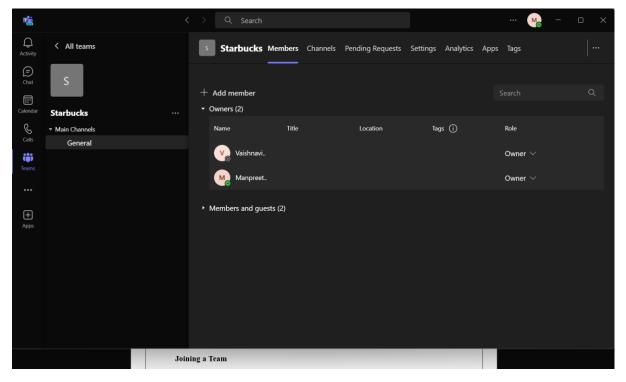


Figure 15. Creating Invitation Code 2

Then you have to head over to "Settings" on top and scroll down to "Team Code".

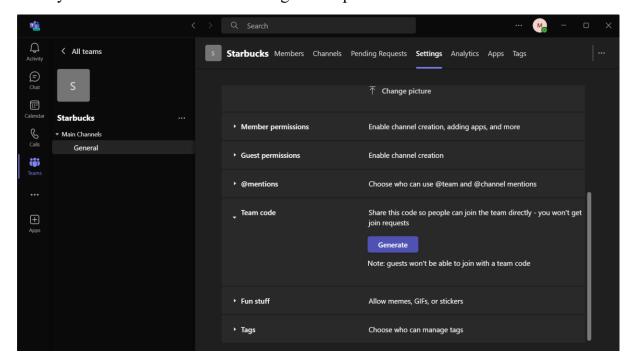


Figure 16. Creating Invitation Code 3

Starbucks Members Channels Pending Requests Settings Analytics Apps Tags ...

Starbucks Members Channels Pending Requests Settings Analytics Apps Tags ...

The Change picture ...

Main Channels General ...

General ...

General ...

General ...

General ...

Teams code ...

Team code ...

Share this code so people can join the team directly - you won't get join requests ...

ggcjcu7

Remove ...

Fun stuff ...

Allow memes, Glfs, or stickers

After clicking upon Team code, you have to click upon Generate.

Figure 17. Creating Invitation Code 4

After that you will get a code, you can then copy this code and send this to anyone.

It is worth noting that you will not get any join request when the person joins.

Joining a Team

There are two ways in which any person can join your team which is either by clicking the team link or by entering the Team code.

Join using a link

If you want to join a team using a invitation link, then simply click upon it, and a join request will be sent to owner, if approved, you will automatically join the team.

Join using a code

If you want to join a team using a invitation code, that you have to go to teams in the left hand side, and select Join or create team.

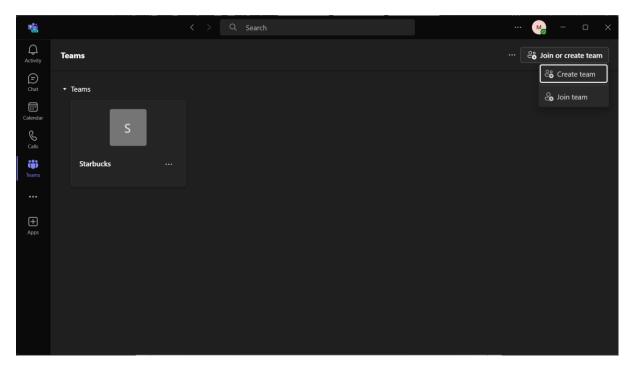


Figure 18. Join using a code 1

Then select "Join team" and then enter the code.

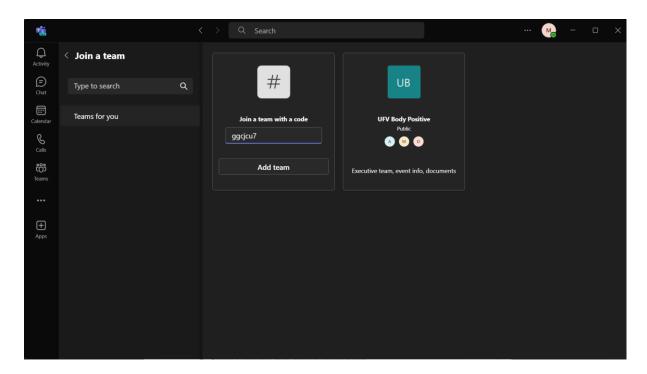


Figure 19. Join using a code 2

Then click on "Add Team" then you will be added to the team.

The main benefit of using Code over link is that you will be added directly to the team without waiting for owner to approve.

Using the Calendar effectively

Calander is one of the most effective tools in teams, as it helps you to schedule and helps you keep reminders.

To make a meeting on calendar you first have to navigate to calendar tab on the left hand side

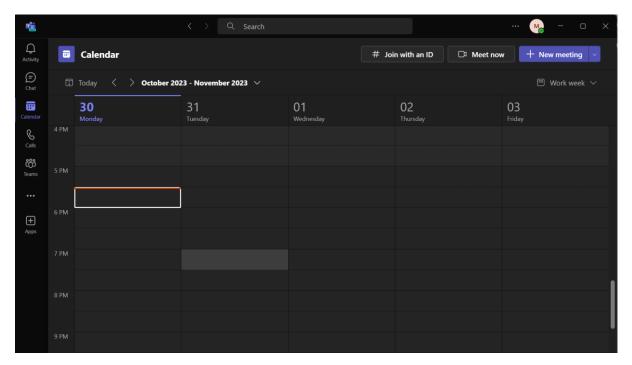


Figure 20. Calendar

Here you can select the date of when you want to make a note and can even customize it accordingly.

To create a note, just click upon the date and time, and input the heading and details of the note.

