AFFINITY INSIGHT

MICROSOFT TEAMS
for LEGAL PROFESSIONALS

MICROSOFT TEAMS

FOR LEGAL PROFESSIONALS

SITE LICENSE

MEET OUR TEAMS EXPERT

Meet our Teams expert who authored this manual.

DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.

MICROSOFT TEAMS FOR LEGAL PROFESSIONALS
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8 SEARCHING

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

SEARCHING ACROSS TEAMS

The **Command box**, located in the top center, allows you to search throughout Teams. *Note: As of the time of publication, Wikis are not searchable.*
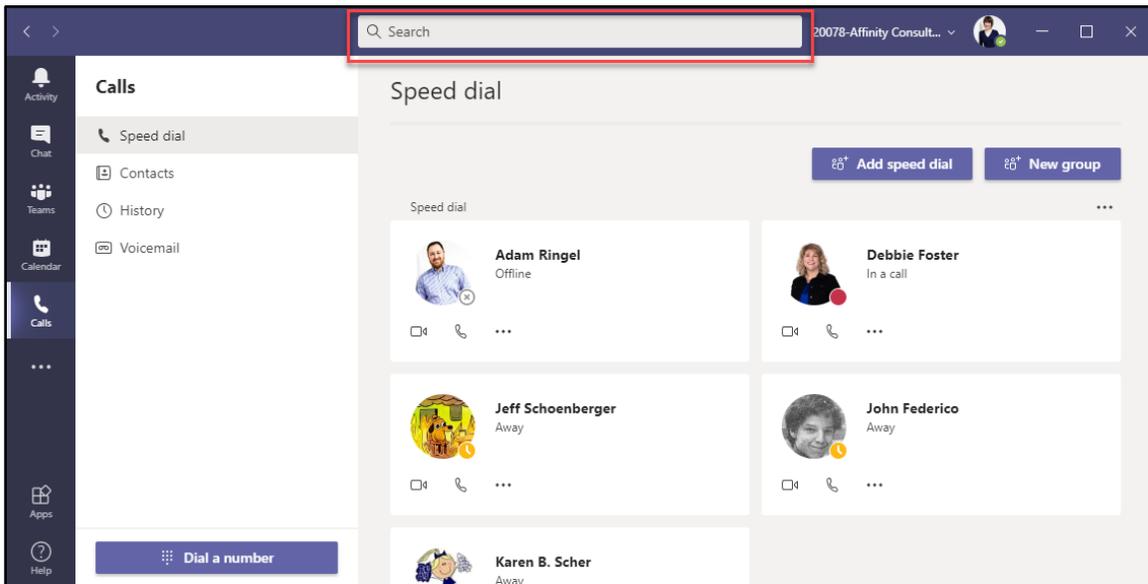
FIGURE 8-1

Search for People

To search for messages from a particular person, type that person's name in the **Command box**. Clicking on the person's name under **People** will open an individual chat with them (as well as any one-on-one chat history). If you are engaged in any group chats with that person, the group chats will show up by name under **Group chats**. If a group chat was not named, you'll see a list of group chat participants.
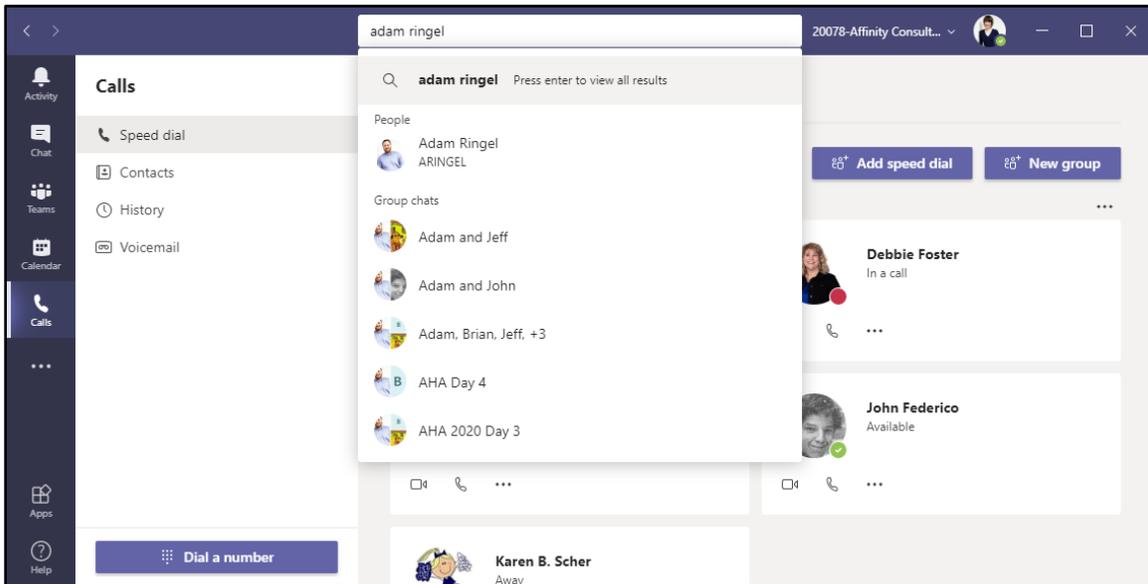
FIGURE 8-2

