# K2's Six Essential Teams Features

The mad scramble to remote work and utilize apps like Teams has been trying for most organizations over the past few years. With a rush to install and no time to plan, most team members did their best, prioritizing remote meetings as the primary concern. Therefore, as a result, Teams is vastly misunderstood and underutilized in most organizations. Join us in this session to go beyond Teams' remote meetings features and learn how to optimize efficiency, communication, and workflow with Teams.

K2 Enterprises

## Introduction

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## Major Topics

- Learn how to set up Teams for successful collaboration
- Create a filing system that does not include endless sub-folders
- Manage staff delegation and follow-ups with ease
- Define what Lists need to be available to your Team
- Discover how to create automatic Flows that can notify others of update
- Utilize survey Forms or questionnaires from within Teams

## Learning Objectives

Upon completing this session, you should be able to:

- List steps for creating effective Teams and Channel structures
- Identify how to setup file management columns for more information within Teams
- Specify examples of how to work with Microsoft Planner within Teams
- Identify how Lists work and why they can be better than spreadsheets
- Identify options for incorporating Power Automate into Teams
- Cite examples of how to use Microsoft Forms within Teams

## Setting Up Teams For Successful Collaboration

Teams is a Microsoft product with specific built-in functionality and the unique ability to **house many other applications**. Appropriately used, Teams is the application to **start your day with and** the **gateway** to your other apps.

As the name implies, Microsoft Teams groups of people should use Teams. What groups of people do you work with that share information and need to collaborate? Are you using Teams to facilitate those activities? If not, today might be the time to start!

## Teams Consist Of Channels

When you create a Team in Microsoft Teams, you also create **channels** for the information that you wish to share with others. Following are a few specific notes about channels.

- Every Team has a General Channel.
- Every team member becomes a member of the organization-wide channels unless you create private channels.
- You can have as many channels as your team needs, up to a maximum of 200s.
- You can create Channels for specific topics or areas the team needs to work within.

When you create a Team, you have the following options within your General Channel and any Channels you establish:

- Posts
- Chat app
- Voice and video calling
- Files, a SharePoint site created for the Team's files

Pick Teams based on

- People that Belong Together to share Files & Communications

Create your Channels based on

- Topics that need to be housed together

The following graphic depicts the typical arrangement of a Team.

