



Microsoft Partner
Gold Project and Portfolio Management
Silver Collaboration and Content
Silver Business Intelligence

Teamwork Makes the Dream Work:
Presented by: Laura Crawford

Agenda

Introductions

Microsoft Teams Overview

Demo

Q & A

Laura Crawford



Senior PPM Specialist

Laura has over 8 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Laura is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Laura holds an BS from State University of New York College at Oswego and is a Microsoft Certified Trainer and a Microsoft Specialist.



Why PPM Works

- **Gold Microsoft Certified Partner** exclusively focused on **Microsoft Project, SharePoint, and Office 365**
- Some recent **Experience** includes Allergan, Medtronic, Plantronics, Shire, Synopsys and many more...



Medtronic



- We believe in **partnering** with you, **exceeding expectations** to build **long lasting success**.
- Our team's experience runs deep with Microsoft.
 - Over **225 Project Server implementations** and Trained **thousands** of students
 - Delivered **dozens** of Industry presentations (Microsoft Project Conference, Project Summit, PMI Conference)
 - Created **hundreds** of webcasts and blog articles
- We have contributed to the **new release of Microsoft Project and Project Server** for the past three cycles and share our expertise as volunteers for Microsoft, PMI, MPUG, and Project Summit.
- We **guarantee your success** and **our results** – we are not done until you are a satisfied client reference



Why Clients Choose PPM Works

Our Philosophy: We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1st
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.



Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all



Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.



Sr. Project Manager Consultant, Large Legal Firm

Learning Objectives

In today's webinar we will demonstrate the collaborative features of Microsoft Teams.

At the end of today's session you will be able to:

- Create a new team
- Add members to the team
- Add channels
- Create meetings

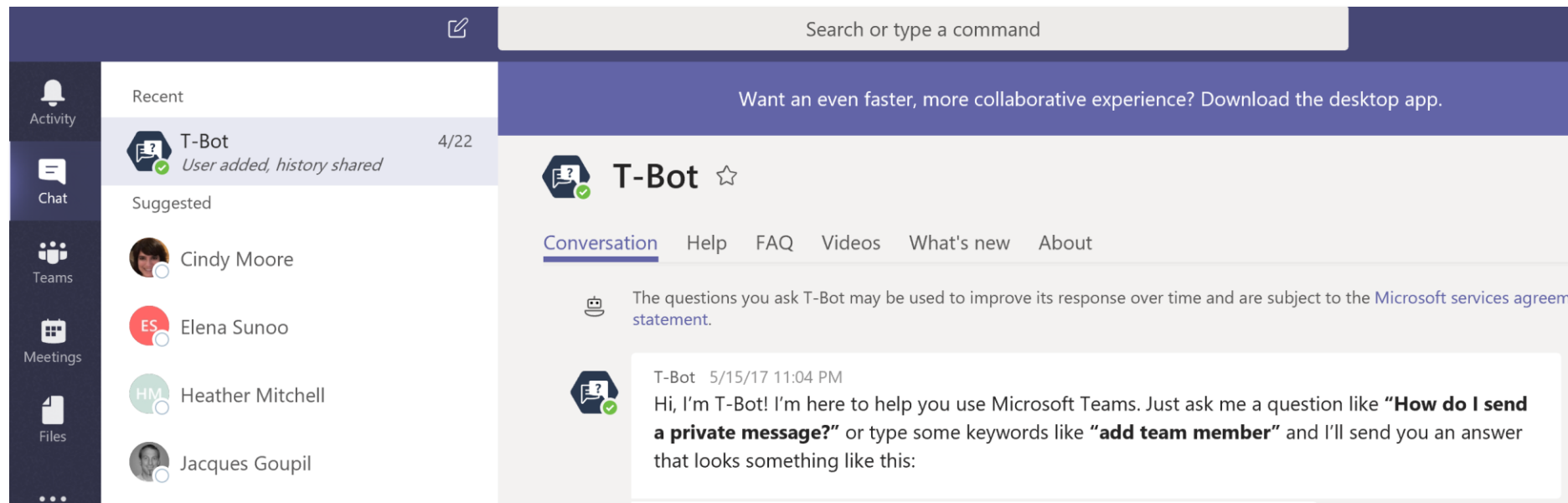
A close-up photograph of a person's hands typing on a laptop keyboard. The person is wearing a green top and a gold bracelet. The background is blurred, showing other people in a meeting room. A blue semi-transparent banner is overlaid at the bottom of the image.