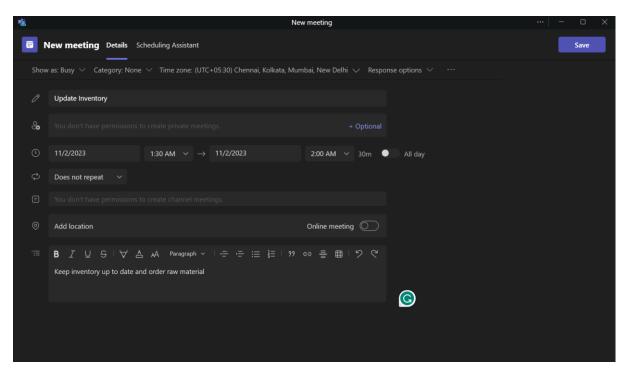


Figure 21. Calendar note

Then click on save to save this note and it will be displayed on that day and time

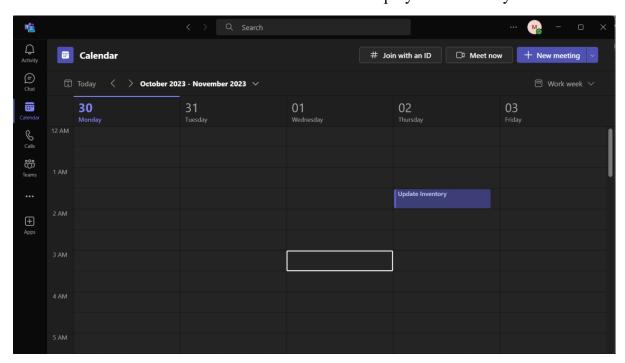


Figure 22. Calander

Meetings

Schedule a Meeting

To schedule a meeting on a particular date and time tick the "Online Meeting" toggle switch button.

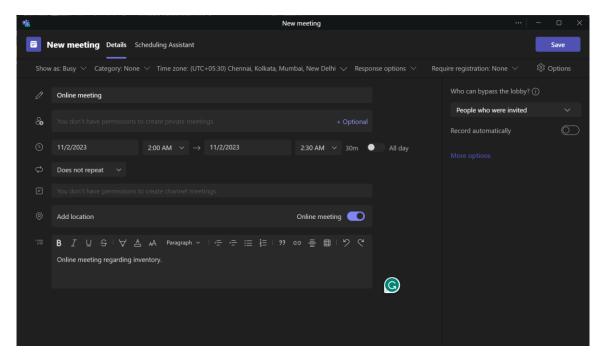


Figure 23. Calander Online Meeting

To add members, add their work mail to the add section.

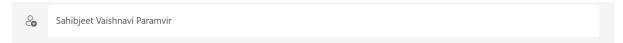


Figure 24. Adding people to the meeting

Teams will automatically provide a time slot that is best suited to all the participants, this is done with the help of scheduling agent, which helps you to see other people's activities and meetings in your organization.

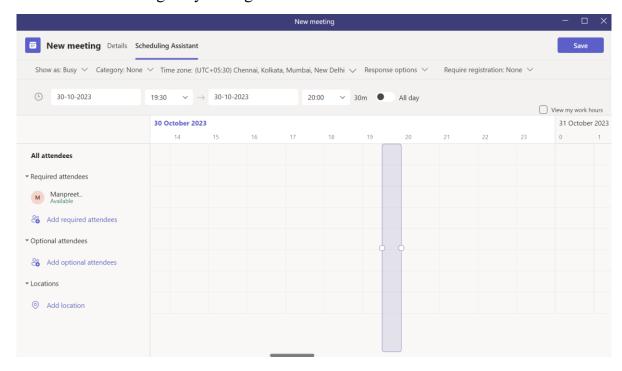


Figure 25. Scheduling agent

When you create a online meeting, you have multiple options, which will be described further.

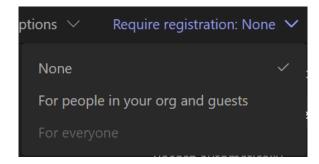


Figure 26. Calander Online meeting Ribbon

This feature asks for registration before the meeting.



Figure 27. Inviting to the meeting

Inviting people to the meetings and customize according to your needs.

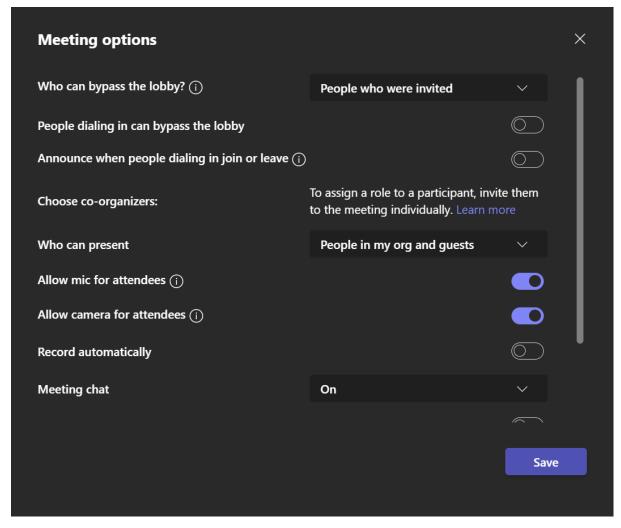


Figure 28. More options in Calander meeting scheduling

In the "more options" section, you will be able to see more details about the meeting.

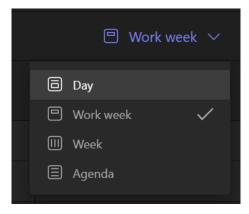


Figure 29. View options in Calander

In the view option, you'll be able to see various options, like day, work week, week, and agenda.

Day shows all the things scheduled on that particular day.

Work week shows all the things scheduled on that particular week (Monday to Friday).

Week shows all the things scheduled on that particular week (Monday to Sunday).

Agenda shows all the things scheduled by a list, along with their date and time.

Sharing Scheduled Meetings

If you want to share the link or code to scheduled meeting to someone, just click upon the scheduled meeting and you will be able to see the details of that meeting.

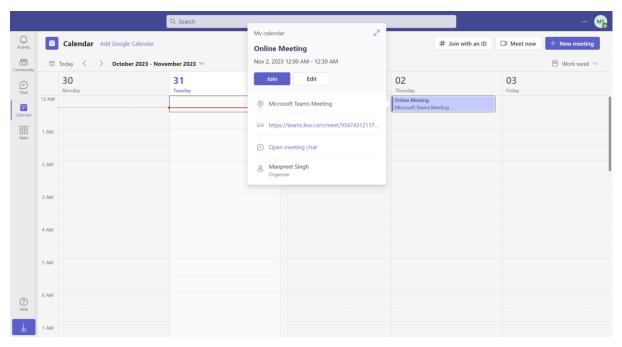


Figure 30. Sharing a Scheduled Meeting

Then you can hover over the link and select the copy option.

To find the code to the meeting, double click upon the scheduled meeting and then you will be able to see the details of the meeting.

