



The Microsoft Teams Experience

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Introduction

Doing more with less is an imperative for every business to be successful in order to keep costs down, to remain competitive, and because it is not always possible to find enough of the right people to fill positions.

Technology holds the promise of helping you get there but most businesses never obtain it for two reasons.

- 90% of technology approaches are reactive only focused on keeping the day to day running
- IT is thought of as G&A not a functional area so it is treated like an expense and put under finance to be cost controlled

In addition if your IT group isn't doing everything it should to make your company cybersecure, you are inadvertently putting the future of your business at risk.

Learn

What your IT should be doing to help create a secure, predictable platform for you to scale your business more easily and profitably.

- What good managed IT support looks like
- The difference between reactive and proactive IT
- How to implement IT strategy that drives business growth
- How to managed IT to metrics.

Whether your skeptical if your current technology plan can support your business plan, feeling like IT costs too much for what they get, or just wanting to make sure you are not missing something, I wrote this eBook to help you.

Sam Bloedow

Sam Bloedow (Founder and CEO of Thriveon)

About The Author



Trusting your business can run smoothly with technology seems impossible when your current IT provider is slow to respond and the guidance is reactive. An IT strategy needs to be effective, support growth, and help get your business where it needs to be.

At Thriveon, we believe current IT methods aren't good enough—period. Your managed IT provider should be doing more than just patching issues and managing the day-to-day. They should be proactively preventing issues altogether, before they disrupt your people, and guiding you on the changes to make your business more efficient.

Back in 2005, your struggles were our struggles. We knew we needed a different solution, and so we built one. For the last 15 years, we've deployed an IT approach that supports and guides your business's entire technology spend, including software, hardware, and services so your business can do more with less. We help align your company to best practice standards with a 500-point inspection, reducing security issues and vulnerabilities by 90%, and proactively eliminating risks before they become a problem. It's time for a solid IT strategy to support your business growth and enable you to scale your business the right way.



- CHAPTER 1 -

Using Channels and Chats in Microsoft Teams

Using Microsoft Teams for Channels and Chats

If there's one thing that stands out about modern technology practices, it's the craving for instant connection. And though your employees may use Facebook, Twitter and a myriad of other social networks for connecting with others personally, adopting this kind of platform for constructive use creates connection and collaboration professionally.

Gartner reports that 52%* of IT Leaders expect an increase in work from home in 2021 which tells us that remote work has been solidified as the norm. With remote and hybrid work being consistently on the rise, it's vital to have a productive work environment while employees are working from various locations and devices.



We're used to it by now

Instant messaging is no longer a novelty, it's a requirement to keep your company functioning. If you don't have an instant messaging platform, you run the risk of having disconnected information, disconnected teams and you lose both time and money. Chat is a primary and valuable function of Microsoft Teams, but there is so much more to the application. To start, let's dig into the how and why of using Teams, Channels and Chats effectively in Microsoft Teams.

[Read: Managed IT Services: What does good IT support look like?](#)

What makes a Team in Microsoft Teams?

In Microsoft Teams, you have the ability to create different groupings called Teams for specific departments, projects, or taskforces. Creating Teams allows the right people to collaborate on the right tasks. Within Teams is also where you can [create new meetings](#) for that specific team.

To create a new Team, click on Teams then Join or Create a Team. From there, you can use a template or create one from scratch. Every Team may have channels associated with it to separate different projects as a way to group certain aspects of the Team.

Using Channels in Microsoft Teams

Channels are the different groupings of projects or similar items for a dedicated purpose within a team.

Only the members of that team can work in those channels or channels can be set to private. To add a channel: within the team, go to more options <...> and add channel. By default, anyone in the team may create a channel. Channels are where the real work happens. Every chat, file and meeting is stored within a specific channel.

