Netitude

GROWTH **THROUGH** TECHNOLOGY

MICROSOFT TEAMS: HOW-TO GUIDE

Get started with tips and best practices
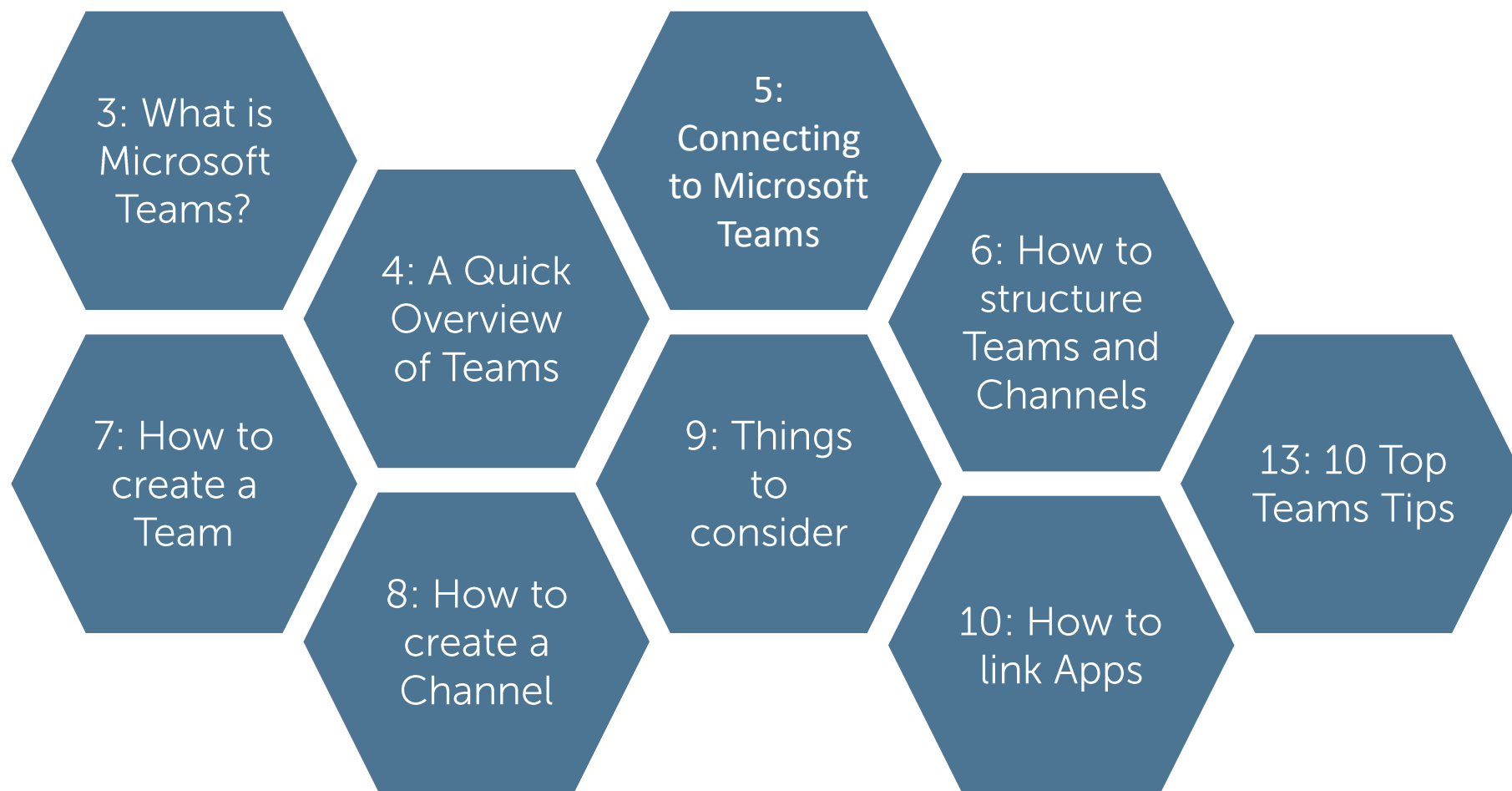
📞 0333 2412323

✉ hello@netitude.co.uk

🌐 www.netitude.co.uk

Microsoft Teams: How-To Guide

3: What is Microsoft Teams?

4: A Quick Overview of Teams

5: Connecting to Microsoft Teams

6: How to structure Teams and Channels

7: How to create a Team

8: How to create a Channel

9: Things to consider

10: How to link Apps

13: 10 Top Teams Tips

What is Microsoft Teams?

Netitude

Microsoft Teams is a chat and collaboration platform for Microsoft Office 365 customers, designed to simplify group work. You could say that, Teams is Microsoft's answer to competing platforms like Slack.

