



Microsoft Teams Best Practices

11/16/2020

Teams for End Users

Best practices for utilizing teams, channels, chat and meetings

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End user basics

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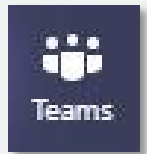
Common use cases: Workspaces

- WS#1: Departments
- WS#2: A cross-functional committee
- WS#3: An innovation day event
- WS#4: A non-work-related social event
- WS#5: A project team with a defined end time

Common use cases: Meetings

- M#1: Job interview with an external candidate
- M#2: Quarterly board meeting
- M#3: Weekly recurring team meeting
- M#4: Morning stand-up/scrum
- M#5: Phone call between two people

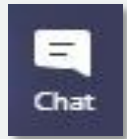
Overview: Teams, channels, and chat



Team: A workspace for a group of collaborative individuals.

Public channel: A focused area where all members of a team can meet, communicate, and share ideas and content.

Private channel: Like a public channel but restricted to a subset of team members, defined by channel owner.



Chat: Two or more users collected into a common conversation thread.

For any Microsoft Teams newcomer, the differences between **teams**, **channels**, and **chat** can be confusing.

Use Microsoft's figure (left) to see how these three mediums differ in their role and function.

Source: "Overview of teams and channels in Microsoft Teams," Microsoft, 2020.

Best practices: Workspaces 1/2

	Team	Public Channel	Private Channel	Group Chat
	A workspace for a group of collaborative individuals.	A focused area where all members of a team can meet, communicate, and share ideas and content.	Like a public channel but restricted to a subset of team members, defined by channel owner.	Two or more users collected into a common conversation thread.
Limits and Administrative Control				
Who can create?	IT, O365 Administrator through the ticketing process. https://help.palmbeachstate.edu/TDClient/1971/Portal/Requests/ServiceDet?ID=29992	Team owners can create a public channel within the team.	IT, O365 Administrator can create a private channel and adds its members through the ticketing process. Teams owners should define the members put in a request for a private channel.	Anyone
Who can add members?	Team owner(s); max 5,000 members per team	N/A	Once the channel is created, the owner of the private channel can manage the membership - up to 250 members – keeping in mind you can only add members that are already in the Team	Anyone can bring new members into the chat (and decide if they can see the previous history) up to 100 members
Who can delete?	Team owner/admin can delete	Any team member if given permission.	Channel owner(s)	Anyone can leave a chat but cannot delete chat, but they are never effectively deleted
Social Context				
Who can see it?	Public teams are indexed and searchable Private teams are not indexed and are visible only to joined members	All members of the team can see all public channels. Channels may be hidden from view for the purposes of cleaning up the UI.	Individuals will only see private channels for which they have membership	Only participants in the group chat can see the group chat
Who can see the content?	Team members can see any content that is not otherwise part of a private channel	All team members	All members of the private channel	Only members of the group chat

When does a **Group Chat** become a **Channel**?

- When it's appropriate for the conversation to have a **gallery** – an audience of members who may not be actively participating in the discussion.
- When **control over who joins** the conversation needs to be centrally governed and not left up to anyone in the discussion.
- When the **discussion will persist** over a longer time period .
- When the **number of participants** approaches 100.

When does a **Channel** become a **Team**?

- When a **team approaches 30 private channels**, many of those private channels are likely candidates to become their own team.
- When the channel membership needs to **extend beyond the boundary** of the team membership.

Best practices: Workspaces 2/2

	Team A workspace for a group of collaborative individuals.	Public Channel A focused area where all members of a team can meet, communicate, and share ideas and content.	Private Channel Like a public channel but restricted to a subset of team members, defined by channel owner.	Group Chat Two or more users collected into a common conversation thread.
Data and Applications				
Where does the content live?	SharePoint: Every team resides in its own SharePoint site	SharePoint: Each team (public and private) has its own folder off the root of the SharePoint site's repository	SharePoint: Each team (public and private) has its own folder off the root of the SharePoint site's repository	OneDrive: Files that are shared in a chat are stored in the OneDrive folder of the original poster and shared to the other members
How does the data persist or be retained?	If a team expires/is deleted, its corresponding SharePoint site and those artifacts are also deleted	Available for 21 days after deletion. Any member of the team can delete a public channel.	The team owner and private channel owner can delete/restore a private channel	Chats are never effectively deleted. They can be hidden to clean up the user interface.
Video	Within channels	Yes, select "Meet now" in channel below text entry box	Yes, select "Meet now" in channel below text entry box	Yes
Phone calls	Within channels	Yes, select "Meet now" in channel below text entry box	Yes, select "Meet now" in channel below text entry box	Yes
Shared computer audio/screen	Within channels	Yes, select "Meet now" in channel below text entry box	Yes, select "Meet now" in channel below text entry box	Yes
File-sharing	Within channels	Yes. Frequently used/collaborated files can be turned into discrete tab.	Yes. Frequently used/collaborated files can be turned into discrete tab.	Yes
Wikis	Within channels	Yes	Yes	No
Whiteboarding	Within channels	Yes	Yes	No

When does a Team become a Channel?

- When a **team's purpose** for existing **can logically be subsumed** by another team that has a larger scope.

When does a Channel become a Group Chat?

- When a **conversation** within a channel between select users **does not** pertain to that **channel's scope** (or any other existing channel), they should move the conversation to a group chat.
- However, this is until that group chat desires to form a channel of its own.

Request a new team

To request a new Team submit a ticket to the IT Department

<https://help.palmbeachstate.edu/TDClient/1971/Portal/Requests/ServiceDet?ID=29992>

Team owner: The Team Owner should be identified in your request. It is possible for the team owner to then invite other members of the team to become co-owners to distribute administrative responsibilities.

Team members: People who have accepted their invitation to be a part of the team.

