

U.S. Coast Guard

Microsoft Training Syllabus

Demo: Explore Microsoft 365 tenant

This demo maps to the following Learn content:

- Learning Path: Describe Microsoft 365 apps and services
- Module: What is Microsoft 365?
- Unit: Explore Microsoft 365 tenant

Demo scenario

In this demo, you will explore various features of your Microsoft 365 tenant. You will view the Microsoft 365 admin center, Azure Active Directory admin center and Teams admin center.

Microsoft 365 admin center

1. Open a browser and in the address bar enter **admin.microsoft.com**. Sign in with your admin credentials.
2. Manage users by selecting **Users** from the left navigation menu to expand options. Select **Active users** to view the available user accounts.
3. Select the top user in the list by selecting their name. A window opens that displays more details for the user account. Close the window by selecting **X** in the upper right corner.
4. Select **Teams & groups**, to expand for more options, and then select **Active teams & groups**. View the active teams and groups. If you don't already have groups add one by selecting **Add a group** and follow the steps.
5. Select the top group in the list by selecting their name. A window opens that displays more details for the group. Close the window by selecting **X** in the upper right corner.
6. Select **Show all** in the left navigation menu to expand for more options.

7. Select **Billing** to expand for more options, and then select Licenses. At least one set of licenses should display. Select the license to view more details like the list of users who have this license assigned.

Azure Active Directory admin center

1. In the **Microsoft 365 admin center**, on the left navigation menu, select **Show all**.
2. Under **Admin centers**, select **Azure Active Directory**. Notice a new tab opens.
3. In the **Azure Active Directory admin center**, on the Dashboard, select **Azure Active Directory** from the navigation menu.
4. Under **Manage**, select **Users**. Notice the same user accounts from Office 365 are displayed. Close the Users window by selecting **X** in the upper right corner.
5. Under **Manage**, select **Groups**. Notice the same groups from Office 365 are displayed. Close the All groups blade by selecting **X** in the upper right corner.

Microsoft Teams admin center

1. In the **Microsoft 365 admin center**, on the left navigation menu, select **Show all**.
2. Under **Admin centers** select **Teams admin center**. Notice a new tab opens.
3. In the **Teams admin center**, the dashboard shows cards for organization information, deployment status, recent activity, user searches, helpful links, and more.
4. Use the left navigation menu to manage settings for **Teams, Users, Meetings, Locations**, and more.
5. Under **Users**, administrators can configure settings for **Guest access** and **External access**.
 - **External access**, formerly known as **federation**, lets Teams users communicate with users who are outside of your organization.
 - **Guest access** lets individuals outside your organization access teams and channels.

Review

In this demo you viewed the different features and ways to manage your Microsoft 365 tenant by exploring the Microsoft 365 admin center, Azure Active Directory admin center and Teams admin center.

Demo: Team collaboration in Microsoft Teams

This demo maps to the following learn content:

- Learning Path: Describe Microsoft 365 apps and services
- Module: Describe collaboration solutions of Microsoft 365
- Unit: Describe how Microsoft Teams promotes collaboration and enhances teamwork

Demo scenario

In this demo you will show Microsoft Teams, the hub for team collaboration in Microsoft 365. You'll show how Teams integrates people, content, and tools to help teams be more engaged and effective. You will walk through Teams capabilities like how to create a team and channel, add members, start a conversation, add a file, add a tab to a channel, create and view a scheduled meeting on your calendar.

Create a team and add members

1. Open a browser and in the address bar enter **teams.microsoft.com**. Sign in with your credentials and Teams will launch. (**Talking points:** *Microsoft Teams is a hub for teamwork. It's an app for people and teams to come together, stay connected and get things done across work, home, school and on the go.*)
2. Select **Teams** in the left navigation column and your teams will open to the right of the navigation. View all the different teams that you belong to. (**Talking points:** *A team is a workspace where a group of people can collaborate on work, projects, or common interests. Sometimes it's your whole organization.*)
3. Select **Join or create a team** at the bottom of your list of teams.
4. On the right page select **Create a team** and a dialogue box opens.
5. There are a variety of options to create a new team, from scratch, from an existing group or team, or from a template. Select From **scratch**.
6. The dialogue box asks "What kind of team will this be?" with two or three options: Private, Public or Org-wide (if you're a global admin). (**Talking points:** *To limit content and conversation to a specific set of people, choose Private. If you want anyone in the organization to be able to join, choose Public. If you're a*

global administrator, you'll also see this option to create an Org-wide team.) Select **Public**.