In its simplest form the service allows users to set up Teams, each of which is essentially a hub for group chat rooms, which are called channels. Teams' integration with other Microsoft services allows users access to shared files and calendars, collaborative editing, and easy switching between voice, video, and text chat.
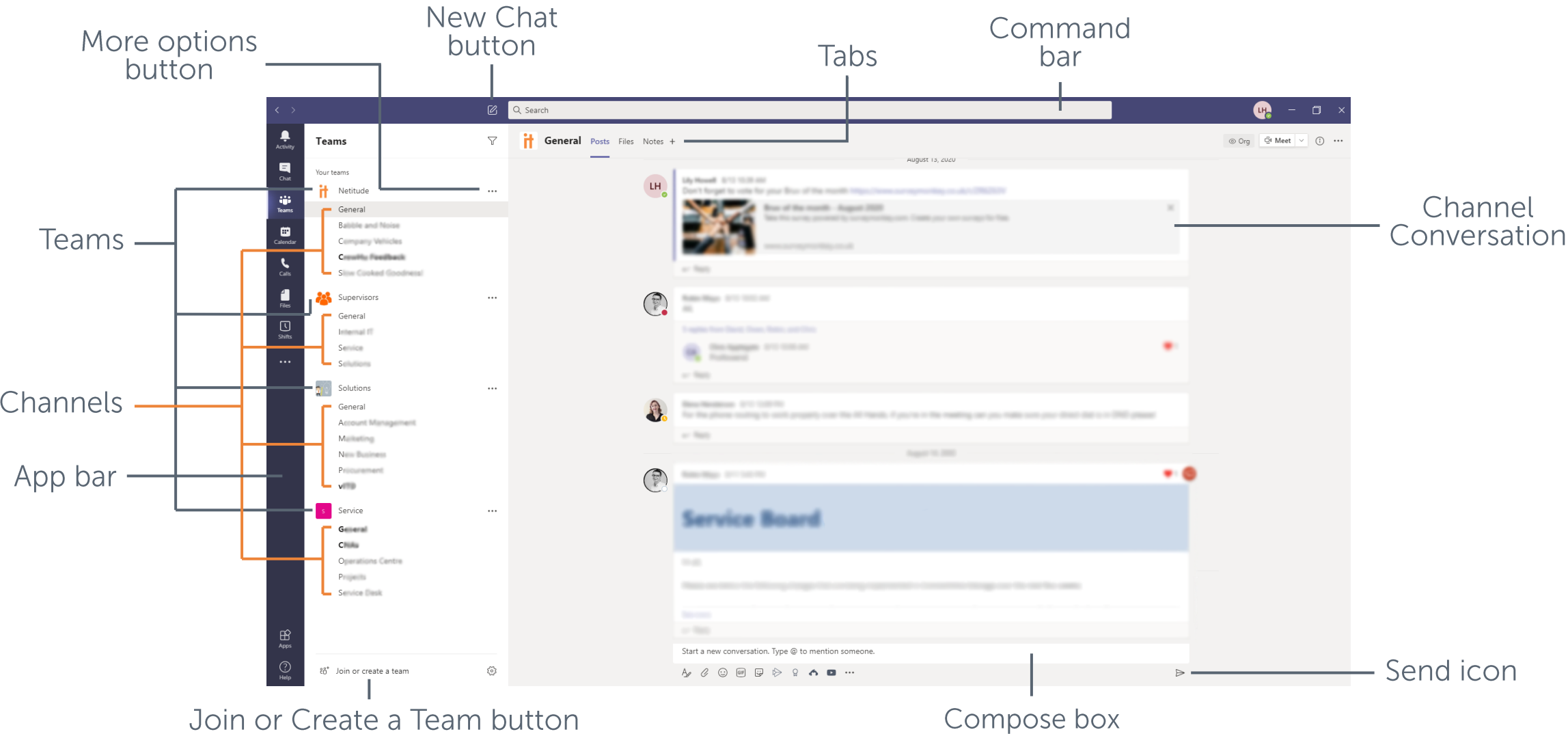
The service is available to most subscribers to Microsoft cloud-based Office 365 suite.

When you create a new Team this will also create a matching Office 365 Group, OneNote, SharePoint site and Plan, so the last thing you want to do is make too many teams.

Top tip: Think about how various groups within your organisation communicate with each other, this will help you structure your Teams.
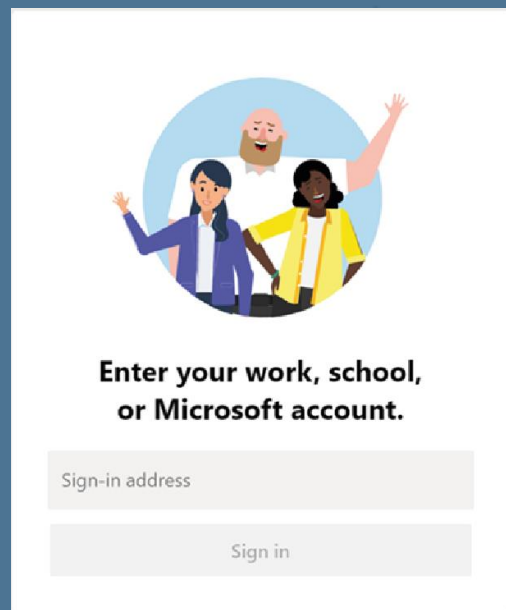
Each Team has subsections called Channels, a General Channel will automatically be created. You can have multiple Channels within a Team for example; you could have each department as their own team and segment them down into different channels. Or your Company could be a Team and Channels can relate to departments - you can choose whatever suits your organisation's way of working.

A Quick Overview

More options button

New Chat button

Tabs

Command bar

Channel Conversation

Teams

Channels

App bar

Join or Create a Team button

Compose box

Send icon

Connecting to Microsoft Teams

Netitude

After you've downloaded that app, double click to launch it. Once Teams launches, type your Microsoft account email address in the required field.