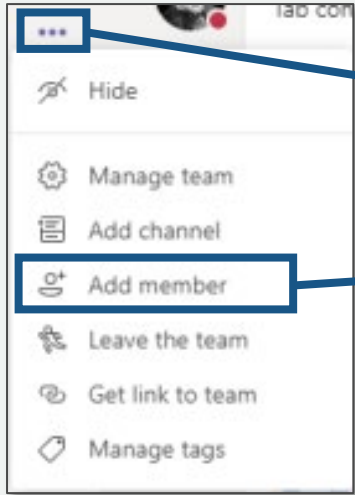
Member Settings / Permissions

Team owners determine permissions for Team Members

Members	Pending Requests	Channels	<u>Settings</u>	Analytics	Apps
<hr/>					
▶ Team picture		Add a team picture			
<hr/>					
▼ Member permissions		Enable channel creation, adding apps, and more			
		Allow members to create and update channels	<input checked="" type="checkbox"/>		
		Allow members to delete and restore channels	<input type="checkbox"/>		
		Allow members to add and remove apps	<input checked="" type="checkbox"/>		
		Allow members to upload custom apps	<input checked="" type="checkbox"/>		
		Allow members to create, update, and remove tabs	<input checked="" type="checkbox"/>		
		Allow members to create, update, and remove connectors	<input checked="" type="checkbox"/>		

Add team members

1



Only **team owners and co-owners** can **add** a team member. To **add** a team member, on the right-hand side of the team name, click “More options.”

Then, from the drop-down menu, click “Add member.”

2

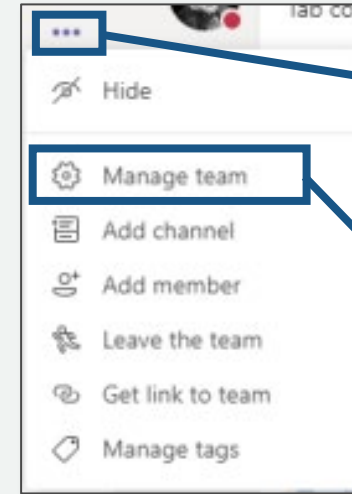
Type a name or email, then send your request to the team owner.

If you're a **team owner**, you can then type a name or an email address to add another member to the team.

If you're a **team member**, typing a name or an email address will send a request to the team owner to consider adding the member.

Remove team members

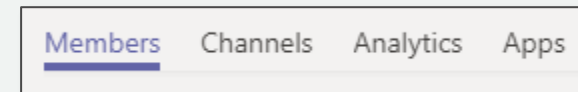
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Only **team owners and co-owners** can **remove** a team member. To do so, on the right-hand side of the team name, click “More options.”

Then, from the drop-down menu, click “Manage team.”

2

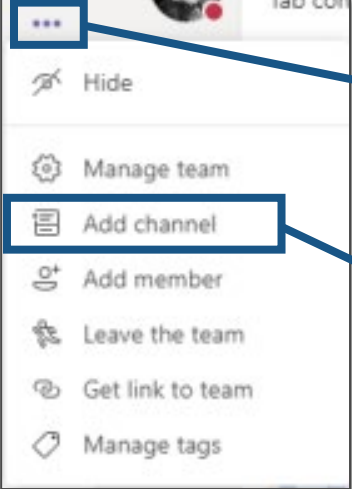


Under the “Members” tab, you’ll see a list of the members in the team. Click the “X” at the far right of the member’s name to remove them.

Team owners can only be removed if they change their role to team member first.

Add a new channel

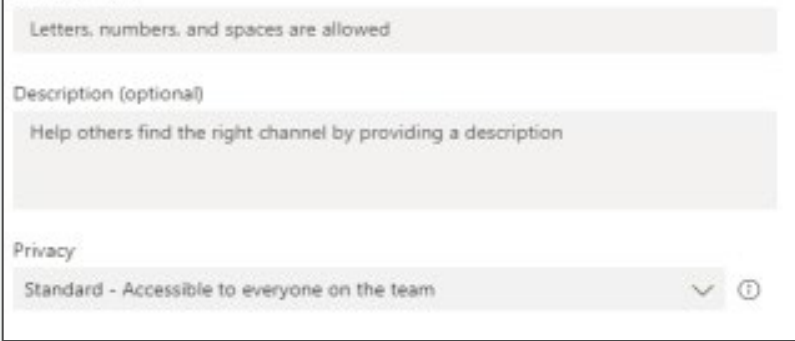
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On the right-hand side of the team name, click "More options."

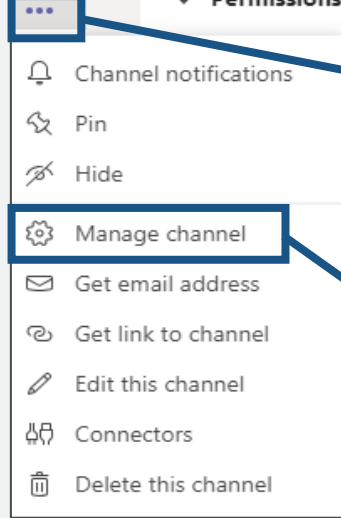
Then, from the drop-down menu, click "Add channel."

2



Name your channel, give a description, and set your channel's privacy.

3



To manage subsequent permissions, on the right-hand side of the channel name, click "More options."

Then, from the drop-down menu, click "Manage channel."

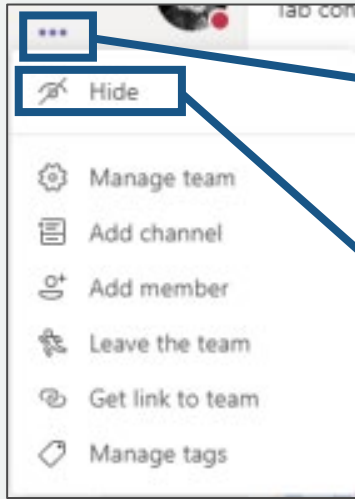
Adding and removing members from channels:

Only members in a team can see that team's channels. Setting channel privacy as "standard" means that the channel can be accessed by anyone in a team. Unless privacy settings for a channel are set as "private" (from which the channel creator can choose who can be in that channel), there is no current way to remove members from channels.

It will be up to the end user to decide which channels they want to hide.