7. The dialogue box asks you to fill out some information on your team. Give your team a name by entering a name in the **Team name** textbox, for example enter **Marketing**. Let people know what this team is all about by entering a description in the **Description** textbox, but it is not required.
8. Select **Create**
9. Once the team is created, you have the option to add team members to your team. Add a team member or group by selecting in the **name or group** textbox.
10. Search for and select "**Megan Bowen**" and/or search for and add "**Sales and Marketing**." Select **Add** and your team member and/or group is added to the team.
11. Select **Close** to close the dialogue box.
12. Notice your team is created and displayed in your list of teams on left.
13. Select the **ellipsis** icon on the right of your team to view ways to manage your team. A menu of options opens. (**Talking points:** *As the team owner, you have a number of options for managing a team you create. You can manage the team's settings, add channels and members, leave the team, edit the team, get a link to the team, manage tags, and even delete the team.*)

Create a channel

1. Select **Add channel** and a dialogue box opens. (**Talking points:** *Each team is made up of "channels." The default channel for team-wide discussions is the General channel, but you can create other channels dedicated to specific topics, departments, projects.*)
2. The dialogue box asks you to fill out some information on your channel. Give your channel a name by entering a name in the **Channel name** textbox, for example enter **Digital Marketing Strategy**. Let people know what the channel is all about by entering a description in the **Description** textbox, but it is not required. Select the **Privacy** textbox to view the three privacy options: Standard, Private, or Shared. Leave the Privacy defaulted to **Standard** so everyone on the team can access the channel. You also have the option to **Automatically show this channel in everyone's channel list**, select this checkbox. When you are finished select **Add** and the dialogue box closes.
3. Notice the channel is available under the **General** channel. (**Talking points:** *Channels are where the work actually gets done, where files are shared, apps are added and where conversations happen.*)

Start a conversation in posts

1. Notice you are automatically on the **Posts** tab within the channel. (**Talking points:** By default, channels contain three tabs: Posts, Files, and Wiki. But you can add other custom tabs, such as the ones shown for this channel.)
2. Select **New conversation** to start a conversation within the channel.
3. Select the **conversation** textbox and enter **"Hey team!"** then select the **send** icon on the bottom far right of the textbox.

Add a new file

1. Select **Files** to view or add files to the channel. (**Talking points:** Files shared within a channel are stored in the team's SharePoint folder. Team members can also view and edit documents right from here.)
2. Select **New** on the top right toolbar. A dropdown of options displays.
3. Select **Word document** and a dialogue box appears.
4. Enter a **name** for your document in the textbox. For example, **Digital Marketing Outline**.
5. Select **Create** and your word document will open directly in Teams for editing. (**Talking points:** In these supported applications like Microsoft Word, PowerPoint and Excel, team members can collaborate on documents in real time.) You have the option to open and edit the document in the desktop app by selecting **Open in Desktop App** in the toolbar.
6. Edit the document by adding content.
7. You have the option to open and edit the document in the browser. Select the **ellipses** icon in the top right corner then select **Open in Browser**. Notice the document opens in a separate tab.
8. **Close** the tab. Navigate back to Teams.
9. A dialogue box displays and asks if you would like to close the file or continue. Select **Close file**. Notice your document is saved and available in the list of documents.

Add a tab to a channel

1. Select the **plus** icon to add another tab to the channel and surface another application directly in Teams. A dialogue box appears with a variety of app options. Scroll and view the different apps available then select the **X** in the top right corner to close. (**Talking points:** Team members can easily add new tabs to

a channel to include the apps and files they want to work with. A variety of apps are available from Microsoft and external services to expand the value of your Teams collaborative experience.)