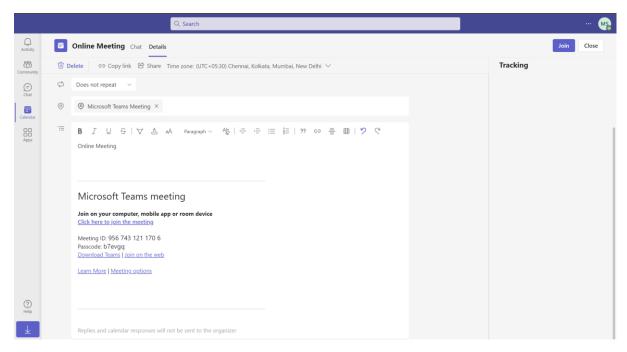


Figure 31. Sharing code for a Scheduled Meeting

Here you can send the Meeting ID and Passcode for anyone to anyone.

Creating and Sharing Instant Meetings

If you want to create an instant meeting, you have to navigate to Calander and once there, click on "Meet-now".

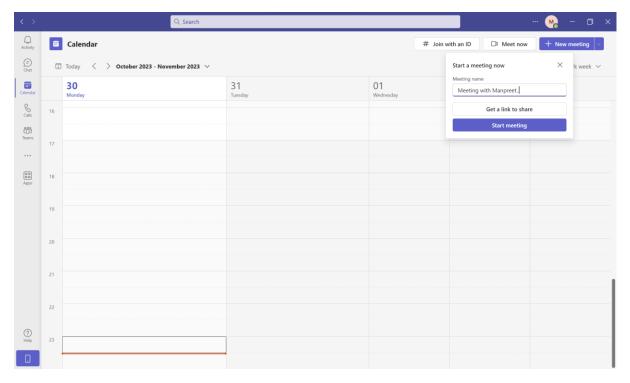


Figure 32. Meet Now

Once there you can click on "Get a link to share" which will provide you with a link to the online meeting, which can be shared anywhere.

If you click upon "Start Meeting" a new window will pop up asking for some basic configurations, like camera and microphone.

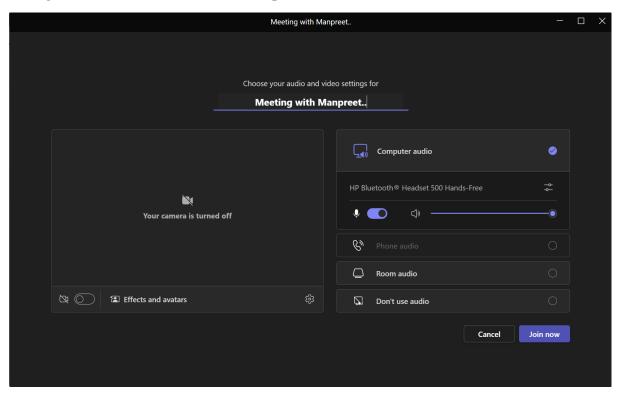


Figure 33. Meeting Configurations

Here you can configure the settings, and you will also see some other settings as well.

Effects and avatars will put some background effect in your background and avatars will replace your facial features.

You also have the option to use the room audio and not to use audio at all.

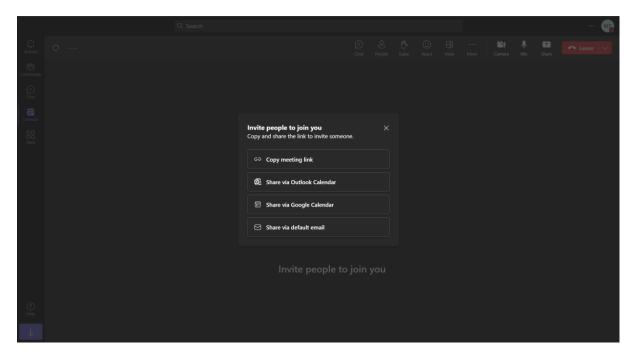


Figure 34. Sharing the link or Code

After clicking on join now, you will be prompted to share the meeting link. You can share this link to anyone so that they can join the meeting.

Another way to join a meeting is through a code.

To find the code for an ongoing meeting, click on "more", and select Meeting info"

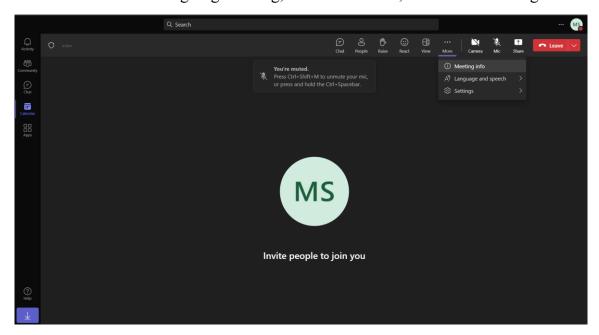


Figure 35. Meeting Code

Once clicking upon it, you will see meeting code and link.

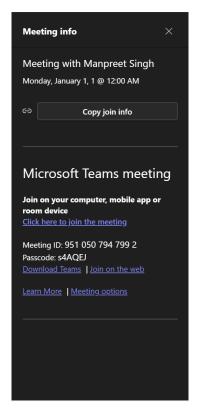


Figure 36. Meeting Code 2

Then you can send Meeting ID and Passcode to anyone.

Joining a Meeting

Joining a Meeting using a link is straightforward, just click on the link and you will be redirected to the meeting.

To join a meeting using a code, you first have to open Microsoft Teams and navigate to Calander. Then you have to click upon "# Join with an ID" on the top ribbon.

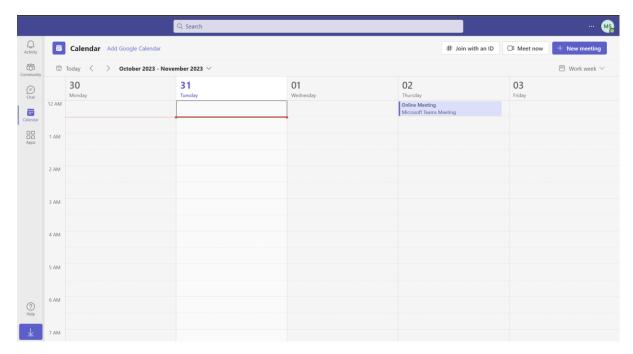


Figure 37. Joining a meeting using code

The you have to click on it and enter the Meeting ID and Passcode, and then click upon "Join meeting"

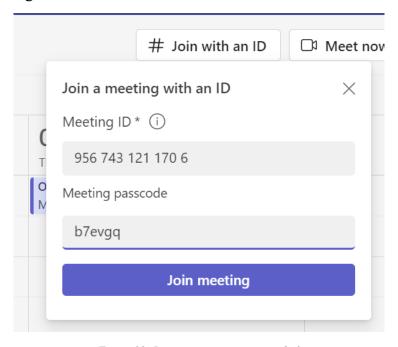


Figure 38. Joining a meeting using code 2

Meeting Controls

During a meeting, you will be able to see the following controls

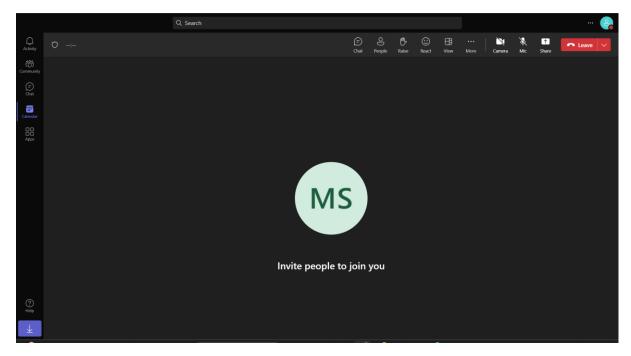


Figure 39. Meeting Controls

First up, is Chat section, which helps you communicate with other members of meeting.

