

Teams is a unified communication and collaboration platform that combines persistent workplace chat, video meetings, file storage, and application integration enabling effective remote office capabilities.

USING MICROSOFT TEAMS TO WORK AND COLLABORATE REMOTELY

**INSTRUCTIONAL GUIDE FOR ACCES-VR DISTRICT
AND SATELLITE OFFICES**

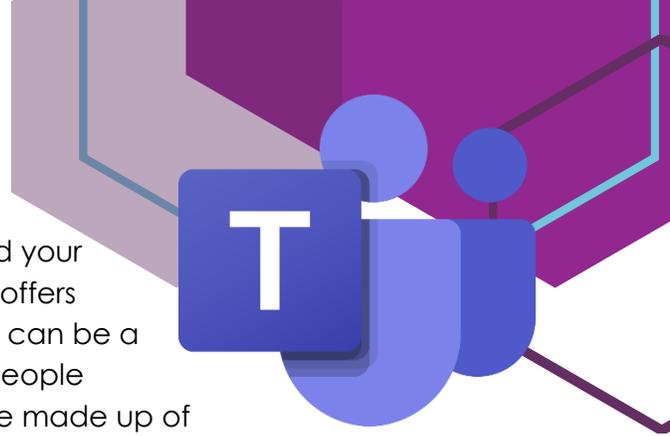


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What is Teams?

Microsoft Teams is a collaboration app that allows you and your team to stay connected, organized and work remotely. It offers features such as chat, file sharing, and screen sharing and can be a powerful tool for staff on the move. A team is a group of people gathered to get work done in your organization. Teams are made up of channels, which are the conversations or designated workflows you have with your teammates. A channel can be dedicated to a specific topic, department, or project. This publication focuses on the General channel which is the default when a team is created.

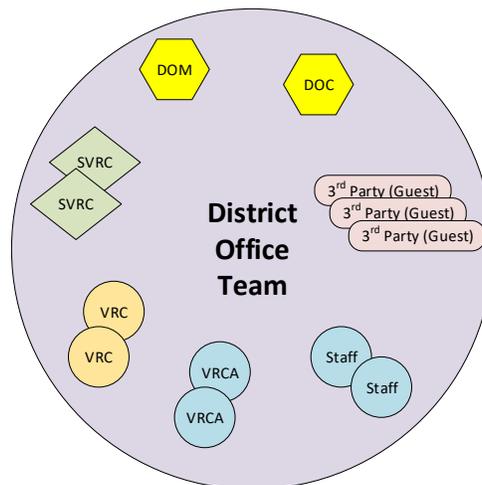


How Can Teams Be Useful?

As the need to work and be productive outside of the office becomes increasingly necessary, and social distancing is part of our daily routine, we will need to adjust the way we do business. That mean less face to face interactions and more virtual interactions. Microsoft Teams works with staff within the agency and business partners outside of the agency who do not have NYSED accounts.

Basic Model for ACCES-VR District Offices

The business model and implementation of Teams can vary across use cases and we will provide you with the basic outline on how to get you and your staff working collaboratively online. In the following model, the District Office Manager (DOM), Director of Counseling (DOC), Senior Vocational Rehabilitation Counselors (SVRC), Vocational Rehabilitation Counselors (VRC), Vocational Rehabilitation Counselor Assistants (VRCA), other office Staff as well as 3rd Parties (Guests) can make up a Team. A District Office Team would allow all office personnel to communicate with each other and Guests using chat, audio and video conferencing tools, a virtual whiteboard and the ability to share files (**Note: file sharing is turned off for Guest accounts per NYSED business rules**).



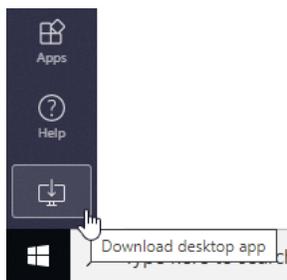
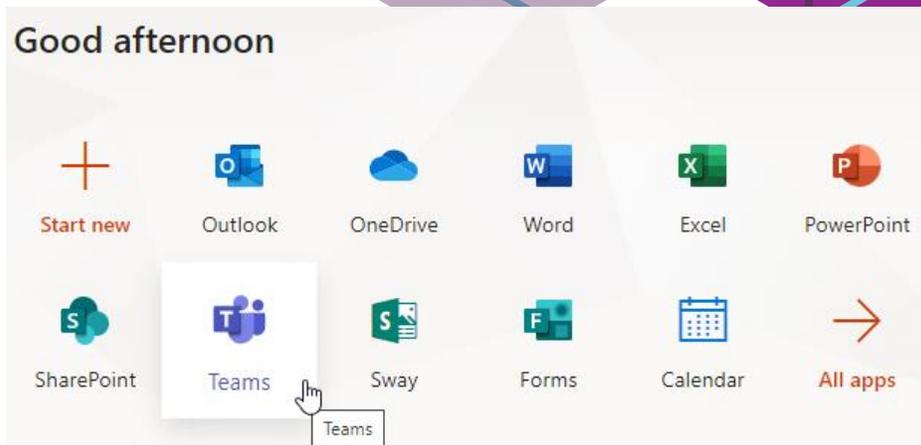
Basic District Office Model for Teams

Getting Started with Teams

You can access teams through the web by navigating to: <https://login.microsoftonline.com/> using your NYSED login credentials, or through a Teams client installed on your desktop.

Your NYSED issued Windows 10 computer may already have the Teams client installed. If using the web-based version of Teams, you will be given an option to

download the Teams desktop application when you sign in. The desktop download option will be in the lower left-hand corner of the Teams web app in your browser



Download desktop app

The Teams desktop app and web-based versions have some minor differences in features and anything of importance will be addressed in this publication. Once you have Teams open, located in the lower left-hand part of the window you should see a Help  button.