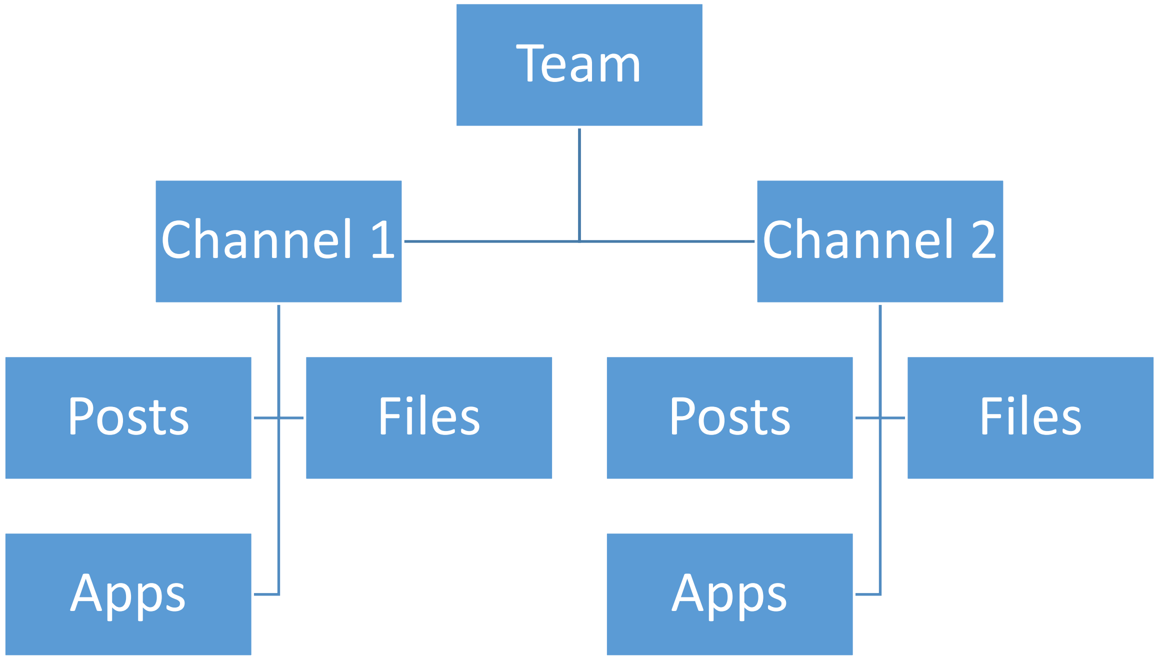



*Figure 1 - Sample Arrangement Of A Team*

## Creating Effective Teams

When deciding on your Teams and Channel, consider the following:

- Which group of co-workers or colleagues do you need to Chat with often
- Who do you need to share files with; there is no need to email files – upload them instead
- Who do you need to meet with on either an impromptu or planned basis
- Who works with you on the files
- Who could have shared plans and to-do lists
- Who do you need to get answers from, perhaps using forms, surveys, or quick polls)

You could base a team on any of the following:

- Main Team to house the information needed by everyone in the organization.
- Departments within a company or organization, such as Accounting and Sales
- Specific functions or roles of people
    - Examples could include: Leadership, Marketing, and Admin
- Projects or long-term assignments

- Committees
- External relationships. When you need to share information with people outside your organization, you can create a Team for that company/person and your organization.

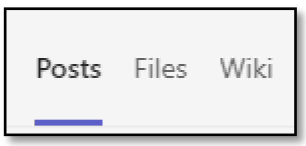
Every Team is separate from one another. Therefore, being a member of one Team does not give you access to any other Team.

You can create Channels within your Team that help the team members focus on distinct topics. First, decide on the significant issues your Team needs to share information about and discuss or meet.

## Post Information To Your Teams

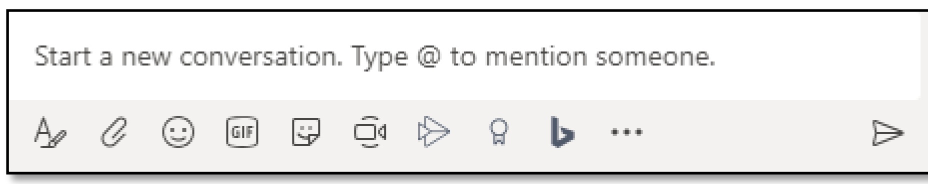
Every Channel has a Posts area where you can converse with other Team members.

- **Posts** is one of the Tabs at the top. It is beside Files.



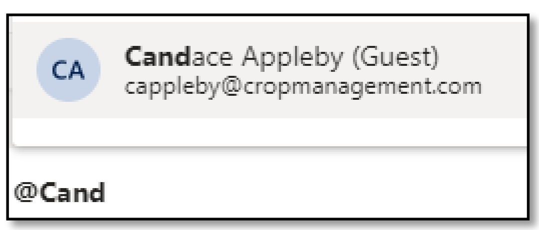

Start a Conversation or Reply to a Conversation.

1. Click the Posts Tab at the top of the Channel.
2. Go to the Bottom of the Page.
3. Start Typing in the Message Area or click New Conversation.



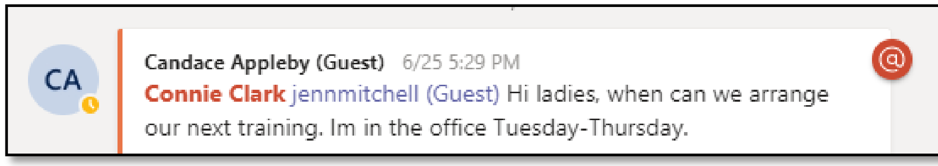

**Mention someone** in a conversation.

Type **@** sign and a person's name to mention someone in a conversation. It's like tagging someone. Teams will notify the tagged member.



**Get Mentioned** in a conversation.

When someone mentions you in a conversation, you will see an **ORANGE** @ symbol by that message.