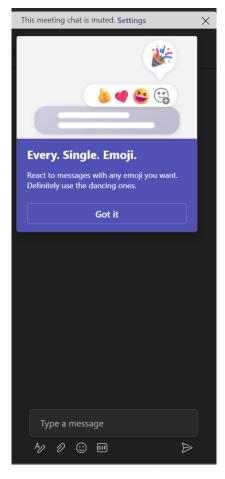


Figure 40. Chat Section

In the chat section you can format your chat, you can send the chat to a particular person inside the meeting room or to the whole meeting room.

To mention someone in the comments, then you can use the @ symbol.

Apart from that, you can use the "Attachment" icon to attach files in the comments and send files to the chat. You can attach both from your device or from an online service.

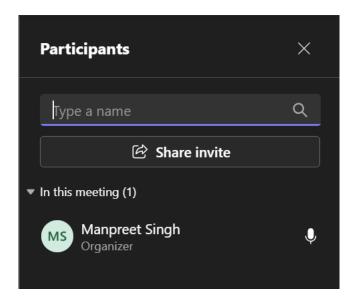


Figure 41. Participants section

In the participants section you will be able to see all the participants in the meeting and their information. you can also share the link to the meeting by click upon "Share Invite".

Raise hand feature, allows participants to let the speaker know that they have something to speak OR they want to speak.



Figure 42. Raise hand feature

React feature allows you to send your reaction to the whole meeting.

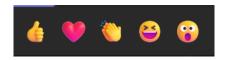


Figure 43. Reactions

View mode helps you to adjust the display according to your needs.

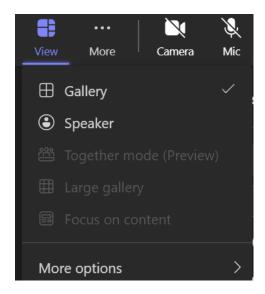


Figure 44. View Mode

More sections has miscellaneous controls

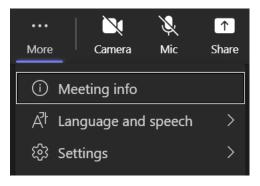


Figure 45. More information

Meeting info allows you to see information like the meeting code.

Language and speech allow you to turn on live captions.

And lastly, settings has accessibility options.



Figure 46. Input controls

Input controls helps you to give input. Camera icon allows you to turn on your camera, Microphone icon helps you to turn on your microphone. Share option allows you to share your screen to the participants.

Lastly, leave option allows you to leave or end the meeting for all.

Activity Centre

Activity Centre has the latest events that has occurred, it contains information like new team member who wants to join team, new messages, and other notifications.

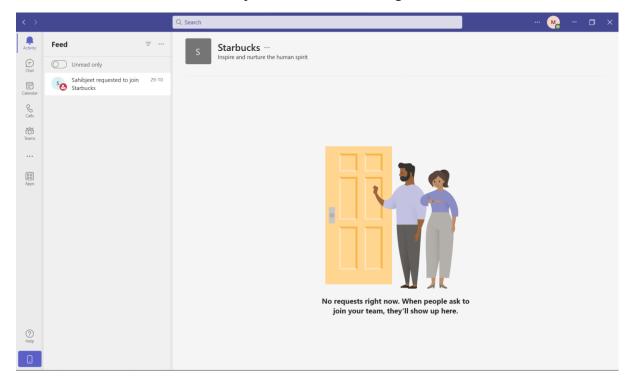


Figure 47. Activity Centre

Here you will be able to see basic settings for the Team you have joined.

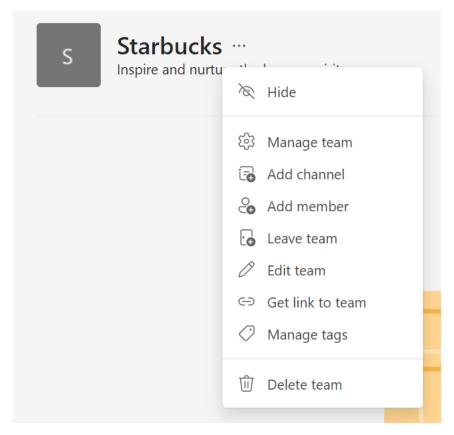


Figure 48. Activity Centre Settings

Manage tags helps you to quickly tag a group of people in an organisation.

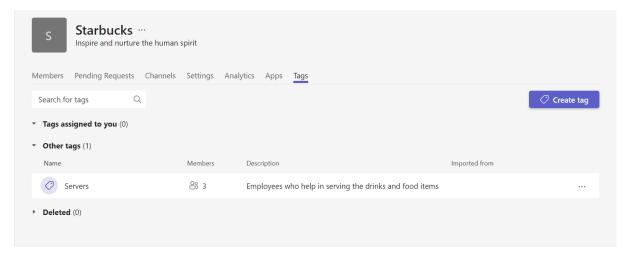


Figure 49. Managing tags

To create a tag you will click on manage tag and click on create new tag, then you have to give it a name, description and add the people from the organisation.

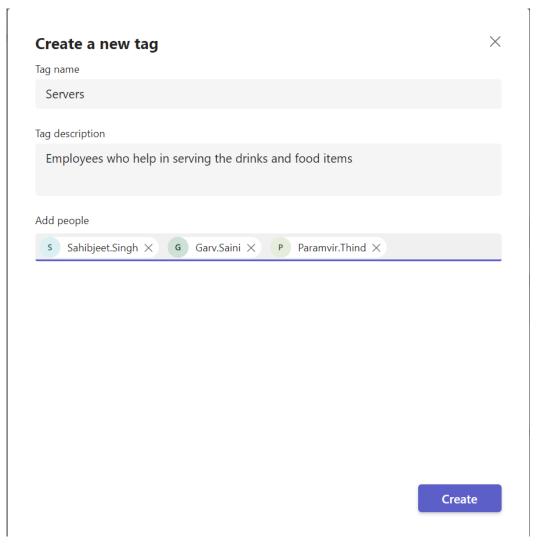


Figure 50. Creating Tags

Chat Section

In the chat section you can have a conversation with anyone and share files.