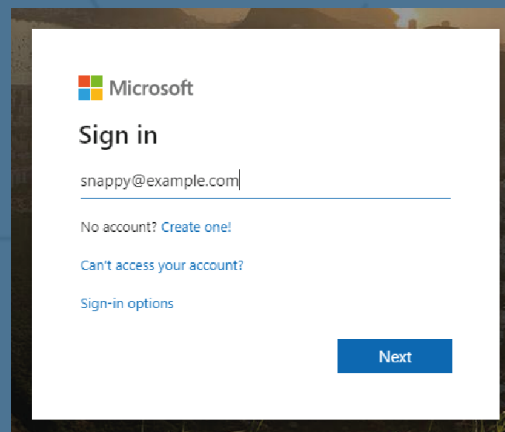Click **Sign In** and then you will be prompted to sign in a second time.
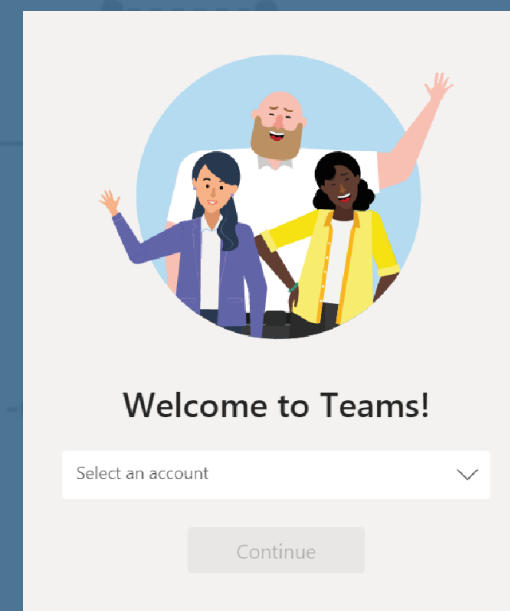
Click **Next** and, when prompted, select the team you want to connect with for collaboration.

How to structure your Teams and Channels

Netitude

Groups, commonly known as Channels, can be open to everyone in the company or private, and by default can be created by anyone!

To avoid confusion or sharing documents with the wrong people, you need to carefully consider how to set up your teams.

You should list your own teams and answer the following questions for each one:

✓ Is any of this information sensitive or restricted?

    ✓ If yes, this should be private.

    ✓ If no, this can be a public team. Note: public teams are only visible to your company.

✓ Who needs to be in this team?

✓ It is a good idea to have an 'all company' public team for announcements?

✓ Who is best to 'own' this team and look after who is a member?

✓ Are there any projects, or smaller groups related to that team? Rather than creating a whole new team, these can be added to existing Teams as 'channels' which share the same access and members. Every team starts with General by default.

How to create a Team

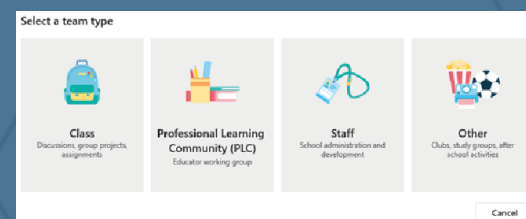To create a Team click the Teams icon in the left navigation bar and then click **Join or create team > Create a new team**.
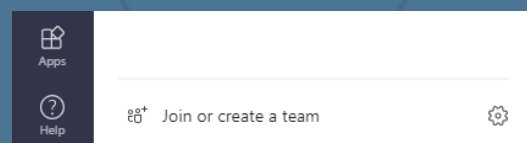
Note: If you don't see the Create a new team option, you may not have the necessary permissions to create your own teams. Please check with your IT administrator if this is the case.
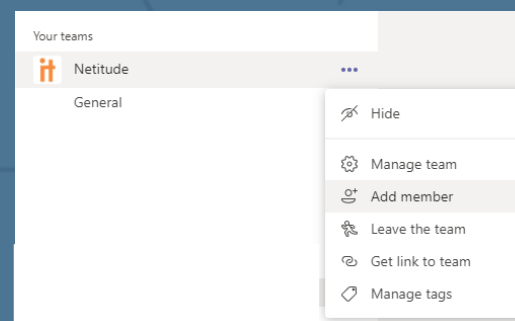
Then choose **Staff**.

Choose a name for your team (this could be related to your department sector e.g. Service). You can add a description of the team if you wish. Then click **Next** to create your team.

Adding member to your Team
As the team owner, you'll be able to add members to your team.

Select the team name in the teams list and click **More options > Add member.**

Then, start typing a name, or Office 365 group to add to your team. You can also add people outside your organisation as guests by typing their email addresses.

When you're finished adding your members, select **Add**. At this point, you could also take the opportunity to make someone a team owner by selecting the down arrow next to the word **Member**. There can be multiple owners in a team.

To add your team members, select **Close**. Those you've added will receive an email to let them know they are now a member of your team and the team will show up in their Teams list.

How to create a Channel

Teams is made up of channels, each channel is dedicated to a specific topic, department, or project. It's where you have conversations with your teammates, share files etc. By default, all members of a team can create channels. A standard channel is open for all members and anything posted is searchable by others. If you need a smaller audience for a specific project, you can create a private channel for your team.

Create a channel

Go to the team you want to create the private channel for and choose **More options > Add channel**.

Create a channel for "Supervisors" team

Channel name

Letters, numbers, and spaces are allowed

Description (optional)

Help others find the right channel by providing a description

Privacy

Standard - Accessible to everyone on the team   ⌄ ⓘ

Standard - Accessible to everyone on the team   ✓

Private - Accessible only to a specific group of people within the team

If you want to make a private channel to discuss sensitive information then under **Privacy**, select the down arrow on the right, and then **select Private – Accessible only to a specific group of people within the team.**

Select **Add**. This adds a private channel to the team.