Add Attachments, GIFS, Stickers, and Emojis to the conversation.

- Teams saves all attachments in the Files area of your Channel.

Start a Meeting within Posts.

- Share screens
- Video conference
- Audio conference (no need for phone lines)

## Creating A Filing System In Teams

You can create a filing system in Teams that does not include endless sub-folders Files. This process begins by noting the presence of a Files tab at the top of every Teams Channel.

When you structure your Teams and Channels well, you already have categorized your files because you have a specific area for a group of people (Team name) to access and save documents based on a particular topic (Channel name). So, this step alone helps you eliminate a couple of folder levels.

Let’s continue to use the Teams structure to help you organize files without using endless folders.

### Use Columns In The Files Area

Within the Files area of a Channel, you have the benefit of being able to add columns to give more information about your files. These Columns are referred to as *metadata*. Loosely speaking, the term metadata means “data that describes other data.”

You can add descriptive columns rather than making subfolders. For example, suppose you usually organize files in a folder with a separate folder for each year. Instead, you could create a *Year* column and manage your date based on the entries in that column.

There are many different types of columns that you can create, including:

- Text
- Date
- Choice
- Number
- Yes/No
- Hyperlink
- Image

With these columns, you have the advantage of:

- Sorting by the column criteria
- Filtering by the column data
- Grouping by the column criteria

You can also use Columns in automatic flows, which you will learn about later in this presentation.

## A Tab For A Document Or Spreadsheet

Do you have any documents that you and your team need to access often? If so, you can display these documents as a Tab in your Teams Channel. This method is better than a shortcut because when you click on the Tab, you will see the file open and ready to use.

Some of the document type Tabs you can create in your Channel include the following:

- Word documents
- Excel spreadsheets
- PDFs
- Websites

To add a Tab, use the **+** button where the Tabs reside. Choose to add in Word if you want to connect a Word document. Likewise, choose Excel if you're going to add a spreadsheet.

## Connect OneNote And SharePoint

When you create a Team, you will automatically have a SharePoint site established for all the files that belong to that Team. However, you may have an existing SharePoint site that you want to connect to this Team. Again, you can use the + button where the Tabs are to add your SharePoint Site.

When you create a Team, if you add a Notebook, you will automatically create a new OneNote Notebook on the Team SharePoint site. You may have existing OneNote Notebooks that you want to connect to this Team. Use the + button where the Tabs are to add your OneNote Notebook.

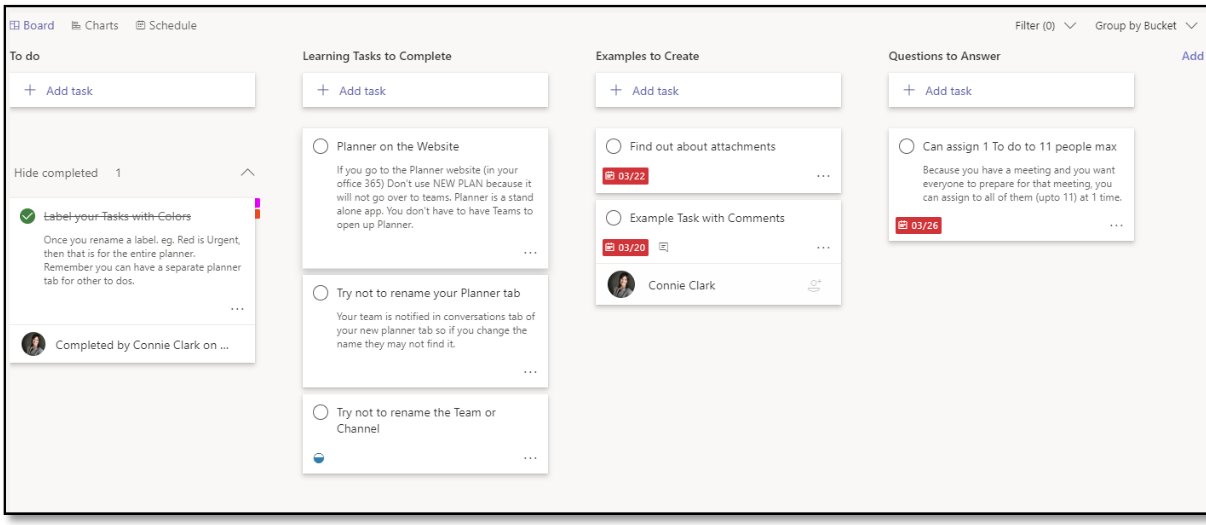
## Manage Staff Delegation And Follow-ups With Ease

**Planner** is one of the many apps available through a Microsoft 365 subscription. You may want to add it to your channels to easily organize projects and share tasks with others.