Microsoft Teams

Microsoft Teams

Microsoft Teams is a digital hub that brings conversations, content, and apps together in one place

- Chat-based work space
- Designed to generate ideas freely and allow them to grow organically



Teams Overview

- Each team can have up to 2,500 members and 100 owners
- Team owners can add new members and other owners, rename, delete, or edit the settings of the team
- When a team is created, a group will be created in Office 365, which includes a shared Outlook inbox and calendar, a SharePoint site and documents library, a OneNote notebook, and Planner
- If you already have an established Office 365 Group, then it is best to activate Microsoft Teams on your existing group instead of creating a new one

Security Teams Trust

- Served from Microsoft's global hyper-scale cloud
- Compliance leadership with HIPPA, ISO27001, and more
- Multi-factor authentication
- Built-in information protection
- Intune integration
- Accessibility features



Use Case Scenarios



Sales

Get quick answers from PMs and Sales Ops

Share key customer wins

Get lead notifications and deal mentions

Share latest company, product, and competitor news



Marketing

Coordinate campaigns and event tasks

Share the latest content drafts for feedback

Get automated reports from analytics tools

Prepare marketing launch for multiple stakeholders



Project Management

Streamline project communication and tools

Provide status updates, get feedback, coordinate tasks

Share files and collaborate on deliverables

Get new project members up to speed quickly



Engineering

Enable continuous discussion across a distributed team

Discuss ideas and requirements, gather inputs in the open

Integrate with developer tools like Jira

Store standard documentation and files



Customer Support

Enable continuous knowledge sharing between shifts

Provide visibility into customer escalations

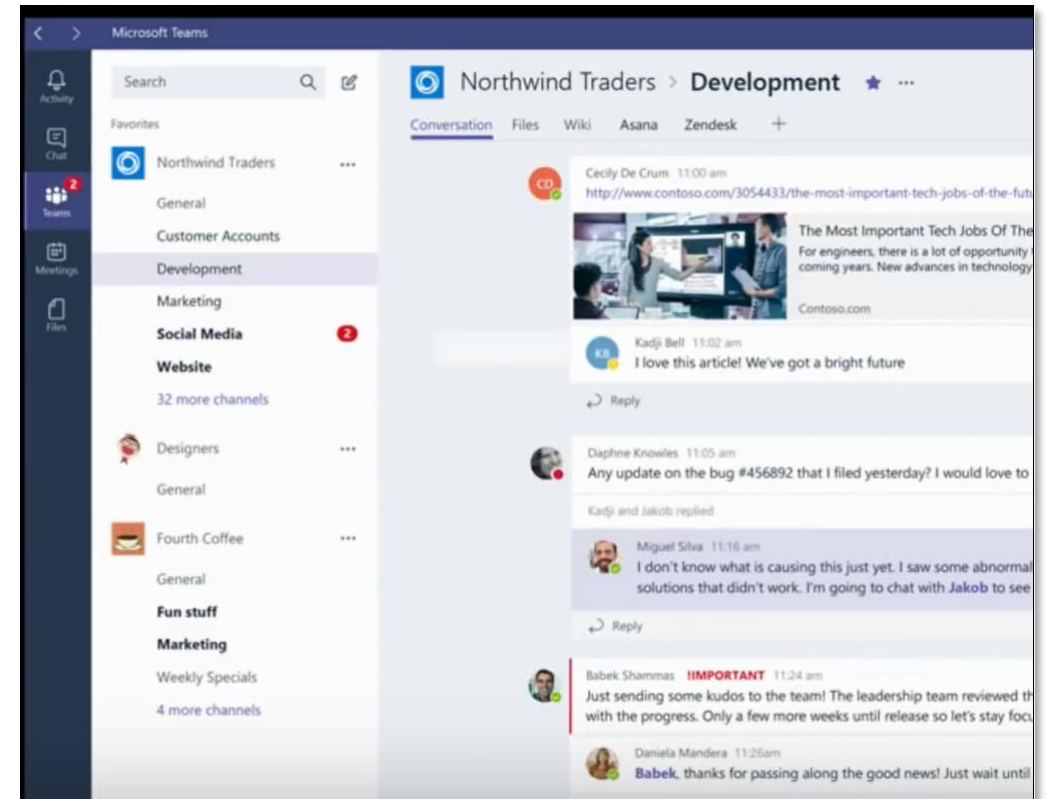
Speed up issue resolution with subject matter experts

Search for solutions across conversations

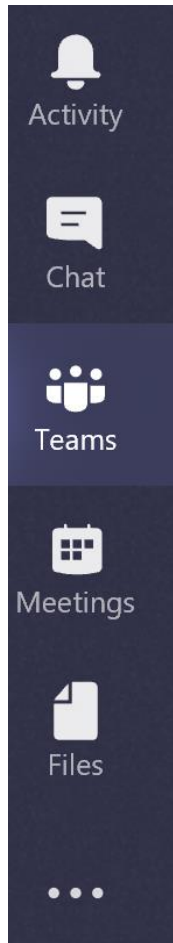
Microsoft Teams

Teams provides:

- Threaded persistent chat
- Open group or private 1:1 conversations
- Emoji, stickers, GIFs
- Mobile voice with video calling
- Email integration



Collaborative Components of Teams



Activity – See @ mentions here, replies and notifications

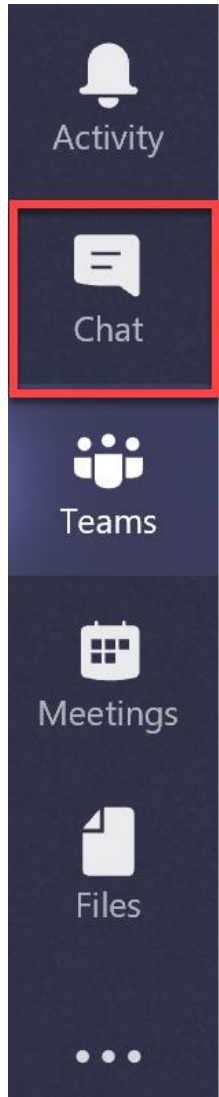
Chat – All your 1:1 chats and group chats

Teams – All your teams

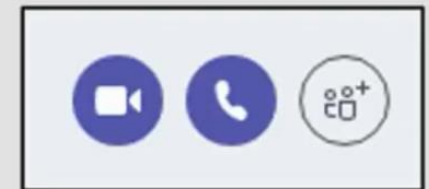
Meetings – Your calendar

Files – your files

Using Chat



- **Start a private chat.** Select **New Chat** icon. In the **To** box, enter the name(s) of those you want to invite. In the **Compose new message** box enter a message, and press **Enter**.
- **Add someone to a group chat.** From a chat, select the **Add people** icon in the top right, and add a member.
- **Start a video or audio call.** From a chat, select **video** or **audio** call in the top right.
- **Favorite a chat.** Select the **ellipsis (...)** to the right of the chat name, and select **Favorite**. When you favorite a chat it will be moved to the top of your chats list.
- **Rename a group chat.** Select the pencil icon to the right of the chat name.



Create a New Team



Activity



Chat



Teams



Meetings



Files



Create a new team

1. From Microsoft Teams, in the left navigation, select **Teams**.
2. In the middle pane, select **Add team**, and then select **Create a team**.
3. Enter a name and a description for your team, select **Public** or **Private**, edit the default security setting if needed, and then select **Next**.
4. In the **Members** box, enter the name or email of a person you would like to add, select the person's name, and then select **Add**. Repeat this step until you have added everyone you'd like to add as team member.

Create your team

Collaborate closely with a group of people inside your company based on organization, project, initiative, or common interest. [Here's a helpful video.](#)

Team name

Description

Privacy
Private

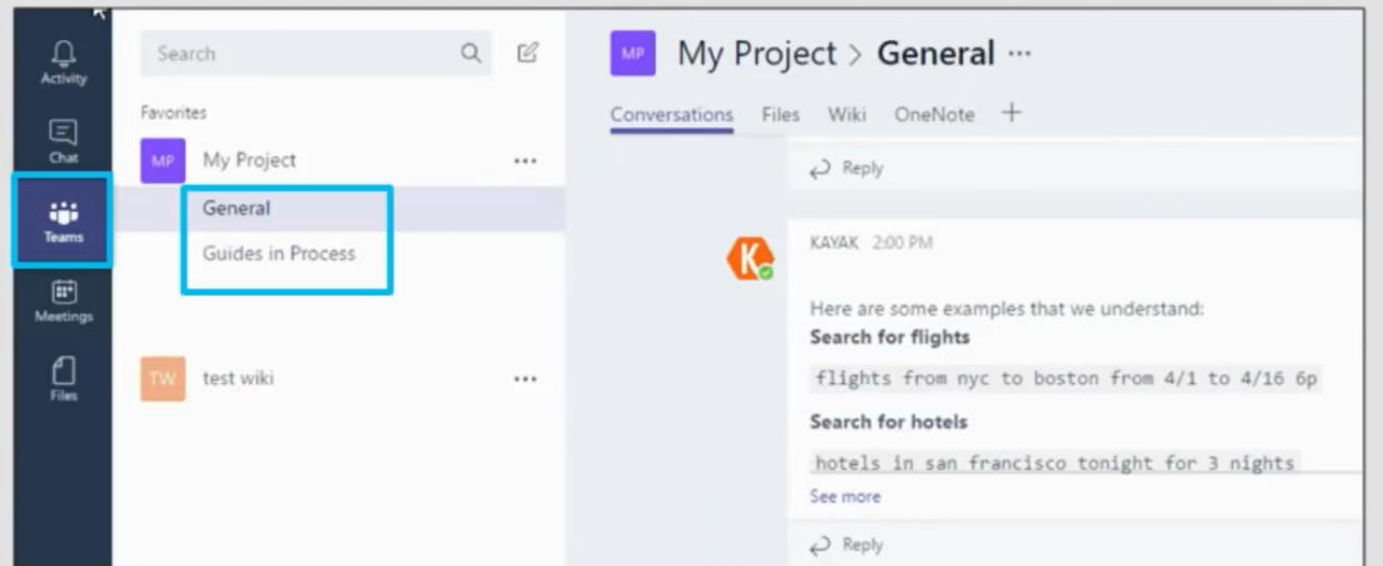
This team is classified for MBI information. [Change setting](#)