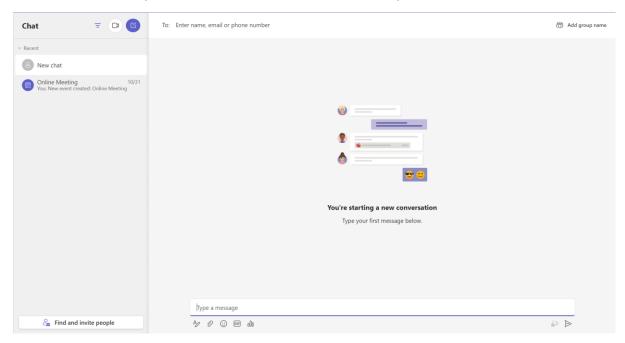


Figure 51. Chat Section

To create a new chat, click on the note icon next to the video call icon. Then enter the name or work mail of that person and compose you chat.

If you have scheduled an online meeting, then you can have a chat about that as well

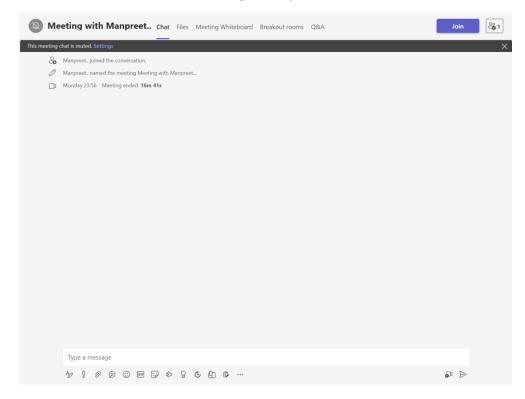


Figure 52. Meeting Chat

The upper section of the meeting chat is divided into various sections.

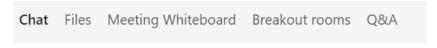


Figure 53. Chat Top Ribbon

Chat

The chat section is where you will be able to write a message for everyone in that meeting.

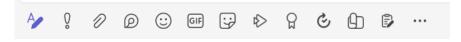


Figure 54. Chat Settings

- The first option is to compose the message.
- The Excitation Mark is to mark the chat as important and urgent.

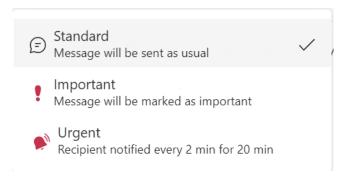


Figure 55. Important and Urgent Messages

- Pin symbol is used to attach files in the chat.
- The loop component is a chat that can be edited by the people.

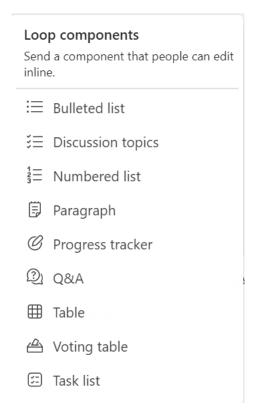
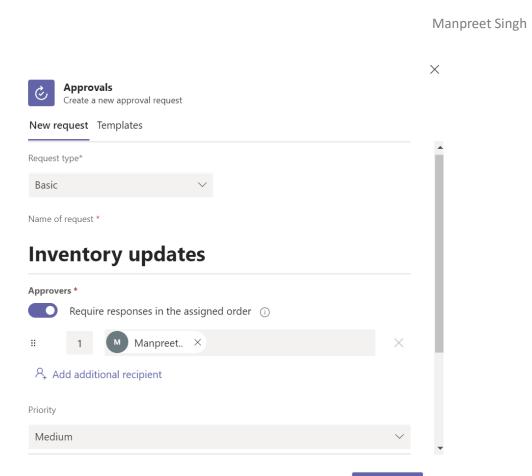


Figure 56. Loop Components

- The emoji symbol is used to send emojis to the chat.
- The Gif symbol is used to send GIFs to the chat.
- The Sticker symbol is used to send stickers to the chat.
- The Stream symbol is used to a Microsoft Stream link to the chat.
- The Praise symbol is used to encourage the team members in the chat.
- The Approval symbol is used to send a task, which requires approval of someone.



Send

Figure 57. Approvals

Depending upon the nature of the task you can set its priority.

Switch to new view

- The Viva learning is used to suggest any courses that can help your team
- The Updates is used to keep you updates to everything that is going on in your organization

Files

This section shows you all the files that have been shared in chat, and also provides you with the option of uploading files.

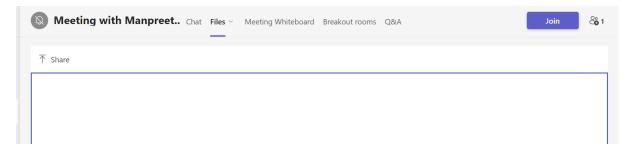


Figure 58. File sharing

Meeting Whiteboard

In the meeting whiteboard you can present your work and allow other people to share their ideas with others in the meeting.

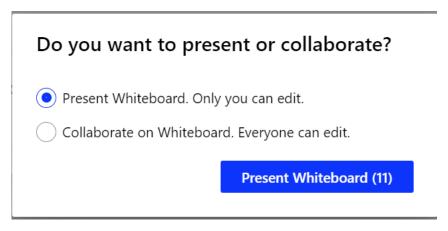


Figure 59. Whiteboard

You can allow other people upon the whiteboard to contribute and brainstorm.

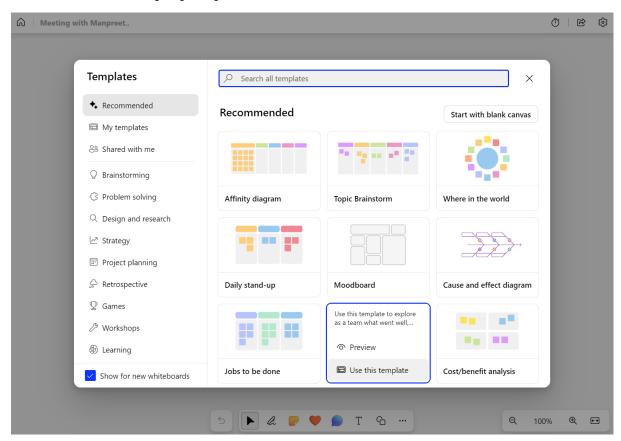


Figure 60. Templates for Whiteboard

You can choose from any premade template, or you can create your own custom template.