Hide/unhide teams

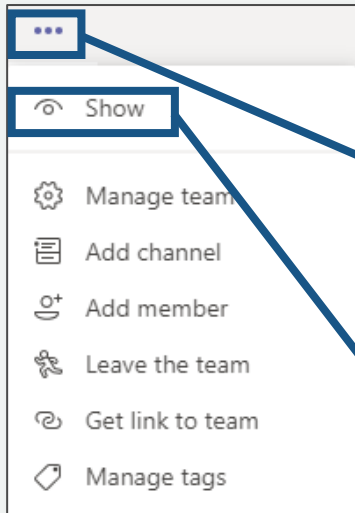
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To hide a **team**, on the right-hand side of the team name, click "More options."

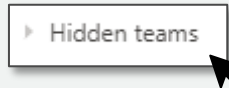
Then, from the drop-down menu, click "Hide." Hidden teams are moved to the "hidden teams" menu at the bottom of your team list.

2



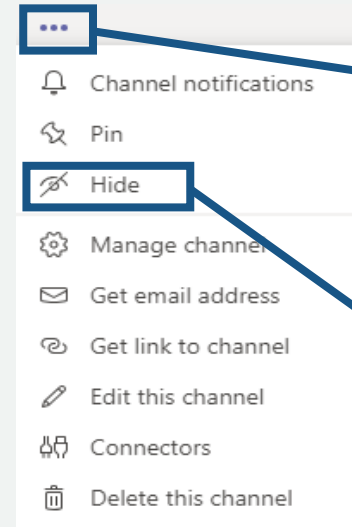
To unhide a **team**, click on the "hidden teams" menu. On the right-hand side of the team name, click "More options."

Then, from the drop-down menu, click "Show."



Hide/unhide channels

1



To hide a **channel**, on the right-hand side of the channel name, click "More options."

Then, from the drop-down menu, click "Hide." Hidden channels are moved to the "hidden channels" menu at the bottom of your channel list in that team.

2



To unhide a **channel**, click on the "hidden channels" menu at the bottom of the team. This will produce a drop-down menu of all hidden channels in that team.



Hover over the channel you want to unhide and click "Show."

Create a chat

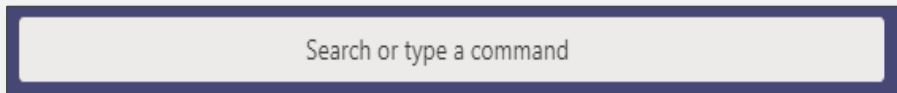
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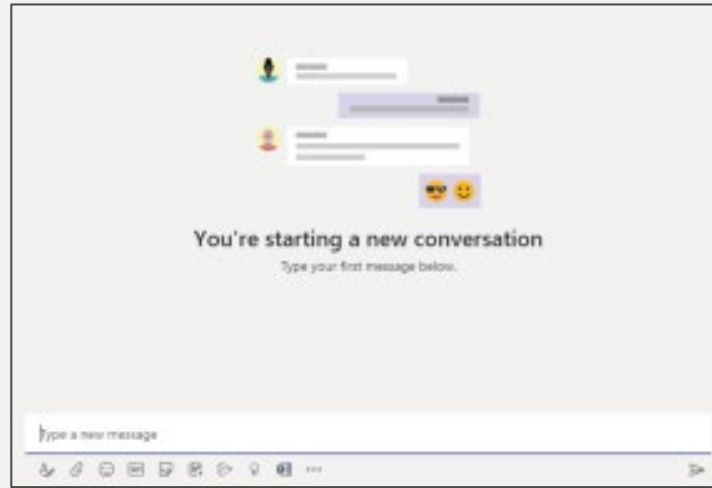
Click the “Chat” tab on the left-hand side of the app (or keyboard shortcut Ctrl+N).

2

In the top search bar, search the name of the person you want to chat with.



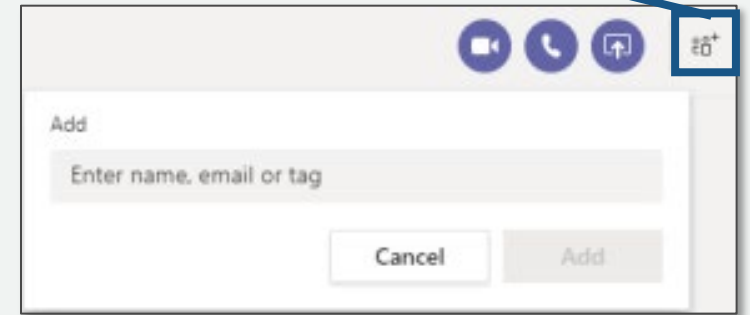
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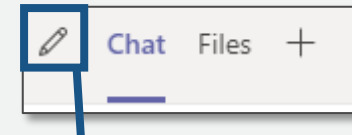
You're now ready to start the chat! You can also send a chat message while working in a separate channel by typing `/chat` into the search bar and entering the recipient's name.

4

For **group chat**, click the “Add people” button in the top right-hand corner of the app to add other persons into the existing chat.



5



You can then rename the group chat (if there's 3+ people) by clicking the “Name group chat” option to the right of the group chat members' names.

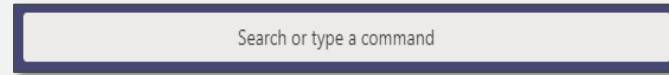
Hide a chat

1



Click the "Chat" tab on the left-hand side of the app.

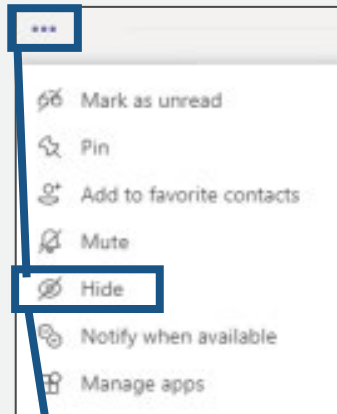
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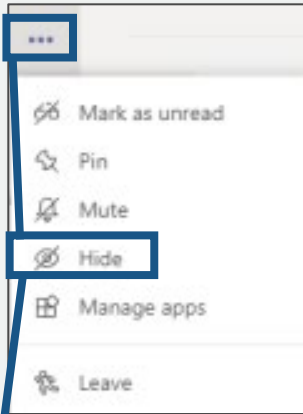
Search the name of the chat or group chat that you want to hide.