Add Microsoft Teams to an existing Office 365 group?
Looks like you're an admin of a group. You can add Microsoft Teams functionality without changing the existing group. Yes, add Microsoft Teams functionality

Channels

Channels organize a team's conversations, content, and tools around specific topics.

- Conversations shared in channels are visible to all of the members of your team.
- All members of your team can create channels.
- All teams have the default *General* channel.



Creating a New Channel

- **Create a channel.** Select **Teams** in the left navigation, select the **ellipsis (...)** to the right of the team name, and then select **Add channel**.
- **Favorite a channel.** Select the star to the right of a channel name. When you favorite a channel, it will remain visible.
- **Follow a channel.** Select the **ellipsis (...)** to the right of the team name, and then select **Follow this channel**. You will receive alerts for all activity on channels you follow.
- **Email a channel.** Select the **ellipsis (...)** to the right of the team name, and then select **Get email address**. Use the channel email address to email the channel from Outlook.

Add Apps

Want an even faster, more collaborative experience? Download the desktop app. [Download](#) × channel

Webinars ☆ ... Private

Schedule and plan upcoming webinars

Members Channels Settings **Apps**

Apps let you complete tasks, receive updates, and communicate at the same time. To get started @mention a bot or add a tab in a team channel. [Go to store](#)

Name	Description	
Forms	Easily create surveys, quizzes, and polls.	
OneNote	Use OneNote notebooks to collaborate on digital content and share it with your team.	
Planner	Planner makes it easy for your team to stay organized, assign tasks, and keep track of your progress. Creat...	
Stream	Share and collaborate with Microsoft Stream, the intelligent video service in Office 365.	

Schedule Meetings



Activity



Chat



Teams



Meetings



Files

 Schedule a meeting

New meeting

Title

Location

Microsoft Teams Meeting

Start

Apr 24, 2018

11:30 PM

End

Apr 25, 2018

Repeat

12:00 AM

[Scheduling assistant](#)

Select a channel to meet in

None (optional)

Invite people

Invite someone

Organizer



Laura Crawford

laura.crawford@ppmworks.com

Details

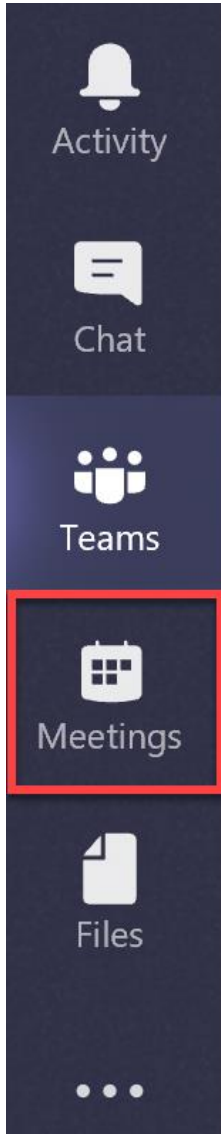
B *I* U ~~ABC~~ **A** AA Paragraph

Type details for this new meeting

Close

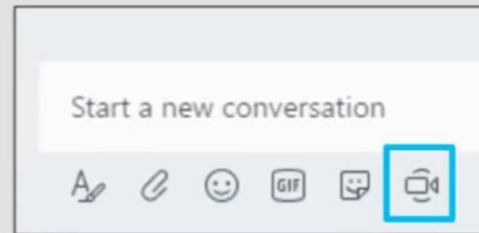
Schedule a meeting

Video Meetings



Go directly from a group conversation into a video meeting.