From the help menu there are very helpful Training videos, and an excellent Topics section that is a great for answers to your questions on

issues like Types of Teams, Teams Creation, basic functionality like meetings and files as well as the ability to browse other help topics.

Creating a Team

To create or join a team select the Teams icon , then click the **Join or create a team**

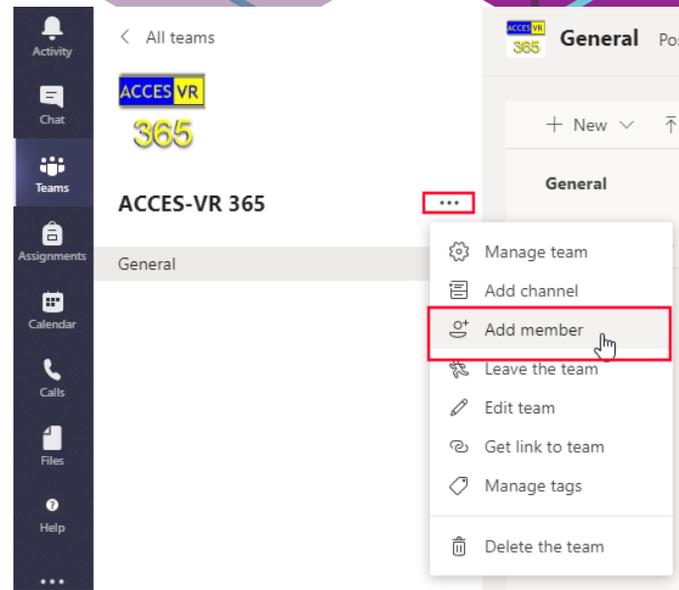
 **Join or create team**

button. You will be able to select a team type and we suggest that you choose the team type Staff for School administration and development for the purpose of getting started with the District Office model outlined above. You will then be prompted to create a team name and select whether your team is private or public. Private – means that only team owners can add members. Public – means that anyone in your organization can join. Choose Private as you will want to restrict access to your team and maintain confidentiality of certain topics in the future. The team name and description are visible to everyone in the agency, so keep that in mind when creating you team. While there are no official guidelines at this time for team naming conventions it is suggested that your first team created for the district office personnel be something like: **01-Albany District Office**, **05-Syracuse District Office**, etc. As your staff become familiar on how Microsoft Teams can be leveraged in your business setting and as each SVRC or VRC creates a Team to manage their own workflow (if needed), the DOM or DOC may wish to create internal guidelines on Teams naming conventions moving forward.

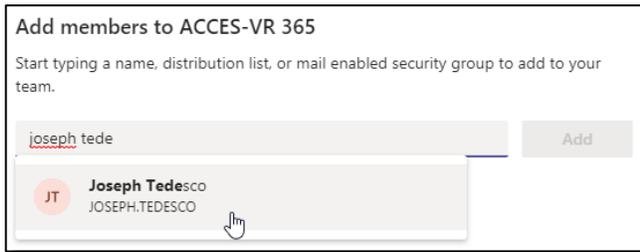
Adding Agency Members to the Team

To build your team constituents, you will **add members**.

From the left navigation bar, select Teams and you will see the three ellipsis (dots). Access the options by clicking the dots next to your Team name and from the options menu select Add Member. Team members that are agency personnel and have NYSED accounts can be added by typing in their name. As you type an agency staff person in the add members dialog box, it will auto complete based on entries in the NYSED user directory (Fig. 4). After you select the user to add, click the **Add** button. You will be adding members and guests to the **General channel**.



Add Members Option



Add team members

Once a member has been added, you have the option of making this member an Owner of the Team. You can have as many Team Owners as you like, and the Owners can function as administrators for the Team who can assist in adding members and guests and manage Teams settings. This is a useful feature in building your team as staff personnel can share the workload of adding members and basic administrative responsibilities.



Member Status

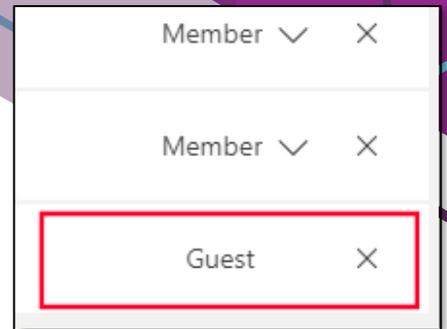
Guest Access for Participants

Guest access allows teams in your organization to collaborate with people outside your organization by granting them access to existing teams and channels in Teams. Anyone with a business or consumer email account, such as Outlook, Gmail, or others, can participate as a guest in Teams with full access to team chats, meetings, and files.

Who is a Guest?

A guest is someone who isn't an employee, student, or member of your organization. They don't have a school or work account with your organization. For example, guests

may include partners, vendors, suppliers, or consultants. Anyone who is not part of your organization can be added as guest in Teams. This means that anyone with a business account (that is, an Azure Active Directory account) or consumer email account (with Outlook.com, Gmail.com or others) can participate as a guest in Teams, with full access to teams and channel experiences.



Limitations for Guests

In general, there are limitations for the guest experience and some of these are by design and some may be based on NYSED business rules. One example of a limitation driven by NYSED at the time of this publication is to disable file sharing for guests. Here is a list of some of the functionality that isn't available to a guest in Teams that is based on Microsoft's limitations:

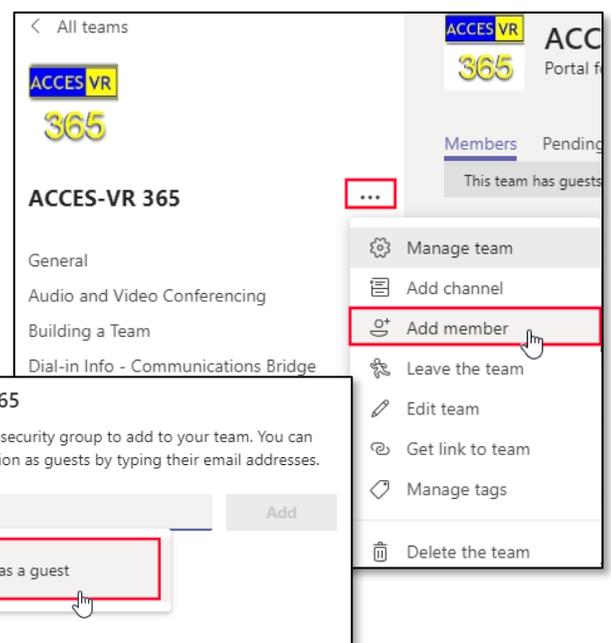
- OneDrive for Business
- People search outside of Teams
- Calendar, Scheduled Meeting, or Meeting Details
- Create or revise a team
- Upload files to a person-to-person chat

How a Guest Joins a Team

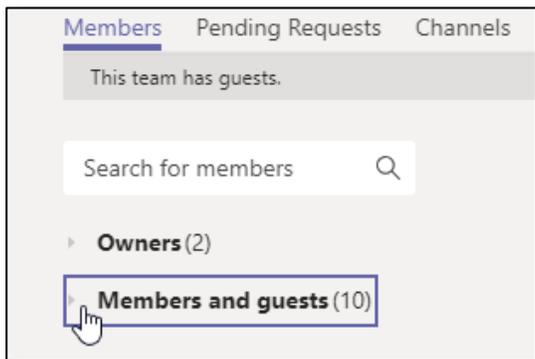
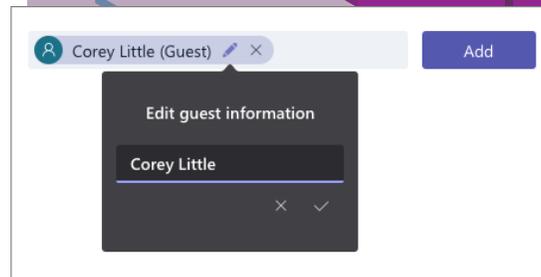
A team owner in Microsoft Teams can add and manage guests in their teams via the web or desktop. Anyone with a business or consumer email account, such as Outlook, Gmail, or others, can participate as a guest in Teams, with full access to team chats, meetings, and files (that have been shared). Only people who are outside of your organization, such as partners or consultants, can be added as guests. People from within your organization can join as regular team members.

Adding a Guest to Your Team

As the team **owner**, you will add a **guest** to the team. Remember, you can make other staff members who are on your team **owners** as well who can then share in the administration of your Team's site. Go to your Team's site and select the three dots to the right of the team name. Select **Add member** from the menu. In the Add members dialog box type the email address of your guest. When you finish typing the complete email address, the Teams will prompt you to add as a guest. Click to add your guest.



Tip: Add your guest's name **now**. Select **Edit guest information**  and type a friendly name for them. Be sure to take the time to do this now—you will not be able to do this later without the help of an ITS administrator. **NOTE: file sharing to people outside the agency is disabled.**



When you go to the menu item **Manage team** (after clicking the three dots to the right of the team name) expand the list for **Members and guests** and you will see that your participant has been added and has been designated accordingly: johnsmith@gmail.com (Guest).

Your only option for a guest is to select the **X** to

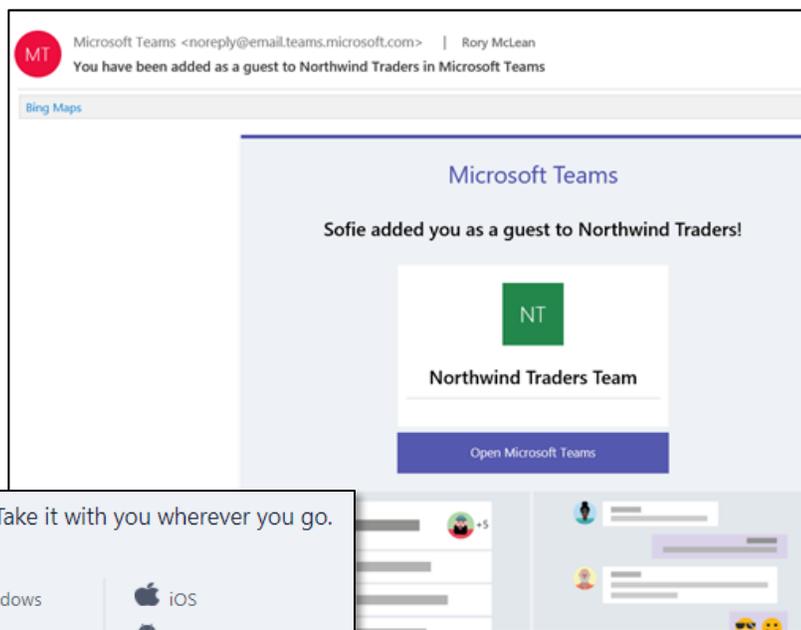


the right in the status column and remove them. You will not be able to make them a member or owner.

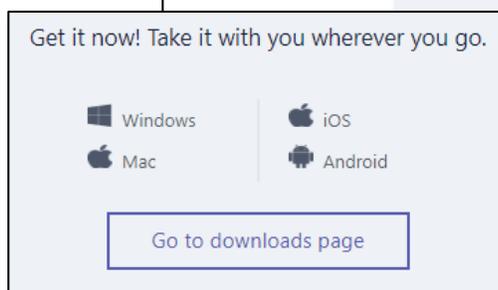
All team members see a message in the channel thread announcing that the team owner has added a guest and providing the guest's name. Everyone on the team can identify easily who is a guest as a banner indicates "This team has guests" and a **(Guest)** label appears next to each guest's name.

Guest Welcome Message

When a guest is invited to join a team, they receive a welcome email message. This message includes some information about the team and what to expect now that they're a member. The guest must accept the invitation by selecting **Open Microsoft Teams** in the email message before they can access the team and its channels.