3

Single person chat options



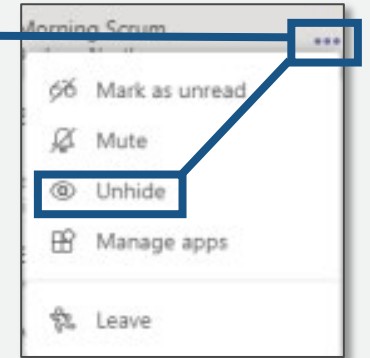
Group chat options



Click "More options." Then click "Hide"

Unhide a chat

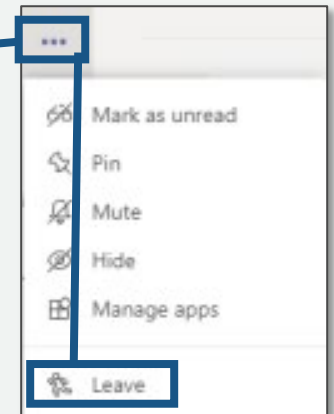
To **unhide** a chat, search for the hidden person or name of the group chat in the search bar. Click "More options." Then click "Unhide."



Leave a chat

You can only **leave** group chats. To do so, click "More options." Then click "Leave."

Group chat options



Best practices: Meetings

	Ad Hoc Call Direct audio/video call	Scheduled Meeting	Live Event
Limits and Administrative Control			
Who can create?	Anyone	Anyone	Anyone, unless altered by admin (permission to create MS Stream events also required if external production tools are used).
Who can add members?	Anyone in the session.	The meeting organizer can add new attendees to the meeting.	The event creator (the "organizer") sets attendee permissions and assigns event group roles ("producer" and "presenter").
Can external stakeholders attend?	Yes, through email invite. However, collaboration tools are restricted.	Yes, through email invite. However, collaboration tools are restricted.	Public events: yes, through shared invite link. Org-wide event: yes, if guest/external access granted.
Who can delete?	Anyone can leave the session. There is no artifact to delete.	The meeting organizer	Any attendee can leave the session. The organizer can cancel the event.
Maximum attendees	100	250	10,000 attendees and 10 active presenters/producers (250 presenters and producers can be present at the event).
Social Context			
How does the request come in?	Unscheduled. Notification of an incoming audio or video call.	Scheduled. Meeting invite, populated in the calendar, at a scheduled time.	Meeting only auto-populated in event group's calendars. Organizer must circulate event invite link to attendees – for instance, by pasting link into an Outlook meeting invite.
Available Functionality			
Screen-sharing	Yes	Yes	Producers and Presenters (through Teams, no third-party app).
Whiteboard	No	Yes	Yes
OneNote (for minutes)	Yes (from a member's OneDrive)	Yes, part of the meeting construct.	No. A Meeting Notes tab is available instead.
Dedicated chat space	Yes. Derived from a group chat.	Meeting has its own chat room.	The organizer can set up a moderated Q&A (not chat) when creating the event. Only Presenters and Producers can chat.
Recording	Yes	Yes	Yes. Event can last up to 4 hours.

When should an Ad Hoc Call become a Scheduled Meeting?

- When the participants need **time to prepare** content for the call.
- When an **answer is not required immediately**.
- When bringing a group of people together requires **logistical organizing**.

When should a Scheduled Meeting become an Ad Hoc Call?

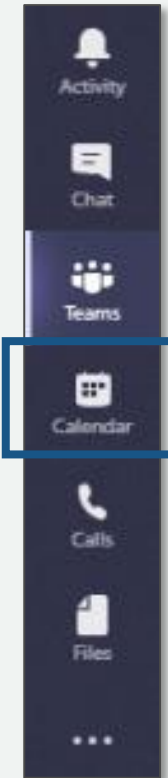
- When the participants can meet on **short notice**.
- When a topic under discussion requires **creating alignment quickly**.

When should a Live Event be created?

- When the expected attendance **exceeds 250 people**.
- If the event **does not require collaboration** and is mostly a presenter conveying information.

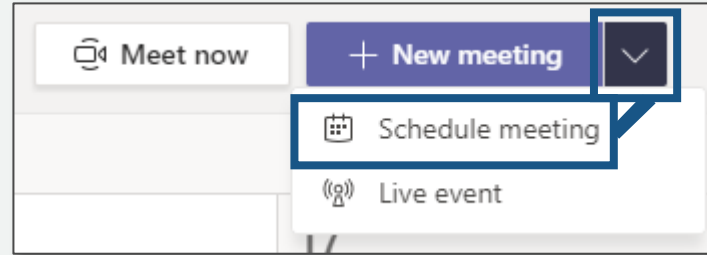
Create a scheduled meeting

1



Click the “Calendar” tab on the left-hand side of the app.

2



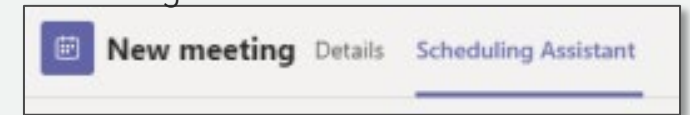
On the top-right of the app, click the drop-down menu for “+ New meeting” and then “Schedule meeting.”

3

4

To determine internal attendees’ availability, click “Scheduling assistant” on the top left.

Then click “Save” to create the meeting.

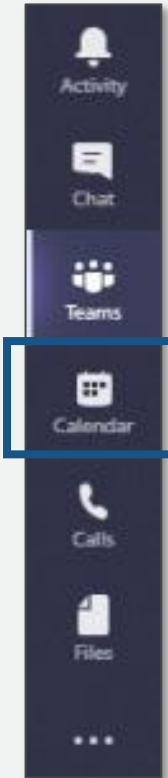


Fill in the meeting details. When inputting internal attendees, their names will drop down without needing their email.

You will need to input email addresses for external attendees.

