

Conversational Office 365 Collaboration



Learn about:

- Co-authoring Documents
- Working together within Groups
- Working together within Teams

By Heather Severino (Microsoft Certified Trainer, OneNote MVP)

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Note from the Author

I've been working with Microsoft Office applications for over two decades, and in the early years my learning was all from self-education.

Some of those learning moments I spent wringing my fist in the air saying "why can't you work the way I want?!". Other times I was praising the application for making work tasks much easier! As I was learning more about Microsoft Office, the Internet was emerging, and it brought with it a wealth of knowledge. With a quick search, tutorials were available to create Pivot Tables, Macros and more.

While Internet searches are still a viable source, the tech is emerging so rapidly there's often not a lot of information available yet. Other times, there are so many choices it's hard to filter for the right results. Office 365 Groups and Teams fits both scenarios.

As a Microsoft Certified Trainer, I've been helping others learn how to be productive for 15 years. Thinking back to my first days in the office, collaboration consisted of inter-office mail, desk phones, and in-person meetings. We've come a long way with Internet, email, mobile devices, web meetings and web apps.

This book explores how personal and team productivity collaboration tools can transform the way you and others work together, transform ideas together and create global engagement together.

Welcome to a whole new world!

Heather Severino



The “Conversational” Method

We have two objectives when we create a “Conversational” book: First, to make sure it’s written in a conversational tone so that it’s fun and easy to read. Second, to make sure you, the reader, can immediately take what you read and include it into your own conversations (personal or business-focused) with confidence.

These books are meant to increase your understanding of the subject. Terminology, conceptual ideas, trends in the market, and even fringe subject matter are brought together to ensure you can engage your customer, team, co-worker, friend and even the know-it-all Best Buy geek on a level playing field.

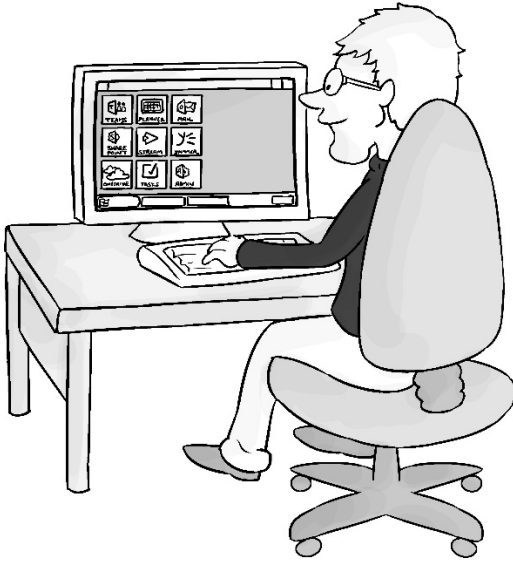
“Geek in the Mirror” Boxes

We infuse humor into our books through both cartoons and light banter from the author. When you see one of these boxes it’s the author stepping outside the dialog to speak directly to you. It might be an anecdote, it might be a personal experience or gut reaction and analysis, it might just be a sarcastic quip, but these “geek in the mirror” boxes are not to be skipped.



Within these boxes I can share just about anything on the subject at hand. Read 'em!

Office 365 Collaboration: What's it all about?



Microsoft Office 365 came about in 2011 as a group of cloud-based software applications and services. Over time the included capability to store and share files in the cloud shifted the way many of us work: anywhere – anytime access, file sharing by email or link, real-time co-authoring of documents, and mobile applications (apps) access.

Over the years, new features and applications have been added to Office 365, many of which are considered collaboration tools.

Before we discuss these tools in greater detail, let's break down collaboration a bit. It can be defined as: to work, one with another.

If you are working with Office 2013/2016 or Office 365, you may already be collaborating and didn't even realize it! Sharing a document from OneDrive for Business with others and

editing (co-authoring) in said document is considered collaborating, albeit on a more limited and possibly smaller scale. Making revisions in a document hosted within a SharePoint Document Library also counts! Working in dedicated collaboration/social spaces like Yammer Groups, Outlook Groups, SharePoint Team Sites and Teams is considered collaboration in a more structured, customizable environment and on a larger scale. Now if OneDrive for Business, Yammer, Outlook Groups, SharePoint Team Sites and Teams are terminology you are not familiar with yet, lets introduce you briefly here and later we will discuss each one in more detail.



Mid-year 2017 Microsoft 365 was introduced by Microsoft CEO, Satya Nadella. Microsoft 365 is an intelligent and secure packaged solution for teamwork providing Office 365, Windows 10, and Enterprise Mobility + Security together. This solution is available for Business (small and medium sized businesses) or Enterprise (large businesses). While we are not getting into this newly bundled offering, we will cover quite a bit in Office 365.

A Breakdown of Applications and Services

Microsoft Office – a productivity suite of applications like Outlook, Word, Excel, PowerPoint, OneNote, Visio and Access is available in Desktop, Mobile, and Tablet-based versions. In this book, reference will be made to Office in its many forms: the common desktop version installed on a computer, Office 2016 for Windows or Mac, the web-based version, Office 365 apps, and the Office 365 mobile apps for tablets and phones.

OneDrive for Business Document Library – document storage and synchronization space for an individual's personal

documents. This is hosted on a SharePoint Server and has a very similar interface and structure to a SharePoint Document Library.

SharePoint Document Library – document storage and management system that's part of a SharePoint portal, a web-based platform that integrates with Microsoft Office.

SharePoint Team Site – this is a dedicated space within a SharePoint intranet portal for connecting with your colleagues, storing and sharing files, creating and managing lists, staying up to with a shared calendar, seeing recent site activity, and linking to other apps.

Office 365 Groups – a service that works with many Office 365 tools and can be set to public or private.

Groups in Outlook include a shared inbox, shared calendar, SharePoint Document Library, Planner app and connectors to more information. An existing group can be turned into a Team.