Using Chat in Microsoft Teams

Chatting is the most effective way to get quick responses on an open item you may need from another department or colleague. There are one-on-one chats and group chats, and you start them the same way. In the taskbar under chat, you'll hit Ctrl+N or New Chat. From there you can enter the name, email, group or tag. For a group chat, you can type in the individual names. With both remote and in-office work, chat avoids physical interruptions and allows your colleagues to respond even if within a meeting. Statuses help to showcase whether you are available, busy or in a call or meeting. The Do Not Disturb feature is helpful when presenting or doing an important task that cannot be interrupted.

One small hint you may not know about: as long as both parties have external chats on, you can chat with connections outside of your team. This is useful for clients, vendors and other external colleagues.

Is your workplace modern?

If you're not using chat today, you're likely not as efficient as you could be. Microsoft Teams is useful for organizing your work and collaboration through Teams, Channels and Chats and it's available for use from anywhere you are, on any device. [Let us help get you](#) to a Modern Workplace with Microsoft Teams.

***Source: [Top Priorities for IT: Leadership Vision for 2021](#)**



- CHAPTER 2 -

Using Microsoft Teams as an Online Meeting Platform

Using Microsoft Teams as an Online Meeting Platform

Has your team discovered and implemented Microsoft Teams yet? Maybe your team followed suit like the other [24 million people](#) who added Microsoft Teams to their tech stack in 2020 when remote work became the necessity. Teams quickly became not just a way, but the way to use as an Online Meeting Platform, and it's not just for internal organization use either. Let's dive into how and why to use Microsoft Teams as your Online Meeting Platform of choice.



Schedule your Microsoft Teams Meeting

In Teams, on the left-hand side toolbar there is a calendar icon where once clicked, you can either “Meet Now” or “Create a Meeting” right within Teams. You also have the capability of adding a Teams Meeting to your Outlook calendar invite or clicking on a specific time and date right in your calendar to populate those details in your meeting. Scheduling a meeting should be this seamless and automatic giving you time back in your day. With the integrated approach that Microsoft Office 365 provides, connecting your meetings with your Outlook is a perfect match.

Within the meeting setup, you can create a standard meeting for your participants, or you can set up a webinar. To make this meeting a webinar, you'll hit Require registration. You can do this for everyone you're inviting or only for those inside your organization.

Get MS Teams working for you! Schedule your FREE Technology Audit now

Set up Microsoft Teams Meeting Options

Once you've set up the time, date and participants in your meeting, you can explore the Meeting Options within the meeting. To get to Meeting Options, you'll open the meeting and under Meeting Options, and you'll have the ability to toggle yes or no for the following options:

Who can bypass the lobby?

Everyone, People in my organization and guests, People I invite, Only Me

Always let callers bypass the lobby

Yes/No

Announce when callers join or leave

Yes/No

Who can present?

Everyone, People in my organization, Specific people, Only me

Allow mic for attendees?

Yes/No

Allow camera for attendees?

Yes/No

Record automatically

Yes/No

Allow meeting chat

Enabled, Disabled, In-Meeting only

Allow reactions

Yes/No

Start your Microsoft Teams Meeting

The day and time to start your Teams meeting has arrived! Once you and your participants have clicked the join button, you have the option to request others to join the call by either their contact or phone number. You may also copy and share a link to then either chat or email them. Everyone will have the ability to pin or spotlight certain people on the call which may be useful to identify the speakers.

One common issue seen time and again is being on mute and not knowing it. While this can make for a hilariously relatable moment depending on your audience, it can sometimes take a minute to locate the mute button. In this event, keep in mind of a helpful shortcut to mute or unmute yourself: Ctrl+Shift+M.

You may decide you'd like to record the meeting. When you press record, there is a prompt letting everyone know that they are now being recorded. Once saved to Microsoft Stream, the meeting recording will be added to the chat so your participants can download it and view later. Presenters have the ability to turn on transcription, which may be a useful tool as well.