At the bottom of the email welcome message, your guest will also see a link to download the app on their mobile device.

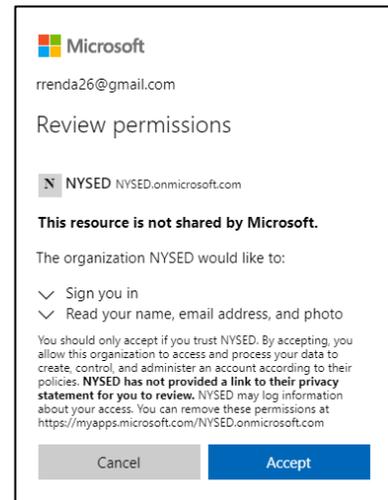
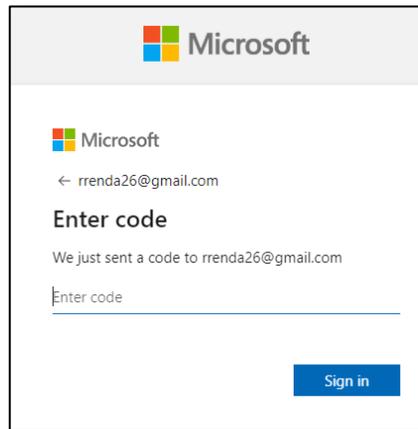
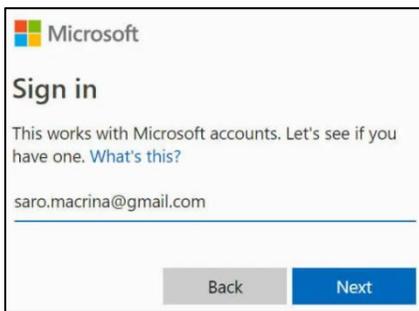


Mobile Device Setup and Sign in for Guests

For iPhone, iPad and Android devices, your guest will need to install the Teams app from the App Store or Google Play store.

- Teams Link for App Store: <https://apps.apple.com/us/app/microsoft-teams/id1113153706>
- Teams Link for Google Play: https://play.google.com/store/apps/details?id=com.microsoft.teams&hl=en_US

When signing in on a PC or app, it is likely that your guest will not have an Office 365 account, but the process of associating your guest's email account (Gmail, Yahoo, etc.) to a Microsoft account is automated. You can assume that this step will be skipped if the guest will use a Microsoft account (outlook.com). Your guest will be prompted to create a password or enter a code that is associated with their non-Microsoft account and then accept permissions:

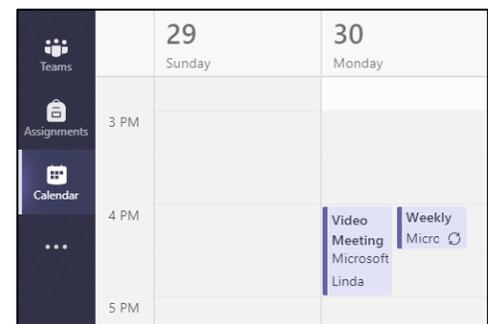


Meetings in Teams

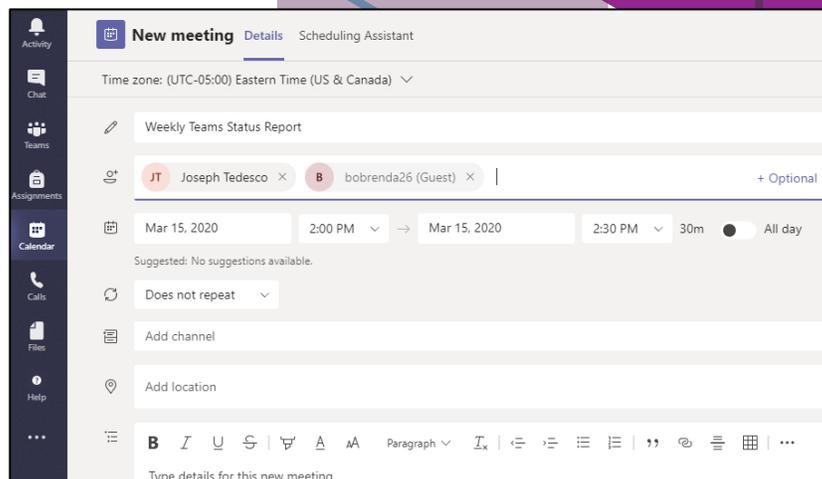
Meetings in Teams include audio, video, live chat and the ability to share your screen. The meetings are online and are accessible via your computer or mobile device.

Schedule a Meeting in Teams

Your calendar in Teams is connected to your Exchange calendar. In other words, when you schedule a meeting in Outlook, it will show up in Teams, and vice versa. Every meeting scheduled in Teams is automatically made into an online meeting. There are several ways to schedule a meeting in Teams and the most common way for new users is to use the calendar.



Go to **Calendar**  on the left side of the app and select **New meeting** in the top right corner. The scheduling form is where you'll give your meeting a title, invite people, and add meeting details. A title for the meeting is required . You can use the **Scheduling Assistant** to find a time that works for everyone in your organization as you would normally in Outlook. You will most likely get an Unknown availability for any Guests you include in the meeting when using the Scheduling Assistant since you probably will not have access to their calendar.



Meeting Scheduling Form

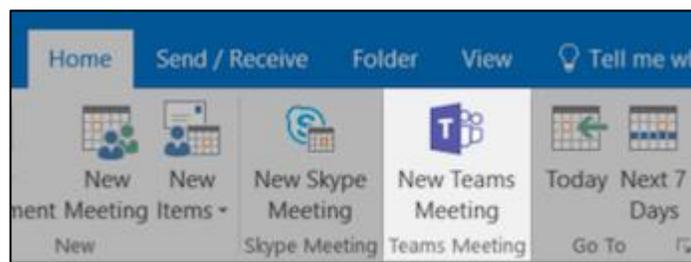
Once you are done filling out the details, select **Send**. This will close the scheduling form and send an invite to everyone's Outlook inbox. You can select **Close** to be prompted to either discard the meeting or continue editing. Notice at the top of the Scheduling Form that the Details and Scheduling Assistant are tabs that you can toggle back and forth while you fill in the meeting and scheduling information.

