

Mastering Microsoft Teams

End User Guide to Practical Usage,
Collaboration, and Governance

—

Second Edition

—

Melissa Hubbard
Matthew J. Bailey
D'arce Hess
Mårten Hellebro

Apress®

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Mastering Microsoft Teams: End User Guide to Practical Usage, Collaboration, and Governance

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D'arce's Dedication

This book is dedicated to my parents Deena and Jim who have always encouraged me to take the road less traveled.

Mårten's Dedication

To the love of my life, my best friend, and my lifesaver, Ann-Louise. Thank you for always believing in me and making me understand what's most important in life. You bring out the best in me, and us, and our fantastic children. Amanda, Jacob, and Matilda, Daddy will be with you shortly, just one second... Love you forever.

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About the Authors

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Mårten Hellebro is an Office Apps and Services MVP focused on Microsoft Teams and an expert in enterprise voice. As an infrastructure, migration, and user adoption lead, Mårten has extensive experience from managing numerous Teams and Skype for Business implementation projects. He regularly speaks at Microsoft conferences and other events, and he is the head organizer of the largest Microsoft Teams conference in the Nordics “Teamsdagen.” He also runs the Microsoft Teams blog msteamsswe.se and is one of two hosts of the Microsoft Teams podcast “Teamspodden” and co-organizes the Swedish Unified Communication User Group. He is pleased to guide customers on their journey from Skype for Business to Microsoft Teams.

About the Technical Reviewer



Albert-Jan Schot, also known as Appie, is someone who lives and breathes Microsoft 365 to such a degree that it has become second nature to him. He has numerous certifications to his name. With his extensive knowledge, Albert-Jan is a valuable source of information for colleagues. Albert-Jan not only enjoys stepping up to the challenge of designing, developing, and building innovative cloud solutions, he also has consultancy and training experience. He is active on a range of forums, blogs, as well as on Twitter

where he shares his knowledge and passion with others. Over the years, he had the opportunity to present at several national and international user groups and events.

Introduction

Microsoft Teams is the heart of collaboration and communications within Office 365. As Microsoft Teams has matured over time, it has brought deep integrations with your favorite Office applications and offered ways to integrate with your internal business processes. In order for organizations to fully appreciate Microsoft Teams, end users must have an understanding of how to use its features. To truly appreciate Microsoft Teams and drive user adoption from the start, business owners and administrators should have a firm understanding of how to provide governance and training. With work landscapes changing from being in an office to including more remote working scenarios, the opportunities to connect colleagues, students and teachers, and customers have never been more vital. In this book, all of these scenarios are addressed and more.

Mastering Microsoft Teams is for anyone that has never used Microsoft Teams as well as anyone that has already been using Microsoft Teams in a work or school environment, but wants to learn more. Additionally, business owners and IT professionals will benefit from learning additional ways to support end users through governance and extendability.

The layout of this book begins by answering what Microsoft Teams is, followed by chapters on how to work, communicate, hold meetings, and extend capabilities. These chapters provide step-by-step guidance on how to perform different actions, as well as tips and tricks to help you get the most out of the application. Additional chapters focus on improving user adoption and the creation and implementation of a governance plan to provide a safe and secure way to allow collaboration within your organization. The remaining chapter focuses on using Microsoft Teams in the classroom by providing instructions for both educators and students to help navigate a world of remote learning opportunities.

Microsoft Teams is continuously updated with additional functionality. Depending on when you are reading this book, we acknowledge that many things have changed already. This being said, we have included a chapter discussing known issues with the limitations of Microsoft Teams and look at some of the updates that are planned for the future.

CHAPTER 1

Introduction to Microsoft Teams

If you are reading this book, it is highly likely that you have heard some of the excitement surrounding Microsoft Teams. Understanding the value of the application and knowing about its components and how they interact with each other is a good way to start learning about the product. In this chapter, we explain the different methods of accessing Microsoft Teams and the different features that combine to make it work. If you're ready to begin your journey of learning Microsoft Teams, without further ado, let's begin!

In today's working world, we all struggle with being on a short schedule, trying to connect with remote workers, and getting our job tasks completed on time. Often there are many people required to work on the same information or documents to accomplish a task. People's work is spread across multiple locations, making it time-consuming and confusing to multitask. These business problems can be resolved with Microsoft Teams.

