



Tips for Getting Started with Teams

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Introduction

These are tips or rules of thumb for getting started in Teams. In order to keep the number of words that you have to read (and I have to write!) to a minimum these generally just provide the action without much explanation. You'll have to trust that these take you in the right direction and that the reasons will emerge to confirm that over time.

There is quite a lot to learn in this 'new way of doing old things' and it's best to learn by doing.

01. Password for Microsoft 365 (and for Teams etc.)

- Don't use the password you use for Microsoft 365 (which is the one that gets you into Teams) for any other site.
- Pro tip: use a long (20 characters or more) password. It can be all lower-case letters. To make memorable pick 4 simple words and string them together. Such as 'maplearcaderadarcolor'

02. Load the Microsoft 365 Apps on Every Device You Use

- Load Teams, Office, OneDrive, SharePoint, Outlook, Word, Excel, PowerPoint, OneNote, Planner and To Do on your phone.
- Load Teams, OneDrive, Outlook, Word, Excel, PowerPoint, OneNote, and To Do on your every desktop and laptop that you use at any time

03. Embrace 'Flatness'

Throughout the Microsoft ecosystem, things have gotten 'flatter' and rigid hierarchical (nested) structures are disappearing. There's much discussion about this happening in the larger digital universe, but, for the moment, ask yourself how much nesting is there on your iPhone home screen and how much on the results of a google search. I think you'll find that they are both 'flat'.

In any case, deeply nested folders (with sub-folder and sub-sub-folder, etc.) are going away. You can still create them in OneDrive (because Microsoft is aware that you can't teach all the dogs new tricks all at once) but there are lots of reasons why resisting them will be good for you in the long run.

However, it's really important to know up front that there is no 'nesting' of Teams themselves and no 'nesting' of Channels. There is only a 'flat' list of all the teams in your enterprise and within a team only a 'flat' list of its channels. There are no Team groups, no Channel groups, no sub-teams and no sub-channels. Nor will there ever be. There are LOTS of good ways to organize Teams and lots of good ways to organize Channels; there are also lots of good ways to organize content within a channel and across channels and teams, just not with a rigid hierarchical nesting.

The sooner you erase the notion of nesting and rigid hierarchical structures from your mind, the faster you'll find the better ways to organize, access and use things in this ecosystem.

04. Create Teams

- By default, anyone in your organization can create teams unless this is restricted. There are 3 kinds of teams you can create:
 1. Org-wide – everyone in the organization will be a member of an org-wide team and membership is managed automatically as people join and leave the company. You can create up to 5 org-wide teams in your tenant.
 2. Private – people need to be added to the team by the team owner.
 3. Public – anyone in the organization can join the team.

The first step when creating a team is to decide who should be able to create teams and what kind of teams should be created. Then you will have to think about how to name and structure the teams. Some

governance will go a long way when it comes to creating teams.

05. Team Naming Rules

- Keep team names to 30 characters or less (there are lots of places where you'll use a list of team names to get access and you'll only see 30 characters or less).
- Include alphabetical sorting in your consideration of team names. Most lists of teams throughout the mobile and desktop ecosystem (Microsoft 365) are alphabetical. It can be quite useful as teams increase in number to have taken this into consideration in how you start a team name.
- Make most of the characters in the team name meaningful to that team. That is, don't start every team name with 'Holding Ground...

06. Team Name Guidelines

In conjunction with the above 'rules' it will be useful if you sketch out a list of future likely teams as a way of shaping guidelines that will provide useful as you grow into them. You will probably need teams for each project and teams for various ongoing aspects of building and running the business itself. Each would benefit from naming guidelines.

Building/Running the Business

- Business Development
- Accounting
- Technology
- ...

Projects

- A
- B
- C
- ...

Since there are only teams (and no grouping or nesting

of teams) it can be useful to bake into the name itself some simple organization, for instance:

- B Business Development
- B Accounting
- B Technology
- P A
- P B
- P C

If you want to generally see all the 'B'usiness stuff together and all of the 'P'roject stuff together. Note that if you want the business stuff together but AFTER the projects then you'd pick a character that came lower down, like X or Z. Or you could do what Porsche has done forever which is just number projects sequentially (the 911 was Porsche's 911th project in their history).

- 001 A
- 002 B
- 003 C
- 999 Business Development
- 999 Accounting
- 999 Technology

In this case, by the time you get project 998 so much else will likely have changed that it won't matter that you've run out of numbers...

You can also reorder your teams in the desktop app by dragging them anywhere in your teams list. The mobile app will show the same order of teams as the desktop app.

Are there old teams you're no longer active in? Hide them and they will drop to the bottom of the navigation bar under the 'hidden teams' section

07. Channel Naming Rules

- Channel names should be 30 characters or less
- Include alphabetical sorting in your consideration of team names. Channels are listed alphabetically and

cannot be re-ordered (you can hide channels if you aren't interested in them, but you cannot re-arrange the ones you do see.)