Breakout Rooms

You can create different breakout rooms so that they can discuss their approaches and talk freely.

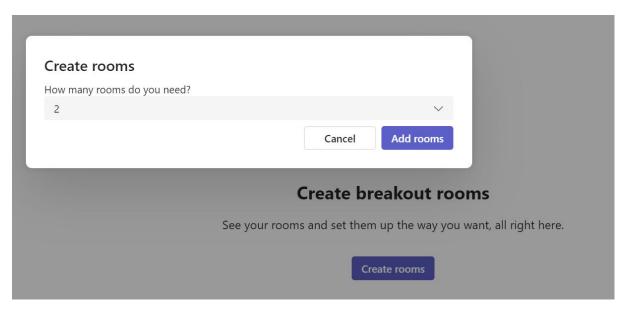


Figure 61. Create Breakout Rooms

And then add different people in their respective breakout rooms.

Adding People to Chat

To add people to chat group, go to the top right section of the window

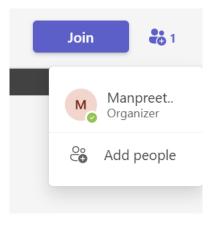


Figure 62. Add people to chat

Calls

On the left-side of the screen you'll be able to find a call section.

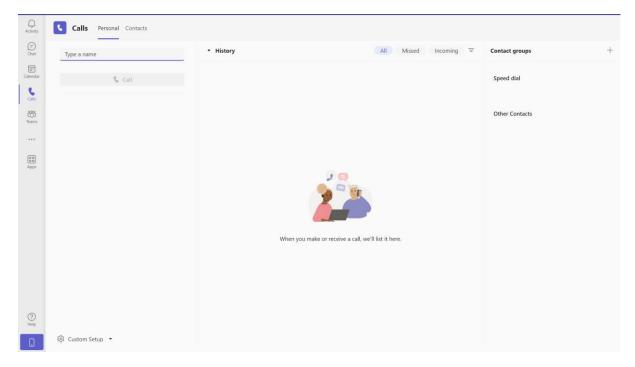


Figure 63. Calls

To call someone from the same organization, and you can also call multiple people from the same organization.

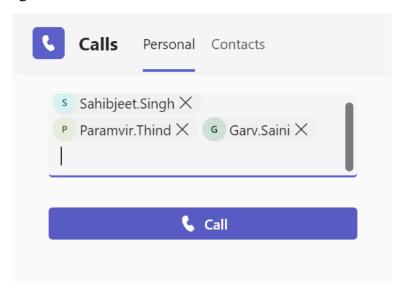


Figure 64. Calling multiple people from the same Organization

Call history can be accessed on the tab right next to it, and can be filtered by different filters like Missed and Incoming.

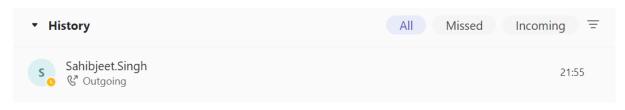


Figure 65. Call History

To add people to Speed Dial or Other Contacts, click on the three dots and select "add people".



Figure 66. Speed Dial and Other Contacts

Added mails can be seen under Contacts section

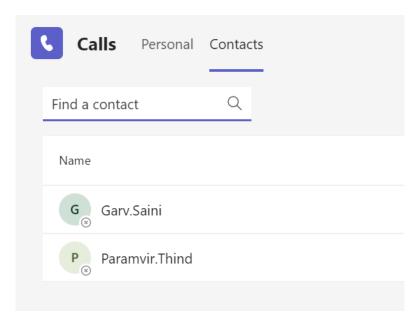


Figure 67. Contacts Added

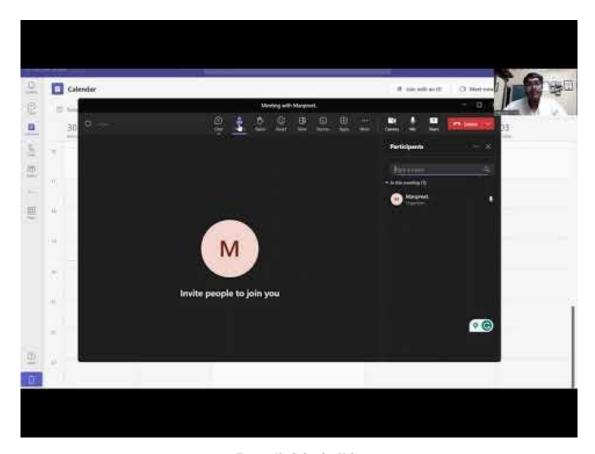


Figure 68. Calander Video

Creating Channels

To create channels inside a particular team, go to the Teams section and select your team, then click on manage team.

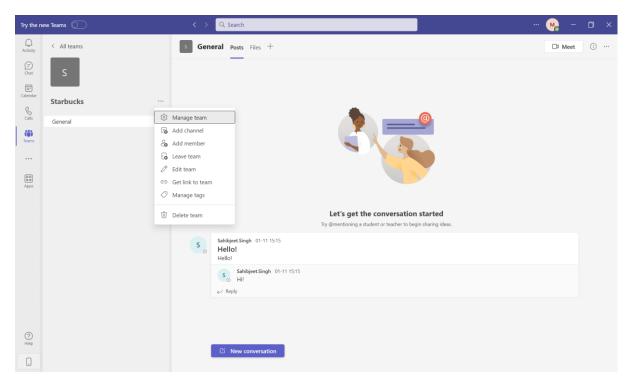


Figure 69. Creating Channels

Then go to the channel section and click on add team.

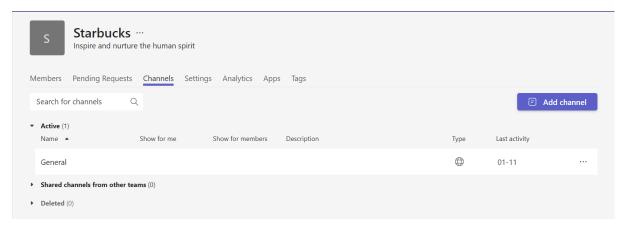


Figure 70. Channel Details

Configuring channel

Channel can be called as a team within a team. They are a very helpful tool to differentiate what person is doing what task and based upon that task there can be multiple channels.

When configuring you can choose various settings depending on your requirements.