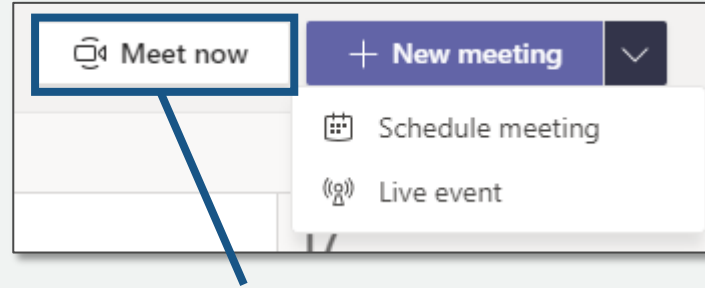
Create an ad hoc meeting

1



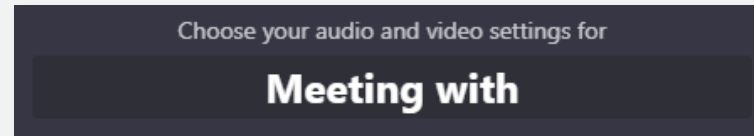
Click the “Calendar” tab on the left-hand side of the app.

2



Along the top-right, click “Meet now.”

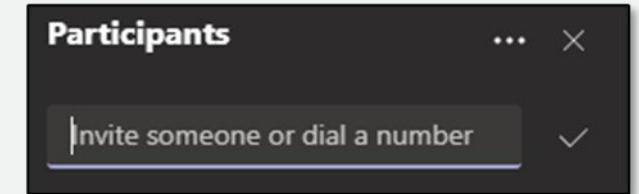
3



Name your meeting, choose your audio and video settings, and click “Join now.”

4

Invite available internal participants by searching by name. You can also enter a phone number which will call the number and add them to the meeting.



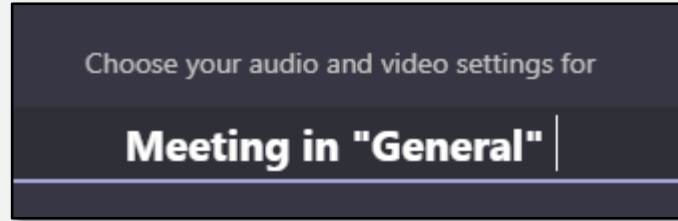
Create an ad hoc meeting in a channel

1



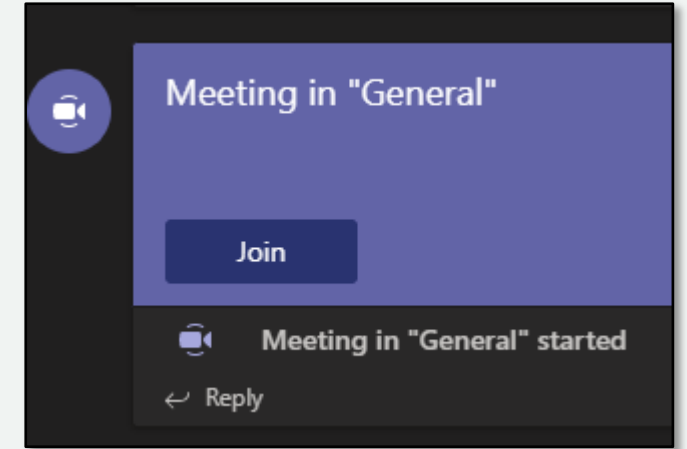
Each channel has an option to "Meet Now" in the top-right corner

2



Name your meeting, choose your audio and video settings, and click "Join now."

3



Team members can join the meeting directly from the channel until the meeting ends. The meeting organizer can also invite participants outside of the team.

Tip: Use existing channels to host the chatrooms for your online meetings

When you host a meeting online with Microsoft Teams, there will always be a chatroom associated with the meeting. While this is a great place for meeting participants to interact, there is one particular downside.

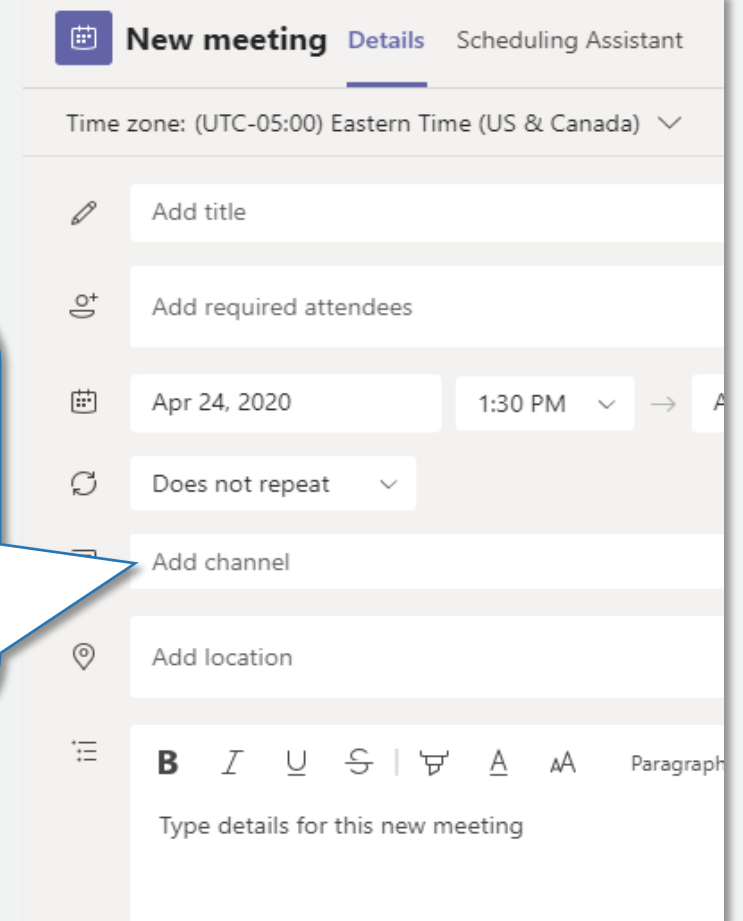
Problem: The never-ending chat. Often the activity in these chatrooms can persist long after the meeting. The chatroom itself becomes, unofficially, a channel. When end users can't keep up with the deluge of communication, the tools have failed them.

