

MS Teams Getting Started for Managers and Supervisors

March 23, 2020

Table of Contents

Recording Time Location by Minute

- 00:00 - Intro
- 00:45 - How To Get Started With Teams
- 03:14 - Basic Concepts of Teams
- 04:37 - Basic Concepts of Team sites
- 08:00 - How do I Know What Team Sites To Set Up
- 10:35 - Team Site Examples – Organization Based
- 11:13 - Team Site Examples – Special Teams
- 12:50 - What Do I Need To Set Up My Teams Site
- 14:44 - What Should I Say About Chat?
- 16:58 - Everyone Has It, Now What?
- 17:55 - Teams Review With Staff
- 20:52 – Work From Home Meeting Recommendations
- 24:15 - Resources for Information and Training

How Should I Get Started With Teams?

1. Confirm M365 Licenses are activated and assigned to you and your group (Your agency IT staff activates the license)
2. Make sure everyone in your group sets up Multi-Factor Authentication(MFA) – they will need that to login from home
3. Have everyone install the Teams Client on their computer if it isn't there – they can use online version but client is better experience – the client install is what will add Teams Meeting option to outlook. If using from home computer, outlook integration will not be possible. [Link to download](#)
4. Take some training yourself or assign someone in your group to be a point person for Teams so someone has better understanding of the tool before you start
5. Decide on how you want to set up sites so you can advise your group how you want them used
6. Only certain designees within your agency have the permissions to create Teams sites. Reach out to your IT Staff for those designees.

Basic Concepts Of Teams

- Remember: Teams is a combination of (1) Skype and products like GoToMeeting and Zoom (communications - web conferencing and chat) and (2) file sharing services (to collaborate and share documents)
- Primary features you will use in Teams:
 - Team Sites for file sharing and collaboration
 - Chat feature – instant messaging with individuals and groups
 - Web Conferencing for 2 to 220 people used for calling, sharing the screen, and chats. Live Events can be used for 220-10,000 participants

Basic Concepts Of Team Sites

- Team site and channels
 - Each Team Site uses “channels” to organize the content like subfolder.
 - Channels are often used to segment/organize different work streams among a common group of individuals
 - Each channel includes a threaded chat(posts), files, and any specific applications you want to add (this is explained more in training)
 - Permissions and access are set at the team site level, so any channel is accessible by any member of the team even if they may not need to participate in its function
 - If you don't want everyone in the Team to see files and content in every channel, a separate Team site should be created to separate the content (Private channels is a feature that will be coming but it's not available yet)
 - Team members can easily be added and removed by the owner of the site

Example – Team Site And Channels

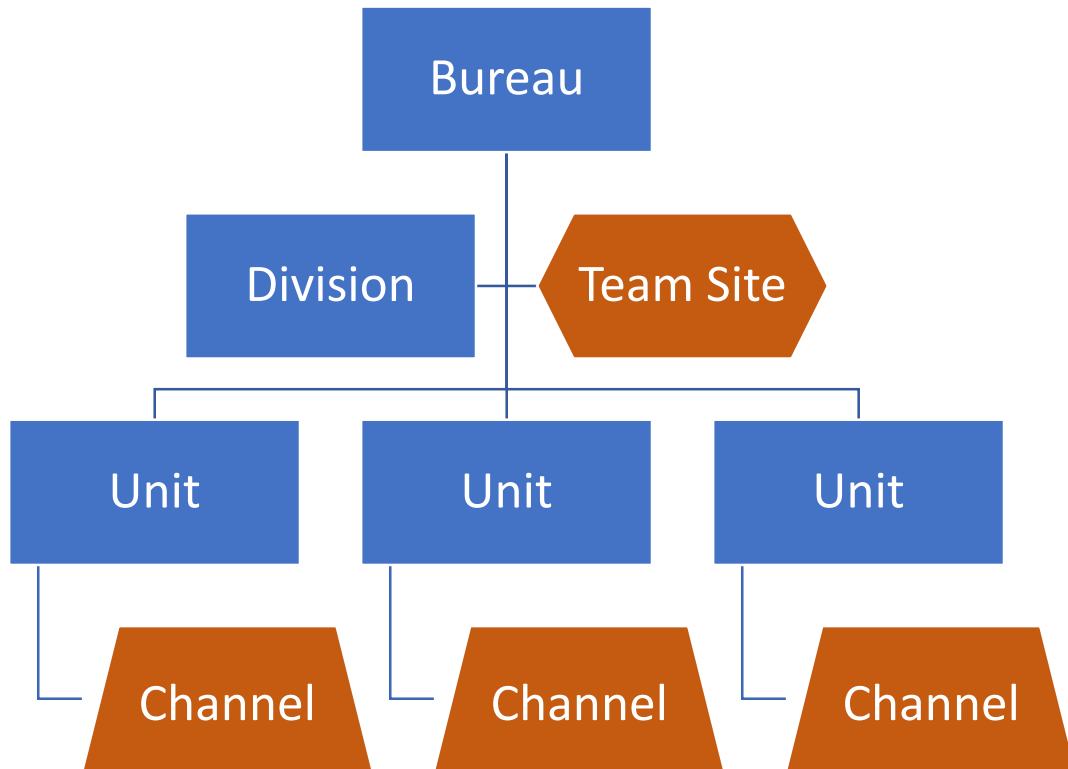
The image shows a screenshot of the Microsoft Teams interface. On the left is a dark blue navigation bar with icons for Activity (2), Chat (12), Teams, Calendar, and Calls. The main area is divided into two panes. The left pane, titled 'Teams', lists several teams: 'BEST Microsoft 365 Statewide IT Supp...' (with a green 'BM' icon), 'General', 'CoreView', 'Exchange Online', 'MFA and SSO', 'Office 365 ProPlus', 'SharePoint', and 'Teams'. A box labeled 'Team Site' points to the 'BEST Microsoft 365 Statewide IT Supp...' team. A box labeled 'Channels' points to the 'General', 'CoreView', and 'Exchange Online' channels. The right pane shows the 'CoreView' team selected, with a sub-header containing 'Posts', 'Files', and 'Overview'. A box labeled 'Channel Content' has three arrows pointing to these three sub-header items.