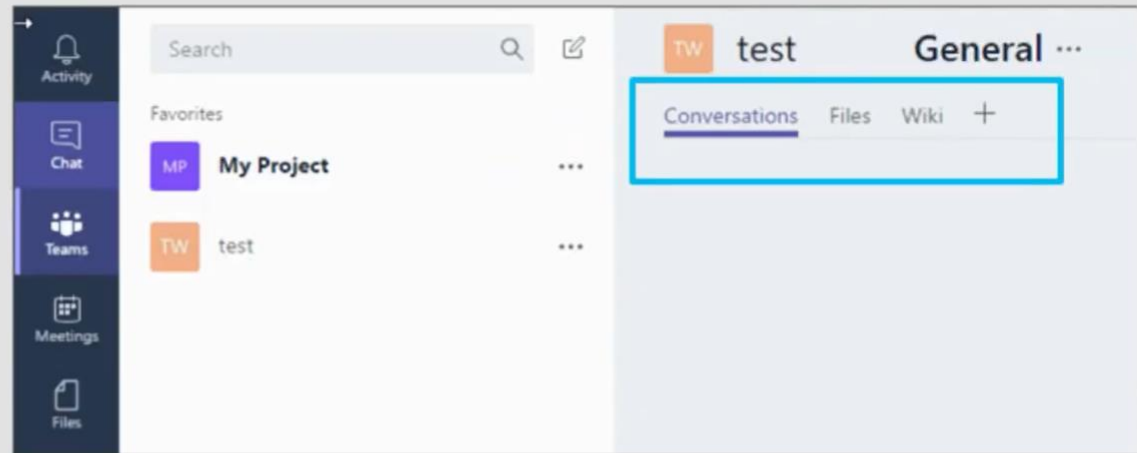
1. From a conversation, select the **Meet now** icon.
2. Select **Meet now** to have an immediate call with anyone in the team who wants to join, or select **Schedule a meeting**.



Tabs

All channels have three default tabs: **Conversations**, **Files**, and **Wiki**.

- **Conversations tab.** Have conversations with your team.
- **Files tab.** Upload, view, and share documents. These documents are stored in your team's SharePoint document library.
- **Wiki tab.** Take notes, @mention your team members, or draft and edit content in real time.