Solution: Adding an existing channel to the meeting. This ensures that discussion activity is already hosted in the appropriate venue for the group, during and after the meeting. Furthermore, it provides non-attendees with a means to catch up on the discussion they have missed.

In section two of this cookbook, we will often refer to this tactic.

Break the habit of online booking meetings in Outlook – use the Teams Calendar View instead!

In order to make use of this function, the meeting must be setup in Microsoft Teams, not Microsoft Outlook. The option to assign a channel to the meeting will then be available to the meeting organizer.



Don't have a channel for the chat session of your online meeting? Perhaps you should!

If your meeting is with a group of individuals that will be collaborating frequently, they may need a workspace that persists beyond the meeting.

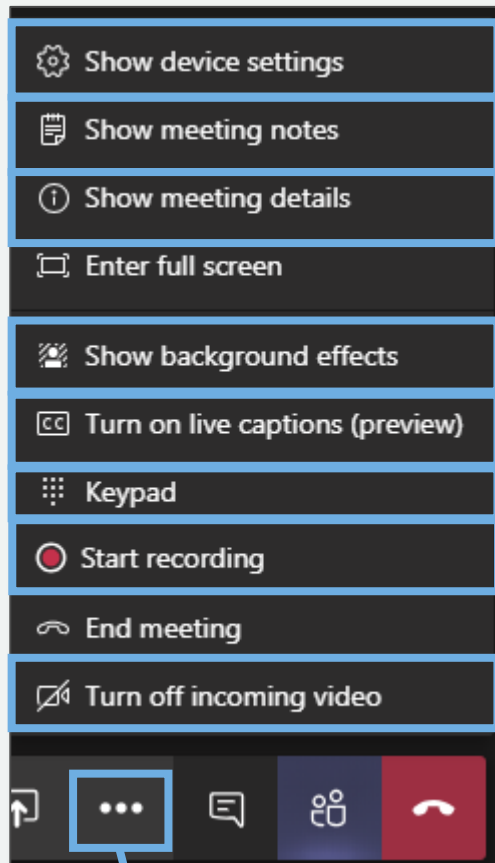
Guests can still attend the meeting, but they can't chat!

If there are attendees in your meeting that do not have access to the channel you select to host the chat, they will not see the chat discussion nor have any ability to use this function.

This may be appropriate in some cases – for example, a vendor providing a briefing as part of a regular team meeting.

However, if there are attendees outside the channel membership that need to see the meeting chat, consider another channel or simply default to not assigning one.

Meeting settings explained



Click "More options" to access the meetings settings.

For settings concerning audio, video, and whether viewing is private.

Use to take notes throughout the meeting. The notes will stay attached to this event.

Find meeting information for: a dial-in number, conference ID, and link to join.

Choose from a range of video backgrounds to hide/blur your location.

Turn on live speech-to-text captions.

For dialing a number within the meeting (when enabled as an add-on with E3 or as part of E5).

Recorded and saved using Microsoft Stream.

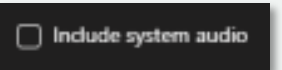
To save network bandwidth, you can decline receiving attendee's video.

Screen share

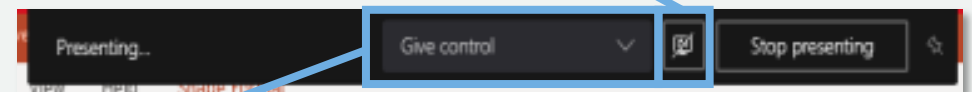
In the tool tray, select "Share" to share your screen. Select particular applications if you only want to share certain information; otherwise, you can share your whole desktop.

System audio share

To share your device's audio while screen sharing, check the "Include system audio" option upon clicking "Share."



If you didn't click that option at the start but now want to share audio during screen share, click the "Include systems audio" option in the tool tray along the top of the screen.



Give/take control of screen share

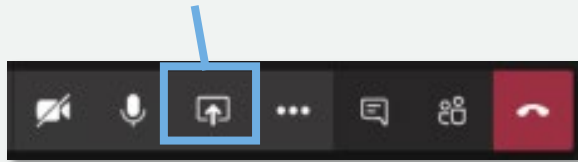
To give control, click "Give control" in the tool tray along the top of the screen when sharing content. Choose from the drop-down who you would like to give control to. In the same spot, click "Take back control" when required.

To request control, click "Request control" in the same space when viewing someone sharing their content. Click "Release control" once finished.

Start whiteboarding

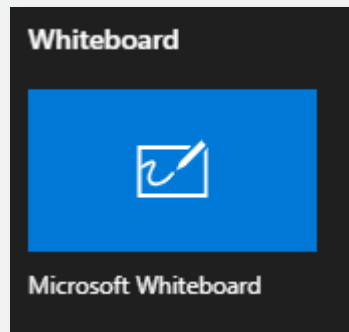
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Once enabled, click “Share” in a meeting. This feature only appears if you have **3+ participants** in the meeting.



2

Under the “Whiteboard” section in the bottom right, click “Microsoft Whiteboard.”



3



Click the pen icons to the right of the screen to begin sketching.

NB: Anonymous, federated, or guest users are currently not supported to start, view, or ink a whiteboard in a Teams meeting.

Will the whiteboard session be recorded if the meeting is being recorded?

No. However, the final whiteboard will be available to all meeting attendees after the meeting, under “Board Gallery” in the Microsoft Whiteboard app. Attendees can then continue to work on the whiteboard after the meeting has ended.

Workspace #1: Departments

Scenario: Most of your organization's communication and collaboration occurs within its pre-existing departmental divisions.

Conventional communication channels:

- Oral communication: Employees work in proximity to each other and communicate in person, by phone, in department meetings
- Email: Department-wide announcements
- Memos: Typically posted/circulated in mailboxes



Solution: Determine the best way to organize your organization's departments in Teams based on its size and your requirements to keep information private between departments.

Option A:

- Request a team for the division.
- Create channels for each division. Remember that all members of a team can view all public channels created in that team and the default General channel.
- Request private channels if you wish to have a channel that only select members of that team can see. Remember that private channels have some limitations in functionality.