How Do I Know What Team Sites To Set Up?

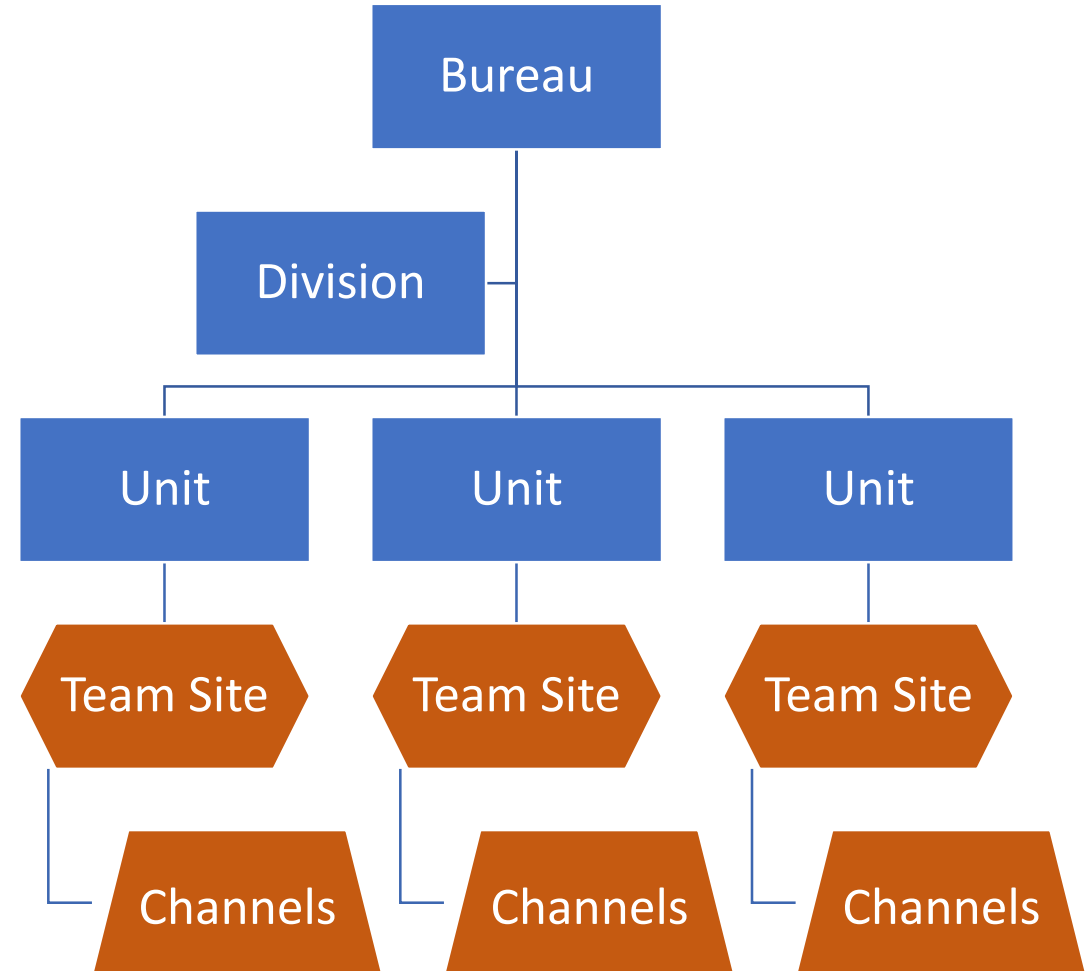
- Create a Leadership/Management Team
 - This might be used for collaboration on matters not ready to be shared broadly or otherwise sensitive
- Create an Organization-based Team?
 - Sites could be based on Bureaus/Divisions/Offices/Units if they communicate together and need to share files
- Special Teams
 - Unique or special projects may merit a Team, but consider first making it a channel in another team to prevent sprawl and a clutter of unused Teams
 - Can be short term, specific purpose to communicate and share confidential or large files (Similar to how Dropbox or Google Docs is used)
 - Decide how to remove channels/Teams when work is done or no longer needed. There are choices based on record retention needs