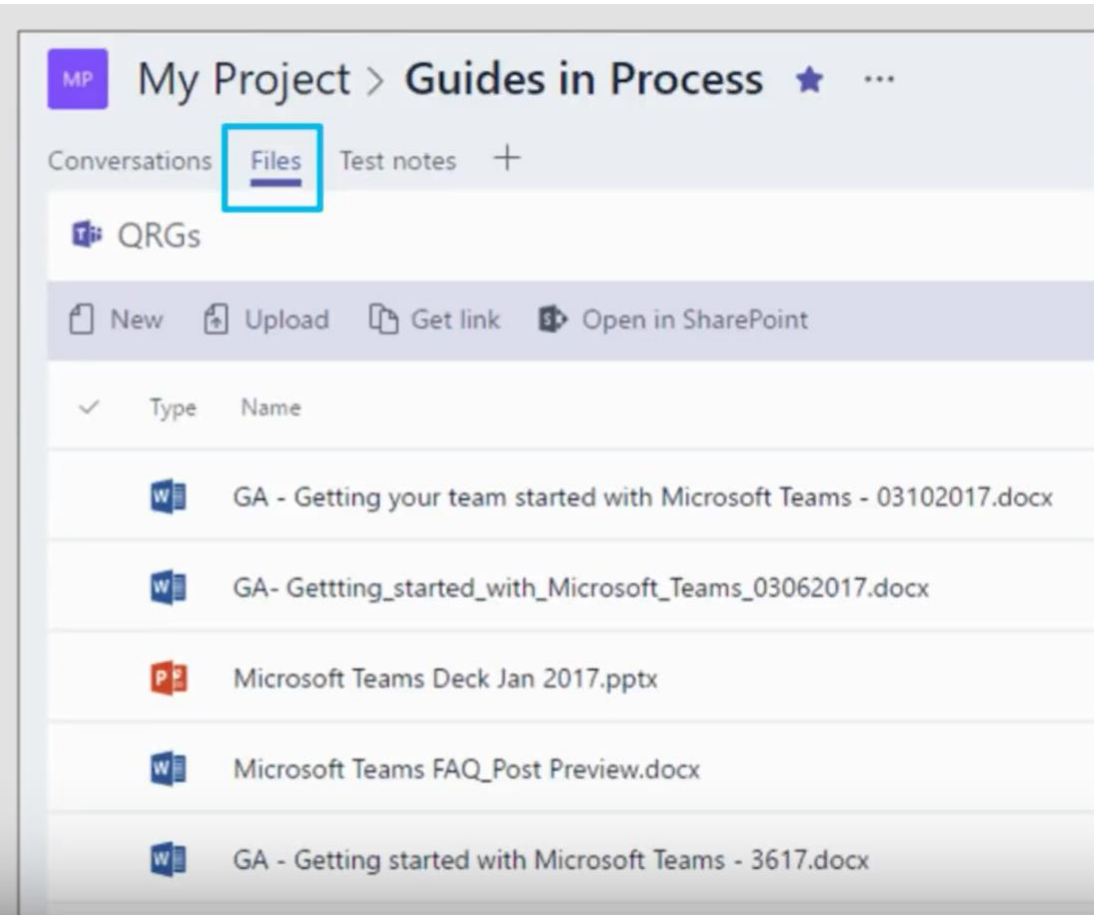
Conversation Tab

- **Start a conversation.** Enter a message in the **Start a conversation box**, and press **Enter** (or the **Send** icon).
- **Reply to a message.** Select **Reply** below a message, and enter a reply for a threaded message.
- **@mention a member.** Include **@MemberName** with your message, and your team member will receive an alert.
- **Message options.** You can save, delete, like, and add some flair to your messages with a Emoji, Giphy, or Sticker.
- **Find a message.** Enter a keyword in the **Search** box, and select the **Messages** tab.

File Tab

All files shared in a team channel conversation can be found in the channel's **Files** tab.

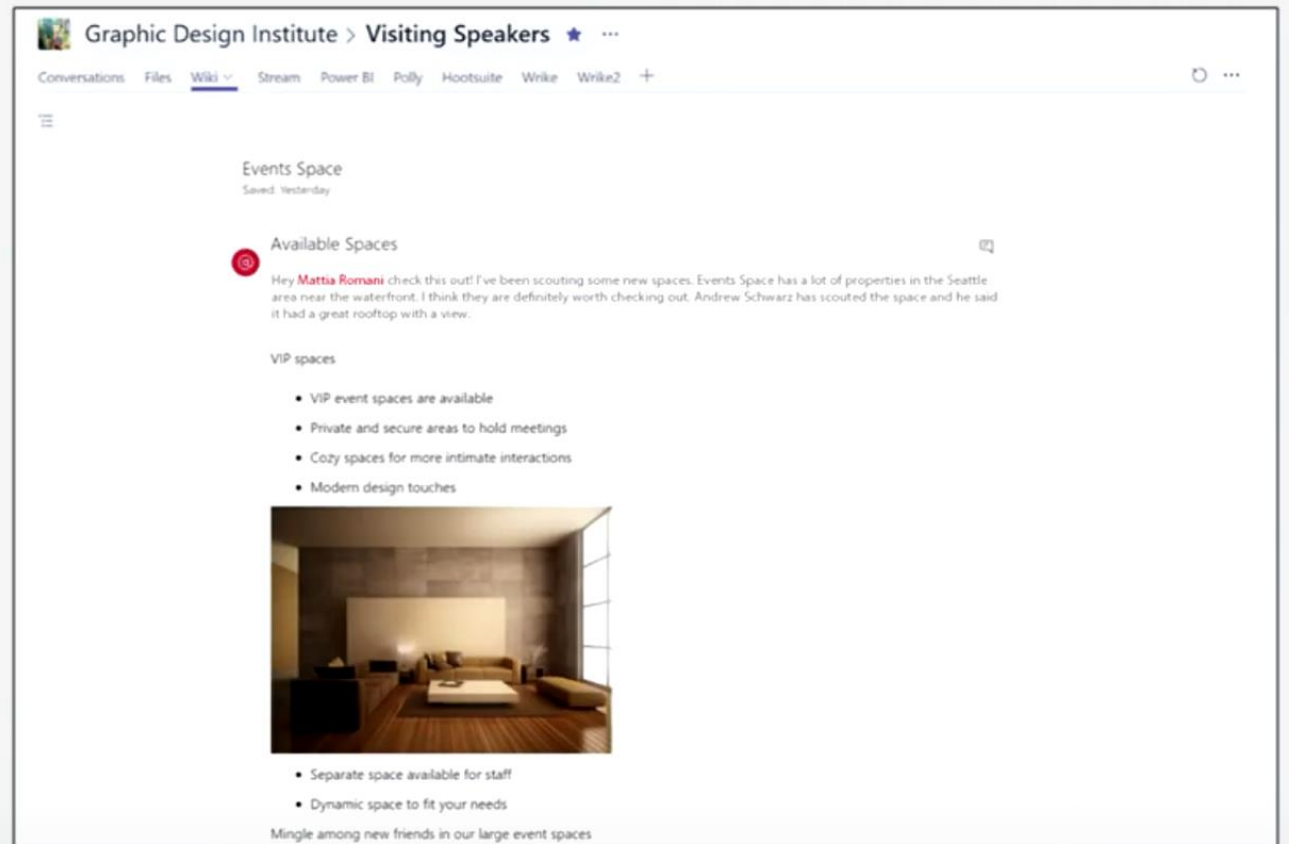
- You can also upload files directly to the **Files** tab.
- You can start a conversation about a file by opening the file in Teams and selecting **Start Conversation** in the upper right.
- To view your Microsoft Team files in SharePoint where they are stored, select **Open in SharePoint**.