Chat, meetings, video and voice calls, document collaboration, file storage and sharing, retrieving information, notes, third-party tool integration, and more have been combined into a hub for teamwork into the Microsoft Teams platform. Microsoft Teams can be thought of as one "super application" that integrates many different apps into one program so that you don't have to open and connect to many apps separately.

Our favorite description of the product is this: "If someone put Skype for Business/ Skype, Outlook's meetings and mailbox, Office 365 Groups, a persistent chat client, Word/Excel/PowerPoint, OneDrive for Business, a SharePoint site collection, Firstline worker scheduling software, and Azure Active Directory (AAD), then mixed them together and cooked them in the oven, Microsoft Teams would pop out." You can then "season to taste" by adding countless different other apps from Office 365 or outside companies to make a recipe of your own.

Examples of other Microsoft apps you can add to a team are Microsoft Planner for project management, Visual Studio Team Services for developer teams, a specific SharePoint site for storage or collaboration, Power BI for data visualization, PowerApps for semicomplex form creation, Stream for video, or Forms for simple data collection. Some examples of non-Microsoft apps that you could add include GitHub for developer’s code, Jira for project management, Adobe Sign for electronic signature collection, and Hootsuite for social media monitoring.

Although Chapter 5 goes into more about real-world use cases for Microsoft Teams, Figures 1-1 and 1-2 show how to set up and use a team. First, let’s start with what a new, blank team looks like.

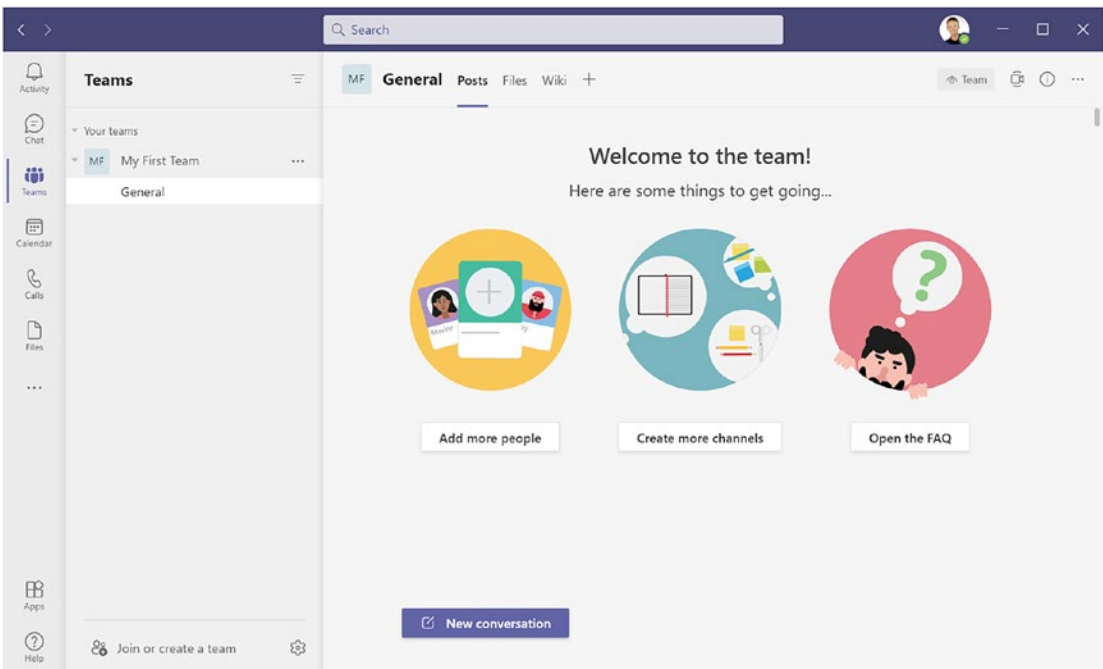


Figure 1-1. A brand-new empty team

As you can see in Figure 1-1, there is not too much happening in a new team. Think of it as an empty “virtual office” waiting to be filled with other co-workers or associates, discussions, files, projects, and video calls. Microsoft Teams is a part of Microsoft’s *modern workplace*, a vision that allows distributed people to work together in a digital, flexible workspace.

As an example of what a team can look like in production, Figure 1-2 is a quick screenshot of a team used for a new product launch. The team has added channels, tabs, applications such as Adobe Sign and Power BI, files, meetings, chats, and many of the other things that a team uses while working on a project. But don't be overwhelmed! There is a lot to learn as you make your journey through this book. Showing you what is possible helps you get excited in learning it! Figure 1-2 shows what an active team with lots of activity looks like.