Groups in Yammer – By creating an Office 365 Group in Yammer, you will get a Yammer group, a place for conversations and information sharing, a SharePoint Document Library, a shared OneNote Notebook, a SharePoint Team Site, and a project plan in the Planner app. If you are not familiar with Yammer, it's a dedicated space for group collaboration with the Yammer cloud-only enterprise social network. This integrates with SharePoint and is included in Office 365.

Teams – an application that combines workplace conversations, chat, meetings, notes, documents, and connectors to other Office 365 application data/information and non-Microsoft products. Teams can be created as public - anyone in the organization can find and join this team, or private – only the owner can add members to the team. The

Teams app is available within Office 365, as a mobile app, a Windows Desktop app, and as a Mac OS 10.10 or later app.

Skype for Business – an application providing instant messaging (IM), video calls, audio calls, web meetings, conferencing. Available in Office 365, a mobile app, Windows Desktop app, and Mac app. Note: In the near future Skype for Business will be integrated with and rebranded as part of Microsoft Teams.

Okay, now you have a better understanding of what these apps and services are and how you might use them. What we haven't talked about yet is how a lot of these services and apps are interconnected and can be accessed from many different places. We will get to that soon enough. First, we need to do a bit of discovery to determine which of these collaboration tools might work best for your group's culture. Even if you are not currently in the process of setting up a collaborative space, you will get to know the differences and what might work best. You never know when the teamwork questions may come up...in a meeting, break room, or the elevator. Get that elevator pitch ready!

Office 365 Collaboration: The Who, What, When, Where and Why

To create a successful culture of collaboration you need to ask key questions and gather answers from others and yourself. This will help you choose the best tool for the way you and others prefer to work together. The questions listed below are just a sampling of some that may be helpful. You may come up with more as they relate to geographic placement and time zones of fellow colleagues, the types of information you work on together, and ways you want to be updated on new and changing information. As you read each question, jot down your answers. Refer to these as each collaboration tool is discussed later in the book. They can help you decide which collaboration apps and services you want to adopt and embrace within your organization's culture.

- Q1: Who will you be collaborating with?
- Q2: How many individuals will you be collaborating with on a specific document or overall project? Is it just a few, 30 or more?
- Q3: Are these individuals internal to your organization, external, or a mix of both?
- Q4: Do you need to collaborate on something specific: email conversations, a document/set of documents, a calendar, project management tasks, connected inflow of information like social media posts and dashboards, or a mixture of many?
- Q4: Do the individuals you will be working with spend a lot of time in one application over others? I.e. is 90% of the work day spent in Outlook triaging email and managing meetings or some other type of application?
- Q5: Is the collaboration on one central topic/idea/product, or a one-to-many (hub and spoke) relationship?
- Q6: Do these individuals prefer to receive email notifications, banner notifications, or something a bit more customizable?

Okay, enough with all the questions, right? Let's collaborate to find the best tools for you.

As a Microsoft Certified Trainer, I help others learn how to be productive with Office 365 on a regular basis. The question I hear most is "Why are there so many choices for collaboration tools? I don't know if I should use SharePoint, OneDrive for Business, OneNote, Yammer, Groups, Teams, or Skype for

Business for what I need to work on with others.” The good news for you is that if you already answered those 6 questions asked in the previous paragraph, you have “the who”, “the what”, “the where” and “the why”. What we will figure out now is “the which”, which collaboration tool(s) works best for your specific answers (needs).



When Microsoft Teams became available in 2016, many speculated that Office 365 Groups was going away (being replaced by Teams). This is not the case and in fact, Groups can be turned into Teams, making the same information accessible in many places. When a new Team is created, a group is also created. Some may argue this is too much information in too many places and that it makes end-user adoption more challenging. I completely disagree with this. Having access to the same collaboration spaces in many apps and services makes sense to me. If you can collaborate on many things from one space, you are streamlining the process. It’s about being more efficient and productive!

The Big Takeaways

Collaboration within Office 365 can happen in many ways. Hopefully, the breakdown of apps and services introduced helped you get a fundamental understanding of what’s it about and where it is located within Office 365. We will get into much greater detail with each service and app as you progress through the book. While some of the collaboration services and apps have similar collaboration tools, some are also unique. We’ll explore each tool based on a scenario from a peer and figure out which Office 365 service or app may provide the best space for teamwork to happen.

Office 365 Collaboration: Co-authoring



Elias has a keynote presentation he and a small group of colleagues are working on. He sent this presentation out to the group by way of an email attachment. A few days later as each coworker responds with their edits he realizes he has many different versions of this file and dreads the process of merging these together. The other challenge he has is that as these various versions are emailed back and forth no one has visibility to the changes already made. He heard about a better way to collaborate in Office 365 and wants to know if this will help his team work more efficiently and give visibility to all seeing the latest changes.

You might be shaking your head right now and saying, “Yes, I have had this exact problem play out time and time again!”

While Elias' scenario is specific to a presentation file, this is not the only file he and his colleagues need to work on together. Storing these files in a cloud-based document library may work great for sharing these with others and editing within the online or desktop version of the Office application. The editing can be done in real time with many colleagues working in the document at the same time. This is what is known as co-authoring. It can also be updating a shared OneNote notebook or co-authoring a document in a Skype for Business meeting. Let's take a closer look at how Elias can accomplish this with some of the Office 365 applications and services.

OneDrive for Business is a great place for Elias to kick off the sharing process. Since this area is set up for personal use, all documents moved to his OneDrive library or newly created from the same OneDrive library are only accessible by Elias.

There are many ways the document can be shared, from OneDrive or while viewing the document in the online or desktop app. With these two methods, there are options available to send by email, grant permissions to edit or view, or copy a link to access the file. Another option is to attach it to an Office 365 Mail app email (in a sharable way).

It's the same familiar Paperclip Attach command you may already know in Outlook, it just works in a different (better) way. When clicked there are choices for how the file can be attached. It can be attached in that old familiar way that caused Elias all the version issues of the past. This might still be good if just sending to one person for viewing (not collaboration). Instead of selecting that, he picks a file from the OneDrive library listed. The file is attached as being shared with each person on the To line of the message.