Wiki Tab

Each team channel has a Wiki tab to use for taking notes or drafting and editing content in real time. It's a text editor that lets you @mention team members and leave or reply to comments.

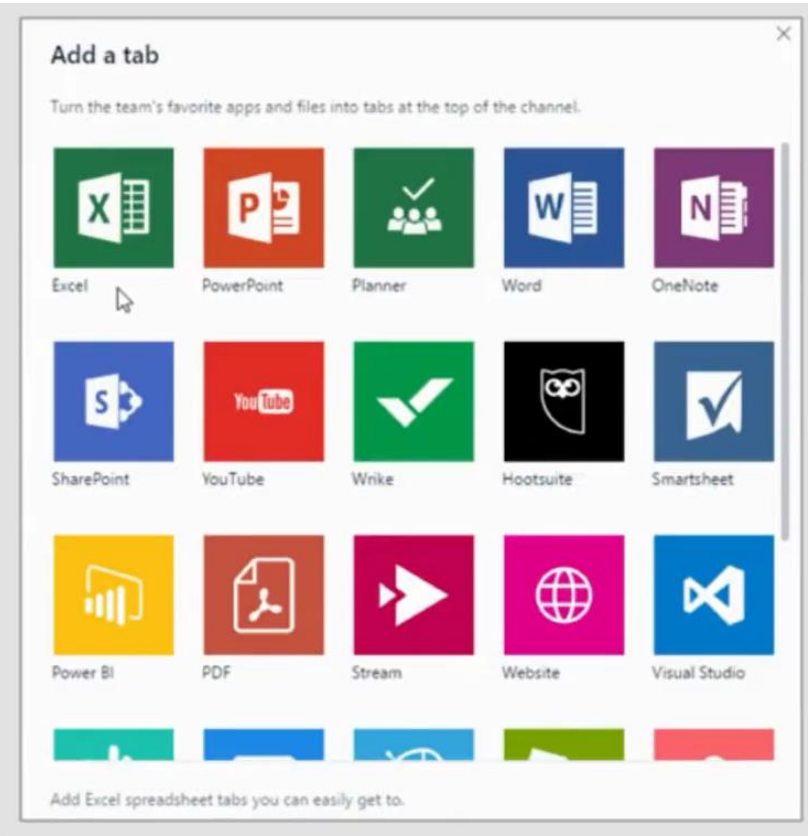
- Wiki topics contain sections
- Each section supports its own conversation
- Wiki content is stored and governed in SharePoint Online



Custom Tabs

Custom tabs allow you to integrate the tools and services you or your team use right into a channel. A few popular examples are:

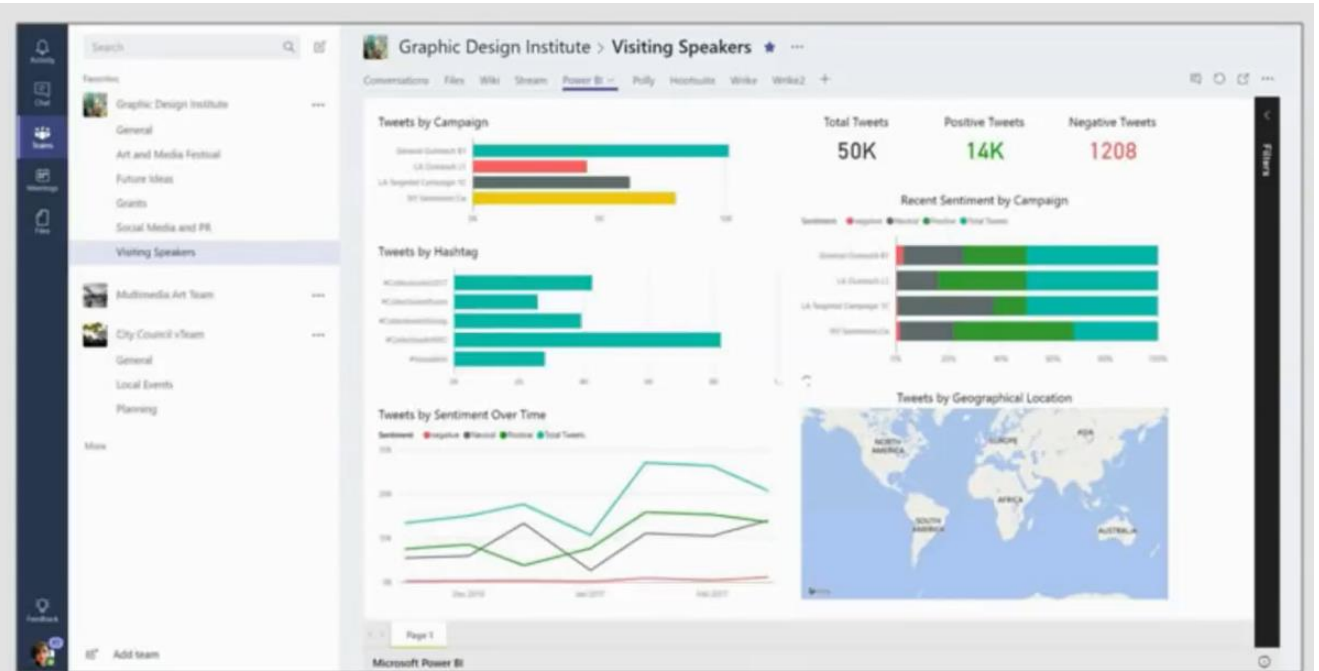
- Office applications: OneNote, Excel, PowerPoint, Word
- Power BI
- Website
- Visual Studio
- Stream



