



How to use Microsoft Teams for Collaboration and Productivity

In April of 2020, CEO of Microsoft Satya Nadella highlighted that Microsoft had seen two years' worth of digital transformation in a mere two months. 2020 brought about dramatic change across many aspects of our daily lives, and Nadella's sentiments speak to the impact 2020 had on how we work, namely, how we transitioned to working and collaborating remotely.

For Microsoft, this is particularly important as they've been the champions of digital transformation for more than a decade now. Transitioning Microsoft Office from an on-premises installed application to a cloud-delivered SaaS platform took many years, and the benefits of that transition were on full display as offices became empty with the prevalence of remote work. Beyond Office applications, Microsoft has invested heavily into the unified collaboration and communication platform known as Microsoft Teams.

With many of Microsoft's customers purchasing Microsoft 365 services, which includes Microsoft Teams, many Office users are finding themselves having to learn a new tool to replace in-person collaborative sessions at the whiteboard or in the meeting room. To support these customers, this article will highlight the primary use cases and unique benefits that Microsoft Teams provides professional remote teams looking to get work done regardless of where they work from.

What is Microsoft Teams?

When Microsoft Teams first hit the global stage, many were uncertain about what it truly brought to the table. Was it simply a rebranded 'Skype for Business', a competitor to Slack, or an extension of SharePoint? While many searched for an answer that made sense to them, Microsoft continued to add integrations and customizations that allow users to conduct a number of activities. Whether it is sending chat messages, hosting video calls, enabling real-time collaborative editing of documents, or acting as a portal into complex SharePoint group sites, Microsoft Teams has ultimately become a platform for collaboration across many forms and media.

In simple terms, Microsoft Teams has the:

- Chat, instant messaging and calling capabilities from Skype
- Calendar and meeting management capabilities from Outlook
- Creation, sharing and editing of content from Office Apps, SharePoint and OneDrive
- To-do list integrations with Planner
- Creating, saving and sharing of notes with OneNote
- Larger social channels from Yammer

Microsoft Teams combines all of the above with deep integrations across Office applications and third-party

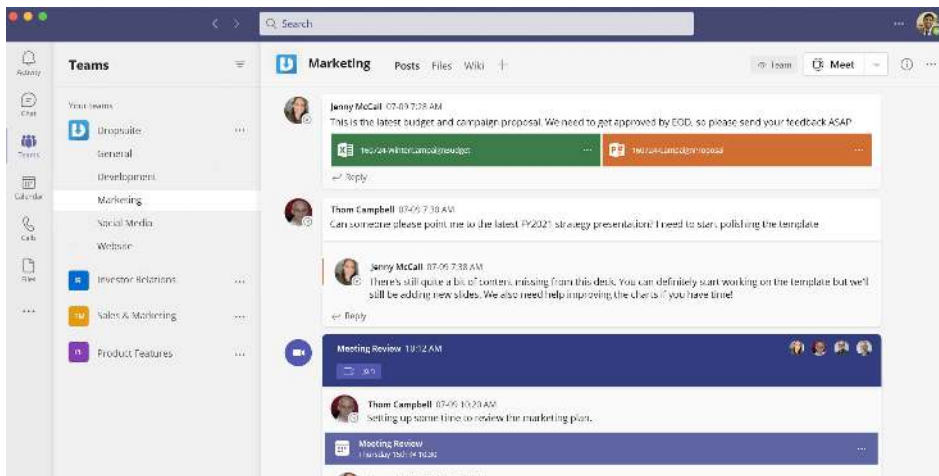
integrations across Tabs, Connectors, Bots and more.

Microsoft Teams users can IM, call, and video chat one-on-one with other Teams users, or they can create chatrooms and groups for larger sets of users. Each chat, whether it is a one-on-one or a group chat, allows for the sharing and collaborative editing of uploaded Office documents. This functionality exists across the desktop and mobile versions of the Microsoft Teams app, so calls and editing can be done at the office or on the go.

In addition to chatrooms, Microsoft Teams users can also create Teams with their own email alias, member list, SharePoint site and a forum-like discussion board for collaboration and sharing.