Schedule a meeting

1. Navigate back to **Posts** and select the **arrow** icon next to "Meet" in the top right corner. An option to meet as a team now or to schedule a meeting display. (**Talking points:** *Team members can schedule meetings in advance or kick off an impromptu meeting.*)
2. Select **Schedule a meeting**. A new meeting page opens to fill out information on the meeting.
3. Enter a title, for example **Brainstorm Digital Strategy** in the **Add title** textbox. Search and add required attendees in the **Add required attendees** textbox. Select a start and end date and time for **tomorrow morning** from **10:00 AM** to **11:00 AM**. Add details about the meeting in the **Type details for this new meeting** textbox. Select **Send** in the top right corner.
4. Notice the scheduled meeting is posted under the **Posts** tab within the channel (you may have to give it minute or refresh your page to view the post).

View your calendar

1. Select **Calendar** in the left navigation column. If you don't see a calendar, select the **ellipses** icon for more options. Search for **calendar** in the **Find an app** search bar. Select the **calendar** to view meeting invites, updates, and reminders. (**Talking points:** *Teams allows you to add and pin a variety apps to the left navigation column for easy access.*)
2. The calendar app opens and notice your newly created meeting scheduled for tomorrow. (**Talking points:** *Calendar shows you a schedule of all your upcoming meetings and appointments for the week. It includes everything that was scheduled in Teams, Exchange, and Outlook. You can also schedule Teams meetings from here.*) To pin the calendar app to the navigation, in the left navigation column right-click the **Calendar** and select **Pin**.

Review

In this demo you showed how Microsoft Teams integrates people, content, and tools to help teams be more engaged and effective. You demonstrated how to create a team

and channel, add members, start a conversation, add a new file, add a tab to a channel, schedule a meeting and view your calendar. You now have a better understanding of how Microsoft Teams can help teams collaborate better and in real-time.

Demo: Explore Microsoft Viva Insights and Viva Learning

This demo maps to the following Learn content:

- Learning Path: Describe Microsoft 365 apps and services
- Module: Describe collaboration solutions of Microsoft 365
- Unit: Describe the Microsoft Viva apps

Demo scenario

In this demo you will show Microsoft Viva, the employee experience platform that empowers people and teams. You will walk through the features of Viva Insights and Viva Learning, two of the four Viva modules. You will show how these applications can help employees create healthy and productive work habits and learn and grow their career.

Viva Insights

Add Viva Insights to Microsoft Teams

1. Open a browser and in the address bar enter **teams.microsoft.com**. Sign in with your credentials and Teams will launch. (**Talking points:** *Microsoft Teams is a hub for teamwork. It is an app for people and teams to come together, stay connected and get things done across work, home, school and on the go.*)
2. On the navigation menu, select the **ellipses** icon for more options. Search for **Viva Insights** in the Find an app search bar and select Viva Insights. (**Talking points:** *Teams allows you to add and pin a variety apps to the left navigation column for easy access.*) It will appear on the navigation menu. To pin the Viva Insights app to the navigation, in the left navigation menu right-click **Viva Insights** and select **Pin**.

Explore Viva Insights

1. Select Viva Insights to open the app (**Talking points:** *Viva Insights provides privacy-protected insights and actionable recommendations that help everyone in the organization work smarter and achieve balance. Viva is accessed through Microsoft Teams*).

2. On the homepage notice there are suggestions on ways you can improve your work life balance and various activities you can complete like sending praise to colleagues, tap into self-reflection, take breathing breaks, or book focus time.
3. Under "Activities for you", select the **Send praise** button in the "**Send praise to your colleagues**" card to show gratitude for your peers. The window changes to send praise.
4. Enter a **name of a team member (ex: Megan Bowen)** in the **To** search bar to search for the team member you would like to send praise too. Select the **team member** when their name appears.
5. **1:1 chat** is automatically selected for the **Where** option field.
6. Add a **personalized note** by entering in the **Note** text field (**ex: You have done a great job!**).
7. Select an **image** on the right to go along with your message.
8. Once you are finished, select **Send** to send your praise to your team member.
9. Select the **Stay connected** tab at the top of the toolbar to keep track of important collaborators and connections (**NOTE: You most likely will not see anything surfaced here as this tab creates AI-based task suggestions, meeting assistance and follow-ups with team members based on your activity**).
10. Select the **Protect time** tab at the top of the toolbar to view and schedule focus time.
11. Under "Book focus time" notice the options to book focus time. Select the **Book time** button next to one of the time slots to schedule focus time. Once booked, the button changes to "Focus time booked" in green.
12. Under "Protect your time" create a focus plan to make time for distraction free work by selecting **Get started**.
13. Select the **Inspiration library** tab at the top of the toolbar to view thought leadership articles and research-based data representing best practices across categories like Wellbeing, Culture, Impact, and Resilience.
14. Navigate to the Teams navigation column and select the **calendar app** to view the focus time you booked.