Option B:

- Request a new team for each department.
- Create channels within this team for projects or topics that are recurring workflows for the department members. Only department members can view the content of these channels.

General:

- Post departmental memos and announcements in the General channel.
- Use "Meet now" in channels for ad hoc meetings. For regular department meetings, create a recurring Teams calendar event for the specific department channel (Option A) or the General channel (Option B). Remember that all members of a team can join a public channel meeting.

Workspace #2: A cross-functional committee

Scenario: Your organization has struck a committee composed of members from different departments. The rest of the organization should not have access to the work done in the committee.

Purpose: To analyze a particular organizational challenge and produce a plan or report; to confidentially develop or carry out a series of processes that affect the whole organization.

Jobs: Committee members must be able to:

- Attend private meetings.
- Share files confidentially.

Solution:

Ingredients:

- Private team

Construction:

- Create a new private team for the cross-functional committee.
- Add only committee members to the team.
- Create channels based on the topics likely to be the focal point of the committee work.
- Decide how you will use the mandatory General channel. If the committee is small and the work limited in scope, this channel may be the main communication space. If the committee is larger or the work more complex, use the General channel for announcements and move discussions to new topic-related channels.
- Schedule recurring committee meetings in the Teams calendar. Add the relevant channel to the meeting invite to keep the meeting chat attached to this team and channel (as meeting organizer, put your name in the meeting invite notes, as the channel will show as the organizer in the Outlook invite).
- Remember that all members of this team will have access to these meetings and be able to view that they are occurring.



Workspace #3: An innovation day event

Scenario: The organization holds a yearly innovation day event in which employees form small groups and work on a defined, short-term problem or project.

Purpose: To develop innovative solutions and ideas.

Jobs:

- Convene small groups.
- Work toward time-sensitive goals.
- Communicate synchronously.
- Share files.



Solution

Ingredients:

- Public team
- Channel tabs
- Whiteboard
- Planner

Construction:

- Create a team for the innovation day event.
- Add channels for each project working group.
- Communicate to participants the schedule for the day and their assigned channel.
- Use the General channel for announcements and instructions throughout the day. Ensure someone moderates the General channel for participants' questions.
- Pre-populate the channel tabs with files the participants need to work with. To add a scrum board, refer to M#4 (Morning stand-up/Scrum) in this slide deck.
- For breakouts, instruct participants to use the "meet now" feature in their channel and how to use the Whiteboard during these meetings.
- Arrange to have your IT admin archive the team after a certain point so the material is still viewable but not editable.

Workspace #4: A project team with a defined end time

Scenario: Within a department/workplace team, employees are assigned to projects with defined end times, after which they will be assigned to a new project.

Purpose: To complete project-based work that fulfills business needs.

Jobs:

- Oral communication with team members.
- Synchronous and asynchronous work on project files.
- The ability to attend scheduled meetings and ad hoc meetings.
- The ability to access shared resources related to the project.

Best Practice

Hide the channel after the project concludes to de-clutter your Teams user interface.

Solution:

If your working group already has its own team within Teams:

- Create a new public or private channel for the project. Remember that some functionality is not available in private channels (such as Microsoft Planner).
- Use the channel for the project team's meetings (scheduled in Teams calendar or through Meet Now).
- Add a tab that links to the team's project folder in SharePoint.

If your workplace team does not already have its own team in Teams:

- Determine if there is a natural fit for this project as a new channel in an existing team. Remember that all team members will be able to see the channel if it is public and that all relevant project members need to belong to the Team to participate in the channel.
- If necessary, create a new team for the project. Add the project members.
- Create channels based on the type of work that comprises the project.
- Use the channel for the project team's meetings (scheduled in Teams calendar or through Meet Now)
- Add a tab to link to the team's project folder in SharePoint.

Meetings #1:

Job interview with external candidate

Scenario: The organization must interview a slate of candidates to fill an open position.

Purpose:

- Select the most qualified candidate for the job.

Jobs:

- Create a meeting, ensuring the candidate and other attendees know when and where the meeting will happen.
- Ensure the meeting is secure to protect confidential information.
- Ensure the meeting is accessible, allowing the candidate to present themselves through audio and/or visual means.
- Create a professional environment for the meeting to take place.
- Engender a space for the candidate to share their CV, research, or other relevant file.
- The interview must be transcribed and recorded.

Note: The external candidate does not need the Teams application. Through the meeting invite, the external candidate will join via a web browser.

Solution

Ingredients:

- Private Teams meeting
- Screen-sharing
- Microsoft Stream

Construction:

- Create a Teams meeting, inviting the candidate with their email, alongside other internal attendees. The Teams meeting invite will auto-generate a link to the meeting itself.
- The host can control who joins the meeting through settings for the “lobby.”
- Through the Teams meeting, the attendees will be able to use the voice and video chat functionality.
- All attendees can opt to blur their backgrounds to maintain a professional online presence.
- The candidate can share their screen, either specific applications or their whole desktop, during the Teams meeting.
- A Teams meeting can be recorded and transcribed through Stream. After the meeting, the transcript can be searched, edited, and shared

Meeting #2: Quarterly board meeting

Scenario: Every quarter, the organization holds its regular board meeting.

Purpose: To discuss agenda items and determine the company's future direction.

Jobs:

During meeting:

- Attendance and minutes must be taken.
- Votes must be recorded.
- In-camera sessions must occur.
- External experts must be included.

After meeting:

- Follow-up items must be assigned.
- Reports must be submitted.

Note: The external guests do not need the Teams application. Through the meeting invite, the guests will join via a web browser.

Solution

Ingredients:

- Teams calendar invite
- Planner; Forms
- Private channel
- Microsoft Stream

Construction:

- Guest Invite: Invites can be sent to any non-domain-joined email address to join a private, invitation-only channel within the team controlled by the board chair.
- SharePoint & Flow: Documents are emailed to the Team addresses, which kicks off an MS Flow routine to collect review notes.
- Planner: Any board member can assign tasks to any employee.
- Forms/Add-On: Chair puts down the form of the question and individual votes are tracked.
- Teams cloud meeting recording: Recording available through Stream. Manual edits can be made to VTT caption file. Greater than acceptable transcription error rate.
- Meeting Log: Real-time attendance is viewable but a point-in-time record needs admin access.