Microsoft Teams is a highly flexible platform that can be customized to accomplish a variety of tasks within the Microsoft 365 ecosystem. With the addition of third-party integrations and custom applications, Microsoft Teams becomes a powerful unified platform that can be used to manage multiple aspects of a digitally-enabled business.

How Does Teams Fit Into The Microsoft Ecosystem?



At a base level, Microsoft Teams is built on Microsoft 365 groups, which itself is integrated with Azure Active Directory. Businesses can define who is part of their organization with Azure Active Directory, and then connect them to specific workloads associated with a Microsoft 365 Group, which are essentially elevated member lists. Microsoft 365 Groups are also connected to Microsoft Stream, Exchange, Outlook, Planner and SharePoint-backed Team Sites.

Behind every Microsoft Teams 'Teams' channel is an associated SharePoint Online website that acts as a back end host for any and all content that is uploaded, shared and edited among members of the Teams group. SharePoint online not only acts as a storage for everything in Teams but each SharePoint site can be modified to present Teams content in an easy-to-consume manner. Because of this integration, Microsoft Teams can also surface information from SharePoint into dedicated Tabs in Microsoft Teams, enabling real-time editing of documents, the sharing of Power BI dashboards, or a shared Planner and Task Tracking system that anyone can view and edit.

Microsoft Teams natively integrates with both individual and shared Exchange Online mailboxes and calendars. This means that meetings,

calls and events set up in Teams will automatically appear in Office Calendar apps (and Outlook Calendar) and vice-versa. Microsoft Teams also carries over features from Exchange/Outlook such as Scheduling Assistant, Registration requirements, and setting Time Zones for calendar events.

For typical Office apps such as Word, Excel, PowerPoint, and OneNote, all documents can be shared, viewed and edited in each Team. Any uploaded documents can also be added as a dedicated Tab inside each Team, allowing Team members to view and edit each document in real-time as a Live Tab. Not only does this aid in collaboration, but Teams can use a common notepad or internal Wiki for the collection and sharing of critical project information.

Planner is integrated natively in Teams and can act as the back end system for complex task tracking. Team members can create tasks, set due dates, assign users, create checklists, add comments, set priority, and indicate progress. Tasks can be labeled, added to buckets, and filtered based on a number of metrics. Planner includes multiple views to better understand the flow of Tasks across a Team. Users can view tasks as a list, as part of a board, or through charts or a calendar. With the charts view, users get a dashboard-like view that highlights overall status,

defined buckets, priorities and how tasks are assigned across Team members.

While Microsoft continues to add new features to Teams, many third-party integrations can extend the power of Microsoft Teams in a number of ways. Some examples include Adobe Creative Cloud, project management software, file sharing systems and hundreds of additional applications that can be integrated as a live tab in Microsoft Teams.

Microsoft Teams Setup:

Microsoft Teams Tenant:

Now that we've highlighted the underlying features that enable Teams to be a collaborative powerhouse, let's dive into some of the day-to-day best practices to ensure that you use Teams effectively.

One major concept to keep in mind, especially when collaborating with users outside of your organization, is that Microsoft Teams exists within a tenant that belongs to your organization. Tenants allow IT and Security administrators to ensure only authorized users have access to Teams. Users outside of the tenant will need to be added and approved by IT, enabling organizations to control their valuable data and documents. Users can belong to multiple tenant and can switch between those tenant at any time using the drop-down selector on the top right of the Microsoft Teams window. Next to a user's profile picture will be the name of the tenant the user is currently on, and clicking the name allows for tenant switching. Within the Teams desktop application, users cannot simultaneously be within two tenant, so it can be helpful to have a second Teams instance running in a web browser. With the second web-based Teams instance, users can choose which tenant they want

to connect to, allowing two instances of Teams, each one connected to different tenant.

Creating Your First Team:

Within Teams, you'll see a sidebar on the left, with a tab called "Teams". This is where you'll be able to create groups of users that can be aligned to projects, business units, departments and similar organizational groupings. Within the "Teams" tab, you can navigate to the bottom "Join or create a team" button to create a space for communications. When creating a Team, you can build the member list from an existing M365 Group or create a Teams from scratch that will automatically assign invited users to the new M365 Group that will be created. In addition, there are several templates that can be used to speed up the initial setup of a Teams channel. These templates are based on common use cases, such as Project Management, Help Desks, Employee Onboarding, Incident Response and many others. These use cases are even industry-aligned, including healthcare, manufacturing, government, retail and more.