Share your Screen in your Microsoft Teams Meeting

An important function of any meeting is the ability to share your screen, so everyone is on the same page of what is being discussed. At the top of your meeting is the share screen button where you can share your entire desktop screen or specify a certain window to share. The second option makes it so the audience can only see the window you've selected, and nothing else. This allows you to keep the rest of your screen for your eyes only.

[Get MS Teams working for you! Schedule your FREE Technology Audit now](#)

Collaborate in your Microsoft Teams Meeting

Creating a meeting also gives the participants the ability to chat, add files, meeting notes and a whiteboard capability. You may want to attach an agenda or another document that you will need for the meeting. These will be stored in Files. Meeting notes may also be used during the meeting and will be saved in the chat for everyone to locate. The whiteboard is currently only available for those within your organization. Just as if you were in the office together, everyone has the chance to add to the whiteboard via text, digital dry erase markers and highlighters as well as shapes to create visuals.

Interact in your Microsoft Teams Meeting

Collaboration is key when meeting with your team, and interactions provide an even richer experience.

Participants can use the reactions feature to like, love, clap, laugh or raise their hand to show they have something to say without audibly interrupting.

You may also like to utilize the breakout rooms feature which is controlled by the organizer of the meeting. You may create the breakout rooms automatically or manually assign specific people to certain rooms. The organizer has the ability to determine the amount of time in the breakout room and Teams will notify the participants when they are being moved back to the main meeting.

Another way to interact with your audience in Teams is to create polls. To add this, you can locate Microsoft Forms under Apps and add it to your chat, team or meeting. You may create the poll before or during the meeting. This is a simple way to create a more dynamic meeting and choose whether to share the results publicly in real-time.

Wrapping up your Microsoft Teams Meeting

You did it. You successfully navigated a Microsoft Teams Meeting with all its unique and intuitive functionality. Using Microsoft Teams as an Online Meeting Platform provides you and your team with the ability to meet digitally, share your screen, show your video, collaborate and participate in an efficient and interactive way.

Finally, to find your Attendance Report for the meeting, click on the Participants and select the three ellipses (...) then Download Participants List and it will show up in your downloads folder to view and use in your reporting. [Thriveon IT Managed Services](#) is here to strategically guide you onto a successful path with Microsoft's Modern Workplace.

If you have questions on Microsoft Teams or any of your other technology, please [contact us](#).

[Get MS Teams working for you! Schedule your FREE Technology Audit now](#)



- CHAPTER 3 -

Using Microsoft Teams for Mobile Collaboration

Using Microsoft Teams for Mobile Collaboration



Collaborate from anywhere

In this day and age, accessibility is paramount to communication and maintaining effectiveness in business operations while employees are working from various locations. Remote and hybrid work is only continuing to rise, and with it comes the "on-the-go" employee. Mobile collaboration is a necessity to any modern workplace where in some cases you have full-time remote employees, and in others partially remote with some in-office hours and everything in between.

Of course, travelling for business has always been, but moreso now that employees are scattered physically, mobile collaboration is necessary. High productivity and mobile collaboration is achievable through Microsoft Teams.

Any device, any time

As workers move, they switch from device-to-device. They may begin their day checking their email and Teams messages on their phone, move to their computer to respond to a message and begin reviewing their daily task list. They may want to grab a coffee on the way into the office, and they've been waiting to hear back from a client or colleague, so they check their phone while waiting in line. The value of Microsoft Teams is that the functionality remains largely the same from device-to-device, so work days are uninterrupted even though physical locations may vary.

Using Calendar for Mobile Collaboration Microsoft Teams

When it comes to your meeting virtually, Microsoft Teams leverages calendar items from your Outlook account so you can access them directly in Teams. You can also create new Teams meetings using your calendar right within Teams. If there is an urgent need, you can choose “Meet Now” to meet with someone, or you can schedule the meeting in advance. Any meeting set in either place will sync up in both Outlook and Teams.