When a file is attached from Outlook 2016 with the Paperclip command, you can browse the Cloud storage libraries like OneDrive and SharePoint. This menu also displays the most recent files you have been creating and editing, making it easy to attach the file quickly. I mean, does it get any better than that? I don't know about you, but when I am attaching something to an email it is usually that last document I just made changes to and need to send it out ASAP!

Okay, so the file is now on its way to his collaborators. So, what's next? Well, let's get to the good stuff, co-authoring, chatting about changes and tracking what's happened.

Co-authoring

When you are working in the same document at the same time, a lot is happening! Who is here notifications pop-up in the upper-right corner, a color legend appears next to a list making it easy to find where each person is making changes, and if Skype for Business is enabled with your Office 365 subscription, a chat panel can display instant messaging inline with the document in view.

While Elias is co-authoring with his colleagues he's having one of those Aha! moments and curiously asks related questions:

Elias: How do I know who made what changes?

Heather: The owner of the document can view versions in the OneDrive for Business library. These versions are displayed in a major version format, 1.0, 2.0, 3.0 and included with this is the date/timestamp for the changes, and who made the associated changes.

Elias: Do I have a way to manage versions?

Heather: Yes, the owner of the document can view the versions and manage the versions. By manage I mean, restore to a previous version or delete a version.

Elias: Does the app know how to manage conflicts if two or more people try to change the same text, cell data, picture placeholder?

Heather: Yes, there are some built-in conflict rules. If you and someone else try to make changes at the exact same time to the same cell, text placeholder, or other area it will not let you.

Elias: How are changes being saved? I don't see a Save button.

Heather: Well that's the brilliant thing about cloud hosted storage. All changes are automatically being saved to the library you opened or created it from.

Elias: Can you co-author in Office 2016 apps? Is the process any different?

Heather: Yes, you can co-author in Office 2016 apps like Word, Excel, PowerPoint and OneNote. The process for the most part will look the same: color legend matching colors to person's name, similar callouts for deletes, additions and edits on screen, and chatting in the IM panel. What works slightly different for some applications is Saving and Refreshing recent changes. This tool helps you to see the latest changes by others co-authoring.

Elias: Why do I have both Office 2016 and Office 365 apps? Is it better to use one over the other for editing and collaborating?

Heather: When you open a document from OneDrive for Business by way of a web browser, the file will always open in the online app like Word Online (browser version). If you have worked with Office 365 before you may have noticed that

some features are not available online like Mail Merge in Word, Macros in Excel, Animation Triggers in PowerPoint, and Video Recording in OneNote.

As features can be engineered for use within modern browsers, they are being introduced by Microsoft. For other reasons, like Macros, they are not available to work with in the online version for security reasons (you can open a workbook that contains macros, you just won't see them). If you need to use application command that is not available in the online version, this is great time to switch to the desktop version. The other reason you may want to work with the online apps version is when you are on-the-go and don't have your device with you. I have, as you may have, on occasion used the computer in the hotel business center. It's great for making quick edits and collaborating with others.



When a student or peer mentions how they wish a Microsoft application could work differently or have a new feature idea, I always mention Microsoft User Voice. It's a place where you can view what others have suggested, and if you agree vote for it! If you don't find what you are looking for, you can suggest your idea for others to vote. I've heard that once the idea hits approximately 100 votes or so, the product development team starts the process of making it possible (if it is). Use your outdoor voice and be heard!

<https://office365.uservoice.com/>

Tracking Changes

Earlier it was mentioned how something might work differently in the online app versus the desktop app. Track changes is one of these. It's enough of one to make sure Elias understands how it works. If a Word document is saved to a cloud-based

library and tracked changes has been turned on in the Word 2016, changes will be tracked no matter where the document is being edited. To accept, reject, or turn off tracking changes, it will need to be viewed in Word 2016.

Co-authoring in a Word, Excel or PowerPoint file has a similar look with a Who's here area in the upper-right corner and Skype chat pane. OneNote also has a lot of great collaboration tools, enough of them that it's getting its own space here to discuss each one.

OneNote has been around since 2003, and Elias has used this over the years for managing his own project and meeting notes but hasn't collaborated with his colleagues in the same notebook yet. Let's explore how this might help him and his small group of colleagues work together.

OneNote can be a multi-user digital notebook to manage all projects. Remember that Trapper Keeper you had back in school, you know, the one that was the coolest (if you were part of that generation)! Even if you didn't have one, just imagine it's that cool times 10!

Speaking of school, OneNote is also used by educators to manage classes and student assignments, in the EDU area it's known as a class notebook and works with the Classroom (which is becoming part of Teams). We will discuss Teams later.



There are some great OneNote learning tool add-ins. For example, if you are helping someone learn how to read, check out Immersive Reader:
<http://onenote.com/learningtools>

Collaboration in OneNote starts from the minute a new notebook is set up. Starting a new notebook works differently than starting a new Word, Excel, or PowerPoint file. Before

content can be added in the notebook, the saved location needs to be selected. For collaboration, a OneDrive or SharePoint Document Library works best. By selecting cloud storage, content can be shared with others. All those who have access to the notebook can create sections, add pages, and add many forms of content like free-form text on pages, drawing and inking on pages, inserting pictures and screen clippings, embedding files - printed or as attachments, record audio or video, include meeting details from Outlook meetings and much more.

All the changes sync to the cloud storage document library (OneDrive or SharePoint) so that everyone is viewing the latest and greatest version.

Seeing who made what changes and when the changes were made works differently than the other familiar Office files like Word, Excel and PowerPoint.

In OneNote, there is a ribbon dedicated to these changes and it's called the History Ribbon. Changes can be viewed by each author or by recent changes - when the changes were made - yesterday, last week and all the way back to 6 months ago. It's quite useful after returning from vacation or a business trip; it's a quick way to catch up on newly added content and see where significant changes have been made. The search results are displayed in a panel and are highlighted on each of the pages.