Viva Learning

Add Viva Learning to Microsoft Teams

1. On the navigation menu in Teams, select the **ellipses** icon for more options. Search for **Viva Learning** in the Find an app search bar and select **Viva Learning**. It will appear on the navigation menu. To pin the Viva Learning app to the navigation, in the left navigation menu right-click **Viva Insights** and select **Pin**.

Explore Viva Learning

1. Select **Viva Learning** to open the app (***Talking points:** Viva Learning is a centralized learning hub in Microsoft Teams that lets you seamlessly integrate learning and building skills into your day. It streamlines content discovery, search, and sharing across the organization).*
2. On the homepage, you can browse and discover from a library of 10,000+ courses. Notice it greets you with your progress on any courses or training that you have (***NOTE:** You will most likely not have any courses or training listed here).*
3. Under "Pick your interests" select **interest areas** based on your role by selecting them in the card. Select **See More** to view more interest areas. Search or select more interest areas. Once you have all the interest areas you would like listed select **Save**.
4. Notice recommended courses surface based on your saved interests. Select a course to view more information, to start the course, bookmark it, share it or view related courses. Select the **Bookmark** icon to bookmark the course.
5. Select the **play** icon to play the course (***NOTE:** You may not have access to the course and you might need to sign in through your organization)* then select **Close** to close the course.
6. Select **Back** to navigate back to the homepage.
7. Use the "**What do you want to learn about?**" search bar to search for courses and training (***ex: Digital Transformation***). Once you found the course you are searching for select the course to open it.
8. Select the **Share** icon to share the course with your team by copying the link or sharing via Teams. (***Talking points:** Viva Learning makes it simple and easy to share with others in ad-hoc chats and conversations in Microsoft teams.*) Select **Teams** and a dialogue box opens.
9. Enter the team member, group or channel you would like to share the course with by entering the name in the **Share to** text field (***ex: Megan Bowen***).
10. Add a message about the course by entering in the **Say something about this text field**.
11. Select **Share** on the bottom right corner of the dialogue box then select **Done** when your message has been shared.
12. Navigate to Microsoft Teams chat by selecting **Chat** in the navigation menu to view the course you shared with your team member. Or if you shared the course with a group or channel navigate to that Team by selecting **Teams**.
13. Navigate back to the **Viva Learning** homepage and scroll to view more course options available. (***Talking points:** Viva Learning can natively connect with popular content partners including EdX, Coursera, Go1, LinkedIn Learning, Skillsoft, and more, Viva Learning also integrates with a growing number of Learning Management Systems, all accessible right in Teams.*)

14. Select the **My Learning** tab at the top of the toolbar to view your courses due and personally curated content. (*Talking points: This tab summarizes your learning by assigned, recommended, bookmarked, and completed learning.*)
15. Select **Bookmarked** to view bookmarked courses. Notice the course you recently bookmarked is listed.
16. Select **Recommended to you** to view recommended courses or browse other courses.
17. Select **Recently viewed** to view courses you have viewed. Noticed the course you recently started is listed.
18. Select **Completed** to view courses you have completed.

Review

In this demo you explored some of the features of Microsoft Viva, the employee experience platform. You specifically viewed the Viva Insights and Viva Learning apps within Microsoft Teams and how they can help employees take care of their wellbeing, balance work and grow their skills and career.

Demo: Explore the Microsoft 365 admin center

This demo maps to the following Learn content:

- Learning Path: Describe Microsoft 365 apps and services
- Module: Describe analytics capabilities of Microsoft 365

Demo scenario

In this demo you will show the features of the Microsoft 365 admin center. You will walk through how to manage the homepage, view the variety of admin tasks, reports, and other admin centers available.