Schedule a Teams Meeting from Outlook

Microsoft Teams includes the Outlook add-in, which lets you create new Teams meetings directly from Outlook. It also lets people view, accept, or join meetings in either app. Note: As of the authoring of this publication, you can schedule Teams meetings from Outlook, but not choose a channel to have them in. At this point, this is not a concern since the General (default) channel is our primary concern for getting our Team up and running quickly.

To schedule a meeting, open Outlook and switch to the calendar view. Click **New Teams Meeting** at the top of the view.

Add your invitees to the **To** field—you can even invite entire contact groups (formerly known as distribution lists). Add your meeting subject, location, start time, and end time. Then click **Send**.



Teams button in Outlook

You can also invite people from outside your organization from Outlook. Just be sure to add them as guests before the meeting starts.

Note: If users do not see the Teams Meeting add-in, instruct them to close Outlook and Teams, then restart the Teams client first, sign in, and then restart the Outlook client, in that specific

order. Not having this option in Outlook does not in any way affect your ability to use Teams capabilities – only the option of scheduling a Teams meeting through Outlook and sending the meeting invitation to a Group (formerly Distribution List).

Join a Teams Meeting

Attendees that you send the meeting invitation to will be provided with a link to join the Teams Meeting as well as dial-in options for those wishing to attend via phone like a normal conference call.

[Join Microsoft Teams Meeting](#)

+1 518-313-1663 United States, Albany (Toll)
(833) 827-2643 United States (Toll-free)

Conference ID: 996 054 127#

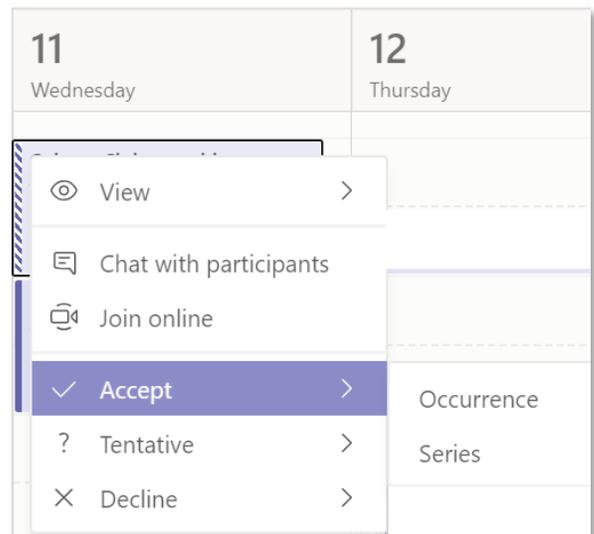
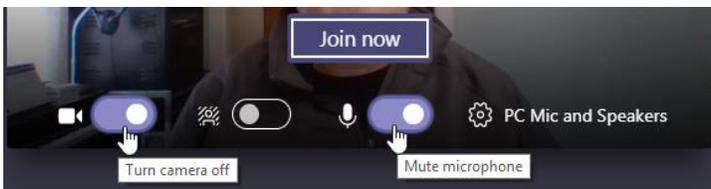
[Local numbers](#) | [Reset PIN](#) | [Learn more about Teams](#) | [Meeting options](#)

When you are ready to join a Teams meeting that is about to start, you can click on the Join Microsoft Teams Meeting link in the details in your calendar or the email invitation that was sent. At this point you will be prompted to choose the Desktop App (if installed) or the Teams Web app to join the meeting. On a computer with video and audio capabilities you will have the option to join with your camera or microphone muted if you wish.

Right-click an event in your calendar to RSVP, remove it if it's canceled, or open the invitation to view the meeting details. If the event is a Teams meeting, you'll also get options to **Join online** and **Chat with participants**.

Teams meetings will show a join button on an event in your calendar five minutes before the start of a meeting. Once someone joins the meeting, the event will change colors to let you know they're online.

Select **Join** to open the meeting settings window to confirm your preferred camera and mic settings before joining the online meeting.



Meeting Options

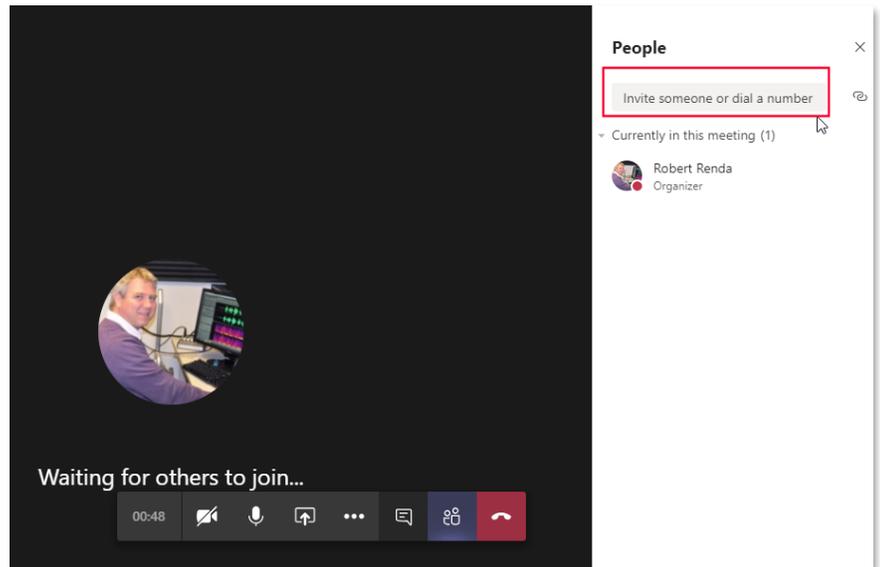
Instant Meetings

You may be having an email exchange with two or more members of your organization and decide that a quick voice conversation with everyone is needed. You can switch over to Teams and go to the Calendar to select **Meet now**.