Power BI

You can integrate a Power BI dashboard into a team channel.

1. Select a team channel.
2. To the right of your existing tabs, select the + icon.
3. Select **Power BI**.
4. Name your tab.
5. Choose one of your Power BI Workspaces from the drop-down menu.
6. Select **Save**.



OneNote Tab

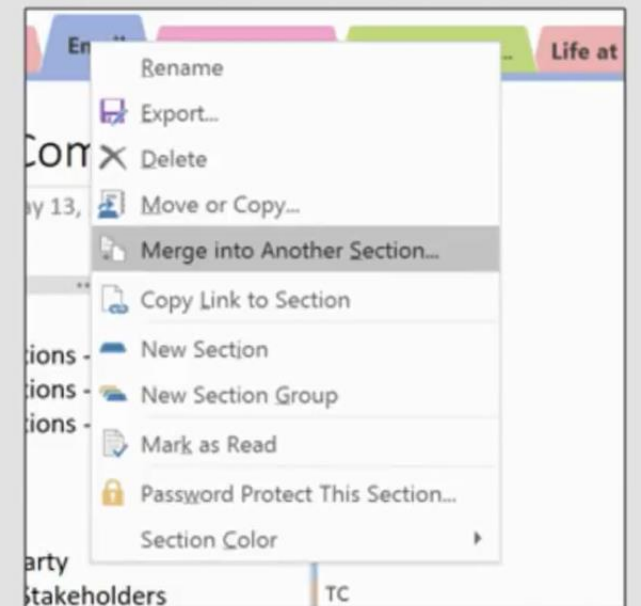
You can integrate OneNote into your channel by creating a OneNote tab.

Add a tab for OneNote

1. Select a team channel.
2. To the right of your existing tabs, select the **Plus** icon.
3. Select **OneNote**.
4. Name your OneNote tab, and then select **Save**.

Copy an existing OneNote notebook into Teams

- If you have relevant content in another OneNote notebook, you can move it to the OneNote notebook associated with your team by opening both notebooks in the desktop client and using the **merge** feature.



Bots

Bots in Microsoft Teams are able to chat one-on-one with members, providing answers and information about things your team is interested in.

The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Meetings, and Files. The 'Teams' section is expanded, showing 'My Project' and 'Teams Training Deck'. The 'Teams Training Deck' team is selected, and the 'General' channel is active. The main content area shows the 'Bots' tab for the 'Teams Training Deck' team. It includes a search bar, a 'Discover bots' button, and a list of bots with their names, descriptions, and delete icons.

Name	Description
Emojify	Say it with emoji! Translates any text into emoji, automagically!
KAYAK	Trying to find a flight for an upcoming conference? Need to agree on a hotel that fits your budget and your team? Wondering when your...
Polly	Poll your team with Polly! Mention @polly to get started. Analyze results by adding the Polly tab to your channels.

A man and a woman are sitting at a desk, looking at a laptop screen. The woman is on the left, wearing a light pink shirt, and the man is on the right, wearing a dark vest over a plaid shirt. They appear to be in a collaborative work environment. A semi-transparent teal banner is overlaid at the bottom of the image.

Microsoft Teams Demo



LinkedIn:

**<https://www.linkedin.com/in/lauracrawfordmct/> and
<https://www.linkedin.com/company/ppm-works-inc->**

Our Site: www.ppmworks.com

Blog: <http://blogs.ppmworks.com>

Calls To Action

1. Start incorporating these techniques today
2. Check out our Blogs / webcasts
3. Get LinkedIn with me (Laura Crawford)
4. Send questions to Info@ppmworks.com

Contact Us

**We'd Love to Hear From You-
Get In Touch With Us!**

Address: 30 Newbury Street, Boston, MA 02116

Phone: 888-858-3060

Email: info@ppmworks.com

Web: www.ppmworks.com