Meeting #3: Weekly team meeting

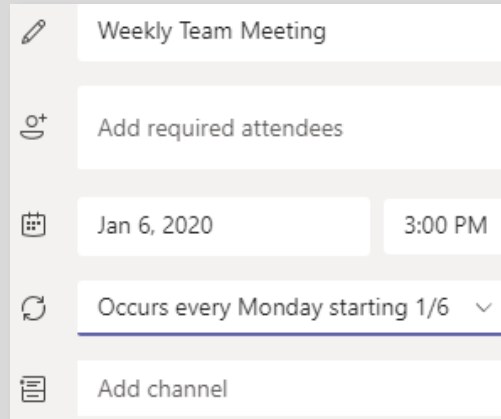
Scenario: A team meets for a weekly recurring meeting. The meeting is facilitated by the team lead (or manager) who addresses through agenda items and invites participation from the attendees.

Purpose: The purpose of the meeting is to:

- Share information verbally
- Present content visually
- Achieve consensus
- Build team morale

Jobs: The facilitator must:

- Determine participants
- Book room
- Book meeting in calendar

A screenshot of the Microsoft Teams meeting creation interface. It shows a form with the following fields: a title field containing 'Weekly Team Meeting', an 'Add required attendees' button, a date field set to 'Jan 6, 2020' and a time field set to '3:00 PM', a recurrence field set to 'Occurs every Monday starting 1/6', and an 'Add channel' button at the bottom.

Solution

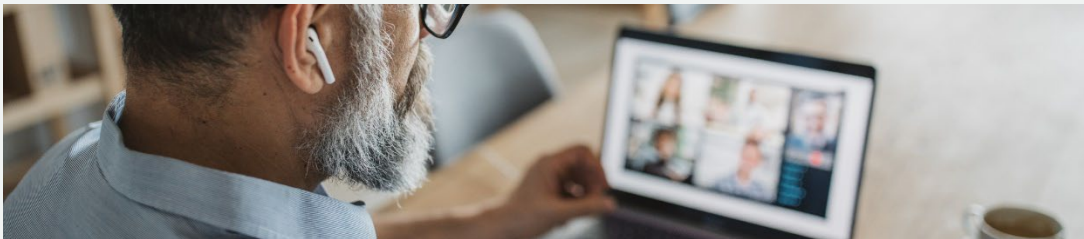
Ingredients:

- **Meeting Place:** A channel in Microsoft Teams (must be public) where all members of the meeting make up the entirety of the audience.
- **Calendar Recurrence:** A meeting is booked through Teams and appears in all participants' Outlook calendar.
- **Collaboration Space:** Participants join the meeting through video or audio and can share screens and contribute text, images, and links to the meeting chat.

Construction:

- Ensure your team already has a channel created for it. If not, create one in the appropriate team.
- Create the meeting using the calendar view within Microsoft Teams:
 - Set the meeting's name, attendees, time, and recurrence.
 - Add the team channel that serves as the most appropriate workplace for the meeting. (Any discussion in the meeting chat will be posted to this channel.)

Note: Create the meeting in the Teams calendar, not Outlook, or you will not be able to add the Teams channel. As meeting organizer, put your name in the meeting invite notes, as the channel will show as the organizer in the Outlook invite.



Meeting #4: Morning stand-up/scrum

Scenario: Each morning, at 9am, members of the team meet online.

Purpose: After some pleasantries, the team discusses what tasks they each plan to complete in the day.

Jobs: The team leader (or scrum master) must:

- Place all tasks on a scrum board, each represented by a sticky note denoting the task name and owner.
- Move the sticky notes through the columns, adjusting assignments as needed.
- Sort tasks into the following columns: "Not Started," "In Progress," and "Done."

A screenshot of the Microsoft Teams meeting creation interface. The title is "Morning Standup Meeting". Below the title is a field for "Add required attendees". The date is set to "Jan 6, 2020" and the time is "9:00 AM". The recurrence is set to "Occurs every day starting 1/6". At the bottom is a button labeled "Add channel".

Solution

Ingredients:

- **Meeting Place:** A channel in Microsoft Teams (must be public) where all members of the meeting make up the entirety of the audience.
- **Scrum Board:** A tab within that channel where a persistent scrum board has been created and is visible to all team members.

Meeting Place Construction:

- Create the meeting using the calendar view in Teams.
- Set the meeting's name, attendees, time, and work-week daily recurrence (see left).
- Add the channel that is the most appropriate workplace for the meeting. Any meeting chat will be posted to this channel rather than a separate chat.

Scrum Board Construction:

- Add a tab to the channel using Microsoft Planner as the app. (You can use other task management apps such as Trello, but the identity integration of first-party Office 365 tools may be less hassle.)
- Create a new (or import an existing) Plan to the channel. This will be used as the focal point.

Meeting #5: Phone call between two people

Scenario: An audio-only conversation that could be a regularly scheduled event but is more often conducted on an ad-hoc basis.

Purpose: To quickly share information, achieve consensus, or clarify misunderstandings.

Jobs:

- Dial recipient
- See missed calls
- Leave/check voicemail
- Create speed-dial list
- Conference call



Solution

Ingredients:

- Audio call begun through Teams chat.

Construction:

- **Voice over IP calls between users in the same MS Teams tenant can begin in multiple ways:**
 - A call can be initiated through any appearance of a user's profile picture: hover over user's profile photo in the Chat list and select the phone icon.
 - Enter your last chat with a user and click phone icon in upper-right corner.
 - Go to the Calls section and type the name in the "Make a call" text entry form.
- **Voicemail:** Voicemail, missed calls, and call history are available in the Calls section.
- **Speed dial:** Speed dial lists can be created in the Calls section.
- **Conference call:** Other users can be added to an ongoing call.

Note. Microsoft Teams can be configured to provide an organization's telephony for external calls, but this requires an E5 license. Additional audio-conferencing licenses are required to call in to a Teams meeting over a phone.

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