Deleted sections and pages go to a OneNote Recycle Bin. You can find this within the History tabbed ribbon. These items stay in the Recycle Bin for 60 days and are then automatically deleted. To save space, check this from time to time, and manually delete what is no longer needed.



In years past there was a great site for OneNote resources like custom templates called I Heart OneNote. While that site is no longer in existence (to my knowledge), I still say I Heart OneNote whenever I talk about it (I really do love it that much, maybe even more than my Trapper Keeper back in the day).

The Big Takeaways

It looks like we may have solved all of Elias' attachment woes.

Documents can be stored in one central cloud-based document library and shared with many for co-authoring in real time while seeing the latest changes. If questions arise about these changes a Skype chat can take place inline with the document and when emailing an attached file, it can now be shared from the cloud.

OneNote can provide Elias a shared notebook which has its own set of unique collaboration and co-authoring features. Depending on the project needs of the group, this may be a more suited workspace.

Office 365 Collaboration: Groups



Peter is what you might call a Road Warrior. Constantly on the go; speaking at conferences, helping others learn emerging technologies, and closing deals. In the many communities he works in, he needs a way to easily switch from project to project; gather the latest discussions, edit files, and view his calendar in line with the community group calendar. Knowing that he spends about 90% of his work day in Outlook, his colleague suggests he try Office 365 Groups. We'll take a closer look at what Groups are all about but first let's see what's needed as far as technology for Groups to be available for use.

Office 365 Groups are a subscription-based service and only available for use if the organization's Office 365 subscription is using Exchange Online and SharePoint Online. These are

included in the Office 365 Business Essentials and Business Premium plans, and the Enterprise E1, E3 and E5 plans.

Groups are most commonly set up and accessed in the Office 365 Mail app or Outlook 2016. So far it sounds perfect for Peter!

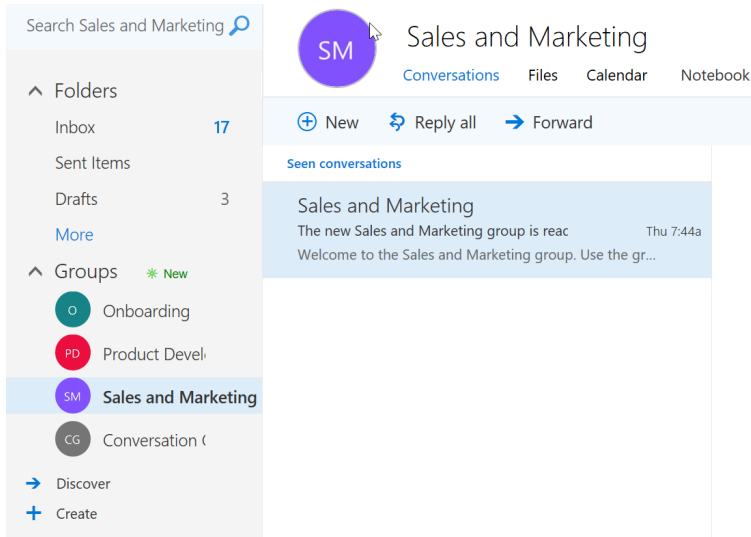
Let's discuss the setup and then get into the specific areas of a group.

The Groups area is located within the Office 365 Mail or Outlook 2016 Navigation Pane (below Inbox, Sent Items and Deleted Items). If Groups are not listed there it's most likely not activated within your organization, the organization is not using the online versions of SharePoint and Exchange, or does not have the version needed of Office 365.

When you are setting up a new group, you need to give it a unique name. The reason for this is that it also sets up a named email address for communicating with all members of the group. Peter has decided to name his Group Book Tour. The assigned email address is auto-populated as booktour@company.com (if this email address is not already in use within his organization). This email address becomes part of the Global Address List (GAL) and is treated like a single identity. When he sends a message to this email address, it will notify all of the members of the group with the message. We'll discuss notifications and conversations more in a bit. For now, let's proceed with the rest of the group setup.

Groups can also be set to public or private. If he selects public, members of the organization can search for and join the group. All content in a public group can be seen by anyone in his organization. If the group is set as private instead, only those who have been approved to join can see group conversations and content. Public and private groups cannot be viewed or accessed by those outside of his organization unless they have been invited as guests.

Members can be added during the setup process or at any point later.



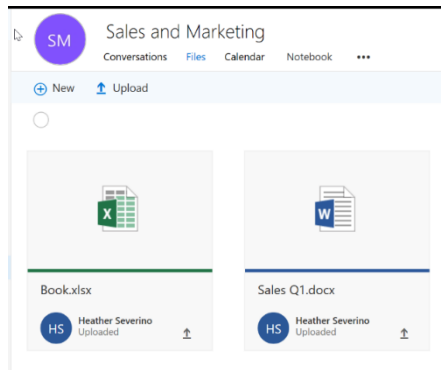
Now that the group is set up, let's discuss the services included in this cozy little space. Groups are really a container to organize and display many services offered in Office 365 and SharePoint Online. It includes a conversation, shared group calendar, a dedicated OneNote notebook, a Planner project board/plan and connectors to many other services.



