Microsoft Teams Rapid Resource Guide

Tips, activities and online training to help connect, collaborate and create together

The time for rapid, highly informed decisions to keep your business working is right now. The way to put the power of Microsoft Teams to work is right here.

Microsoft is making Teams available to all organizations. Accenture and Avanade are here to help.

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Protect your people and your productivity

Each section of this guide include links to how-to videos, key activities and best practices to help you put Teams to work.

Setting up a team

Working on documents together

Working across boundaries

Setting up a team

Setting up a team

Bring people together to chat, share content and access the tools you need to collaborate and achieve more.

How to create & manage your team
Video: [Intro to Microsoft Teams](#)
Video: [Set up and customize your team](#)
Video: Take Microsoft Teams to the Next Level: [Part 1 Video](#) & [Part 2 Video](#)
Video: [Create and organize Teams](#)
Online Training: Take Microsoft Teams to the Next Level : [Online Training](#)

How to create & manage channels
Guide: [Create a channel in Teams](#)
Video: [Collaborate in teams and channels](#)

How to have a chat
Video: [Work with posts and messages](#)

Best Practices

Determine if a related team might already exist
Setting up a group to collaborate on a piece of work could be as simple as creating a channel or identifying an existing channel for the right subset of the people in an existing team. Make use of private channels to limit access rather than creating a whole new team.

Plan the structure of your team in advance
Add and organize channels based on sub teams or workstreams. Structure folders and subfolders ahead of time.

Use tabs for easy sorting
Add tabs to link to key documents, external sites or external applications that people need to do their work.

Customize your notifications
You can customize notifications to prioritize messages about key projects and avoid being "over-notified."

Set up a governance process
Governance is key to managing access, documents, and other tasks.

Key activities when setting up a team

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1. **Name your team.** Choose a name that is short but descriptive and clearly articulates the purpose of the channel. Add a distinctive team icon to make the team easily recognizable in the user's list of teams

2. **Create channels.** Segment your team by creating channels. Channels organize a team's conversations and content. They also provide a way for teams to share content. For example, you can create a project-wide Teams site and then create channels for each of your workstreams. Create private channels for small, ad-hoc groups to organize information which doesn't need to be shared across the team. Be thoughtful when setting up channels. Creating too many channels can be overwhelming and create too many places for people to check.

3. **Add all appropriate members and set permissions**. It is good to have at least two owners of the Team to manage access and other activities

4. **Create folders within your channel's files section.** Within each channel create the appropriate files structure allowing team members to effectively navigate within the Team and find information. It may be easiest to use the SharePoint view to set up the folder structures and/or leverage the Files Explorer view.

5. **Manage your notifications .** Show team members how to set notifications on channels so they don't miss any chats/updates. Show team members how to set notifications on channels so they don't miss any chats/updates, how to "@" target the team and individuals and how to pin a channel so it is at the top and they will easily see recent activity.

Working on documents together
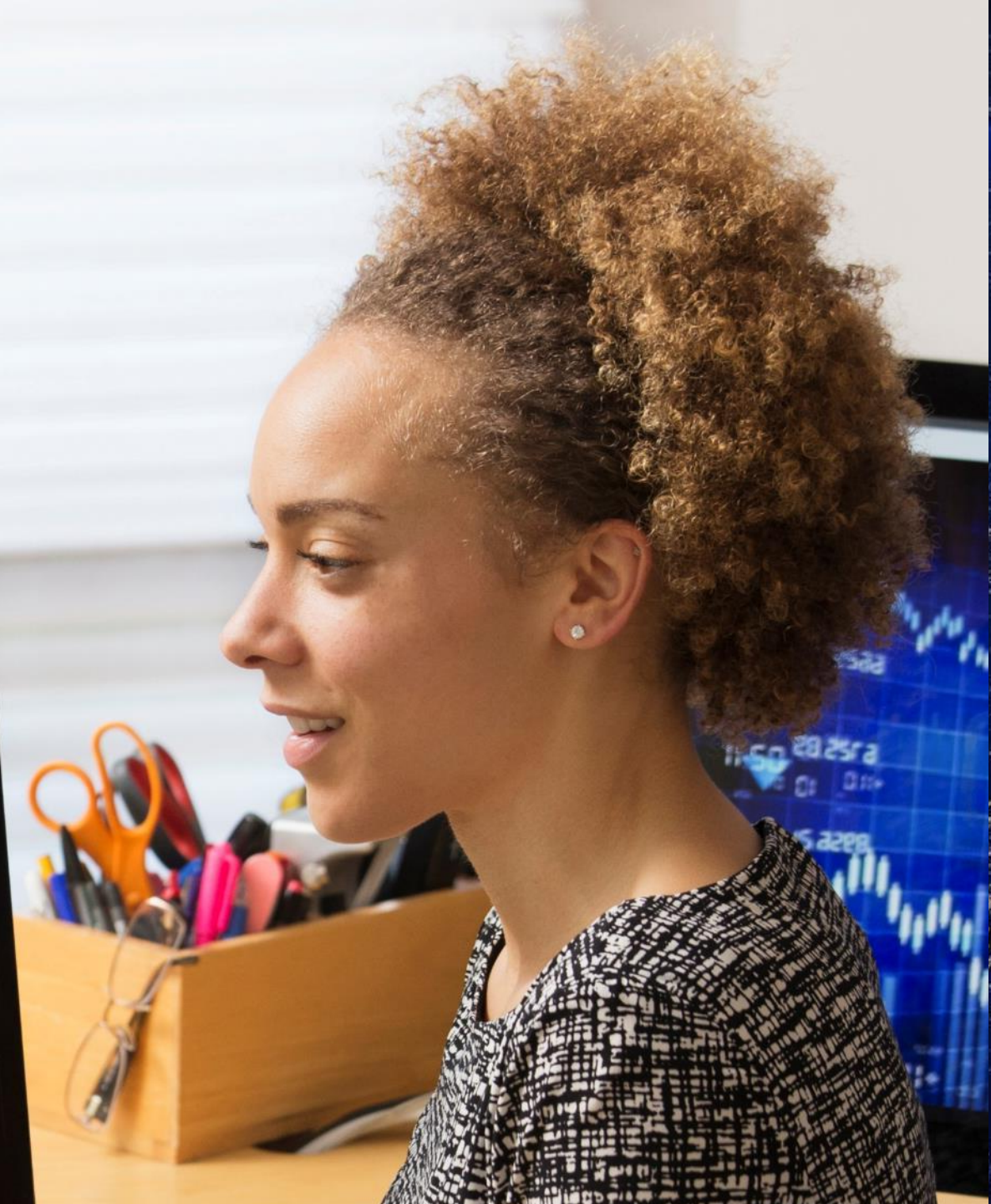
Working on documents together