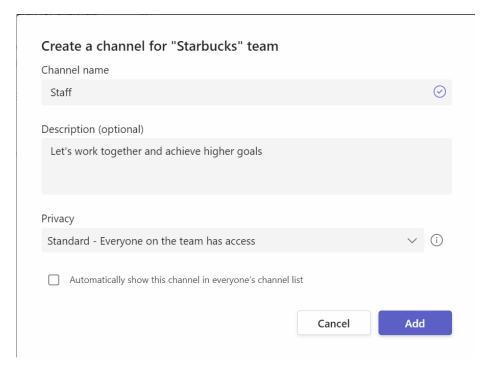


Figure 71. Configurations of channel

Channel name and Description should be adequate for the channel, to avoid any confusion between people.

Apart from that, you can also choose the privacy option.

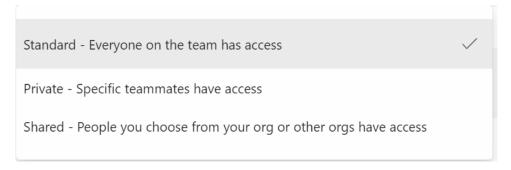


Figure 72. Privacy options

Standard -: Every person who is in that team, will have access to that channel

Private -: Some people (that you choose) will have access to the channel

Shared -: Everyone from the organization will have access to that channel

Note -: It's best to create a private channel so that it is easier to manage.

In private channel you have the option to add team members to that channel, you can also change their privileges to owner or a member of the channel.



Figure 73. Adding members and changing ownership

Furthermore, you can configure the channels according to your likings like hide the channel, pin the channel, etc by clicking upon the more option button.

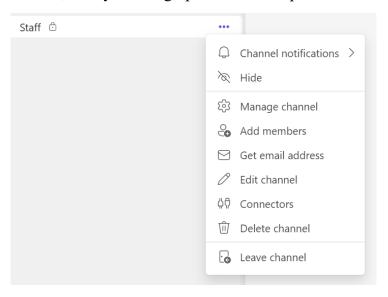


Figure 74. Channel Settings

Connectors help to deliver content and services from third party services into that channel.

Applications

To add apps to your team, you first have to navigate to apps section in Teams software and then select your application that you want to add to your Team.

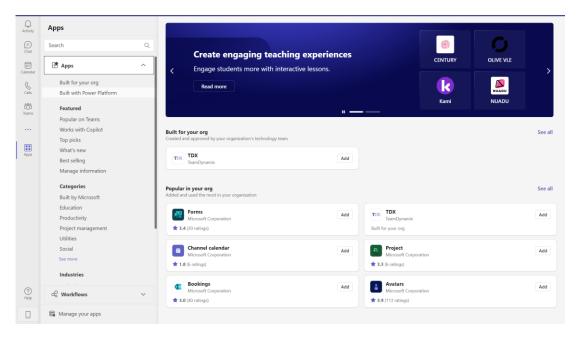


Figure 75. Apps on Microsoft Teams

It is to be noted that some apps require Permission from your IT admin to be added to your team.

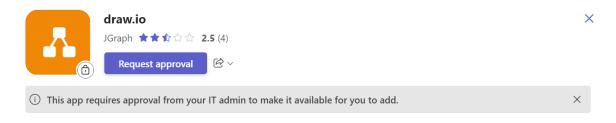


Figure 76. Requesting apps

While some apps can be directly added to your team.



Figure 77. Adding apps

To add this app, click on add button and the application will be added to teams software. Some apps can only be added for you while some apps can be downloaded for a whole team.

To add a application to team, click on the drop-down button and select team.

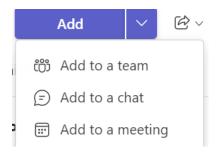


Figure 78. Add app to Team

Then you have to select your team.



Add TDX to a team

TDX will be available for the entire team, but start by setting it up in a channel. The app may post messages here; you can also @mention TDX to chat with it.

Type a team or channel name

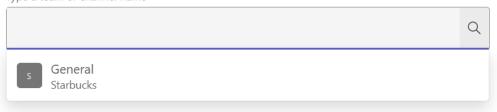


Figure 79. Select team

Then click on add and the bot will be added to the team.

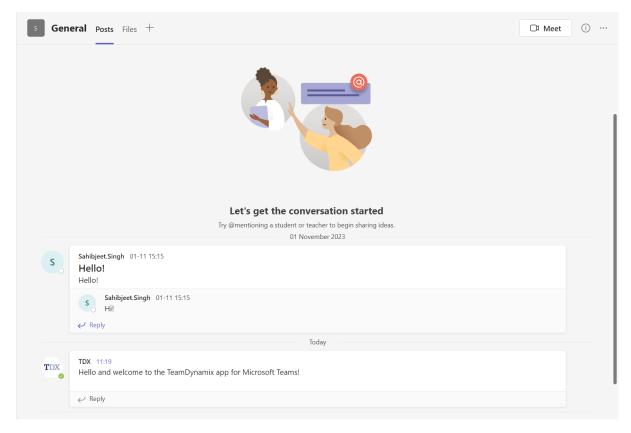


Figure 80. Bot added

You can also add the app to the team, by click the plus button on top of the ribbon.



Figure 81. Team Ribbon

Then this new window will pop up.

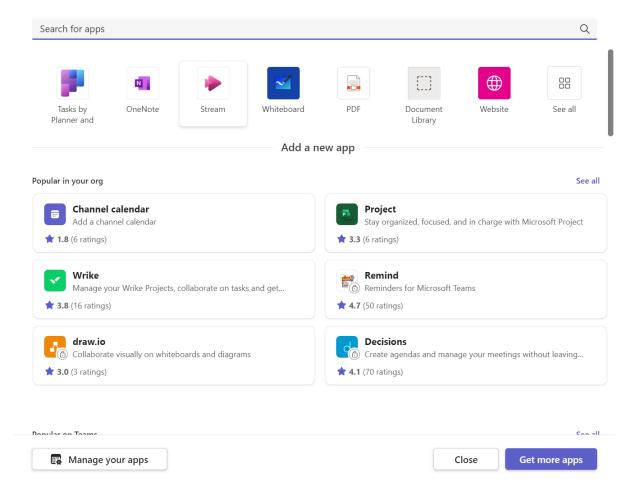


Figure 82. App Management

To Manage app, click on "Manage your apps", here you can delete, or add new apps.