[Read more: Using Microsoft Teams as an Online Meeting Platform](#)

Using Statuses for Mobile Collaboration in Microsoft Teams

Using information from your calendar, Microsoft Teams intuitively updates your status to “on a call” or “in a meeting.” It will also inform your contacts if you are presenting and will put you in Do Not Disturb mode. This helps others to understand if you’re available to chat or collaborate or if they should try another time.

You can actively change your status to any of the following and set a duration:

When in Do Not Disturb mode, by default Microsoft Teams will not send notifications if activity comes in. However, you may decide that for certain people you will want a notification to come through. To update this, go to settings then Privacy and click the button that says Manage priority access to assign any contacts.

Along with the status, a Status Message can be useful to add a brief note about what you're up to and when you'll be back. You can choose to show the message when contacts attempt to chat. You can also use it as an out of office message or to schedule an out of office notification for your email too.

Using Chat for Mobile Collaboration in Microsoft Teams

Another quick way to interact on tasks and projects is through Chat. This is one of the main reasons organizations implement Microsoft Teams. There are group and individual chats where even once a chat is started you may add or remove people to them depending on how the conversation shifts. The formatting on chats is robust with the ability to add a header, any color, size and font, bullet points, highlight color as well as the usual bold, italics, underline and strikethrough capabilities.

Set Delivery Options

With your message you may choose to add a notice to the recipients depending on if the message is standard, urgent or important. This is a helpful feature to showcase the level of urgency. You may also keep a record of your messages by

Screen Sharing

Collaboration is also possible through screen sharing which many employees have grown accustomed to now that many are out of the office more regularly. While on a call, a meeting or a chat, participants can click the share screen button and choose to show a specific window, screen or their desktop.

Language Translation

Finally, you or your organization may work with others who have a different first language than you. The language translation feature in chat can help to communicate when a participant communicates in their first language then you may easily translate to read in yours. This wonderful communication tool expands accessibility to collaborate across the world.

[Read more: Using Channels and Chats in Microsoft Teams](#)

Using Files for Mobile Collaboration in Microsoft Teams

With every channel, comes its own Sharepoint folder where files that are shared through Teams are stored. This becomes particularly useful when your team is collaborating in a Teams chat or meeting and needs to access documents and files quickly. Add graphics, documents, PPT presentations, etc... for easy access for all on your team.

Collaboration has never been easier

With the implementation of Microsoft Teams, your team will be able to virtually share anything they could in person, including whether they are busy, away or in a meeting. They can create meetings, chats and channels. Channels will create a Sharepoint site where they can store files. Because it is a downloadable application with your Microsoft login, Microsoft Teams can be accessed from any device, from anywhere with an internet connection. It's never been easier to connect and collaborate than it is with Microsoft Teams. [Let us help](#) get you to a Modern Workplace with Microsoft Teams.

- CHAPTER 4 -

Using Microsoft Teams as a File Server



Using Microsoft Teams as a File Server



You are already managing your tasks, chatting, and running meetings in Microsoft Teams. Keep the collaboration going by replacing your current file storing system with Microsoft Teams! The more things you can get done in one platform, the better for productivity, efficiency and collaboration with your team.

Let's talk about how and why to use Microsoft Teams as a file server.

Let's Talk Files

The files you use - whether they are images, documents or spreadsheets – are important to your business. They are your intellectual property and not only should they be protected, but they should be accessible (by the right people) within your organization. Keep in mind that anyone with access to that Team, will have access to those files within the channels of that Team. This is one reason it's imperative to set up Teams with their appropriate channels and subsequent files in the first place. And we can help you do that!

In the top of your channel, Files will appear as a tab next to Posts. This is where your folders and files will be stored for each channel in Microsoft Teams.