To see all communication (including messages in channels), hit the **Enter** key on your keyboard to open the search results page. Chat messages and messages posted in channels that you have access to are listed under the **Messages tab**. Contacts are listed under the **People tab**. Files are listed under the **Files tab**.

Search for Teams and Channels

To search for a team or channel, type the team or channel name in the **Command box.**
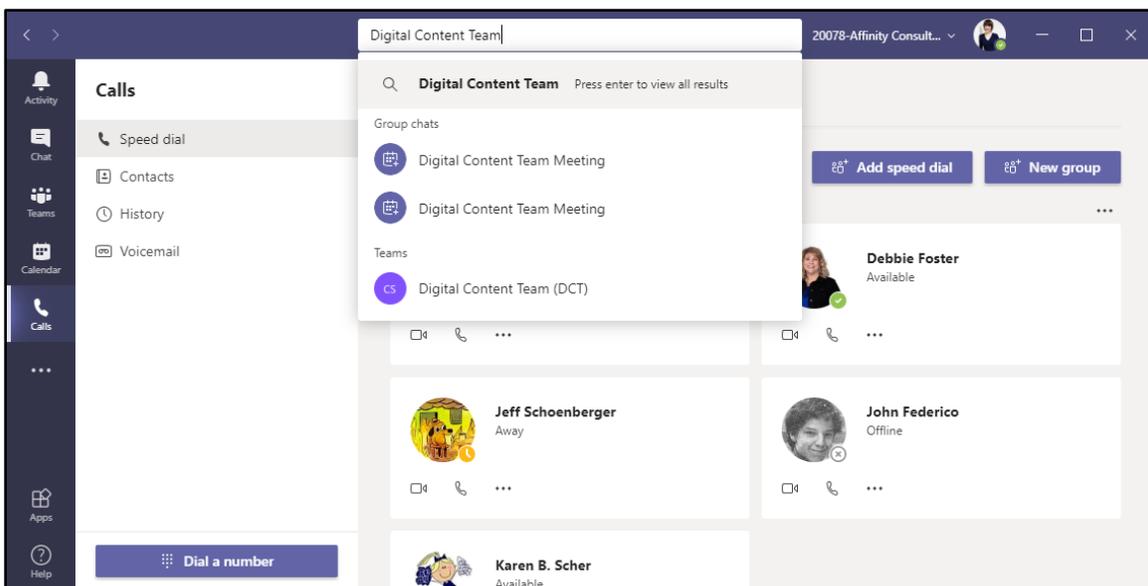
FIGURE 8-3

Search by Keywords

To search for words used in messages and files, type the word in the **Command box** and hit the **Enter** key on your keyboard to open the search results page. Chat messages and messages posted in channels that contain the keywords are under the **Messages tab**. Contacts are listed under the **People tab**. Files are listed under the **Files tab**.

FILTERING SEARCH RESULTS

From the search page (see above), you can filter messages by the sender, the type of message, subject, date, team, channel, mentions, and attachments. Files can be filtered by team, file type, and individuals who modified the file.