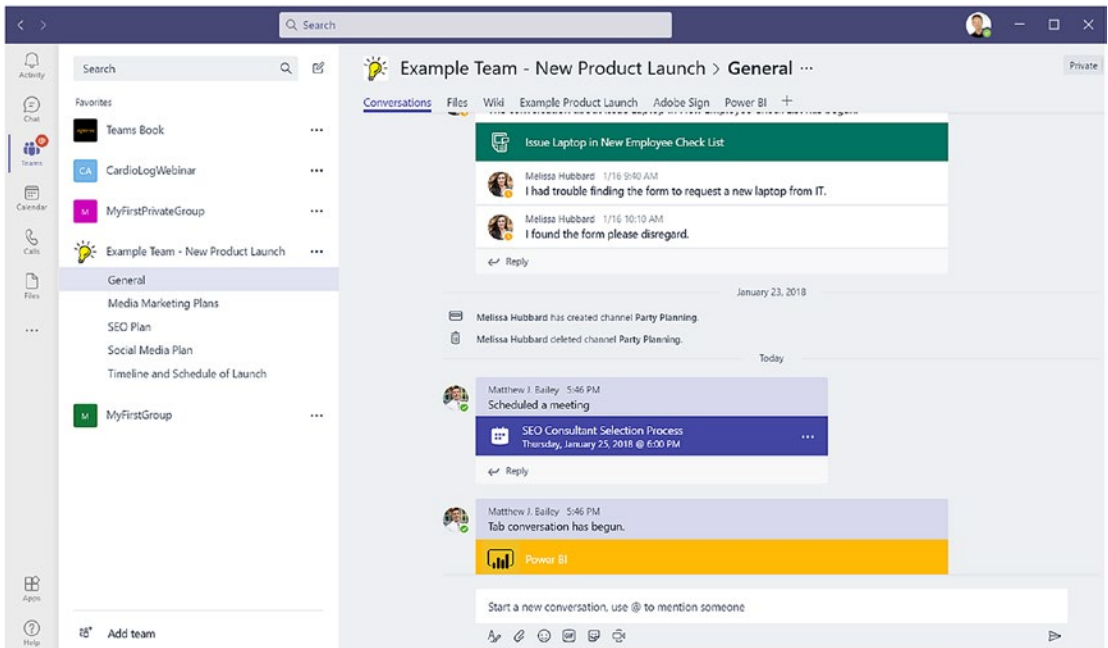


Figure 1-2. An example team for a new product launch with lots of activity and interaction

Microsoft Teams is very fluid and can be used for many different purposes. A team working on a new product launch, a group of people working to develop and launch a small software product, or even authors collaborating to write a book are just a few examples of why people might use Microsoft Teams.

Having a goal of how you like to work, what you want to work on, and who you want to work with should be a part of every team's setup process. We review these topics in more depth in upcoming chapters.

How to Use and Access Teams

As you see in Figure 1-3, Teams is accessible via three different methods. Each format that you access a team in places slightly different parameters around what you can do with it. As an example, you currently have the option to access a team through the following ways:

- Your Internet browser by accessing your Office 365 tenant
- The Teams client application installed on a Windows-based computer or on Mac OSX operating system
- The app installed on either an iOS-based (Apple) or an Android-based smartphone

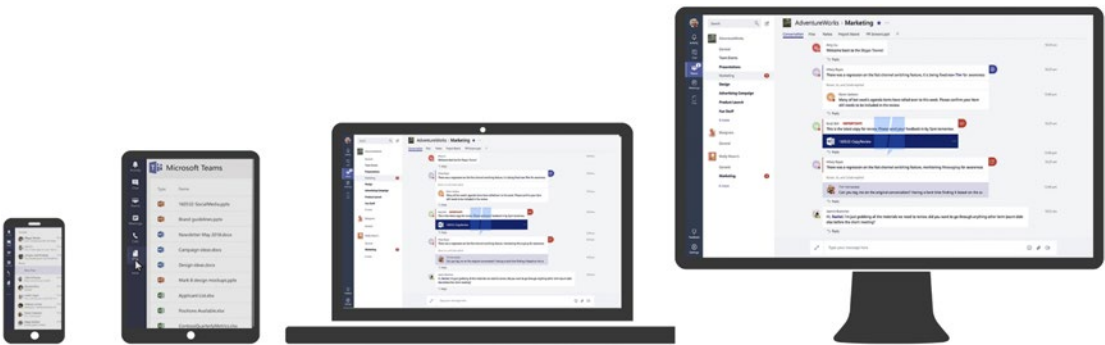


Figure 1-3. Teams is available as an installed client for Windows or Mac computers; as an app for iPhones, Android phones, or Windows phones; and via some web browsers