Link across teams to co-author and edit documents in real-time, share and store files, and gather feedback all in one place.

How to chat effectively
Video: [Start chats and calls](#)
Video: [Work with posts and messages](#)

How to co-author documents
Video: [Collaborate on Files](#)
Video: [Upload and share files](#)
Video: [Work together in Teams](#)
Video: [Optimize team conversations](#)
Video: [Collaborate in teams and channels](#)
Video: [Create a plan with Planner in teams](#)
Video: Say Hello to Teams [Video](#)
Online Training: Say Hello to Teams [Online Training](#)

Best Practices

Work with a cloud-first mentality
Save your files to your teams, then share a link to save your and your colleagues' inbox space.

Get up to speed on version controls
Learn how file versioning and check-out features work so you can get away from trying to manage versions and archives.

Key activities when working on documents together

1. **Chat.** The chat feature lets you name, pin, hide and mute your chats as needed to stay on top of your Teams messages. You can also add emojis to your conversations for additional communication options.

2. **Group your conversations.** Threaded conversations or channel conversations live on Teams channels and are visually grouped by a specific topic.

3. **Make calls**. Easily call your colleagues both inside and outside your organization.

4. **Collaborate during meetings.** Set-up a meeting with one or multiple people. Use the chat or file sharing features during your meetings as well.

    Share a link to your file instead of emailing an attachment whenever possible. Use the Share feature next to the document that you want to share in your OneDrive and choose if you would like to allow or block editing and downloading.

    Make it easy for team members to reference tasks and keep each other accountable with the Teams Planner application.

Working across borders

Working across business boundaries

Host and join conference calls and video calls with people outside of your organization even if they're not on Teams.

How to collaborate externally
Communicate with users from other organizations in Microsoft Teams
Guide: Manage external access in Microsoft Teams

How to chat effectively
Video: Start chats and calls
Video: Work with posts and messages

Best Practices

Host calls with external contacts
For simple video/conference calls with external clients you can set up a normal Teams call and add your external participants. They can join via a browser or Teams client.

Set up guest access
If your external contact does have Teams deployed, inquire if they have guest access enabled and if they could join you to a team.

Access meetings by phone
External clients can also join your Teams meeting by phone, though that would limit their meeting options.

Key activities when working across business boundaries

1. **Chat, call and meet with colleagues inside and outside your organization.** External colleagues will need to be granted permission to join your meeting. When an external colleague joins your meeting, they will enter a virtual lobby until they are granted permission by a member within the organization. Once allowed into the meeting, your colleague will be able to see screenshare content and participate in the call. If it is your colleague's first time joining your Teams meeting, consider running a test meeting or having them join early to troubleshoot any potential issues.

2. **Put whiteboarding to work.** Microsoft Whiteboard is an option if your colleague is on Teams and can add you as a guest to their Whiteboard session (if they have guest access enabled in Teams).

3. **Host meaningful and productive meetings** Use the chat or file sharing features during your meetings and use the @mentioning feature to call out specific people in the comments so they are aware of questions/comments which are directed towards them.

   Video is encouraged so that people can read facial cues and to keep participants focused on the conversation at hand, minimizing multi-tasking.

   Bad audio is a showstopper for virtual meetings. Make sure you are in a quiet private space and use an external speaker or headset.

   Monitor the meeting chat actively for participants who cannot interject during the discussion or have technical difficulties participating in your meeting. Use Meeting Notes to capture minutes, key decisions, and action items. The Meeting Notes will stay pinned to your meeting for future reference and edits. This is especially useful for recurring meetings.

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