Team Sites Examples-Organization Based

No sensitive data. All units can access all the channels even if content does not apply to them.

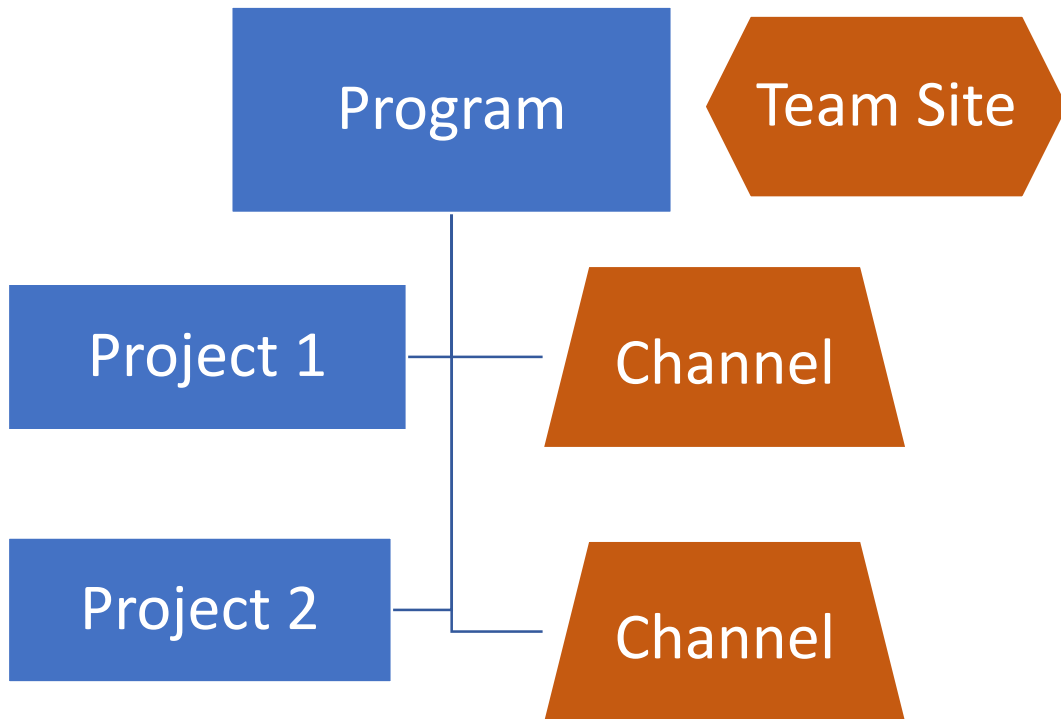


Data is sensitive and should not be accessible to other units

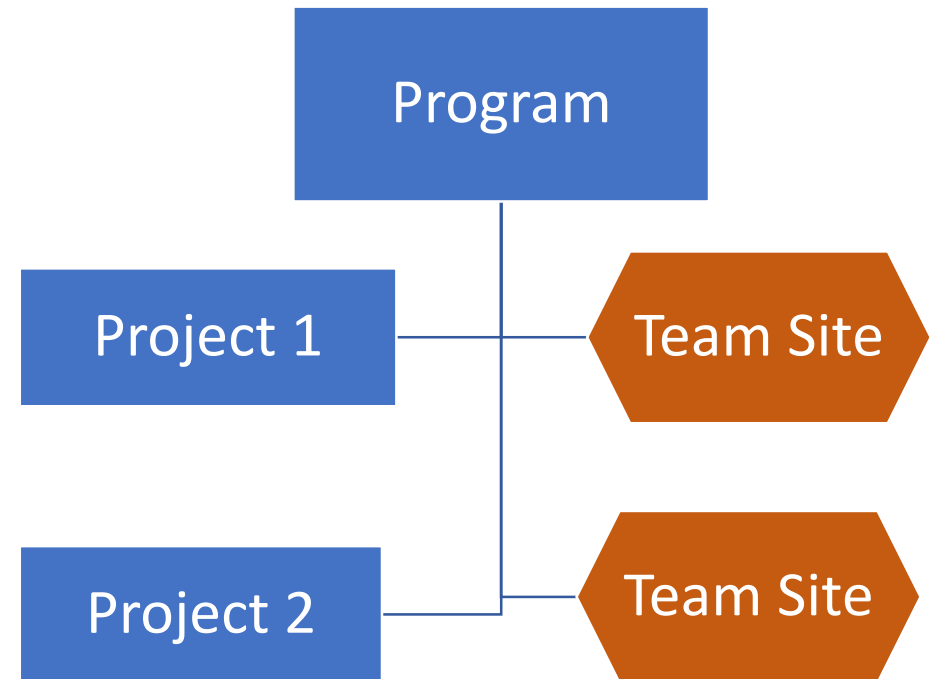


Team Site Examples – Special Teams

No sensitive data. All project teams can access all the channels even if content does not apply to them.



Data is sensitive and should not be accessible to other units



What Do I Need To Set Up My Team Site

Look at the work your staff does and remember there are multiple options for this and no wrong way to do it based on your needs.

What you need:

- A Team site name (check if your agency has any naming conventions)
- Who will be the owner? They can create more channels and add permissions (there should always be at least two owners for backup purposes)
- Who will be the members of the team. They are added by the site owner - (this may help you decide how to organize your Team and channels)
- Have the site created by a Teams Site Creator Admin. If you don't know who has this access, contact your IT staff
- Once the site is created the owner can add members and set up the channels (all members can add channels once they are added to the site)

What Should I Say About Chat?

- Need to set expectations about monitoring and use
 - Compliment to email or in lieu of email?
 - Whatever a group chooses to do, it needs to be clear so messaging isn't lost through inattention
- For groups that don't use chat regularly today, consider experimenting once established in your new Work From Home(WFH) cadence using Teams
- Chat threads in meetings are very helpful, especially for large meetings for gathering questions and documenting answers that can be seen later
 - Consider a moderator for large meetings

Everyone Has It, Now What?

Have a Teams kickoff meeting with your group and go over the following:

- Catch up with your group – get input on how they are doing WFH
- Make sure they have the Teams client and provide Teams training resources if they haven't attended any training
- Review how you want them using Teams when working remotely (and how they interact with staff still in the office) – suggestions on what to cover on the next slide

Teams Review

- ❑ Remind them to launch Teams Client when they login and keep it open all day
 - Ask your group to launch Teams client every morning when they login (it will require them to enter their MFA factor).