Join the meeting and then you can invite someone as you wait by typing in the member names. If you are already in Teams, you can do one of the following to start a meeting:

- Select **Meet now** in a new conversation.
- Select **Meet now** in an existing conversation to keep all that conversation's context.
- In your video preview, enter a name for the meeting, and select **Meet now**.
- Select the names of the team members you want to invite to the meeting. You can also type a **phone number**, a good way to add people outside your organization that aren't using Teams.



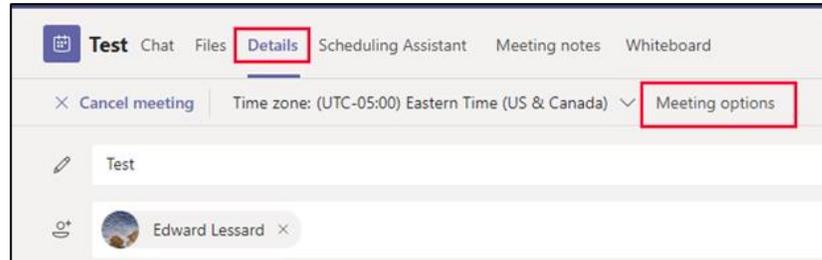
Dial-in Access to Meetings

For the most part, you should build your team by adding members ahead of time. This is not just to facilitate meetings, but to give team members and guests access to resources such as documents, chat threads and the opportunity to follow any channels that you may create. The **Communications Bridge** add-on for Teams allows dial-in access by providing both a toll-free and local number for anyone to join a meeting via telephone without having to install the client, use the web app or log in at all. This is a benefit for members of the team that may not have computer or smart-phone access at that moment, and it will also allow you to have a voice meeting with a participant that is not part of your Teams community.

As outlined above, when you create a new meeting, the details of that meeting include a link to Join Microsoft Teams Meeting via the client, web app, or smart phone app. It also includes a local (Toll) number, Toll-free number and the Conference ID.

Who can bypass the lobby?

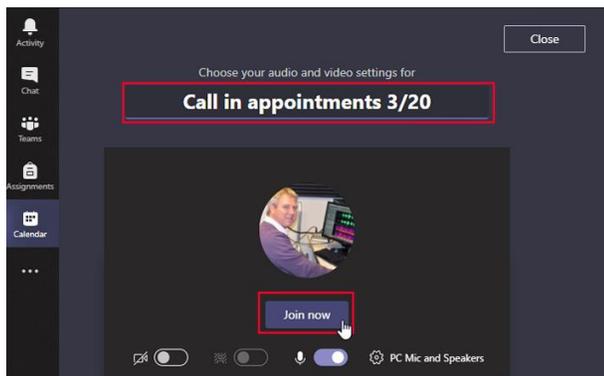
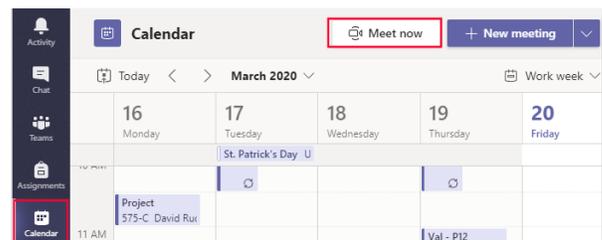
Third party attendees including Guests will be put in a queue called the Lobby and will have to be admitted to the meeting if you do not choose the **allow Everyone to bypass lobby option**. Once you set a meeting and choose **Send**, up you can then go to the Meeting Options by opening the meeting in your calendar and select **Meeting options**. This same option is available under the **Details** tab once you have clicked **Send**.



Using Meet Now for Conference ID

You can use the **Meet Now** function to launch an impromptu meeting and then email or text the dial-in numbers and **Conference ID** to someone.

Select the **Calendar** from the left-hand menu in

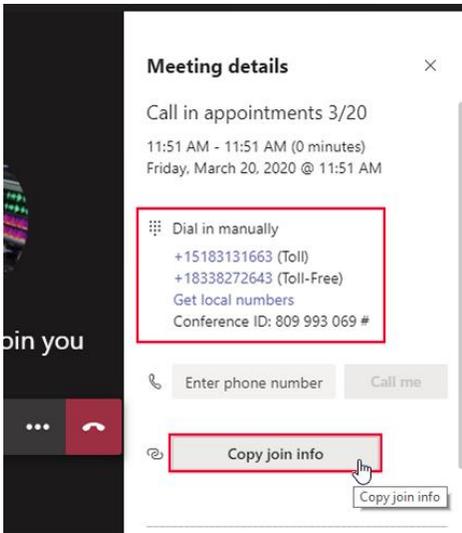
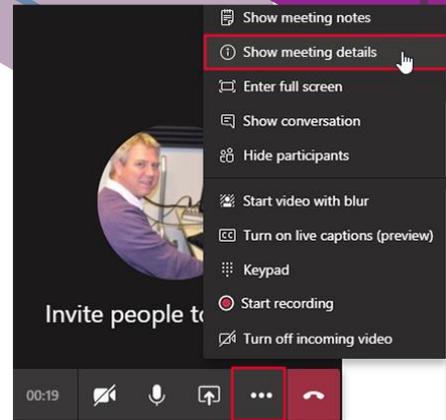


Teams and click the **Meet now** option in the upper-right corner.

Type in a title for your meeting if you like and click the **Join now** button.

You are now in a meeting! To get the Dial-in access numbers and the Conference ID # to send to participants, go to the **Meeting Details** by selecting the three dots and clicking **Show meeting details**.