- Make most of the characters in the channel name meaningful to the contents of that channel. That is, don't start a series of channels with 'Construction Stage #...'

08. Channel Name Starter Kit

Since most of your activity will be in 'project' teams, come up with a starter kit (or baseline or default) list of the channels that you'd likely want in every project. Something like

- Client Interactions
- Project Scoping
- Weekly Actions
- Preliminary Design
- Schematic Design
- Pre-construction
- etc.

Note the above would appear in alphabetical order rather than as typed above so you'll want to either be very clever about the words you choose so they 'naturally' fall in the right sequence or start with '01 ', '02 etc.

If there are a handful of channels you are most active in, you can pin those and they will appear in the top section of the navigation bar.

09. Files, the 'Files' tab in Teams, SharePoint and OneDrive

The good news about all the plain, old-fashioned 'files' in Teams is that you can get to them from anywhere, you can edit them individually or as a group without leaving Teams and there are lots of new ways of organizing, storing, accessing and using them. The bad news is that (a) You have to let go of some old ideas (nesting, folders, sub-folders, etc.) and (b) There's a fair amount of application/branding stuff to sort through. So...

1. Let go of your old ideas about nesting, folders, sub-folders and;
2. Learn the basics about the relationship between the Files Tab in Teams, SharePoint and OneDrive.

Some basics about 2

- All your files you create or upload in both Teams and OneDrive are actually stored in SharePoint.
- You can access, see, organize and work with all your Teams files inside Teams.
- You can ALSO access, see, organize and work with all your Files inside SharePoint (browser or mobile app).
- If you think of a team as a digital tam/project/ war room, then
 - The team's Files tab is like the bookshelf in a room that contains documents you need for that effort as reference and the ones you're creating while doing the work.
 - SharePoint is the larger library building in which that team room exists and where those reference documents come from and where the documents being created will be permanently stored (even after the Team has finished its work).
- OneDrive is really just a wrapper for SharePoint to provide a direct equivalent to Google Drive, DropBox or Box. Maybe it's like the desk at the library for people who aren't doing deeper work but just want to check in/out a book. Or something...
- In your case though, since most of your files are actually created/used in relation to specific work projects (whether for clients or for building/ running the business), as you increasingly use Teams for THAT work you will deal with most files from INSIDE Teams and your usage of OneDrive will shrink.
- OneDrive is also the service that allows you to

sync your SharePoint document libraries to your laptop or PC.

10. Private Channels

Channel membership is defined at the team level. All members of a team have access to all channels and all posts and files in those channels. However, you can create private channels in a team. If there are files and conversations that not all members of a team should have access to. There are some differences and limitations when it comes to private channels but, for the most part, they function the same way as other channels. The biggest difference perhaps is that the private channel creates its own Microsoft 365 group and a lightweight SharePoint site so that access to content can be managed separate than the parent team. If members of the team should have access to the files but not the messages, there is a way to add them as visitors to the private channel SharePoint site.

11. The Difference Between Chat and Conversations in a Channel

Teams provides two different 'places' to send/receive messages: Chat and Conversations (Posts tab in a channel). It's essential to understand why they're both there and to use them appropriately.

- A Conversation is to all the members working in that team (unlike email or text where you have to pick the recipients with every message. Any member who joins a team along the way has instant access to all the knowledge embedded in the Conversations to date amongst team members (also unlike email/text in a very good way!).
- A Chat is to a person (or persons) specifically identified when creating the message (very MUCH like email and text).
- As a rule of thumb, in a well-functioning ecosystem 90% of your messages should be in Conversations. If you're finding yourself doing

most messaging in Chat then you're going in the wrong direction and NOT embracing the better way of working that Teams offers.

Some notes about Chat

- Chat is provided as an occasional adjunct to Conversations for when you want to send a message to a person(s) and the content of that message is not (or not yet) connected to the work of an existing team.
- Chat is a snazzier version of plain old text messaging.
 - You can edit messages after they've been sent.
 - You can add another person to a Chat, and when you add them it will give you the choice of letting them see old messages from that Chat or not.
 - You can even name a Chat.
- You can pop out a Chat in a separate window.
- It is tempting to use Teams Chat as a subconscious way to recreate the comfort of email inside Teams. Resist this and see the rule of thumb above for an occasional check on whether you've fallen into this trap.

12. The Difference Between 'New conversation' and 'Reply'

Inside Conversations, one always has two ways of adding a post: 'New conversation' and 'Reply'. It's essential to understand their distinct purposes. There are real benefits to getting everyone to use them as intended and not randomly. Once one does, it will seem obvious. But there are some recognized imperfections in the user experience -- particularly in the mobile app -- that can make it a bit confusing.