M Marketing   ...

General

Announcements

Budget 🔒

Messaging pillars
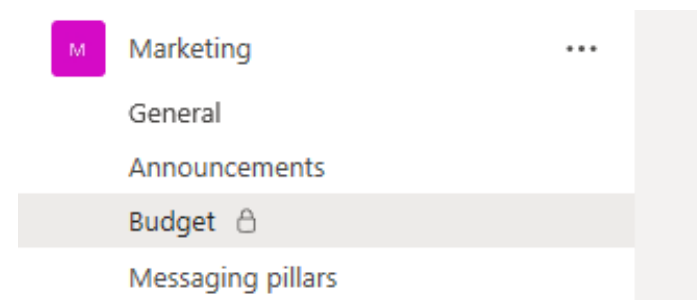
To add members to a channel:

Next to the private channel name, select More options **More options > Add members**

Use the **Members and Settings** tabs to add or remove members and assign roles. Channel can have multiple owners and up to 250 members.

When you're ready, select **Done**. Members can now post messages on the channel.

Things to consider

Teams is designed to be flexible. You can easily add new teams and channels if you find that things do not fit into the existing structure.

If you decide to remove a team make sure that any files have been moved to another location first, or they will be deleted.

By default, files can be shared with guests. This can be disabled or restricted across the organisation by your IT Administrator.

There are lots of features built into teams that can be added on as needed, for example, notebooks, wikis, todo lists and Kanban boards.

Net**it**ude

How to link Apps to your collaboration platform

You can use Microsoft Teams' tabs to host your apps or third-party programs. Microsoft's Teams collaboration tool is an important component of its business applications strategy, hosting not only your conversations and conference calls, but also the tiny snippets of work that would otherwise interrupt your actual tasks.

A key element of Teams is its extensibility, using it to host other applications and services and building conversations around them. Teams gives you different ways to link applications to the platform—from bots in a channel to tabs that link directly to online content or services.

Apps let you do more in Teams. Most of the tools, files, and dashboards your org already uses can be added right into Teams. Plus you'll have access to new ones.
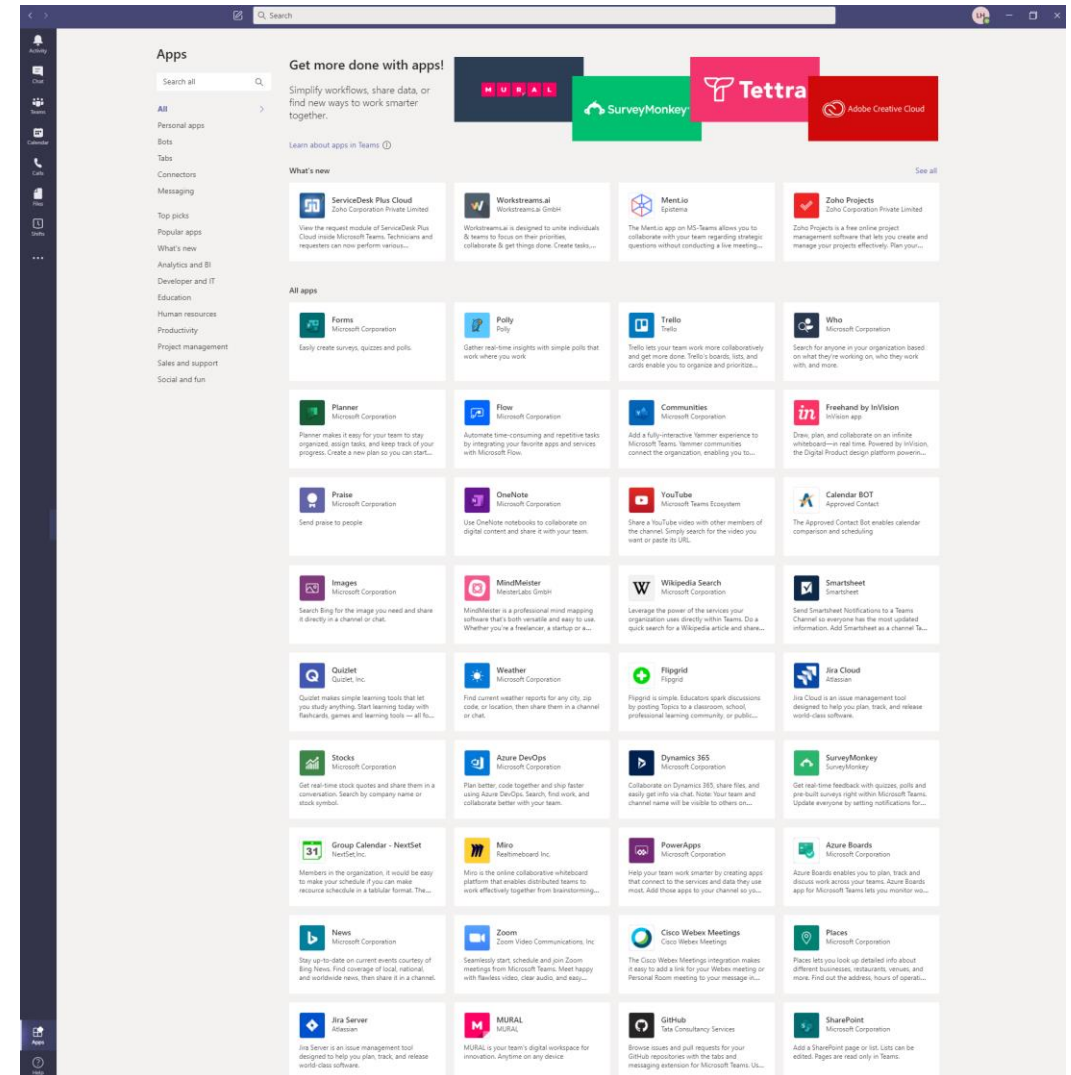
Add apps from the left side of Teams