Connection to SharePoint

When a channel is created a SharePoint site is also created within your organization. This is where any files that are shared within the channel become stored. By default, all files shared within Teams will be stored in the General channel – which cannot be removed. SharePoint is primarily for storing documents, so the integration with your Microsoft Teams channel provides the accessibility to collaborate with your team while you're chatting, meeting or traveling. SharePoint was originally designed around how people save information. With Microsoft Teams, it's designed around how people work.

Access Your Files from Anywhere

The biggest win for using Microsoft Teams as your file server comes when you're on the go. Historically, you would have to VPN in to access documents from outside the office and you'd use a mapped drive. With Microsoft Teams, you now have the ability to access critical files via any device that has your Teams app downloaded.

[Read more: Using Microsoft Teams for Mobile Collaboration](#)

Where we come in

At [Thriveon](#), when we're setting up a client with the full Microsoft Teams experience, and particularly when it comes to using Microsoft Teams as a file server, we start with an entire project plan, then move to the migration and mapping of files - and we do all of this for you!

The back end of your Teams files is still through SharePoint, but you'll never need to go there in your browser– everything is accessible right in Microsoft Teams where you are already working! The versatility of Microsoft Teams and the ability to have all of your collaboration tools in one platform is unmatched.

It's never been easier to connect and collaborate than it is with Microsoft Teams.

[Let us help](#) get you to a Modern Workplace with Microsoft Teams.



- CHAPTER 5 -

Using Microsoft Teams as a Phone System

Using Microsoft Teams as a Phone System

Your organization is already investing in a phone system today that does what you need it to. Or maybe it doesn't and you're finding periodic connectivity or log in issues. However, many people aren't aware they can replace their phone system by using Calls through Microsoft Teams. And you're already using Microsoft Teams to create workspaces for collaboration, chats, meetings and storing files – why not make your calls from Teams too?

First, let's discuss why using a disparate system – though it may work – may not be the best solution for you. Phone systems that are disconnected from the technology stack can be clunky in terms of efficiency for your day. It's a different username and password, it's set up in a different platform, and it has a different interface and functionality. That said, depending on your unique business needs, you may still need to include a robust phone system; however, for the average use calls, Teams provides everything you need with some added benefits.

3 Major Benefits of Using Microsoft Teams as a Phone System

1. Everything you need is in one platform

Having your phone calls available in the same place that you set and run meetings and collaborate via chat will provide you with the ease and accessibility of doing all your major communications right there on one platform. The more you can do in one location, the more efficient you will be. Internally, you can be chatting with a contact and realize the need for a quick call to discuss and hit the call or video button and meet on the spot.

2. Know the status of your contacts before you call

In Microsoft Teams, you can see the presence of your contacts before you make that call, saving both you and the recipient time and energy of back-and-forth exchanges. If your contact is busy in a meeting, you'll know to wait until they are available to give them a call. Or, if you have a relevant message for them for the meeting they're in, you might consider chatting with them so as to not disturb the meeting.

3. Intuitively integrated phone system

In many phone systems outside of Microsoft Teams, statuses must be actively set. However, Microsoft Teams knows your status by pulling information from your calendar –whether you're presenting, busy or on Do Not Disturb. When you're in a meeting and a call comes through, Microsoft Teams will not ring to disturb your meeting by default. If you have the Microsoft Teams app installed on your mobile or other devices, calls will ring to the active device allowing you to choose where you'd like to answer.

[Read more: Using Microsoft Teams as an Online Meeting Platform](#)

Add Calls to Your Microsoft Teams Toolbar

To pin the Calls feature to your toolbar, open the Calls app in Find Apps. It will appear on your left toolbar. From there you may right click and “Pin”. This will allow you to access your Calls conveniently right in the platform where you're accessing Chat, Calendar and Meetings, Files and Tasks.

Making the Call

Your organization will likely already have internal contacts included on your contacts list based on your Outlook contacts, but you can also add them manually by phone or email. When you're ready to make a dial, you can also simply enter phone numbers into Teams without creating a contact.