A fundamental and very useful element of the architecture of Conversations is the ability to create a 'threaded' conversation about a particular subject inside

a given channel. Each conversation has a bolded heading and can be added to at any time regardless of strict chronology; that is, 'replies' to a specific conversation are in chronological order but I can 'reply' to any thread at any time regardless of how old the last reply happens to be. This makes it easy to organize topics within a channel such that team members can scan, find and both keep up to date and reply to a series of inter-related but distinct conversation. (You can think of such conversations as sub-channels if that floats your boat.)

So, at any moment in an active channel when you have something to say the first question to ask yourself is, 'is this about a subject/topic that already exists here?' Then use the 'reply' box at the bottom of that threaded conversation. If not then, 'what is the subject (topic) of this new thread that I am starting? Then use the 'start a new conversation' box (button on mobile).

13. The Format ('A+pen') Icon

In both chat and channel conversations ('replies' and 'new conversation') you can either just type something (a la texting) OR you can apply a bit of formatting (bold, italic, bullet points, etc.). If you want/need to add formatting, then click the little 'A+pen' icon and it will bring up a formatting bar. If you don't open the formatting box, hitting 'enter' will post the message as opposed to going to the next line.

In the 'new conversation' box this is also how you name the subject of the new conversation. Note that it auto-bolds the subject to make finding it by others easier.

14. @Mentioning Someone (or a whole Team or Channel)

Given that all messages in Conversations are by definition to all members of the specific team, if you want to ensure that a particular person sees or pays attention to a particular message then @ mention them in the message. This will push that particular message

into their Activity Stream. It is a generally accepted leading practice now among enterprises using this better way of working that the decorum is for someone @ mentioned to feel obliged to read – and respond where required. (Equivalent to the general professional obligation one feels to read/respond to an email message explicitly directed to you by a known and trusted person.) You can also @mention a Team or Channel and this will result in a notification being pushed to each individual in that Team or Channel. If you need to notify a subset of the team members (as opposed to all members), you can create 'tags' and add the people you want to notify at once to each tag.

15. Reacting to Something Written by Someone Else

Replying via text isn't the only way to respond to messages or posts. Teams allows you to "react" to messages or posts with one of six emojis: Like, Heart, Laugh, Surprised, Sad, or Angry. Much like their use in social media or text messaging, a reaction provides an acknowledgement that a message is received and allows the respondent to add a small display of emotion without the need to type out a full reply. Typically these are best used as a way to say "yes, I will perform x task" or, if no ask is being made, letting the author of a message know that their response has been read.

16. The Video and Calling Experience Inside Teams

Teams has a full-featured scheduled and ad-hoc calling and video experience baked right into it. It essentially does everything Skype does (actually it essentially IS Skype under the covers) and includes most features of other business phone systems. It takes some work to both understand it and activate it (there may be some extra cost as well depending on your plan) but it has many benefits.

- One-click contact of any team member.
- Record that a conversation/meeting happened.

- Ability to schedule calls/meetings and attend from any online device (phone, tablet, computer).
- Depending on the level of service you subscribe to, it will even auto-transcribe a meeting and provide the transcript as part of the team record.

17.Channel Meetings

You can schedule meetings within channels by adding a channel when you're scheduling a new meeting in Teams. When you add a channel to the meeting, a conversation is created in the channel with the meeting details and a link to the meeting. What's important to understand is that ANYONE who is a member of that team/channel can join the meeting regardless of whether they were added as attendees to the meeting invite. Also, they can see when a meeting is in session and can join the ongoing meeting. The benefit of scheduling a meeting in a channel is that all the information about the meeting, including meeting agenda, notes and action items will be kept together in one place and attendees can continue the discussion in the same thread.

18.The Always Online and Available 'Wiki'

A Wiki is just a simple immediately accessible note-taking and content-chunk-writing applet. (This Tips list was in a Wiki). It gets automatically added to every channel. It is like a very slimmed down Word that makes it easy to create good-looking content that can be group-edited by any team member from anywhere.

It is effectively a simpler alternative to OneNote (or Word) that takes away a bunch of features in exchange for always being available with one click (without downloading, uploading and syncing).

It does not replace either Word or OneNote but can be quite useful for chunks of content that

- Have some ongoing value as a chunk of content (rather than a temporal or means-to-an-end message);

- Might be edited and refined by more than one person; and
- Are useful to have at hand online at any time without having to scroll or search.

Note that there is NO 'Print' button at present for a wiki. People must cut and paste into Word (or something else) to print. (There is a big notion here about the changing nature of work and work artifacts but that's for another time...)

19.Configurable Tabs

Inside a channel there are Tabs across the top of the frame. They always start with 'Posts' and 'Files' and those can't be changed. 'Wiki' is also defaulted as the 3rd thing but it can be changed (renamed, moved or deleted). Tabs can be created very quickly for many other wondrous things. Learn what Tabs do and experiment with them. Most things that need to be generally available to the team can be linked to a tab. You can create a tab for a collection of documents, a website, a particular document, etc.