- ❑ Discuss Team Sites you created or that you want created and go over how you want them used (Note: This could be done later if you aren't ready but still want them to get started with meetings and chat – you don't need a team site to use those)
- ❑ Review Teams Meetings – Anytime staff wants to set up a meeting that normally would have been in a conference room. Do the same steps, go to Outlook, invite who you want, add “New Teams Meeting” and link will be included. Like a physical conference room, everyone will join and instead of sharing your screen on the room screen you share it remotely and go through as you normally would

Teams Review (continued)

☐ Review the Chat Feature- Advise them to start communicating with each other this way for all informal communication

☐ Go over the presence icons and make sure they have understanding of how that works and best practices.

● Available

● Busy

● Do not disturb

● Be right back

● Appear away

- Green – online and free – Expect you could get immediate response
- Red – They are in a meeting. You can write and depending on the situation they may or may not be able to respond at that time
- Red / Do Not Disturb – You're chat will not pop-up until it is removed
- Yellow - They are away from computer and you can write but they wont see it until they come online

WFH Meeting Recommendations

Daily or Weekly Group Meetings

- Set up a daily or weekly checkpoint meeting with your group through Teams. Working remotely can be isolating and bringing everyone together for even 15 minutes can ensure they feel like part of the group. You can also use it as status meeting once you get into a routine.

Examples

- Virtual Coffee Talk – suggest 15 minute meeting with video periodically so individuals can see each other for socialization and team cohesion. Will help keep some of the comradery they have in the office
- Set up a daily or weekly PowerPoint presentation and run through the high level of what everyone is working on or should be focused on. You can use to set the priorities of the day or week.
 - As users get used to this process you can have them all contribute to a daily or weekly presentation by sharing the file on a Team Site
- Use for project or Program status meetings

Resources For Information And Training

- [A Guide To Managing Your \(Newly\) Remote Workers](#) – Harvard Business Review website
- [Work from Home Technology Resources](#) (CT.gov website)
 - [Specific MS Teams Information and Training](#)
- [Download Teams](#)
- [Archiving and Deleting Teams sites](#) (Microsoft Support Document)