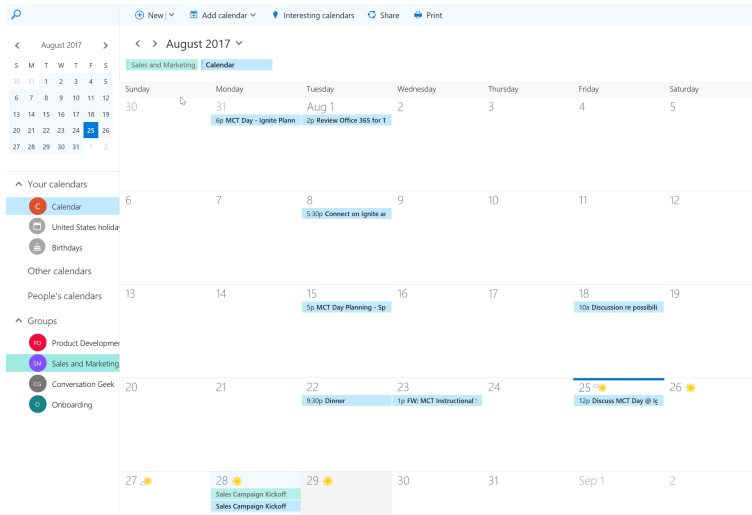
Here is how each of these areas might be useful to Peter and the other members of his group:

Conversation – a dedicated area for communication within the group space. The messages are persistent, meaning they are always there. When Peter returns from that trip to the Cayman Islands, he can catch up on the brilliant ideas his colleagues have shared.

Files – This is a SharePoint Document Library that is automatically created with the group. Access to this follows the group permissions, public or private; only members with the permissions needed can work with the files.

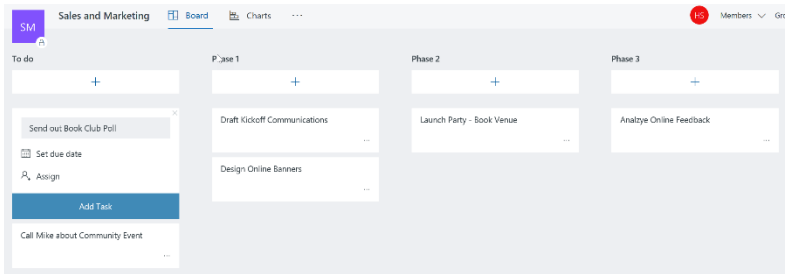


Calendar – A place to list all the activities and milestones happening with projects the group is working on. The Group Calendar can be viewed inline with a personal calendar so that all meetings are in view. This helps to see where there is overlap and available time.

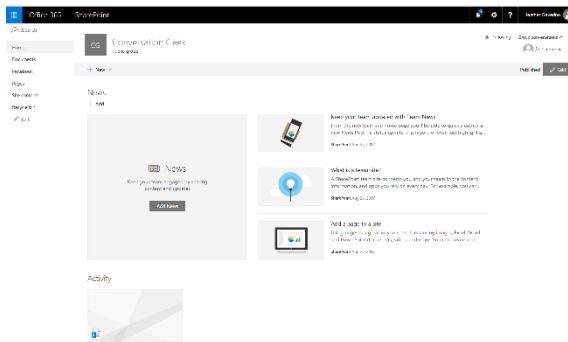


Notebook – A shared OneNote notebook that is ready for use, no setup needed. Add content and collaborate, collaborate, collaborate.

Planner – An Office 365 app included with the Group. Great for assigning and tracking tasks for group members. Tasks can even be assigned to more than one person!



Site – A way to view the same services available within the Group, just a SharePoint Online Team Site view instead.












Connectors – Delivers interactive content and updates from Office 365 apps and services to the group. These connectors go far beyond the Microsoft apps you know. They include many for Sales, HR, Project Management, and other industries. A few to mention are Aha!, Twitter, Salesforce, Zendesk, MailChimp, GitHub, UserVoice and Trello.

Connectors for 'Sales and Marketing'

[Build a Connector](#) [Send Feedback](#)

Keep your group current with content and updates from other services.

Search All Sort by: Popularity ▾

MANAGE			
Configured		Trello Manage Trello cards and tasks all in one place.	Add
My Accounts			
CATEGORY			
All		Twitter Send and receive messages called Tweets.	Add
Analytics			
CRM		Wunderlist Track tasks to be done and collaborate on projects.	Add
Customer Support			
Developer Tools		RSS Get RSS feeds for your group.	Add
HR			
Marketing			
News & Social		JIRA Gather, organize, and assign issues detected in your software.	Add
Project Management			
Others		Visual Studio Team Services Collaborate on and manage software projects online.	Add
		Asana Track projects from start to finish.	Add
		Incoming Webhook Send data from a service to your Office 365 group in real time.	Add
		Bing News Get news summaries powered by Bing.	Add

At this point Peter says “Whoa, Nelly, this is great but how am I going to keep track of these updates that are happening frequently?” That’s where subscribing to email notifications comes in, Peter. When you subscribe to a group, the messages and meeting invitations are sent to your inbox. They are also saved in your group folder. If the messages or meeting invitations are accidentally deleted, there is still a separate copy stored in the associated group folder. The subscription notifications in Groups works very differently than that of Teams (we’ll get to this in the next chapter).

In early 2017, Yammer groups were integrated with Office 365 Groups. This means that Yammer groups now have Office 365 services like SharePoint Online, OneNote and Planner available. You can also collaborate externally in this group by adding customers, partners, vendors and others to the group conversations for input. If you need more than a conversation, dedicated external groups or networks can be created in Yammer to expand the community capabilities. Yammer groups

can't be activated in Teams. You can add a Yammer feed as a connector to a channel instead.