Manage cards

1. Open a browser and in the address bar enter **admin.microsoft.com**. Sign in with your admin credentials.
2. On the homepage, you can create cards for tasks that you perform frequently. To add a new card, select **Add cards**.
3. A window pane expands from the right. Find the card you'd like to add and either **drag** the card to the location you want or select the **plus** icon next to the card.
4. When you are finished adding cards, select the **X** at the top right corner of the window.
5. Rearrange the cards on the homepage by **selecting** and **dragging** them to where you want.
6. To remove a card, select the **ellipses** icon at the top right corner of the card then select **Remove**.

Admin tasks

1. To view more admin tasks, (if not expanded already) select the **three-bar** icon to expand the navigation menu.
2. Manage users by selecting **Users** from the navigation menu to expand options.

3. Manage billing and licenses by selecting **Billing** from the navigation menu to expand options.
4. To enable more features that come with your subscription, select **Setup**. You can manage sign-in security, migration, apps, email, and more.

Help and support

1. If you need support at any time, select the **Help & support** button at the bottom right of the homepage.

Reports

1. View reports by selecting **Reports** from the navigation menu to expand the two reports available, Adoption Score and Usage reports. (***Talking points:** Adoption Score provides insights into your organization's digital transformation journey through its use of Microsoft 365 and the technology experiences that support it. Usage reports help you see how employees are using the different services of your Microsoft 365 subscription.*)
2. Select **Adoption Score** to view your organization's score.
3. Select **Usage reports** and the page displays a variety of reports. View more information for any report by selecting **View more** on the bottom left of the card.

Other admin centers

1. Access other admin centers for specific products and services under "**Admin centers**" near the bottom of the navigation menu and select **All admin centers** to view the rest of the admin centers available.
2. Select another admin center from the list and notice that another tab opens taking you to that admin center. For example, select **Exchange** and another tab will open navigating you to the **Exchange admin center**.

Review

In this demo you explored the features of the Microsoft 365 admin center. You learned how to manage your homepage, view the admin tasks, reports, and other admin centers available.

Demo: Explore User and billing management in the Microsoft 365 admin center

This demo maps to the following Learn content:

- Learning Path: Describe Microsoft 365 pricing, licensing, and support
- Module: Describe Microsoft 365 pricing, licensing, and billing options

Demo scenario

In this demo, you will show user and billing management features in the Microsoft 365 admin center. You will walk through how to add users, licenses, and payment methods. You will also show other options on the navigation panel that help manage users and billing.

User management options

View Active Users

1. Open a browser and in the address bar enter **admin.microsoft.com**. Sign in with your admin credentials.
2. Select **Users** from the left navigation menu for more options.
3. Select **Active users**. A list of active users displays.
4. You can sort users by **Display name**, **Username** or **Licenses**.
5. Select **Choose columns** to add more columns and a window pane expands from the right with a variety of column options to add.
6. Select the columns you want to add and select **Save**. Notice the column(s) are now visible.
7. Select a user to view more options and information. Options become available at the top of the list such as **Manage their product licenses**, or **Mange roles**. A window pane will also expand from the right with more details about the user.

Add a user

1. On the top left of the list select **Add a user**.

2. A window pane expands from the right. Enter a **name** and other information.
 - Example: Enter **Carl** in the **First name** textbox and **Johnson** in the **Last name** textbox. Select the **Display name** textbox and Carl Johnson should auto populate, if not enter **Carl Johnson**. Enter **CarlJ** in the **Username** textbox.
3. Select **Next**.
4. Notice **Assign user a product license** is auto selected. Select the **Microsoft 365** license (**Example: Microsoft 365 E5 Developer**). Notice the number of licenses available decreases.
5. Select **Next**.
6. Select **Roles** to expand. Notice **User (no admin center access)** is auto selected. View the different administrator roles that a user can be assigned.
7. Select **Profile info** to expand. Enter profile information about the user.
 - Example: Enter **Business Analyst** in the **Job title** textbox and **IT** in the **Department** textbox.
8. Select **Next**.
9. Review the user information and select **Finish adding**.
10. Once the new user (**example: Carl Johnson**) has been added to active users, select **Close**.
11. View your new user (**example: Carl Johnson**) in the list of active users.