After creating your new Teams group, you can begin inviting users based on their associated M365 email accounts, or send the associated Teams invite code. Once users can join, they will be assigned default permissions that will allow them to create and update channels, post messages, add new tabs and upload content. To directly control what members have access to, the Teams group owner can use the Teams group settings to alter permissions for both Teams members and Guest members.

Within each channel, users can create various tabs beyond the basic "Posts", "Files", and "Wiki" that are included by default. Users can create a shared notebook, embedded SharePoint site, document libraries, forms, embedded documents, virtual whiteboards and

many more. Each Team can define their own workspace with the appropriate first-or third-party apps to extend Teams capabilities to enable greater virtual collaboration. For example, Project Managers can leverage Teams task tracking, or third-party task tracking to ensure everyone on the Project Team is clear about responsibilities. Creative Teams can leverage the virtual whiteboard for collaborative virtual sessions. IT Teams can leverage Forms or a point solution for ticket submission.

Outside of Teams channels, users can see general Activity wherever they are mentioned, individual and group chats, a calendar that contains everything from your Outlook account, a calling center, and a list of recently shared and edited files. The Chat section is different than Teams Groups, as Chat is more oriented around direct communication and messaging between users, whereas Teams Groups functions more like a message board in a one-to-many format.

For Calls, users can engage in video chat, audio chat, or text messaging all at once. Users can also choose to record calls, and after the meeting concludes, an auto-generated link to Microsoft Stream will appear in the Call chat with the meeting recording. The meeting recordings include auto-generated subtitles and timestamps for easy navigation and referencing specific moments of a call recording.

Microsoft Teams Best Practices

Now that you've been able to set up Microsoft Teams channels and consider the flexibility of how Teams can be adopted to a large number of use cases, let's think about some Best Practices that will help all users become more comfortable with Microsoft Teams and what it has to offer.

Staying Organized:

Any number of Teams groups and Channels can be set up, but organization is key to avoiding sprawl, so it helps to have a logical structure to how you set Teams up. For most organizations, it makes the most sense to align Teams groups based around your organization's employee hierarchy, with Business Units or Teams getting their own dedicated Teams groups. For channels, since these will act as dedicated communication spaces meant for a particular topic, it's recommended that channels be used for specific projects so all project communications are together.

Users can also tag each other using "@Mentions", which will generate an Activity alert for the users tagged. This can be an effective method of bringing someone's attention to a specific issue. Wherever the @Mention is posted, the tagged user will be able to quickly navigate there and respond accordingly.

Workplace Culture:

You'll want to ensure that your Microsoft Teams experience aligns with your overall workplace culture. With users being able to share images, memes, videos and other media, it is critical to set expectations and make sure that users know how they are expected to behave. In addition, with remote work being so common, it helps to consider if any dedicated social channels may help employees stay connected. Dedicated channels can be created to act as a "virtual water cooler", giving employees a space to discuss non-work social topics, such as new movies, TV shows, music and more.

Access and Security:

Your organization's IT and Security teams will need to go through Teams settings to define default permissions and create a plan for how your