Filtering Messages

To filter by sender, click on the **From dropdown** and type then name of the sender. Then click on the name of the sender to filter.
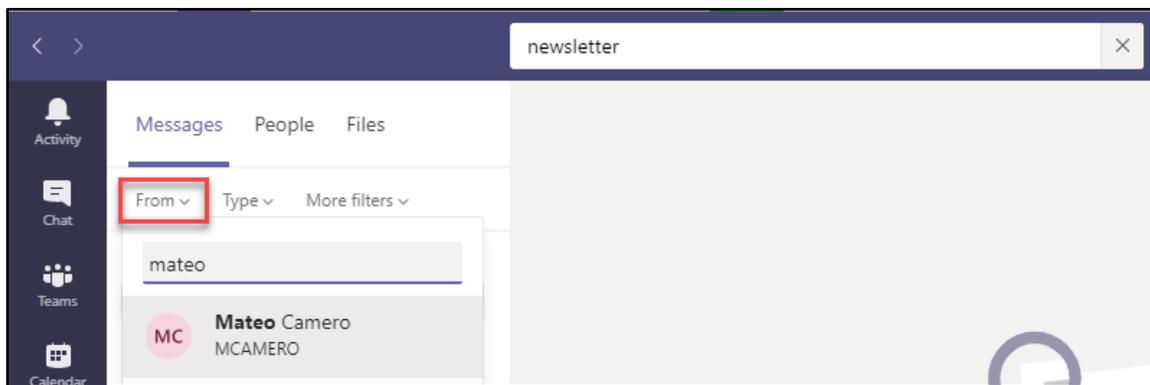
FIGURE 8-4

To filter by chat messages or messages posted in a channel, click on the **Type dropdown** and click on the desired type of message.
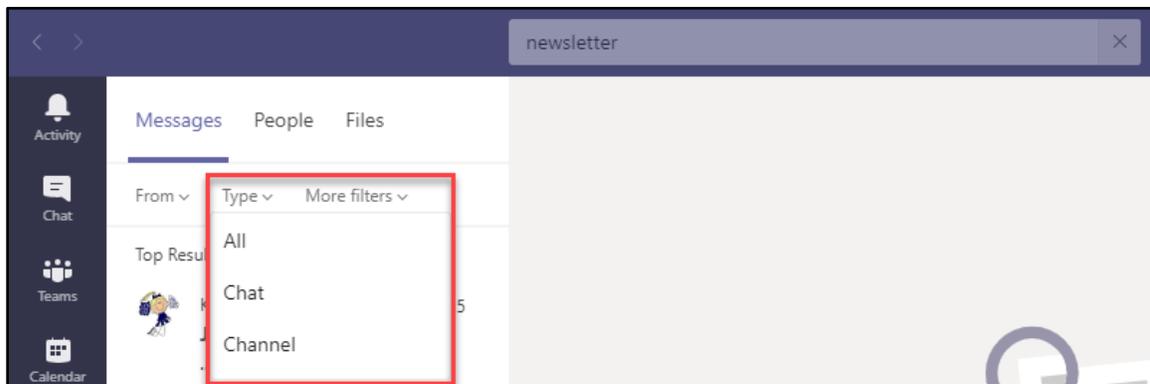
FIGURE 8-5

To filter by subject, date, team, channel, mentions, or attachments, click on the **More filters dropdown**. Make the desired selections and click on the **Filter button**.

FIGURE 8-6

Filtering Files

To filter the file search results, click on the **Filters dropdown**, make the desired selections, and click on the **Filter button**.

FIGURE 8-7

ADVANCED SEARCHING

Keyword Query Language

As of the date of publication, Teams supports four advanced search queries using the **Command box** (see above).

