



# MICROSOFT® TEAMS®

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Setup Guide

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# FOCUS OF THIS GUIDE

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## WHAT YOU CAN EXPECT FROM THIS GUIDE

Our focus with this Guide is to show you how to use Microsoft® Teams® for your GTD® workflow. You will learn how to productively use the key features and functions in Teams, including integrating other Microsoft 365 applications and using Teams to manage your individual or shared projects and reference.

We are aware that there are many features and ways to configure Microsoft Teams. This is not a technical manual, nor will it cover all the instructions for how to use Teams. We'll leave that to the folks at Microsoft to share with you through their excellent support material (e.g., we will not be covering the meeting aspects of Teams, Chat, Calls, or File Sharing).

This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Teams. But in this Guide, you will learn fundamental GTD best practices that can extend to your other applications as well.

We will share how to bring other Microsoft applications into Teams, such as Outlook, To Do, and Planner to optimize your workflow. Although you can integrate non-Microsoft apps into Teams through the App Marketplace, we will only be focusing on the native Microsoft solutions.

Teams can't serve (yet) as your primary system for email, calendar, and lists, but it can be a powerful portal if you are using Microsoft Outlook. We'll walk you through setting up an app in Teams to manage your GTD lists, given it works for everyone on any platform, and will sync to Teams. If you've already set up your lists using one of our other Setup Guides, this will be a good refresher on the recommended lists and best practices. If you're new to GTD, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity in Teams.

Whatever configuration you choose in tools like Teams, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

Don't worry about using every available feature in Teams. There may be more offered than you will ever need. Focus on what makes a difference for you. OK...let's get started!

***Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.***

# UNDERSTANDING THE GTD® BEST PRACTICES

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To get the most out of Teams as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

## WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done,” the groundbreaking work-life management system and bestselling book<sup>1</sup> by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

## GTD'S FIVE STEPS OF MASTERING WORKFLOW

- CAPTURE** Collect anything and everything that's grabbing your attention.
- CLARIFY** Define actionable things into concrete next steps and successful outcomes.
- ORGANIZE** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it.
- REFLECT** Step back to review and update your system regularly.
- ENGAGE** Make trusted choices about what to do in any given moment.

## THREE STAGES TO INTEGRATING GTD

- 1. UNDERSTANDING** You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've captured by asking the key clarifying questions, about what something is, and what you want to do about it.
- 2. IMPLEMENTATION** You have installed at least the basic gear to support a GTD system, including ubiquitous capture tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.
- 3. BEHAVIOR CHANGE** The five steps of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on.”

This Guide will leap forward to the Implementation stage, by configuring Outlook and Teams as organizing tools for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

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<sup>1</sup>*Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback.

# UNDERSTANDING MICROSOFT<sup>®</sup> TEAMS<sup>®</sup>

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## USING TEAMS IN YOUR GTD WORKFLOW

### WHAT IS TEAMS?

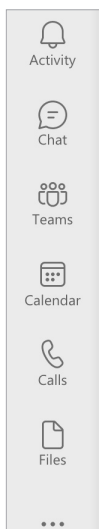
Teams is a communication and collaboration tool. Most people use Teams with their intact team or organization, although it is possible to use Teams individually for your personal workflow. In either case, you will need the business/pro version of Microsoft 365 to have full access to the features Teams offers. If you are on the personal/home version of Microsoft 365, you will typically not have access to the team collaboration functionality in shared spaces or integration of other applications—you will only have access to meetings, chat, and Outlook calendar sync.

Teams is a unique tool in that it's both a portal and destination. As a portal, it serves as a dashboard to other applications you use in your day-to-day workflow, such as Outlook, OneNote, and SharePoint. As a destination, it stores information for you in team spaces, for your own use or to collaborate with others.

### WHAT TEAMS DOESN'T DO

Teams can't serve (yet) as your primary system for email, calendar, and lists. We are assuming you are still managing those in Outlook for Windows, Mac, or Web, or using another tool. Teams syncs with those apps, but does not fully host those within Teams, such that you don't need those other apps. At some point that might change, as Teams evolves, but at this point you will still be doing some activities like email in another application.

### KEY FEATURES AND FUNCTIONS IN TEAMS



To get started, let's review the key features and functions in Teams. Your left navigation (also sometimes called the left rail) is the primary navigation tool for Teams.

## TASKS

### MANAGING TASKS IN TEAMS

As more of your work flows through Teams, having quick access to your Projects and Next Actions lists will be essential for your productivity. This can be done through the app that integrates with Teams called Tasks by Planner and To Do. This app combines your tasks captured in Microsoft Outlook Tasks/To Do and Microsoft Planner.