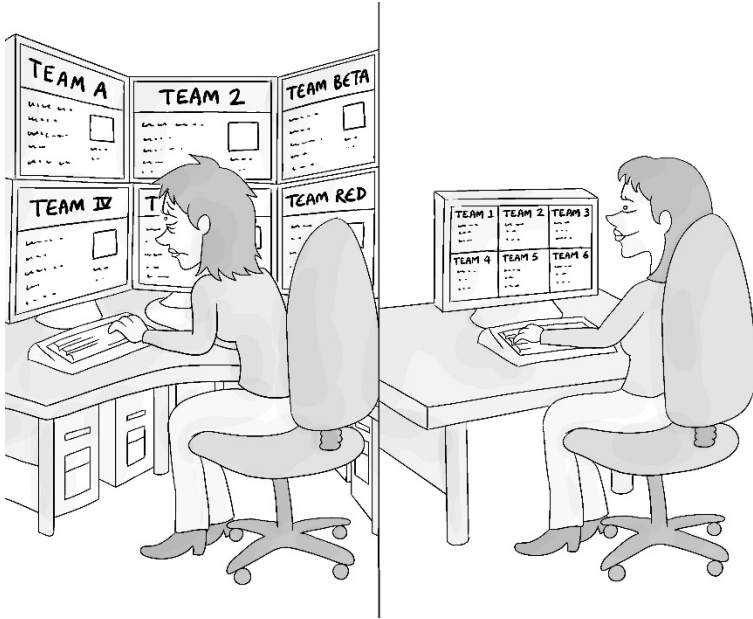
In my opinion, Office 365 Groups work best for small to medium size groups of internal and external members. Yammer Groups are more suited for large groups across an entire organization or those that may need more visibility. If you are not familiar with Yammer, it's an enterprise social network.

The Big Takeaways

We found an excellent collaboration space for Peter. Groups is accessible to him on the go with the Office 365 Mail app, even on his mobile device. While working from his PC, he can also work in Outlook 2016 Groups. On occasion, while being a social butterfly in Yammer groups, he can work in a familiar way as the same Office 365 Group apps and services are available there, too.

If he ever decides to venture beyond the walls of Outlook, he may want to tip-toe on over to Teams. After all, an existing group can be turned into a team. More on this in the next chapter.

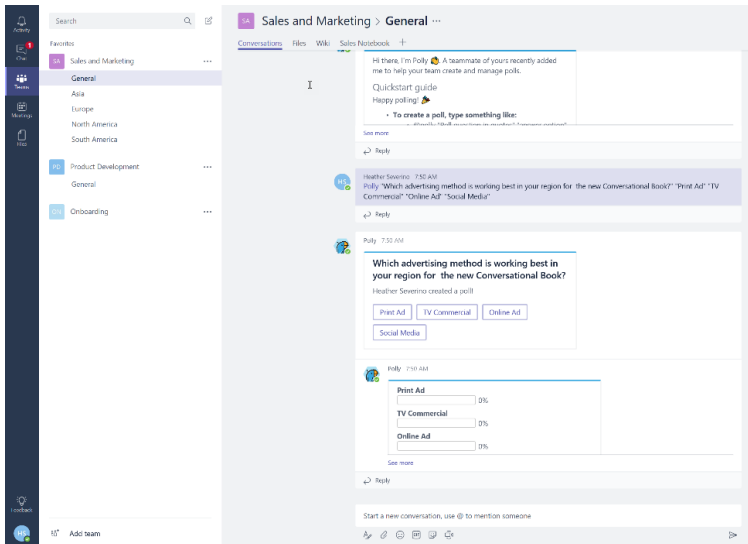
Office 365 Collaboration: Teams



Today Shari works on twice the number of team projects as she did 5 years ago. She spends her work days switching from app-to-app to send communications, attend online meetings, chat with her coworkers and update project tasks. Her wish is to have a central hub to work with others on these projects. Her colleague Leeanne suggests a new Office 365 app called Teams. Let's kick the tires and take Teams for a spin!

Teams is one of the new kids on the Office App Launcher and is getting a lot of attention (rightfully so, IMO).

Its dubbed a chat-based workspace by Microsoft and that description is fitting. The same apps and services available in Groups (for the most part) are also available in Teams. The difference is the hub-and-spoke approach to the Team and Channels relationship. This approach is what makes Leeanne's suggestion to Shari seem like a good solution for her needs.



An existing group can be turned into a team, or when creating a new team, a new group will also be created and associated with the team.

Shari is currently working on 6 projects, let's see how they may translate to a Team and Channels workspace. She's been invited to three different Teams: Product Development, Sales & Marketing, and Onboarding.

Within the Sales & Marketing team, she navigates to the various channels by region: North America, South America, Europe and Asia and catches up on recent conversations with geographically located colleagues, views a pinned Power BI dashboard, adds information to a wiki, and creates a poll with the Polly bot.

With another couple of clicks she quickly navigates to the Product Development team and starts a Skype meeting within the Phase 2 Channel automatically including all the Product Development team members.

She's discovering that the experience in the Teams app is comfortable; all the familiar Office apps are integrated in one workspace and in a way that she likes to work.

The private messaging is a cozy place for one-to-one or group conversations that don't need to take place in the channel conversation for all to read. Sometimes these conversations that don't apply to the entire team or around a topic of concern to all can become noise. These unscheduled messages or meetings are less formal and more like a coworker stopping by your desk to chat.



Can't decide which one you will use – Groups or Teams? If one of these is being adopted in your organization, I often find it's the boss who decides. If email is what the boss likes, Groups it will be.

That's why you are part of this conversation here, right? So, you can help drive that decision when the time arrives!

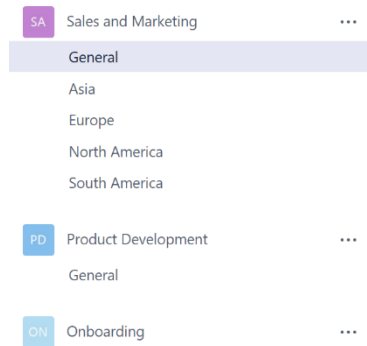
While Shari's finding her way around Teams, let's point out some of the key areas.

Teams – A central hub workspace for collaboration. A team includes individual channels for specific work and projects to take place in.

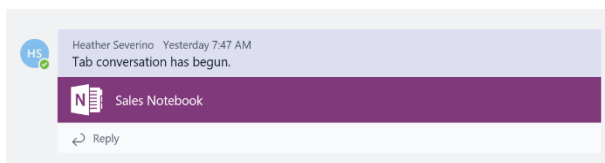
Here are quick facts you may want to consider if you are the administrator for Teams, the owner of a Team, or creator of Teams:

- The maximum number of teams that can be created in an Office 365 tenant is currently 500,000.
- A team can have up to 5 owners.