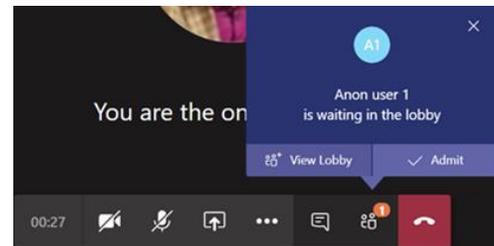
Your **Meeting details** will appear in a window and will allow you to **Copy join info** that you can paste into an email if you like. You can also now text or tell someone the dial-in numbers and Conference ID.



The **Copy join** info was selected and this is what was pasted:

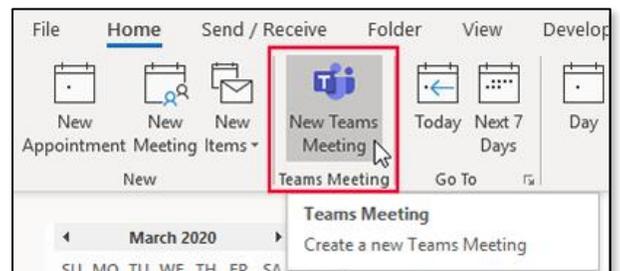


As a participant calls in to the meeting, you will be notified that they are **waiting in the lobby** and be prompted to **Admit** them. Note: any Teams **members** will be able to skip the lobby and join automatically.

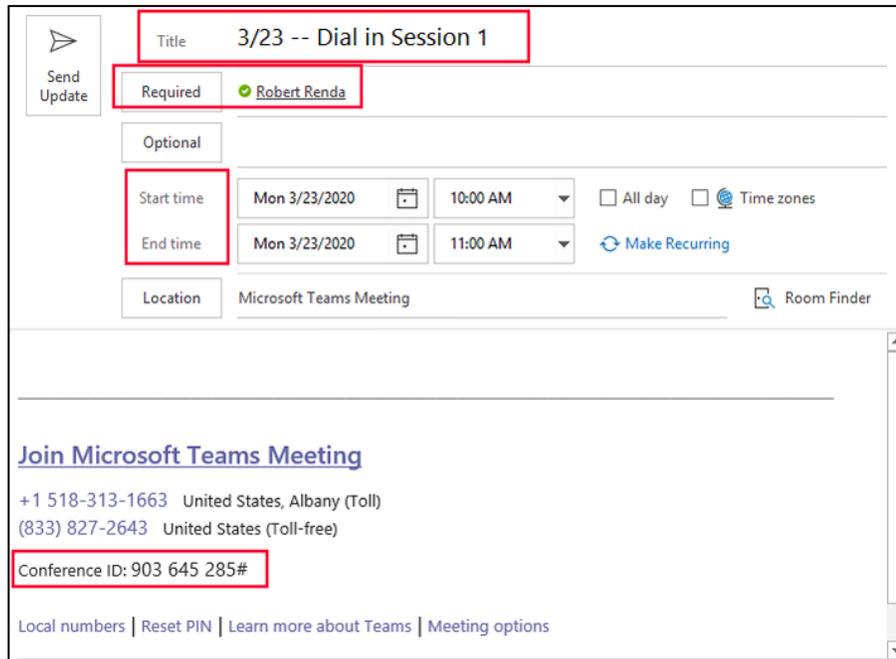


Schedule Your Dial-in Sessions in Advance

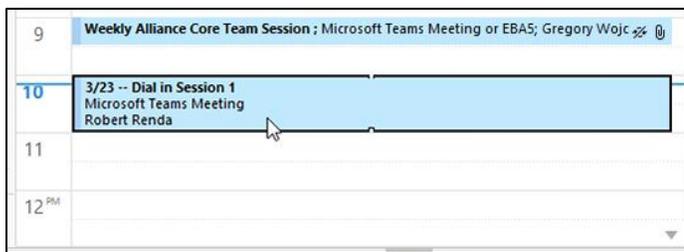
If you would like schedule a series of meetings ahead of time and not want to add attendees to get the **Conference ID** so that you can send it via email or text message to a participant days or weeks in advance, you will have to schedule the meeting in **Outlook**. Currently, you are not able to add just yourself as a required attendee in the **Teams** desktop app or web app.



Go to your **Outlook** calendar and select **New Teams Meeting** in the Teams Meeting group on the ribbon. You will notice that it automatically creates a **Conference ID** for the meeting and all you must do is add a meeting **Title**, **Start time** and **End time**.



You can now access the meeting details and forward the **Conference ID** and dial-in telephone numbers to a participant. At any time, you can open the meeting up in either the **Outlook** or **Teams** calendar and retrieve these details once the meeting is scheduled. This will allow you to schedule as many meetings as you need ahead of time in order to send the meeting information to a participant.



Outlook Calendar



Teams Calendar

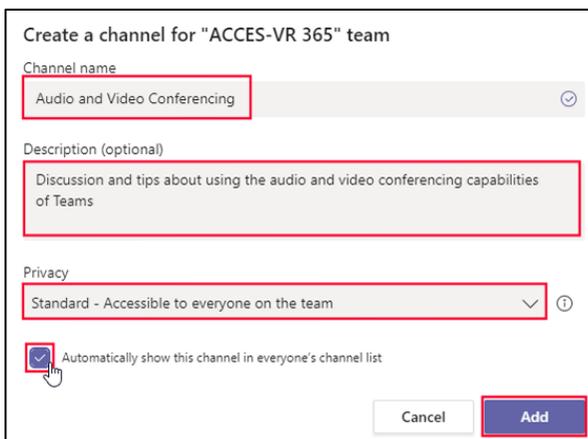
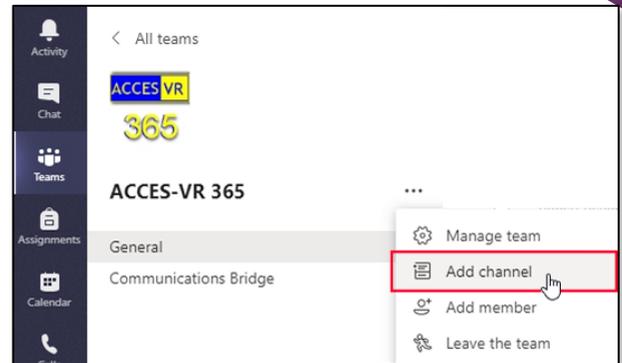
Adding Channels to Your Team

Your Team is designed to bring together a group of people who work closely to get things done. A **Channel** is a dedicated section within a Team to keep conversations organized by a specific topic, project or component. Any files you share in a channel are stored in **SharePoint**. **Channels** are most valuable when extended with apps that include tabs that increase their value to the members of the team.