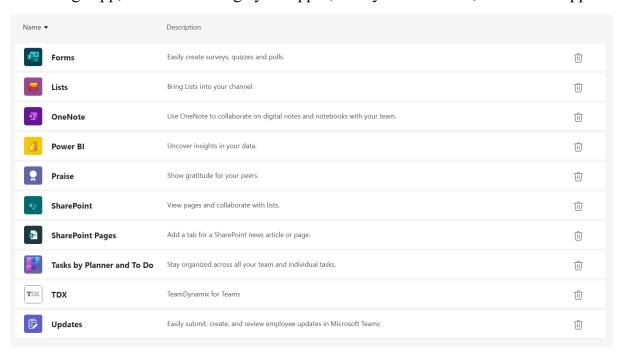


Figure 83. Removing apps from team

You can add different applications to teams this way.

Sync Microsoft Applications with Teams

By default, Teams automatically syncs up with downloaded Microsoft applications like word, excel, PowerPoint, etc.

To access them in teams go to apps and select Microsoft app that you want, it will automatically pick up the files stored on your cloud (with your work ID) and local files.

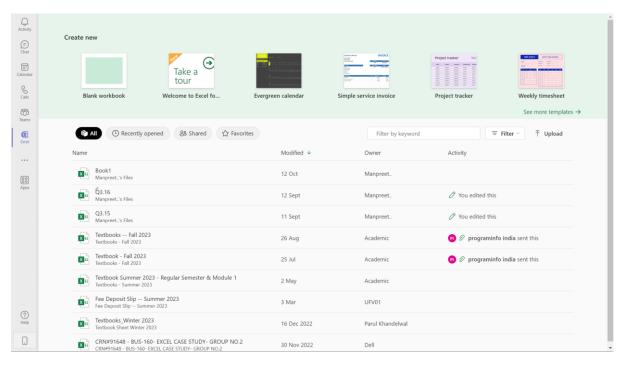


Figure 84. Sync applications with Teams

Summary

This Training manual covers all the fundamental and advance topics of Microsoft Teams, with the help of this training manual, employees will be able to

- Communicate more efficiently and effectively
- Centralise all the information flow
- Be more productive

To achieve these goals, this training will take over a period of 1 week.

On first day, members will be taught how to install and login into their account.

On the second day, they will be taught how to set up their Teams software and application

On third day and fourth day, they will be taught the basic usage of teams

On fifth day and sixth day they will be taught the advanced usage of teams

Finally on the seventh day, Employees will be taught about troubleshooting.

After the Training a practical quiz will be taken to check the knowledge of employees.

Do note that throughout the training, employees are encouraged to do practical during and after the session. Each session will be of 3 hours and after each session, the employee will be given a handout which will contain all the activities done throughout the session and some topics that will be performed tomorrow.

The handouts will contain references and some videos so that employee can learn more about Teams.

Troubleshooting

Microsoft Teams is a powerful software that offers a lot of features, but sometimes it can encounter various issues. Here are some common problems that you may face while using Microsoft Teams and the solutions to fix them:

1. Audio/Video Issues:

Check your device's microphone and camera settings. Make sure that they are not muted. Also, ensure that your internet connection is stable. If the problem persists, try restarting Teams or your device.

2. Trouble Joining or Hosting Meetings:

Make sure that you have the latest version of Teams installed. Clear your cache and restart the application. Try to join the meeting a few minutes early to avoid any connectivity issues.

3. File Sharing Problems:

Ensure that you have the necessary permissions to share files within your team. Check the file size limits (2GB per file) and the file types supported. If the problem persists, try uploading the file through OneDrive or SharePoint and share the link.

4. Chat and Message Delivery Issues:

Verify your internet connection and ensure that Teams is not experiencing outages. If messages are not being delivered, try restarting Teams. If the problem continues, contact Microsoft Support.

5. Slow Performance:

Teams might be slow when running other resource-intensive applications. Close unnecessary apps or browser tabs. Also, ensure that your device meets the minimum system requirements for Teams.

6. Notification Overload:

Customize your notification settings to receive only the most important notifications. You can set different notification preferences for channels and chats.

7. Trouble with Screen Sharing:

Verify your screen sharing permissions and settings is enabled in Teams. If you're still experiencing issues, try restarting the application.

8. Guest Access Problems:

If you're having trouble adding or managing guest users, ensure that guest access is enabled in your Teams settings. Review your organization's external sharing policies as well.

9. Login and Authentication Issues:

Verify your credentials and ensure that they are correct. If you're using multi-factor authentication (MFA), ensure that you complete the MFA process. Try signing out and signing back in or resetting your password if necessary.

10. Application Problems:

If third-party apps are not working correctly, verify their permissions and settings within Teams. Ensure that the apps are up to date and compatible with your Teams version.

11. Inability to Find or Access Channels/Teams:

Double-check your Teams and Channels list. You may need to join or be added to a Team or Channel to access it. If you're still unable to find what you're looking for, contact your organization's Teams administrator.

12. Missing Features:

Teams regularly updates with new features. Ensure that you're using the latest version and check for feature updates or changes in the release notes. If a specific feature is missing, it might not be available in your organization's plan or settings.

If you encounter persistent issues that you can't resolve, consider reaching out to your organization's IT support or Microsoft's official support channels for further assistance.

Additional Resources and References

helenclu. "Teams Troubleshooting - Microsoft Teams." *Learn.microsoft.com*, https://learn.microsoft.com/en-us/microsoftteams/troubleshoot/teams-welcome

"Troubleshoot in Microsoft Teams - Microsoft Support." Support.microsoft.com,

https://support.microsoft.com/en-us/office/troubleshoot-in-microsoft-teams-6fa7c08a-6fd4-47a0-b275-90a5f60f1df9

"Downloadable Guides - Microsoft Support." Support.microsoft.com,

https://support.microsoft.com/en-us/topic/downloadable-guides-6bd3eb82-0a0f-43cc-a4d2-c9f4e7ebdf39

Key Performance Indicators

Employees can benefit by using Teams in the following ways -:

- Enhance communication between the employees.
- Increase Productivity.
- Centralize all the information in a single place.
- Making sure that employees can use teams effectively.

After the completion of the training plan, a survey would be conducted to test trainee for the following skill -:

- Their knowledge regarding Microsoft Teams
- Understanding and Comprehension
- Troubleshooting abilities
- Performance increase

A quiz will also be conducted to test their -:

- Practical ability
- Creating and managing Teams
- Fundamentals and application of the software
- Managing schedules and meetings
- Knowledge of the software

This quiz will conclude that employees can perform the following tasks -:

- Create a Team from scratch
- Add members to the team and manage their labels
- Perform regular meetings according to their schedules
- Increase productivity
- Create channels and integrate application