- A user can create 250 teams.
- The maximum number of members who can be added to a team is 999.
- Downloadable 32-bit and 64-bit installers for Windows are available for centralized IT installation. A .dmg installation file is also available for Mac computers.



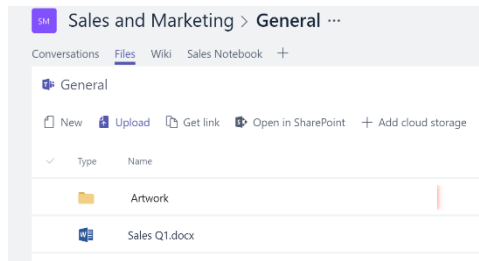
Channels – Considered a spoke to the Team hub. It is listed below the channel and indented. It's a dedicated space for content relevant to the named channel. Each team comes with one pre-built channel named General. This channel has three tabbed areas to get you started; Conversations, Files, and Wiki. Conversations – a place within a channel for Shari and others to have persistent chats. Your messages can be edited or deleted during the first 24 hours after they are posted. When documents are added, meetings are launched, and polls are created, notifications for these will also appear in the Conversations area.



Emojis, Stickers and Memes – These are great ways for Shari to respond to conversations visually; giving praise, office drama (never happens, right?) and adding some daily humor with custom messages.



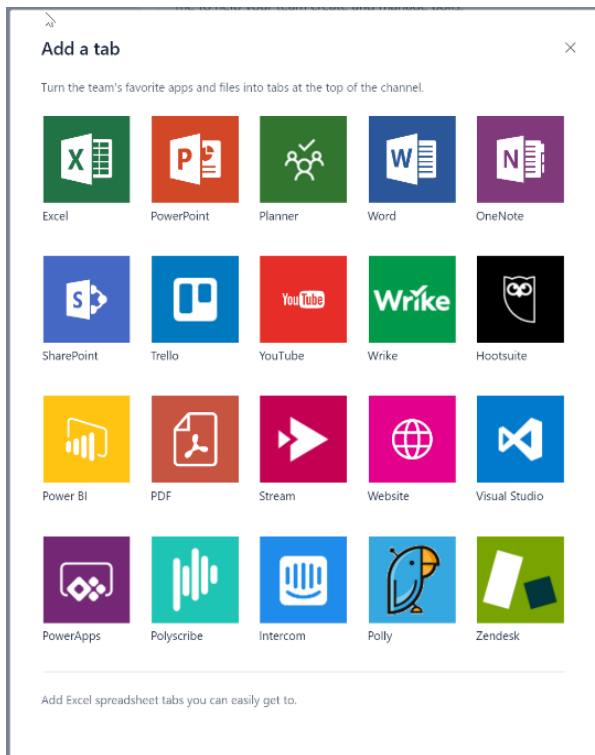
SharePoint Document Libraries – This is where documents added to a conversation will be saved. New documents can also be created here and existing documents uploaded here. Each library has 1 TB of storage and each document can have a maximum size of 10GB.



Team members can also add a document library from an existing SharePoint site as a tabbed area within a channel. For advanced SharePoint functionality like applying a workflow and reviewing version history, they will need to go to the SharePoint site to manage this.

Tabs – Office 365 apps and files like Planner,

OneNote, PowerPoint and more can be added to the Channel space.



Connectors – These are the same connectors discussed in Groups. It's a way to bring information into the Team channel for everyone to have a conversation around, build insights and respond as needed.

Those listed in the screenshot below are the most popular ones as of August 2017. There are several categories you can peruse. For online news and insights set up RSS feeds and Bing News. Your team can quickly analyze and respond to social media with connections to Facebook Pages, Twitter, Hootsuite and Yammer. CRM content from Dynamics 365 and Salesforce can flow into a team. If you work with Project Management, connections can also be established with Jira and Trello.

Connectors for "General" channel in "Sales and Marketing" team

×

Keep your group current with content and updates from other services.

Search All Sort by: Popularity ▾

MANAGE

Configured

My Accounts

CATEGORY

All

Analytics

CRM

Customer Support

Developer Tools

HR










Marketing

News & Social

Project Management

Others

Connectors for your team

	Visual Studio Team Services Collaborate on and manage software projects online.	Configure
	RSS Get RSS feeds for your group.	Configure
	Incoming Webhook Send data from a service to your Office 365 group in real time.	Configure
	JIRA Gather, organize, and assign issues detected in your software.	Configure
	Twitter Send and receive messages called Tweets.	Configure
	Yammer Updated Receive updates from your Yammer network	Configure
	Trello Manage Trello cards and tasks all in one place.	Configure
	Bing News Get news summaries powered by Bing.	Configure
	Wunderlist Track tasks on the go and collaborate on projects.	Configure






Bots – There are many bots available to help. T-bot is the Teams bot that can provide help when questions are asked.