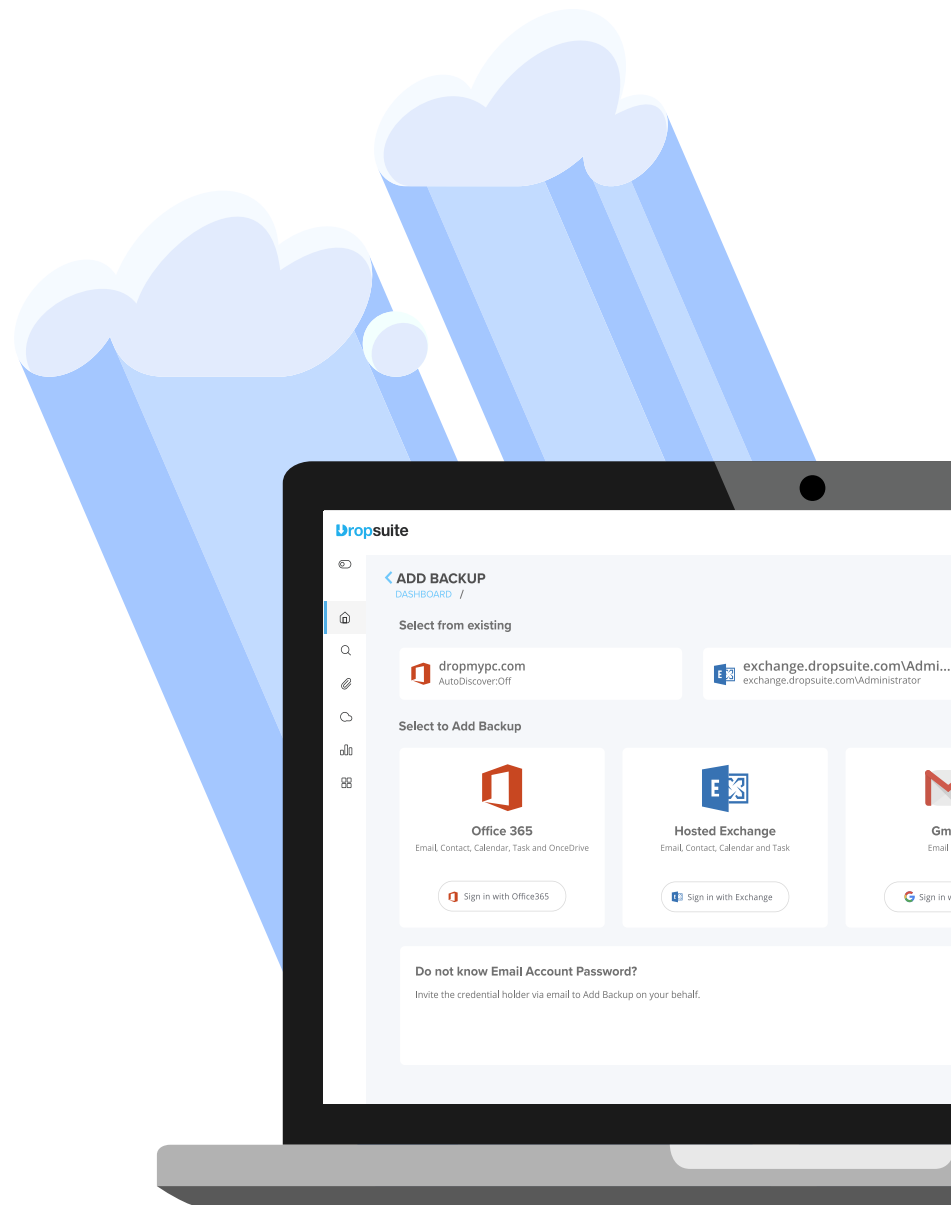
organization should handle external users and guests. Any invites to Teams calls that involve users outside of your organization will automatically assign those external users guest permissions. Reviewing permissions will help ensure unauthorized users don't have access without explicit permission. IT and Security teams should strongly consider using security features such as Multi-Factor Authentication and additional identity services used in conjunction with Azure Active Directory. In addition, IT and Security will want to audit any third-party integrations, as well as AI and Bot services that may use connectors or data from your organization.

Backup:

While Microsoft Teams and the broader Microsoft 365 platform is hosted on Azure and has some layers of data protection, Microsoft still advocates for a dedicated backup solution. Microsoft follows the Shared Responsibility Model, which indicates that while SaaS providers maintain the physical infrastructure and connectivity, it is ultimately up to the customer to maintain their critical information and data. With accidental deletion and ransomware being a critical threat to an organization's access to their own data, every organization must ensure their Microsoft 365 data is always accessible in case of emergencies.

Dropsuite is here to help close the data protection gap. With Dropsuite solutions such as Microsoft Office 365 Backup, customers can ensure their critical Microsoft 365 documents, emails and data are backed up, GDPR, HIPAA and FINRA compliant, as well as protected by military-grade 256-bit

AES encryption. Data has become the lifeblood for many businesses, and Dropsuite is here to ensure your data is protected and maintained, even when the unexpected happens.



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