Go to **Apps** on the left of Teams, then search for your favourite app or browse the app categories to find new ones.
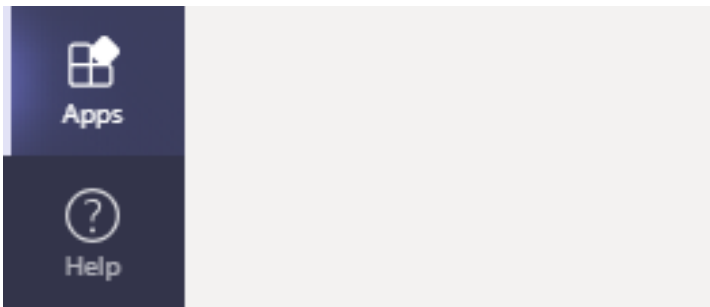
Select the app you want and a description screen will open. Take a moment to browse the subsections (e.g., **Tabs**, **Messages**, **Personal** app.) This area explains the capabilities of the app—and where it will show up in Teams, ready for you to use or configure.
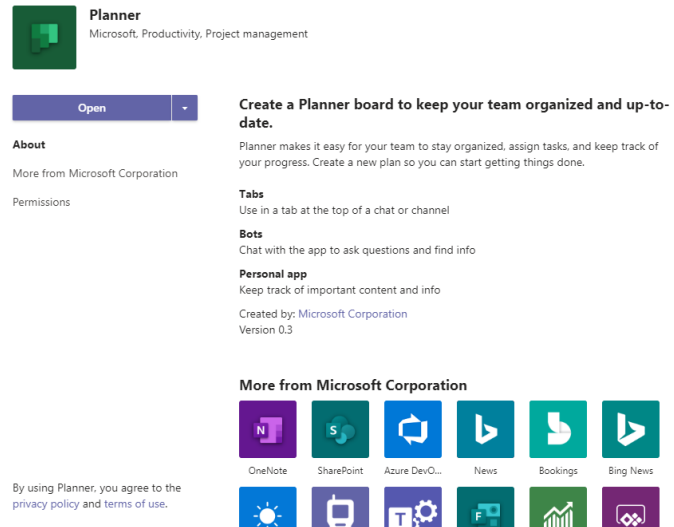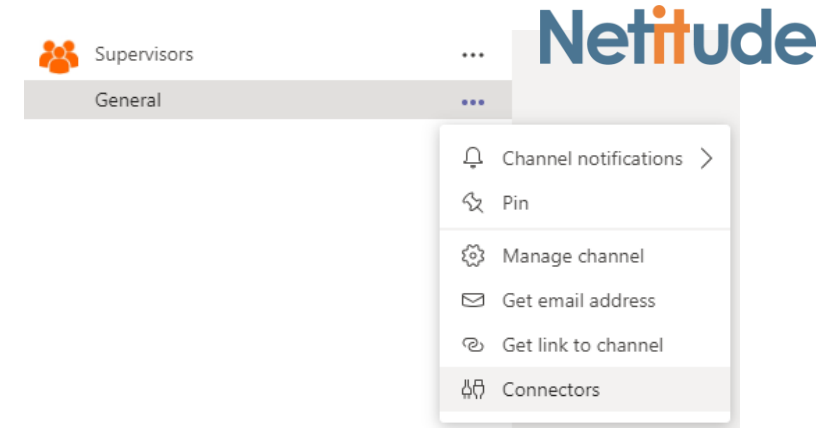

As far as adding the app goes, just hit **Add**. This step is the same from every location where you can add an app.
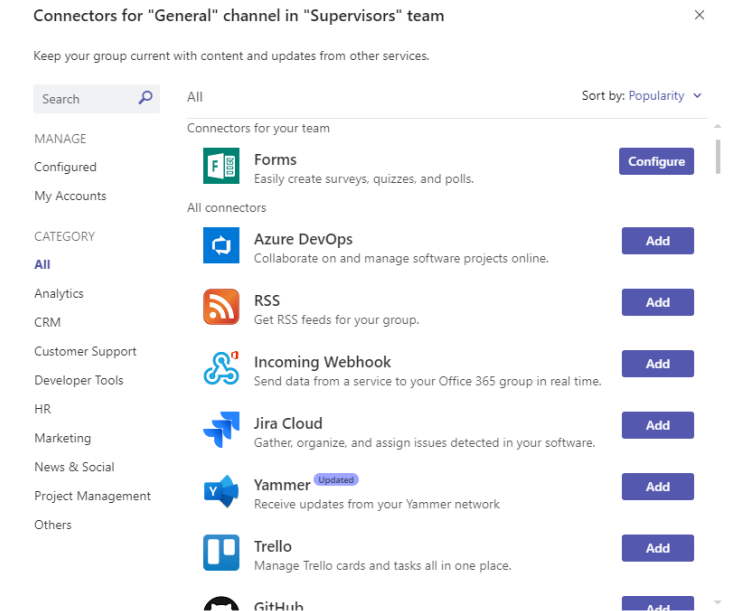
Add app notifications to a channel

An app capability called a **Connector** inserts app notifications into a channel.