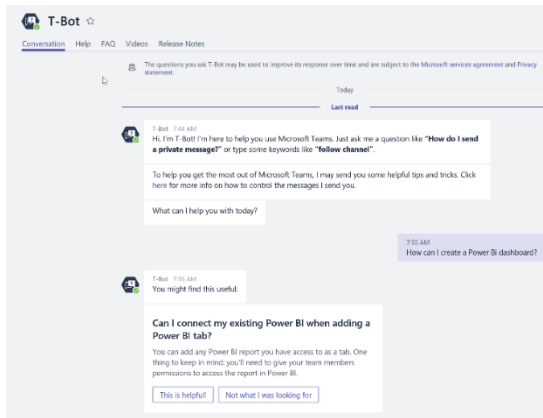
Bots

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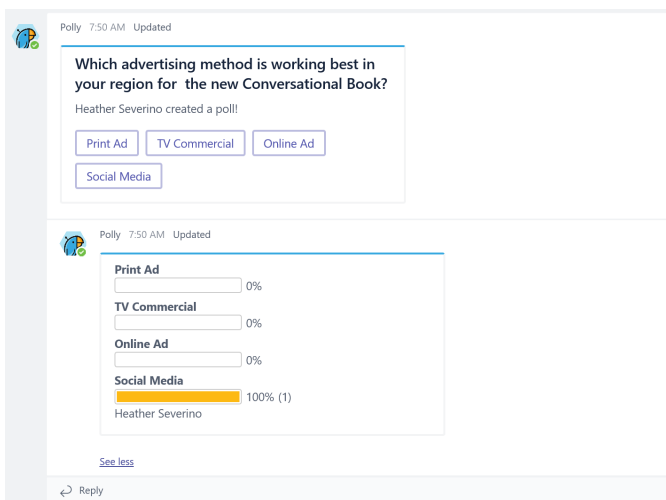
Bots allow you to get more done by helping you complete tasks in your conversations. Chat with bots 1:1 or add them to a team. [Learn more](#)

Search

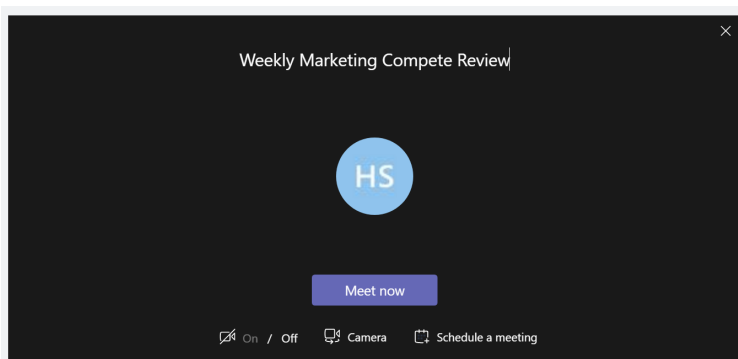
	SecretaryBot Help you to arrange 1:1 and team meeting.	+
	SurveyMonkey Poll your team and collaborate on surveys.	+
	ScrumGenius The clever bot for productive teams. Run standups and checkin meetings	+
	Polly Poll your team with Polly!	+
	Suttna Suttna, your remote team assistant.	+



Other helpful bots include Polly for creating Polls in conversations, Personal Secretary for scheduling meetings, and Kayak for gathering budget-friendly travel fares. While T-bot is automatically enabled in the chat area, the other bots must be enabled in the area they will work in - private chat or specific team. Bots need to gather information from team members and need to communicate this in the conversation or chat areas. The Polly Bot sets up a poll based on a question asked by a team member.

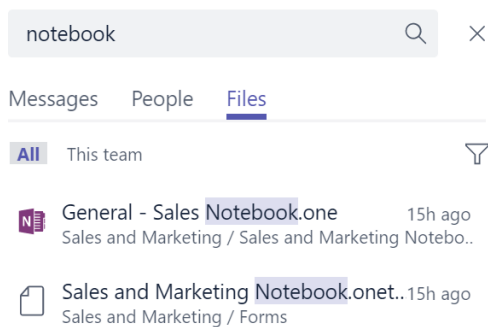


Skype Meetings – An unscheduled meeting (also known as Meet Now) can be started in the Team Channel conversation area. A scheduled meeting can also be created from the same area or the Meetings area of the Navigation bar. The maximum number of people in a meeting is 80.



Meetings – This area displays upcoming Outlook meetings for the person logged into Teams.

Private Messages – Outside of the open group conversations, this is where private questions can be sent to T-bot for help and where private chats with one or several other colleagues can take place (outside of the Channel conversation). There can be 20 members in a private chat including the person who created the chat.



Search – As the team grows and the channels fill with conversations, documents and other types of content search can help find by a key word search, name of person or key word. The search results that appear are sorted in three categories: Notifications – This works differently than the email subscriptions for Office 365 Groups. There are many ways to be notified: by banner, email and more and what you want to be notified about, like @mentions, updates and more.

The Teams app is available as an online app within Office 365, as a desktop app and a mobile app.

The Desktop and Online apps have the same interface, with slight differences. As of August 2017, the only functional difference I have seen is hosting a Skype meeting within a team. It's not available in the online version yet, but it should be available soon. Other differences you may see with the online version may be caused by the browser you are working with and settings of this, like if apps can display in frames or if it needs to open in another window.



Many, including myself, are embracing this new all-in-one workspace. As Microsoft adds additional apps, services and capabilities, my crystal ball (or is it the Magic 8 ball?) says this may be the only app you need to get work done individually and as a team!

The Big Takeaways

Shari has discovered a way to work together better. She has a more efficient way to easily navigate the 6 growing projects she is working on with her colleagues in the Teams app. Not only is she able to access the tribal knowledge being shared by others in the conversations area, she is also able to get intuitive help from her intelligent bots named T-bot and his cute sidekick bluebird pal, Polly, and many others.

While she is on the go, the Teams mobile app is essential in updating the team with site visit photos, document revisions and those spur-of-the-moment meetings. Occasionally she accesses the associated Office 365 groups in Outlook (unlike Peter, who pretty much lives there).

Easily “converse” about collaboration in Office 365.

Office 365 is rapidly changing (as it should) and a lot of new tools have been implemented over the past two years. These new tools have created workspaces of connected tools for individuals to work together in more meaningful ways.

You will learn how OneDrive for Business, Groups, Teams, and SharePoint work together in the cloud.

You may have thought you knew the Office 365 ecosystem inside-and-out; but with these new collaboration tools, it's a whole new world!



About Heather Severino

By land, Heather Severino is a Microsoft MVP, Microsoft Certified Trainer (MCT) and owner / full-time author and trainer for TeachUTech, specializing in Microsoft Office, presentation and instructional skills training, instructional design, and authoring training videos.

By sea, she is an adventurer and SCUBA Diver looking for sea turtles, sharks and the ever-elusive seahorse.



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