### How To Add The Planner App To The Teams Channel

Add the Planner App to your Team's channel.

1. Use the **+ button where the Tabs are to add in Planner.**
2. **Add in Tasks** with dates, priorities, assignee(s), notes, attachments, lists, and comments.
3. Create **Buckets** for Groups of Tasks or Projects.
4. Customize the **Labels** to help you categorize the Tasks further.
5. **View By** Boards, Charts, or Schedule.




### How Planner Works

Everyone within the Channel can add to or edit these tasks. Further, you can filter Tasks and organize them organized in many ways.

Begin by adding Planner to your Teams Channels. You could decide to have only one Planner for your Team and have it reside in the General Channel, or you could create a Planner for each Channel of your Team that needs to organize tasks (specific to that channel topic).

Within the Settings option of the online Planner application, you can specify how you want to receive notifications. For example, Planner can notify you when someone assigns you a task. You can also have Planner alert you when an assignment is late, is due today, or is due in the next seven days.

## Utilizing Lists In Your Team

Microsoft **Lists** is another Microsoft 365 application that can work well with Microsoft Teams. Lists let you manage information in a similar way to a spreadsheet. Consider creating Lists for job information, issues, inventory, contacts, projects, goals, and more.

Within Microsoft Teams, Lists can provide quick and up-to-date information that helps the team stay organized and informed on tasks and projects. Everyone in the channel can then view, edit, and update the list in real time. This feature allows for seamless collaboration and helps keep everyone on the same page.

Lists provides pre-built templates for everyday use cases such as issue tracking, inventory management, and event planning. You can also create templates or customize the existing templates.

### Advantages Of Using Microsoft Lists Within Teams

Microsoft Lists provides many unique advantages, and when combined with Teams, you have the added benefit of sharing and updating information in real time. Further, Lists integrates seamlessly with Power Automate, allowing you to automate processes and workflows. Some examples of use cases include:

- Use conditional formatting in Lists to highlight important data and make it easier to identify trends and patterns.
- Create rules and reminders within lists to automate tasks and keep your data current. For example, you can set up a reminder to follow up on a task after a specific date.
- Use Microsoft Lists as a mobile app so that team members can access and update lists from anywhere, anytime.

Within the Teams environment, Lists appears as a tab at the top of your Channel. This characteristic makes it easy for team members to access and update information.

## Discovering The Power Of Automatic Flows

In today's fast-paced and interconnected world, staying updated with the latest information is crucial for success. However, manually updating others can be time-consuming and prone to errors. Fortunately, you can use automated workflows to solve this problem. By leveraging the power of technology, you can create workflows that automatically provide others with essential updates, saving you time and ensuring that your colleagues, partners, or clients stay abreast of critical information. Let's explore how to create these automatic flows and learn how they can benefit your business or organization.

To create a flow, you must identify the trigger event or condition that will activate the workflow. This trigger can be anything from a new message posted in a channel to someone uploading a file. Once you've identified the trigger, you can specify the actions that should occur when the workflow is activated, such as sending a notification to a specific person or group or creating a new task in Planner.

### Example Of Automated Flows

**Example 1**

Let's follow an example of a flow you could create about a new file to review.

*Trigger*:

Someone adds a new file to a specific folder in a Teams Channel.

*Actions*:

1. Notify the Accounting department in a Teams channel that someone has uploaded a new file.
2. Create a Task in Planner for the team to review the file.
3. Send an email to the accounting manager with a link to the file in the Team's Channel (SharePoint) for their review.