View Contacts, Guest Users and Deleted Users

1. In the left navigation menu under "**Users**" select **Contacts** to view the list of contacts available to your organization. Perform other actions like add contacts.
2. Under Users select **Guest users** to view or add guest users.
3. Under Users select **Deleted users** to view your history of deleted users.

Billing management options

View and assign licenses

1. Select **Billing** from the left navigation menu for more options.
2. Select **Licenses**. Your list of subscriptions displays (**example: Microsoft 365 E5 Developer**). Select your subscription to view license details.
3. Users that are assigned a license to that subscription display. View your newly added user in the list (**example: Carl Johnson**).
4. To add a license to a user who does not currently have a license select **Assign licenses** at the top left of the list.

5. A window pane will expand from the right. Search for the user that you would like to add a license to by entering a **name** or **email address** in the **search bar** or skip this step by selecting the **X** in the top right corner.
 - o Once you find the user you would like select **Assign**, then select **Send email** to help the new user get started. Close the window by selecting the **X** in the top right corner. Notice the newly assigned user in the list and the available licenses decreases.

View bills and add payment methods

1. In the left navigation menu under "**Billing**" select **Bills & payments** to view invoices, payment methods and billing profiles. (**Note:** *You are most likely not going to see any information here if this is a free trial environment and no payment is being made.*)
2. Select **Payment methods** to view and add payment methods.
3. Select **Add a payment** method on the top left of the list to add a payment method.
4. A window pane expands from the right where you can add payment information. Close the window by selecting the **X** in the top right corner.
5. Another way to view and add payment methods is to select **Payments methods** under "**Billing**" in the left navigation menu.

View billing accounts

1. In the left navigation menu under "**Billing**" select **Billing accounts** to view the billing account associated with your Microsoft product(s). (**Talking point:** *A billing account is created when you sign up to try or buy Microsoft products. You use your billing account to manage your account settings, invoices, payment methods, and purchases. You can have access to multiple billing accounts. For example, you signed up for Microsoft 365 directly, or you have access to your organization's Enterprise Agreement, Microsoft Product & Services Agreement or Microsoft Customer Agreement. For each of these scenarios, you would have a separate billing account.*)

Manage billing notifications

1. In the left navigation menu under "**Billing**" select **Billing notifications** to manage billing notifications. On this page you can **Edit notification settings** and view the organization contact and admins that receives billing notifications. Notice your name listed under "**Admins receiving billing notifications.**" You have the option to **Change Billing admins**, **Change Global admins**, or **Assign one of these roles by adding a new account.**

Purchase services and view products

1. In the left navigation menu under "**Billing**" select **Purchase services** to search for and purchase Microsoft products.
2. Under "**Billing**" select **Your products** to view the list of Microsoft products your organization owns.

Review

In this demo you explored the user and billing management features within the Microsoft 365 admin center by learning how to add users, licenses and payment methods. You also explored the other options on the navigation panel to manage users and billing.

Demo: Create a support request in the Microsoft 365 admin center

This demo maps to the following Learn content:

- Learning Path: Describe Microsoft 365 pricing, licensing, and support
- Module: Describe support offerings for Microsoft 365 services
- Unit: Explore support options for Microsoft 365 services

Demo scenario

In this demo you will show how to create a support request through the Microsoft 365 admin center if help is needed using Microsoft 365. You can also show where you can view existing support requests.

Create a new service request

1. Open a browser and in the address bar enter **admin.microsoft.com**. Sign in with your admin credentials.
2. In the left navigation menu, select **Show all** to expand the rest of the options.
3. Select **Support** to expand the support options.
4. Select **New service request**.
5. On the right, a window pane will open where you can enter a support question and view the results. Enter a question or problem in the search bar and select the **arrow** icon on the right to search.
6. If the recommended instructions or articles don't answer your questions, select the **headset** icon at the top of the window or select **Contact support** at the bottom to contact technical support.
7. Fill in the required information like **Title, Description, Preferred contact method**, etc.
8. Select **Contact me** and a support agent will contact you.

View existing service requests

1. Navigating back to the navigation menu, select **View service requests**.

2. The page shows service request history in a grid. You can search, filter, sort by date and export your service requests tickets.

Review

In this demo you walked through how to create and view support requests in the Microsoft 365 admin center. Now you know how to contact support if you are having an issue with Microsoft 365 and how to view the status of your existing support requests.