When you create a Team, the default channel created is the **General** channel. You do not need to create any more channels to use Teams in regards to chat, audio and video conferencing capabilities or to store files, but as you become more comfortable with the core functionality of Teams you may want to separate a particular workstream or discussion.

To create a Channel, go to your team and select the three dots to the right of the Team name.

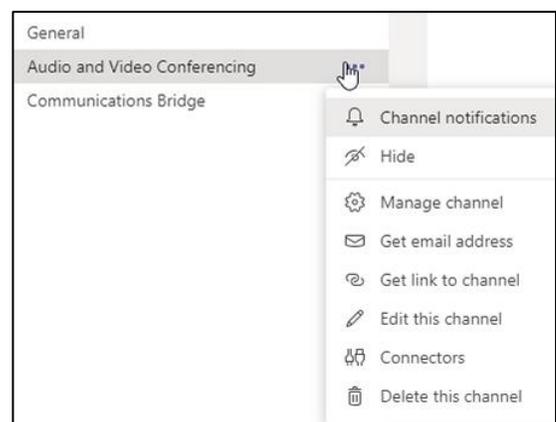
In the **Create a Channel** dialog box you will add a name for you channel, an optional description, choose a privacy setting and be able to check the option for Automatically showing the channel in everyone's channel list.



The Privacy option allows you to choose between Standard and Private. Standard allows everyone on the Team to access the **Channel** and Private will allow you to restrict access to only a certain group of people within the Team.

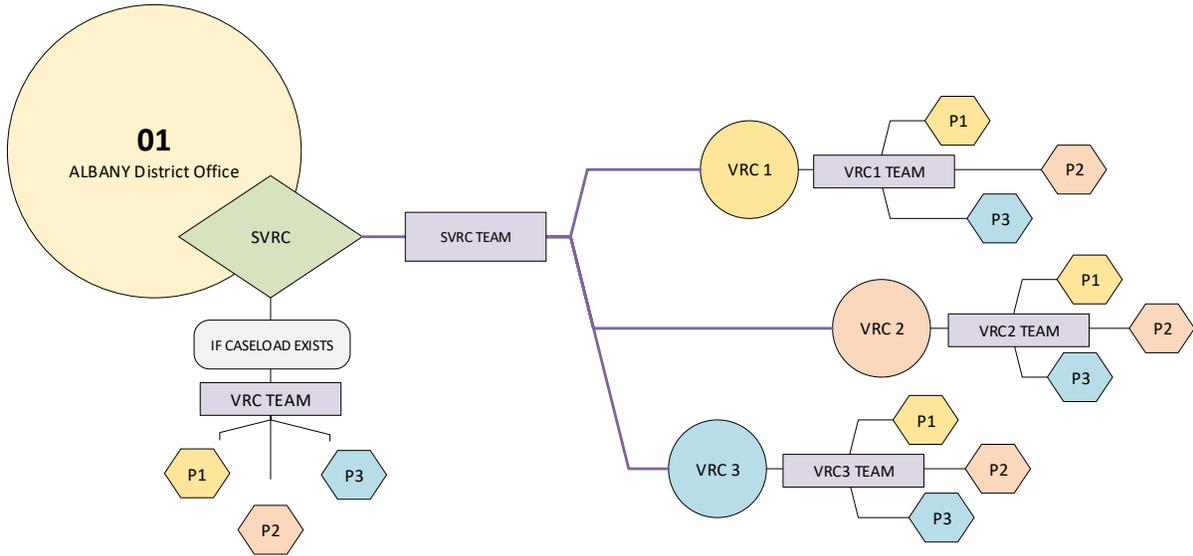
Check the option to Automatically show the channel in everyone's channel list. Click **Add** to create the **Channel**.

Your **Channels** will be added under the **General** channel. Select the three dots to the right of any channel name to manage Channel notifications for posts and mentions, Manage Channel for who can start a new post, get a link to the Channel to send in an email or to edit the channel properties. You can even use the Get email address to send an email to the channel to start a post to which people can respond.



An Extended Model for ACCES-VR Offices

As you build the basic Team model for your District Office and become more comfortable using the available tools in Microsoft Teams, you and your staff may wish to extend this type of functionality towards other workstreams to accomplish your tasks. Consider the following example of how Teams can be created by each SVRC and VRC to address working with participants in a remote setting:



The basic District Office team outlined at the beginning of this publication serves as a hub for daily workflows with office personnel and guests able to communicate and collaborate when needed. In the extended model, the SVRC could create a Team where he or she would add members specifically with a workflow in mind and each VRC could do the same. In this extended model we see how it would be possible to work with participants in a remote setting by creating individual Teams for a caseload. It is reasonable to assume that not everyone you must communicate and work with will have the technical capabilities to conduct video conferencing, live chat or be able to see a shared computer screen, but with Teams and the ability for anyone to dial into a Teams meeting it is possible to remain productive, stay connected and provide for an uninterrupted workflow while working remotely.

Teams Resources

Use these training resources to help get the most out of Teams.



[Welcome to Teams!](#)
[Watch this short video introducing you to Teams](#)



[Follow this quick start to get up and running quickly on Teams](#)



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