To set one up, go to the channel you want, select **More options > Connectors**, and choose an app.
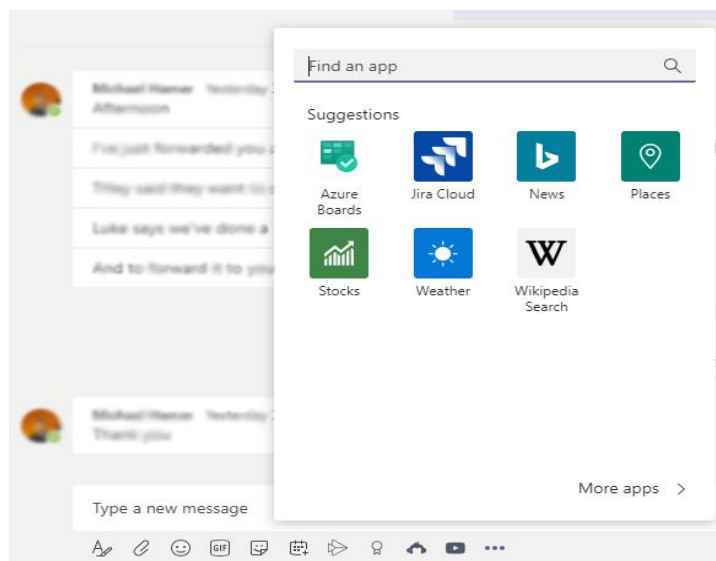

You'll be given the option to Configure notifications for any app already added for your team or to Add a new app.
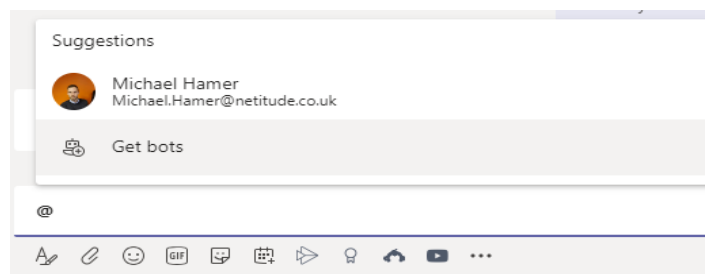
Add apps from the messaging area

Some apps let you insert content from the app directly into Teams messages.

To add one, select **More options** beneath the box where you type a message and choose an app.

Another way to add apps is to type @ in the box then click **Get bots**.

Bots provide answers, updates, and assistance when you chat with them one-on-one or in channels.

Using Tabs

Give team members quick access to tools, services, and files with Microsoft Teams Tabs.

✓ Tabs allow you to integrate the tools and services you love right into your chat or channel.

✓ Tabs are always visible at the top and stay with the conversation, so everyone can get to them easily.

By default, you automatically get a couple of tabs. Files that get uploaded to the chat will live in the files tab. And notes people add will live in the Notes tab.

How to add Tabs

By default, you automatically get a couple of tabs. Files that get uploaded to the chat will live in the files tab.

Go to the channel, group chat, or one-on-one conversation of your choosing, and click **Add a tab +.**
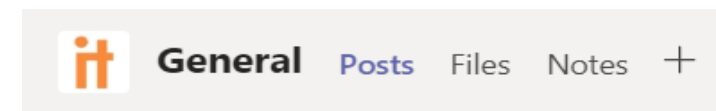
From there, select the app you want and give the tab a name. In some cases, you might go on to add a specific file to the tab, like a Word doc.

10 Top Teams Tips for Business Professionals

Try the following tips to get more out of your Teams environment!

Sync files to your desktop from teams

Thanks to its deep integration with SharePoint, Teams users can sync files directly from the platform to their device, from anywhere. If you haven't already Synced your SharePoint site you will need to follow the steps below.
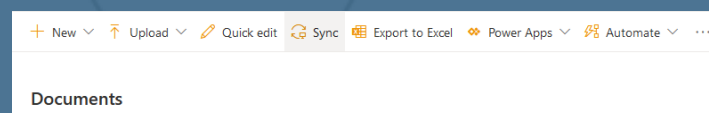
Sync SharePoint and Teams files with the OneDrive sync app

On the Microsoft 365 app launcher, select SharePoint or Teams, and then select the site with the files you want to sync.
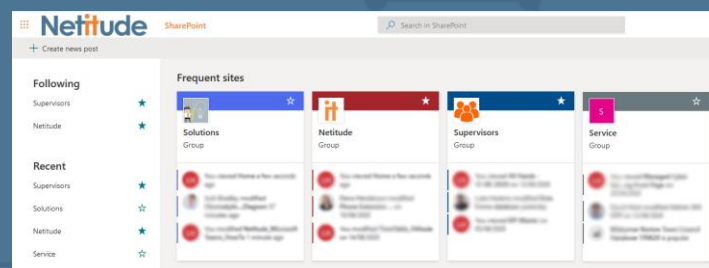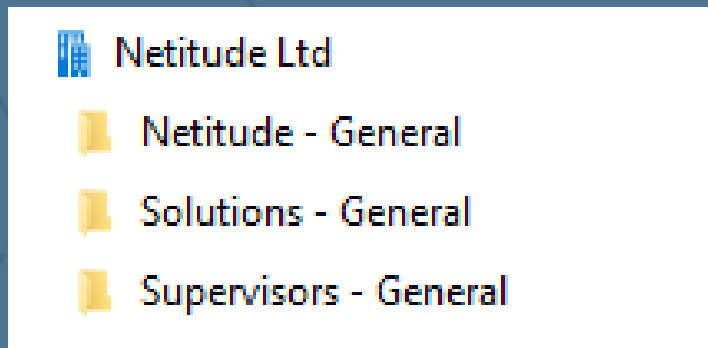

Select **Documents** or navigate to the subfolder you want to sync.