We recommend using Outlook Tasks/To Do app for your project and action list management. If you have not already set this up using our [GTD & Outlook Setup Guide](#), we walk you through how to do that in the next section of this Guide. If you'd like to set that up now, skip ahead to that section and then come back here to continue learning about how it will integrate with Teams.

Tasks by Planner and To Do is the application that integrates with Teams within your team Channels. Tasks tracked there can be assigned to you or others on your team. You can also use Planner as a stand-alone application through Microsoft 365. It is possible to use Planner for your personal list management, instead of Outlook Tasks/To Do, but in our experience, it won't be as effective (yet) at managing your key GTD lists as Outlook Tasks/To Do will be for the flexibility and features built into Outlook Tasks and To Do, such as turning emails into Tasks. Outlook Tasks/To Do is a more intuitive app for managing your key GTD lists.

The good news is that your Planner Tasks will also appear inside Outlook for Web and Mac and Outlook To Do on mobile, through the list called Assigned to you. They will not appear in Outlook for Windows desktop or the old version of Outlook for Mac Tasks.

In some Microsoft applications, items will be in Outlook Tasks and in others it will be called Microsoft To Do. Tasks/To Dos will sync across all platforms, but the features and functionality will be different. Not all will allow you to also see Microsoft Planner tasks as well as Outlook Tasks/To Dos.

#### How tasks are treated across Microsoft apps:

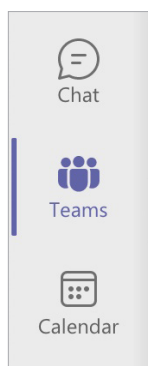
Application	Tasks Application	Can View both Outlook and Planner Tasks
Outlook for Windows	Outlook Tasks	No
Outlook for Mac – old version	Outlook Tasks	No
Outlook for Mac – new version	Microsoft To Do	Yes
Outlook for Web	Microsoft To Do	Yes
Microsoft To Do browser	Microsoft To Do	Yes
Microsoft To Do mobile	Microsoft To Do	Yes
Tasks by Planner and To Do in Teams	Tasks by Planner and To Do in Teams	Yes



## PROJECTS

### MANAGING PROJECTS IN TEAMS

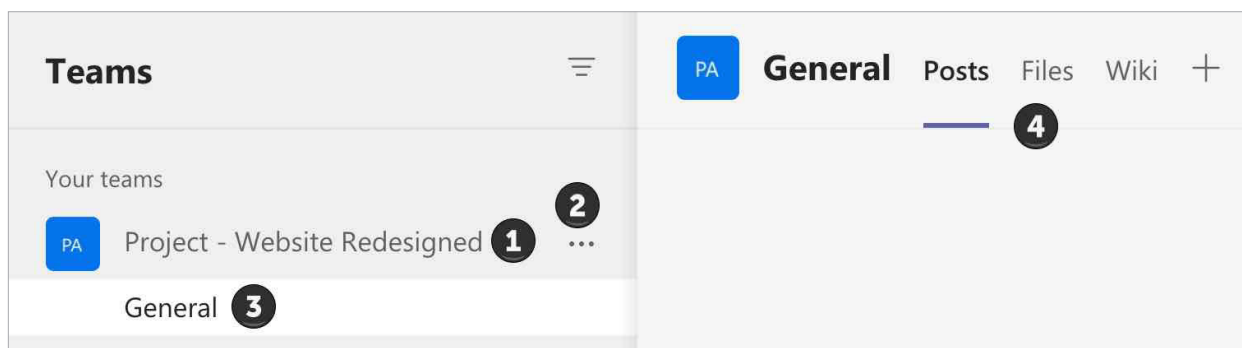
Collaborating on projects in Teams is one of the most powerful aspects of the app. This is done through the teams in Microsoft Teams (yes, a mouthful!). You'll see your teams spaces (sometimes called teams rooms in Microsoft support) as an option in the left navigation.



Think of these as shared spaces to capture reference, have discussions, and capture team actions on topics, projects, and areas of focus. In this Guide, we'll demonstrate how to use them for shared projects.

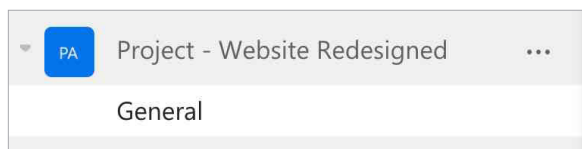
#### Each team has four key areas:

1. **Team name** – The overall space where you will be collaborating.
2. **Team settings** – Settings for your team, including adding members and seeing analytics.
3. **Channels** – Rooms within your team for managing information. The default will always be General, which cannot be deleted or renamed. You can add additional Channels.
4. **Tabs** – Think of these as different types of workflow you will be doing, such as discussions, managing files, capturing notes, and integrating other applications.