What you will probably notice first is that based on which type of client you are accessing, you have different features available to you. In the case of the Internet site or Windows client vs. the smartphone app, this is pretty much an industry standard. Most phone apps are not quite able to provide as much functionality as the other ways an application might be created. For the most part, enough features exist on all platforms to use the product successfully. Just be aware that the product has variances, and because it is new to the market, it will continue to have many features being added, changed, or updated on its different clients.

Background: The Journey from Skype

Teams was built by the Skype for Business product group at Microsoft. Skype for Business will eventually become Microsoft Teams; however, it is important to note that this is a longer-term vision and not something that will happen immediately. At the moment, there is still a Skype for Business 2019 version planned to roll out that will be supported for many years. At the moment, Microsoft Teams is *only* available in the cloud; it is not available to be installed on local servers. Although Teams works with an on-premises installation of Microsoft Exchange (one of the pieces of Teams), it is important to note that currently some of the features, such as eDiscovery for Teams, will not work in that scenario.

As a quick point of reference, to utilize all the functionality that Teams has available and the new features continually being added, you need to be fully in the cloud on the Office 365 suite and all the related applications (SharePoint, Exchange, Skype for Business, and OneDrive for Business).

It is also important to note that although Microsoft Teams is built in part from Skype for Business, not all the features from Skype for Business are available in Teams at the moment. According to the Microsoft road map, however, they are in progress and should be delivered in the near future (or have already been delivered, depending upon when you are reading this book).

What Is Included When Creating a Team

Microsoft Teams is a combination of different applications rolled into one. However, there are some key ingredients that allow Teams to function. Each time you create a new team, the following items are created in the background on Microsoft's servers outside of Teams:

- Office 365 Groups (Modern Groups) – unless you choose an existing group when you add a team
- SharePoint site collection (with a document library)
- Exchange Online group mailbox

When you are using Microsoft Teams, it might not be immediately apparent that you are using these other pieces of software because they are “masked” behind the Microsoft Teams interface. One example of this is the Files tab in your team. In Figure 1-4, you can

see that your documents all appear to be in Teams. However, they are really stored in SharePoint behind the scenes. We have elaborated this in Figure 1-4, which is similar to the meetings that are stored in Outlook. As a regular user, this isn't extremely important to know; however, if you are the administrator of a Microsoft Teams environment, these are key notes you want to be aware of because some of the maintenance and repairs that you perform might be done directly in that software, and not via Microsoft Teams.