Select **Sync**. (After you set up syncing, the files sync automatically.)

The files then sync to a folder on your PC that has the name of your organization. This folder is automatically added to the left pane in File Explorer. You can't select to sync to a different location.

Record Teams meetings and group calls

Hosting a long Teams meeting with clients or colleagues? Record your Teams meetings and group calls to capture audio, video, and screen sharing activity, to look back on important information discussed.

You could even send the recording to parties involved to confirm action points etc. To do this, users must have access to **Microsoft Stream**.

How to Record meetings

Start or join the meeting. Go to the meeting controls and select **More options > Start recording**.

This will notify everyone that recording has started.

To stop recording, go to the meeting controls and select **More options > Stop recording**.

The recording will be processed and saved to **Microsoft Stream**, and then it's ready to play.

The person who started the recording receives an email from **Microsoft Stream** when the recording is available. It also shows up in the meeting chat—or in the channel, if you're meeting in a channel.

Assign tags to names

Rather than copy and pasting the same message to each member of a group, Microsoft now allows users to assign team members with specific tags. For example, if the head of a warehouse wants to send a message to all managers, they can simply select the @manager to send the message to those individuals. People can be grouped by common attributes, roles, projects, locations, and more.

Create and assign custom tags

To create and assign custom tags, select **Teams** on the left side of the app, and then find your team in the list. Select **More options**, and then choose **Manage tags**. Here, you can create tags and assign them to people on your team.
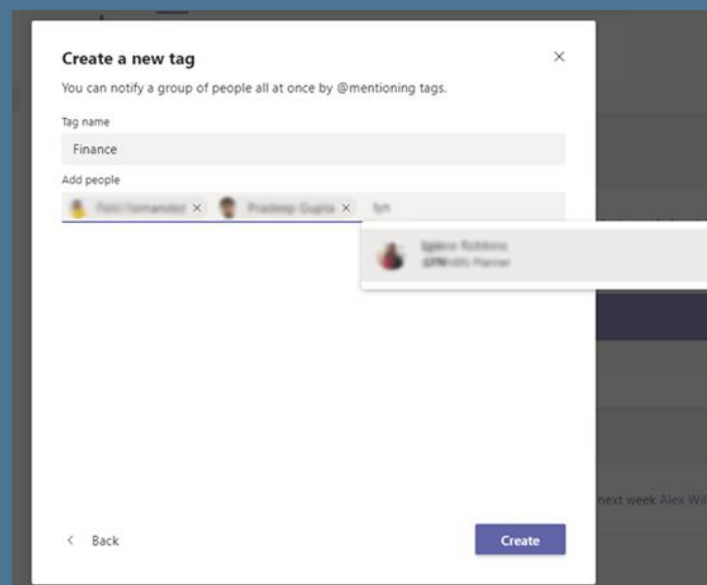
To delete a tag, remove all team members associated with the tag.

Note: By default, team owners can add custom tags. Admins can change this setting to allow team owners and team members to add tags or you can turn off tags for your organization.

In the left navigation of the Microsoft Teams admin center, click **Org-wide settings > Teams settings**.

Under **Tagging**, next to **Tagging is enabled for**, select one of the following options:

✓ Team owners and members: Allow team owners and members to add tags.

✓ Team owners: Allow team owners to add tags.

✓ Disabled: Turn off tags.

Share to Outlook from Teams

Share either a chat or channel conversation as an email to Outlook—without ever leaving Teams.

Within the message or channel, click **More options > Share to Outlook**, choose recipient, customise the email, and send.
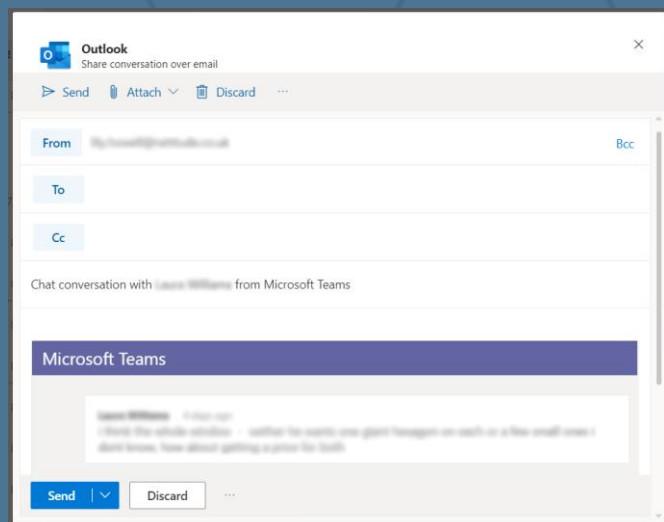
Use Teams live events

Host your business presentations through Teams live events.