Quick Tips from Microsoft:

- “**Speed dial** allows you to quickly reference and call back any recent contacts or contacts that you have added to speed dial.
- Call groups organize your teammates to help you find or reach certain people based on a role or team.
- To add someone to speed dial or any call group, select **More actions** next to the group name and choose **Add a contact to this group**.
- You can quickly call any contact back by selecting **Call** below their name.”*

Available Settings

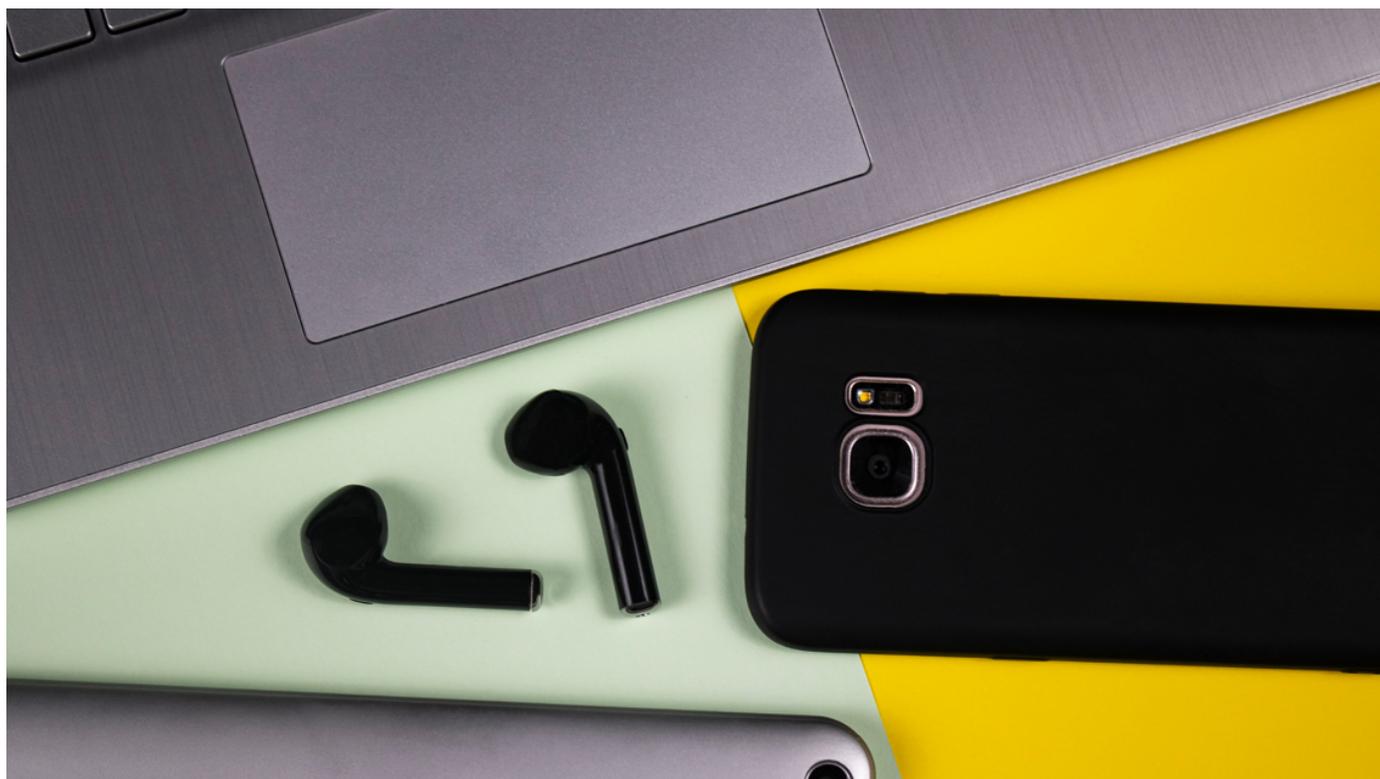
Calls in Microsoft Teams provides the ability to choose if you want calls to ring or be forwarded. You may also set it up so unanswered calls go to voicemail or do nothing. In settings is where you'll configure and record your voicemail. This is where you can choose a ringtone and turn on TTY mode if applicable.