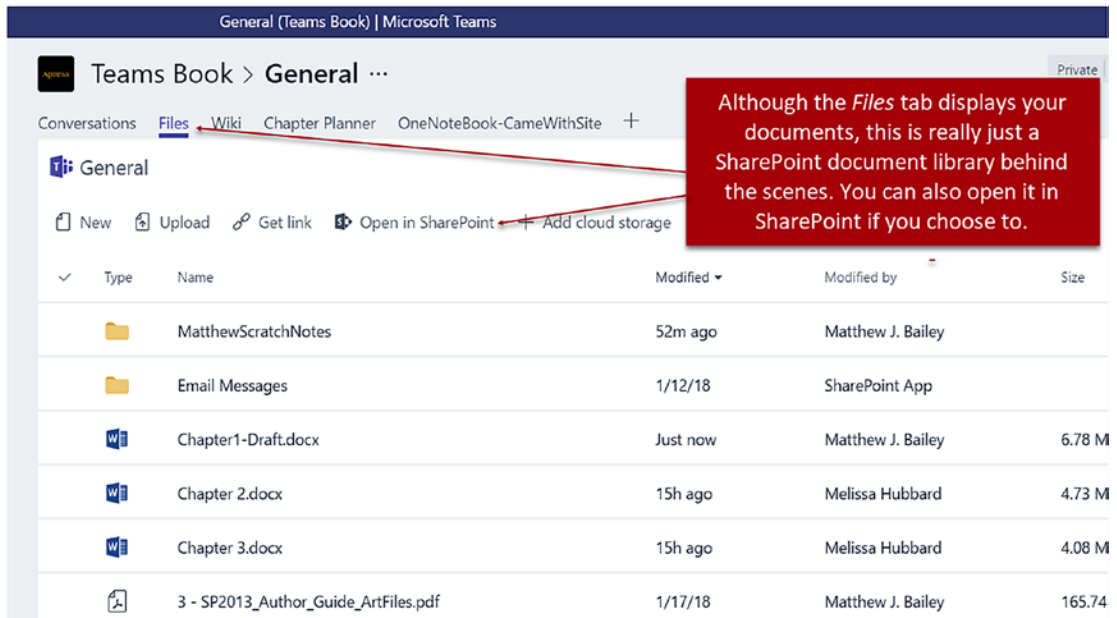


Figure 1-4. An example of how the Microsoft Teams interface surfaces data from other applications so that it “appears” as though it is all in one place

SharePoint and Teams

When creating a team, one of the components it creates is a Modern SharePoint Online Team Site with a document library. SharePoint Online must be active in your tenant to work with Microsoft Teams, because SharePoint On-Premises is not supported. The Shared Documents library is created inside this team for you; however, there are ways to use an existing document library from another SharePoint site if you currently have all of your documents somewhere else.

Note Although each channel in Microsoft Teams has a corresponding folder in SharePoint Online for the files that you work with, the folder is not created until there is actually a file uploaded.

Some of the files that users upload are stored “behind the scenes” in this SharePoint document library. Figure 1-5 shows a SharePoint document library holding these documents. We go into where each file is stored later in this book.

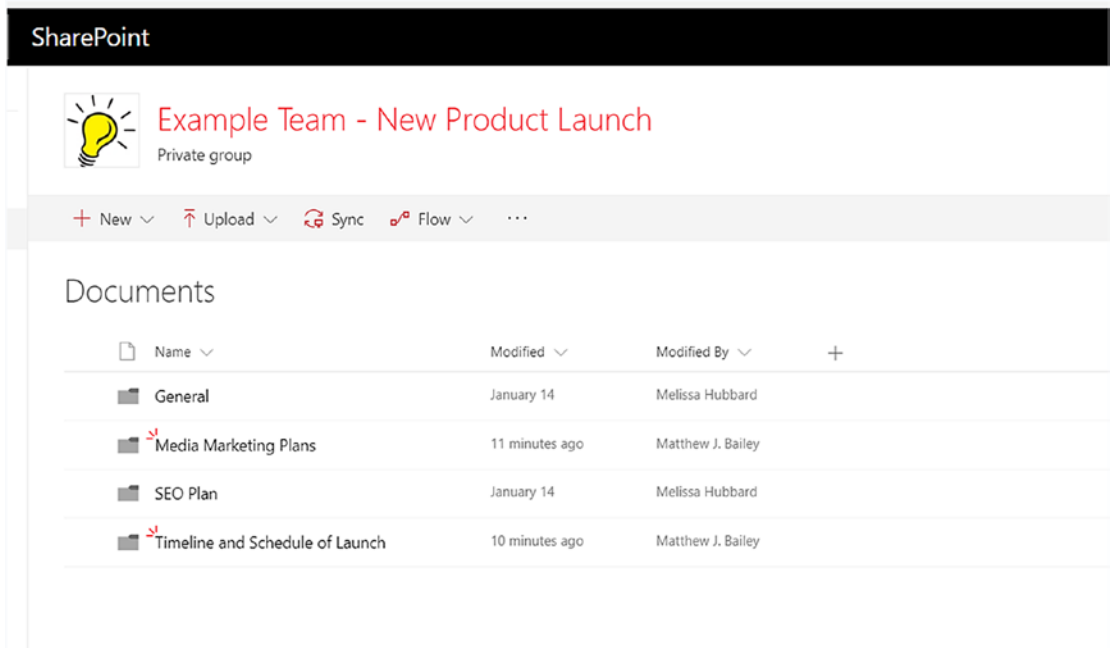


Figure 1-5. A document library created in SharePoint Online from a team

When a private channel is created, it will also provision a separate site collection with its own SharePoint document library with documents specific for users of that private channel allowing them to be kept separate from other members of the team.

If you open the document library in SharePoint, you will also be able to add metadata columns to provide additional information about the document such as a description or a status. These metadata columns will not be available to view within Teams at the current time.