This flow would automate the process of notifying the accounting team of new files that need review and also create a task in Planner to ensure that team members complete the review promptly. Additionally, the accounting manager would receive an email notification with a direct link to the file, allowing them to review it quickly and provide any necessary feedback or approvals.

**Example 2**

Let’s follow an example based on an email in a shared inbox.

*Trigger*:

When a new email is received in the accounting team’s shared mailbox

*Actions*:

1. Forward the email to a specific email address associated with a Teams channel
2. Notify the accounting team in the Teams channel that a new email was received
3. Create a task in Planner for the team to review the email and take necessary action
4. Save the email attachment to a specific folder in SharePoint for record-keeping purposes

This flow would automate forwarding the new email to a Teams channel, allowing the accounting team to review the message and take necessary action in a central location. The flow would also create a task in Planner to ensure that someone reviews and responds to it promptly and saves the email attachment to a specific folder in SharePoint for record-keeping purposes.

**Example 3**

Let’s look at another example using Microsoft Lists within Teams and notify us in the Posts area when someone adds a new list item. Specifically, when someone adds a new invoice to the “Accounts Receivable” list, a notification appears in the “Accounting” channel.

*Trigger*:

When someone adds an item to a SharePoint list.

*Actions*:

1. Choose the “Accounts Receivable” list in Teams as the SharePoint site address and list name.
2. Add an action to “Post a message as the Flow bot to a channel.”
3. Choose the “Accounting” channel where you want to post the message.
4. In the “Message” field, enter a brief message such as “A new invoice has been added to the Accounts Receivable list.”
5. Save and test the flow.

When a new invoice appears in the “Accounts Receivable” list in Teams, a notification will automatically post in the “Accounting” channel, alerting the team to the new invoice. This notification can help improve communication and collaboration because everyone can see the information in the channel.

## Working With Survey Forms Or Questionnaires In Teams

You can incorporate Microsoft Forms into your Teams environment when looking for efficient and effective ways to gather feedback. This action provides a convenient way to create and distribute survey forms or questionnaires to team members. It also helps to streamline data collection, improve communication, and lead to better decision-making.

Let's look at the benefits of utilizing survey forms or questionnaires from within Microsoft Teams.

### How To Add Microsoft Forms To The Teams Channel

Microsoft Forms is another application included in Microsoft 365. You can use Forms as a web application or integrate it into your Teams. You can add Forms to Teams using the procedure outlined previously in this text. Upon adding Forms, you can create a form from scratch or add an existing form. If you add a form from scratch, your team can edit that form and see the form results in the channel.

If you add an existing form, you have a few choices:

- Collect responses within the Teams channel (this creates a place for team members to fill in the form);
- Show results within the Teams channel (this will show a summary page of results); or
- Collaborate within the Teams channel (this option will let you collect responses, show results, and edit the form).

### Using Forms Within Teams

Microsoft Forms can be used in several ways within Teams to gather feedback, assess knowledge, plan events, and gather customer feedback. Following are four examples of using Forms within Teams:

1. **Employee Feedback:** Gather feedback about work experiences, job satisfaction, and other relevant factors. You can add Forms into the appropriate Teams channel so team members can quickly access and respond to the surveys. This is a terrific way to improve communication and increase employee engagement.

2. **Training and Development:** Create quizzes or surveys to assess the effectiveness of your training programs. Identify areas to improve. Ensure your team members have the knowledge and skills they need to succeed.

3. **Event Planning:** Create polls to gather information about event preferences, such as dates, locations, and activities. This action helps ensure that the event meets the needs and preferences of team members.
4. **Customer Feedback**: Create surveys to gather customer feedback about your products or services. Ensure that your customers are satisfied with their experience.

With Forms integrated into Teams, you can streamline data collection, improve communication, and make better-informed decisions.

## Summary

Microsoft Teams is a compelling platform with excellent customization options. As you've seen in this session, you can use Teams for many different tasks and purposes, extending far beyond voice calls, meetings, and chats. By organizing your Teams and Channels appropriately, you can leverage the platform to plan and manage your work, gather information, collaborate with others, and automate tasks. So, use the knowledge you've learned in this session to increase personal and team productivity with Teams.