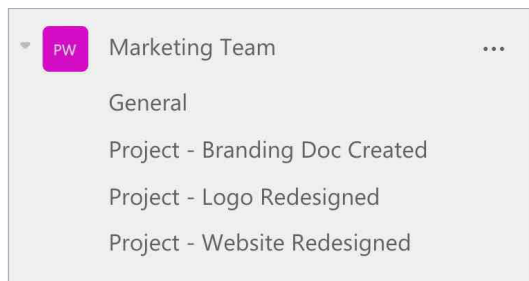


## Two options for managing projects in Teams:

1. Create a separate team for each major project



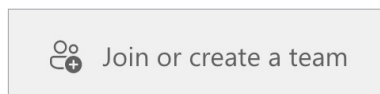
2. Create a team for all projects by Area of Focus and create separate Channels for each project



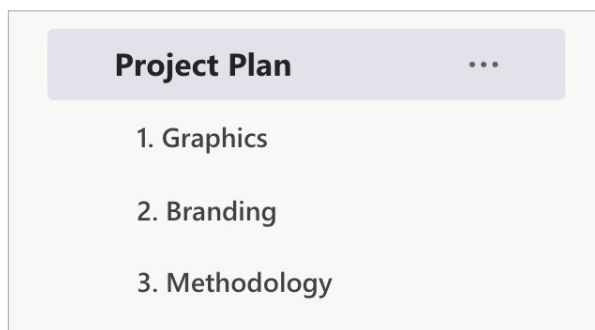
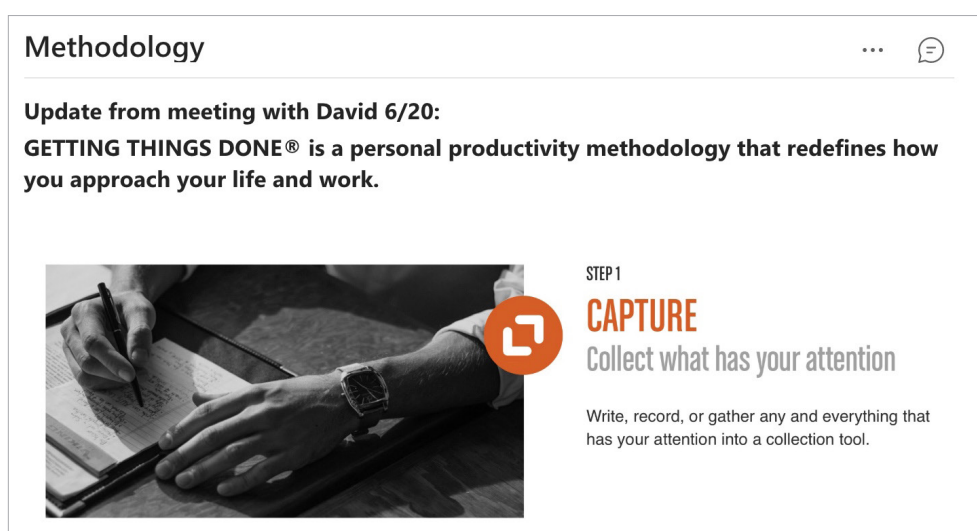
Your IT department determines if you are able to create a new team on your own or if it is done through them. Each company is unique on this governance. If you are able to create a team yourself, follow the directions below. If it needs to be done through your IT department, read through the directions to understand the functionality and options.

## Here are the steps to follow for creating a new team:

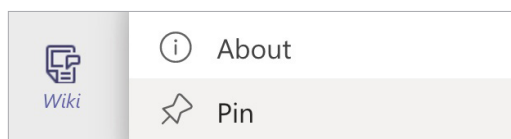
1. Click Join or create a team.



2. Click Create a team.
3. Choose from scratch or from a team or group. We suggest, if this is your first time creating a team, to select from scratch.
4. Choose Private or Public. We suggest Private if you are not sure or are considering this just a practice site for now.
5. Give your team a name and click Create.
6. Add members to your team if you are ready to do that, or skip if you are not sure or considering this just a practice site for now. Owners will have full access to the team settings, including deleting the team. Members are more like participants in a team.

**Example of Sections:****Example of Content with a Section:****To see all Wikis across all of your Channels you can open and pin the Wiki app to your left navigation of Teams:**

1. Click the ellipsis in the left navigation panel.
2. Search for Wiki as an app or select the icon if it appears in your list of suggestions.
3. Right-click on the Wiki icon and choose Pin.



# CONCLUSION

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## FINAL THOUGHTS AND NEXT STEPS

### ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this Guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD system up and running.

### FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

[gettingthingsdone.com](https://gettingthingsdone.com)

[gtdconnect.com](https://gtdconnect.com)