Sender: To search by sender, type **From:** immediately followed by the person's name. Do not put a space between the colon and the person's name.
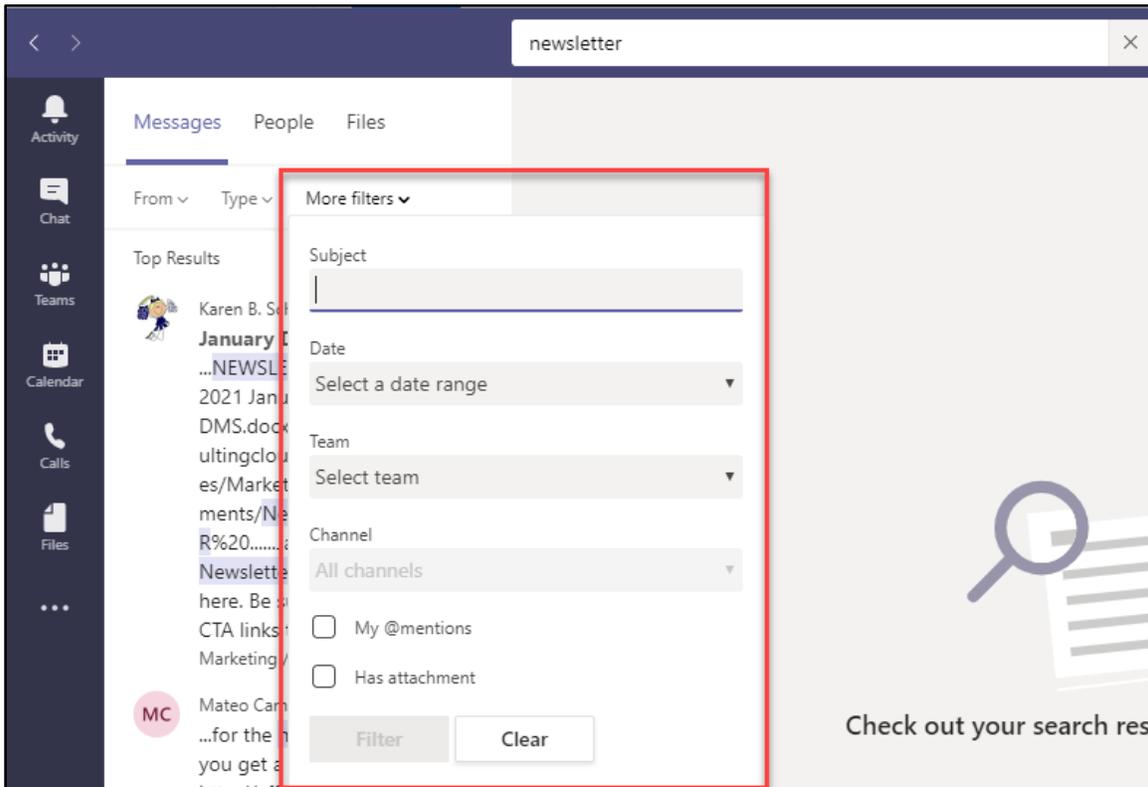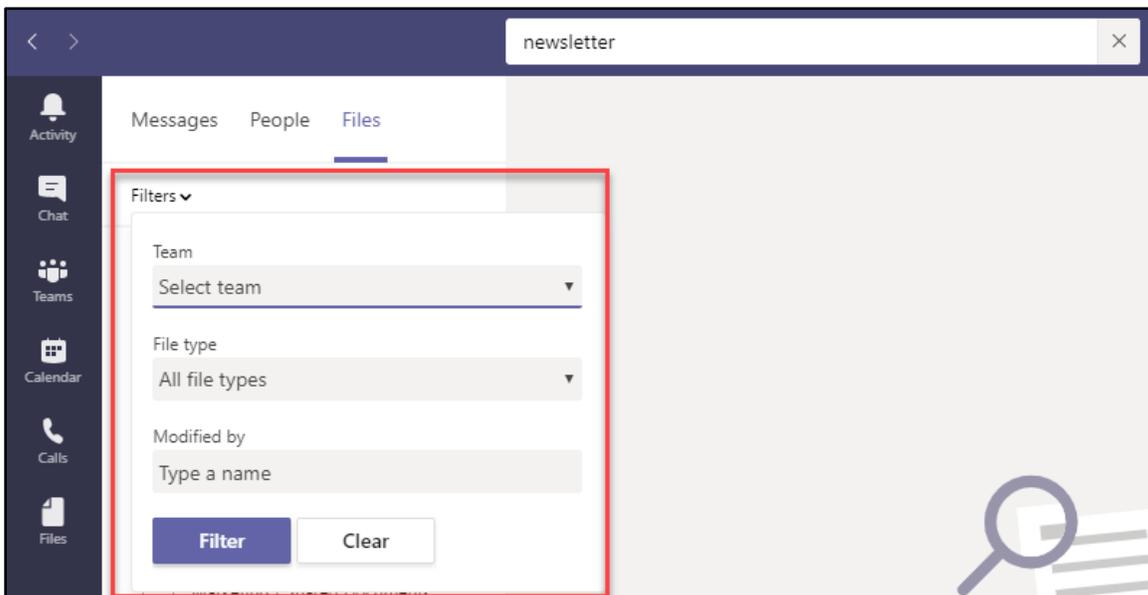
Group Chat or Channel: To search by the group chat name or channel name, type **In:** immediately followed by the group chat or channel name. Do not put a space between the colon and name.

Subject: To search by keywords within channel message subjects, type **Subject:** immediately followed by the keyword. Do not put a space between the colon and keyword.

Date: To search by date that a message was sent, type **Date:** immediately followed by the date. Do not put a space between the colon and date.

Exact Matches

To search by for an exact match on a word or phrase, use quotation marks.

Prefix Search

To search for words that start with certain characters, type those characters followed by an *****. For example, enter **stat*** to get search results that include words such as state and statute.

SEARCHING CURRENT LOCATION

Search the open chat message or channel by hitting **Ctrl + F** on your keyboard. Type your keywords and hit the **Enter** key on your keyboard.

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TRAINING TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

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