



Improve how you work from home or the office with Microsoft Teams

A step by step guide



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Unless you've been living on another planet, you've probably noticed that things have been a little... strange, lately.

Covid has changed the way we do pretty much everything. And it looks as though it will be some time before things go back to the way they were. If at all.

On the up side, you may have discovered that your business can be more flexible with the way your people work, than you'd imagined. With many people working from home to some extent, remote working has become a viable, permanent option for many organisations.

And if your people are getting on well with it, what's not to like?

People can work in a way they're comfortable with; you could make a big financial saving on office space and travel; and you're literally giving your people the gift of time, because they no longer have to commute.

But the important thing to always keep in mind is how you're going to continue to collaborate as a team.

- How will meetings look if remote working becomes a permanent fixture?
- How will documents be shared, added to, and refined?
- How will you keep motivation and morale up if your formerly "all in one place" team don't see each other from one week to the next?

It's likely that you've already looked at some of these potential issues during lockdown. Have you found the best solution for your people?

If not, it's time you looked really closely at Microsoft Teams.

Microsoft Teams has it all when it comes to uniting your business and helping you to get the job done. In this guide, we're going to look at it, step by step.

1. First things first

Download Teams. If you have Microsoft 365, then you already have it (you'll just need to download it). If not, there's a free plan if you'd like to suss it all out before making a commitment. And a month's free trial for businesses.

Log in to OneDrive and you'll be able to access all of your documents.

Get the Teams app on your devices and they'll all sync, allowing you access to Teams wherever you are.

2. Create your team

Once you've done that, it's time to create your team. A team could be your business - let's call it Bob's Brewery.

3. Now create your channels

Your team would then be made up of channels. Bob's Brewery, for example, might consist of a channel for product development, one for marketing, one for sales, another for design, etc.

Or it could be made up of different projects - each for a different product in the range, for example. All of the documents, conversations, apps and meetings that relate to a channel would be held within that channel. But everyone in the Bob's Brewery team could access it.

For a larger business, or one where there is a lot of confidentiality to consider, you might want to set up multiple teams to limit access to your channels.

Channels are where the work gets done. Here you can have conversations which can be seen by the whole team, or chats which are private. These conversations and chats can be text, audio, or video and can be held between anyone within the team. You can share files and documents within each channel, and others can add to them, or edit them.


Teams is designed to make life easy for everyone. If someone needs a file and can't find it? Just attach it to the message like you would with an email. It will then appear in the files tab so that everyone else can access it too.

If you're offline, you're still able to access everything that was available the last time you logged on. It makes it easy to quickly look over a document, or fact-check something in a hurry.



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Microsoft Teams



Welcome to Microsoft Teams!
A happier place for teams to work together.

Sign-in address

[Sign in](#)

Get help with signing in

[Sign up for free](#)

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4. Need a meeting?

When you're not working a couple of desks away from someone, asking a question or seeking advice isn't always a quick task. With Teams you can use the Meet Now function.

Go to your calendar and select Meet Now.

Give your meeting a title, decide if you want it to be a video meeting or not, and select your audio source. Then when you're ready, select Join Now.

Now you can invite people to join you using their name or number. When you select them they'll be called straightaway.

Alternatively, you can create a meeting link and send it to your attendees. Just select 'copy join info' and paste it into a message.

You can also set up a meeting through your selected channel, clicking on the posts tab, and following the above steps.

5. Save time

If your team has loads of channels, but you find yourself using some more than others, you can pin the ones you use most to the top for easy access. No more scrolling through a list to get to where you want to be.

You can use keyboard shortcuts if you don't use a mouse. Hit Ctrl+ to see what's available.

If you're working on a project, you probably use the same files, websites, and tools time and time again. So set up custom tabs to make it even easier to access them.

Click the + next to the tabs at the top of your chat or channel, add the website, file, or app that you need, and it will be immediately visible to everyone on the team.

There are some apps that will allow you to insert content directly into messages. And that will answer questions for you so you don't have to waste time unnecessarily. Plus apps that will follow your commands. All hail the time-saving bots!

6. Get personal

Teams knows that people like things a certain way... but that certain way is unique to each individual. That's why you can personalise your view.

Apps that help you with this appear on the left hand side of Teams. Pin your favourite apps by right-clicking them and clicking the pin icon.

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Messaging in text a lot? Add some personality, or drive your point home with a GIF. Just choose the GIF button underneath where you type your message, find the one you want to use, then hit send when you're ready.

7. Stay updated

With any project, it's important to keep up-to-date with new information and developments. This can be slower if your team is working remotely, but it doesn't have to be. Your notifications will alert you in real-time to the goings-on within your channels – if you've been mentioned, if you have a reply, and lots more.

You can edit settings to ensure that notifications go to the relevant people within a channel. Just select notifications and choose your preferences.

There is also an activity section so you can see at a glance what has happened recently. Look for the bell icon at the top left of teams.

Get the app and keep updated on the go. It's available on any iOS or Android device and gives you the same features as the desktop version.

Microsoft Teams

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Still need help?



There's a massive help section if you're ever unsure, and even a training tab full of how-to videos and guides to get you up to speed. Find it in the left corner of Teams.

Alternatively, we're always on hand should you need any guidance.

Really, the new generation of working from home should be full of positives for your business. With the right tools, there should be little disruption to your business and projects. And communicating can become more precise and fruitful.

Give Teams a go and see how it could work for your business. As ever, contact us for any help and advice along the way - on this, or any other aspect of your business's IT and data security



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