20.Apps

You can add many Microsoft-provided apps or third-party apps to your Teams experience. Apps can be added as a tab to the top of a channel or they can be pinned to the navigation bar for easy access. These are worth exploring as there might well be specific applications particular to your business that can be added to Teams. They are easy to find and set up once they exist! In general, if you find one that might be useful you can just add it, play with it and if it isn't useful then you can get rid of it with little negative consequence.

21.Connectors

Connectors are Microsoft's way of letting content from services you often use directly into Teams. You can add connectors to channels to receive RSS feeds or updates from many third-party services like Twitter and GitHub.

Be careful when experimenting with these as they can quickly clutter a channel with not-so-relevant content.

22. Tasks by Planner and To Do

Planner is a light group task and small project management tool. Less complicated than Microsoft Project, more robust than To Do. Roughly equivalent to Basecamp, Asana, Wrike, etc. (btw, there are Connectors for those three apps for those who are already using one of them and don't want to switch to Planner).

Microsoft recently combined Planner and To Do into a single app called 'Tasks by Planner and To Do' in Teams. The idea is to pull all your tasks and plans into a single location so you can see and manage them in one place instead of going to individual apps. This has been a part of Microsoft's strategy to break the apps out of their containers and make them accessible throughout the M365 ecosystem.

If you have a bunch of stickies with tasks, a whiteboard with to-dos or an excel or word document that lists tasks you could probably do that better in To Do.

Planner generally wants you to create a Plan for each project or team. You can create a Plan for a team or team/channel and then connect to that specific Plan in a channel tab for instance to work on the Plan INSIDE Teams.

There is also a separate Planner app (browser and mobile) that lets you look ACROSS Plans and see all of your (or others') tasks across multiple Plans. Out of the box there are fairly nifty views of task cards as well as charts that show what is being worked on, is overdue, etc.

It was designed to be picked up and used within minutes. As a consequence, it has real feature and function limitations. It can't do task dependencies or resource loading for instance (that's what MS Project is for). But it is pretty nifty and for straightforward rough task plans it is both at hand and free

23. Search

Microsoft has recently enhanced the search capabilities across the Microsoft 365 ecosystem with the help of artificial intelligence to process the queries. This modern search experience is available in Bing, Office.com, SharePoint and most of the productivity apps where you see the same Search box in the header bar. Microsoft has not rolled out the same search capabilities to Teams yet (scheduled to be rolled out in mid-2021), but the current search in Teams is pretty decent in helping you find what you're looking for.

When you type your query in the search box, Teams shows you a list of suggested results. Don't see what you're looking for? Hit 'enter' and all search results show in the left-hand column. There are tabs for Messages, People and Files as well as detailed filtering capabilities. You can also filter your activity feed by typing a query in the box above the feed. If you want to search a specific channel or chat, type Ctrl+F in the search bar followed by the query and search will be limited to that location.

If there are chats or conversations that you want to easily find and go back to, you can save them in Teams. Then type /saved in the search bar and your saved messages will display in the left-hand column. By the way, type / in the search box and you'll see a bunch of other useful commands and shortcuts.

24. Teams as the Center of Your New Work Universe

Microsoft is quite clear that they are positioning, promoting and expecting Teams to be the THE hub for communication and collaboration in their ecosystem (Microsoft 365). Particularly, this means they are expecting:

- That most people in enterprises who embrace this way of working to be in Teams more than in any other place – more than Outlook, more than SharePoint, more than OneDrive, more than in whatever texting app they use; and
- Most people will shift most of their

intra-enterprises messaging from email and texting to Teams. (Which does NOT mean that email goes away altogether, just that it shrinks and moves from the center to the periphery for most people.)

To support that, Microsoft has done and continues to do a lot to make Teams effective as 'THE place you want to spend most of your work time' and 'THE place you don't have to leave to get most of the other things you want'.

- You can see, access and work on documents from WITHIN Teams.
 - You can make voice and video calls within Teams.
 - You can schedule, conduct, manage and document meetings within Teams.
 - You can do ad hoc text messaging (Chat) within Teams.
 - You can carry out discussions about documents (using Conversations) and work in Teams.
 - You can do light task planning and management from within Teams (using Planner, Asana, Wrike, Basecamp, etc.).
 - You can access various SharePoint Sites and datasets (Lists) (if those are used in your enterprise) within Teams.
 - You can interact with Bots from within Teams.
 - You can search for people with specific skills in your enterprise within Teams (Who Bot).
 - You can access any external websites from within Teams.
 - Soon you will have an app pinned to the top of the navigation menu to access your intranet's home site (SharePoint Home Site) within Teams.
-