Unlike Teams Meetings which are designed for interactive and collaborative participation from many, Teams live events are made for situations where the few are presenting to the many, attendees can only participate via text-based Q&A. Live events are ideal for webinars, business presentations, conferences and product demos.

You can learn more about Teams live events here.

Use Teams Keyboard shortcuts

Did you know by pressing **Ctrl + Shift + A** you can accept a video call? Or quickly start a new chat hit **Ctrl + N**? Microsoft Teams has a tonne of keyboard shortcuts that you can use to speed things up, to see all shortcuts hold down **Ctrl + .** (Ctrl and fullstop).

![Netitude logo]
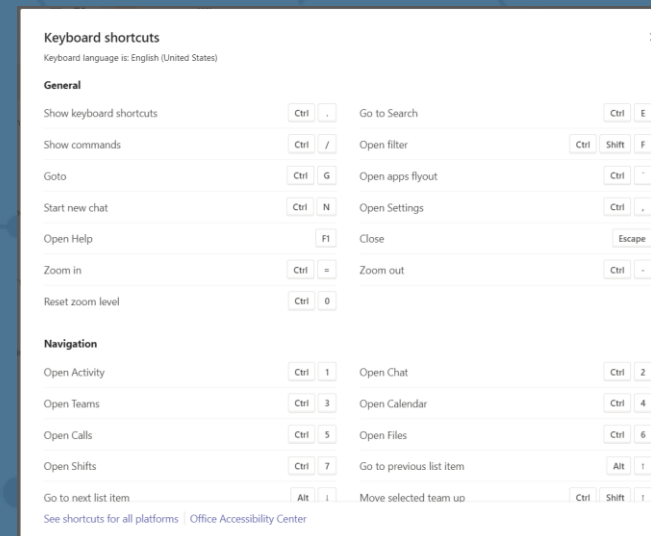
Add important apps to Teams

Using Teams doesn't mean you have to change your existing workflows or drop the tools that you already use.

Microsoft Teams makes it easy to add third-party apps **Trello**, **Google Drive**, and **Dropbox** right into your chat channel in Microsoft Teams.

For advice on how to do this, see slide 11.

Use the Pop-out feature

If you need to focus on work inside Teams, use the Pop-out feature to divide work across multiple windows and easily move ongoing conversations. This feature is particularly helpful when you need to keep an eye on a chat while working in another area in Teams,
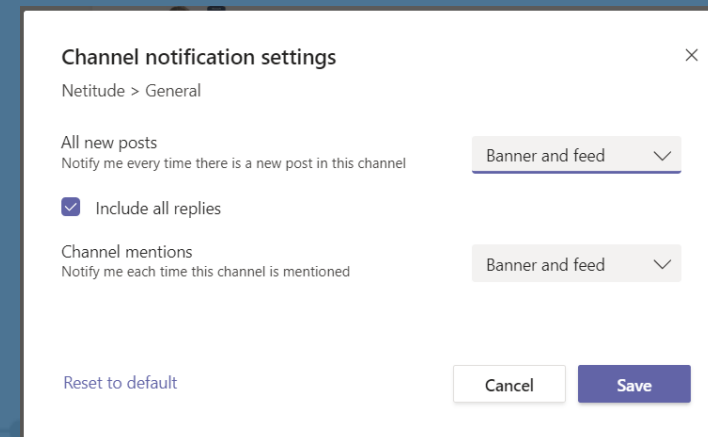
such as viewing a document. You can now do this for video calls too!
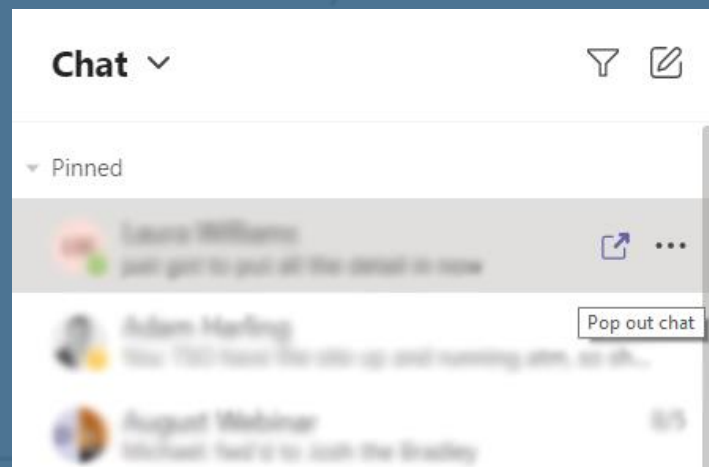
Mute Teams

If you need to stay focused and don't want this distraction of Teams notifications, select the team you want to mute, click **More options > Off (Except direct replies and personal mentions)** or **Custom**.

Custom allows you to drill into the type of notification and how they are displayed.

You can also mute chats. Select the one on one, or group chat that you want to mute, click **More options > Mute**.

Use Teams Bots

Teams introduced Bots to help with repetitive everyday admin talks. This means admins can use the bots to save time and take care of everyday tasks while the work. Admins can also easily create their own bots!

Netitude

GROWTH **THROUGH** TECHNOLOGY

Whether your business is looking to move to a Cloud-based platform, or seeking advice on Microsoft Teams

As proud Microsoft Gold Partners and Cloud specialists, Netitude can support your technology-based needs, whatever they may be.

Contact us today for more information on how to improve working processes, we would love help!

Let's chat about your

Business IT requirements:

📞 0333 2412323

✉ hello@netitude.co.uk

🌐 www.netitude.co.uk