Are you ready to replace your phone system with Microsoft Teams?

In becoming a modern workplace, using Microsoft Teams as a Phone System is one way to maximize productivity and efficiency in your day. Teams is device agnostic, meaning wherever you are you can take the call whether it's on your mobile device or computer – it's all there in one application.

Get MS Teams working for you! Schedule your [FREE Modern Workplace Review](#) now

*Source: [View or add contacts in Teams](#)





- CHAPTER 6 -

Using Microsoft Teams for Business Intelligence

Using Microsoft Teams for Business Intelligence

Is your organization data-driven? Are the measurements you need to effectively evaluate your business' success metrics readily available to you? Are they customizable? Easily accessible?

You will be able to answer these questions with a resounding "yes!" with Power BI's integration with Microsoft Teams. Integrate your favorite dashboards and analytics tools into one platform using this powerful feature set. View your measurables on the same platform that you and your team are already using daily to chat, create and hold meetings, collaborate remotely, access critical files and information as well as using as a full-service phone system.

According to The Total Economic Impact of Microsoft Teams, a Forrester study*, Microsoft Teams saves on average 4 hours a week per computer user enhancing organizational productivity across the board and using Teams for Business Intelligence metrics will help to get you there. Let's dive in to how Using Power BI with Microsoft Teams works.

Using Power BI in Microsoft Teams for Business Intelligence

The idea of Business Intelligence for you, as a business leader, means that you will not have to use multiple different sources, software packages or have the need to utilize IT in order to set up custom dashboards and analytics reports to help track your performance goals. As an executive, you can easily slice and select your own data fields to view and create your own custom reports then share them with your colleagues via Teams.

What is Power BI?

From Microsoft*, "Power BI is a collection of software services, apps, and connectors that work together to turn your unrelated sources of data into coherent, visually immersive, and interactive insights. Your data may be an Excel spreadsheet, or a collection of cloud-based and on-premises hybrid data warehouses.

Power BI lets you easily connect to your data sources, visualize and discover what's important, and share that with anyone or everyone you want.”

Getting Started with Power BI

In Microsoft Teams, go to apps and type in Power BI to add it to your view. A license is required to use Power BI, but there is a 60-day trial available. At the top of the app, there are tabs for the home page, datasets, create, learn and about.

Under Create, you have a few choices to how you would like to add data. You may paste or manually enter data, pick a published dataset or analyze your Teams data. Using the manually entered data allows you to create your own reports or datasets right in Microsoft Teams.

Once you have created or pulled in your datasets, they will be accessed under the tab labeled **Datasets**. You may also choose to select certain datasets as your **Favorites**. These can be accessed on the left-hand navigation. There too, you can find a tab called **Goals** where you can use scorecards to track and measure progress toward related goals and subgoals and add your scorecards to track each Team and Department.

Workspaces

Workspaces are areas where you can collaborate with your team to create dashboards and reports. It is where you can save reports, dashboards, datasets and workbooks and other users can access.

We can help

The versatility of Microsoft Teams and the ability to have all your collaboration tools in one platform is unmatched, and with Power BI, you'll be able to pull in multiple sources of data into one platform in a familiar view where you're already collaborating in your Teams in order to evaluate metrics and make decisions.

It's never been easier to connect and collaborate than it is with Microsoft Teams. Let us help get you to a Modern Workplace with Microsoft Teams and the Power BI integration.

[Get MS Teams working for you! Schedule your FREE Modern Workplace Review now](#)

Source: [The Total Economic Impact of Microsoft Teams](#) (Forrester)



Schedule a Consultation

Learn more about the benefits our proactive approach would have in your business.

[Schedule a Consultation](#)