

Microsoft Teams Guide

This guide will walk you through the specific applications that will be available to use in Microsoft Teams. If you have not done so already, please make sure that you have reviewed the Microsoft Teams Account Setup and Change Notification Settings instructions prior to reviewing this guide. These materials can be found at:

<https://generalconvention.org/ms-teams-training>

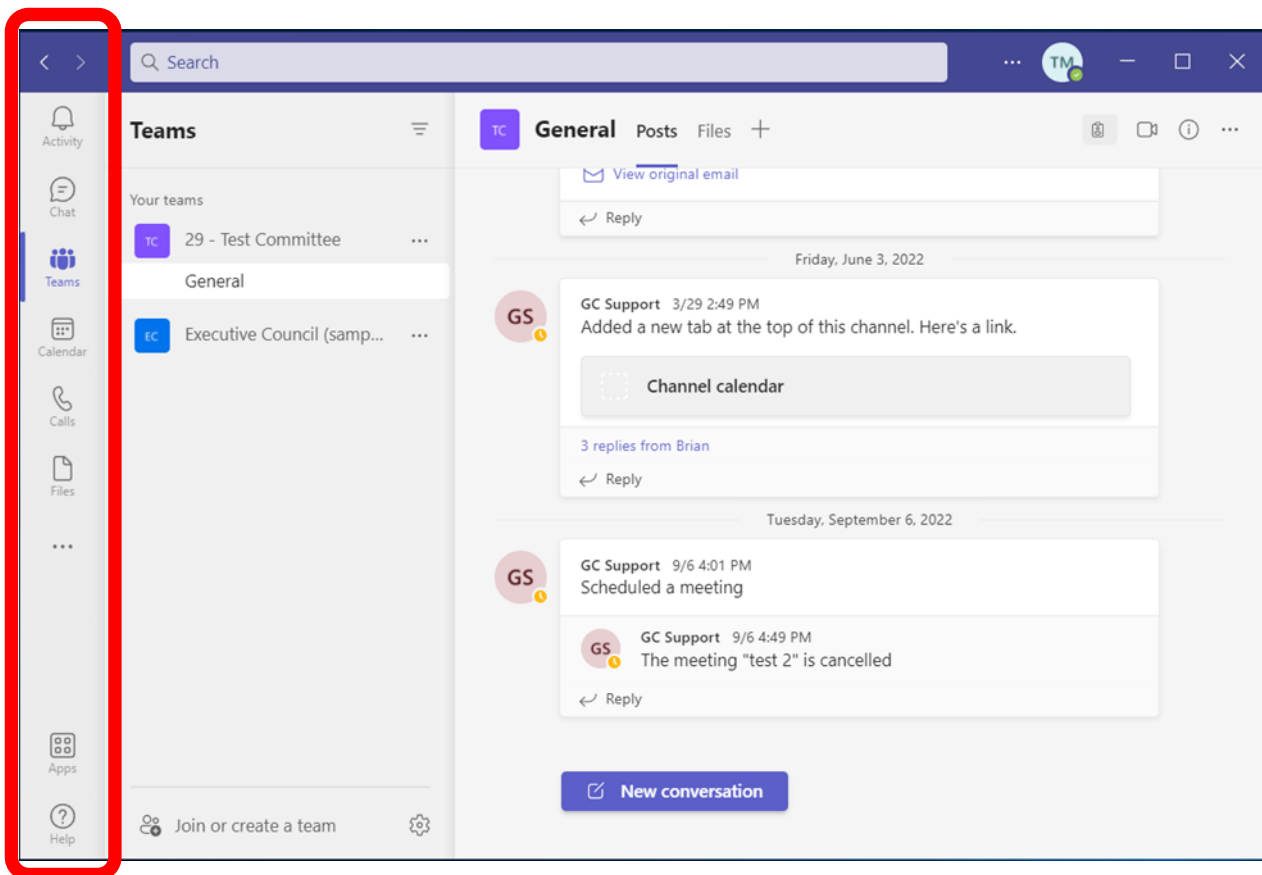
We ask that all users review these materials. If, after reviewing these materials, you experience any challenges accessing Teams or have any questions, please reach out to us at gc.support@episcopalchurch.org.

Applications

Once logged into Teams, on the left sidebar, you will see a series of apps listed. Note that the only apps that will be relevant to your work will be the following. We will be exploring these apps in detail on the following pages.

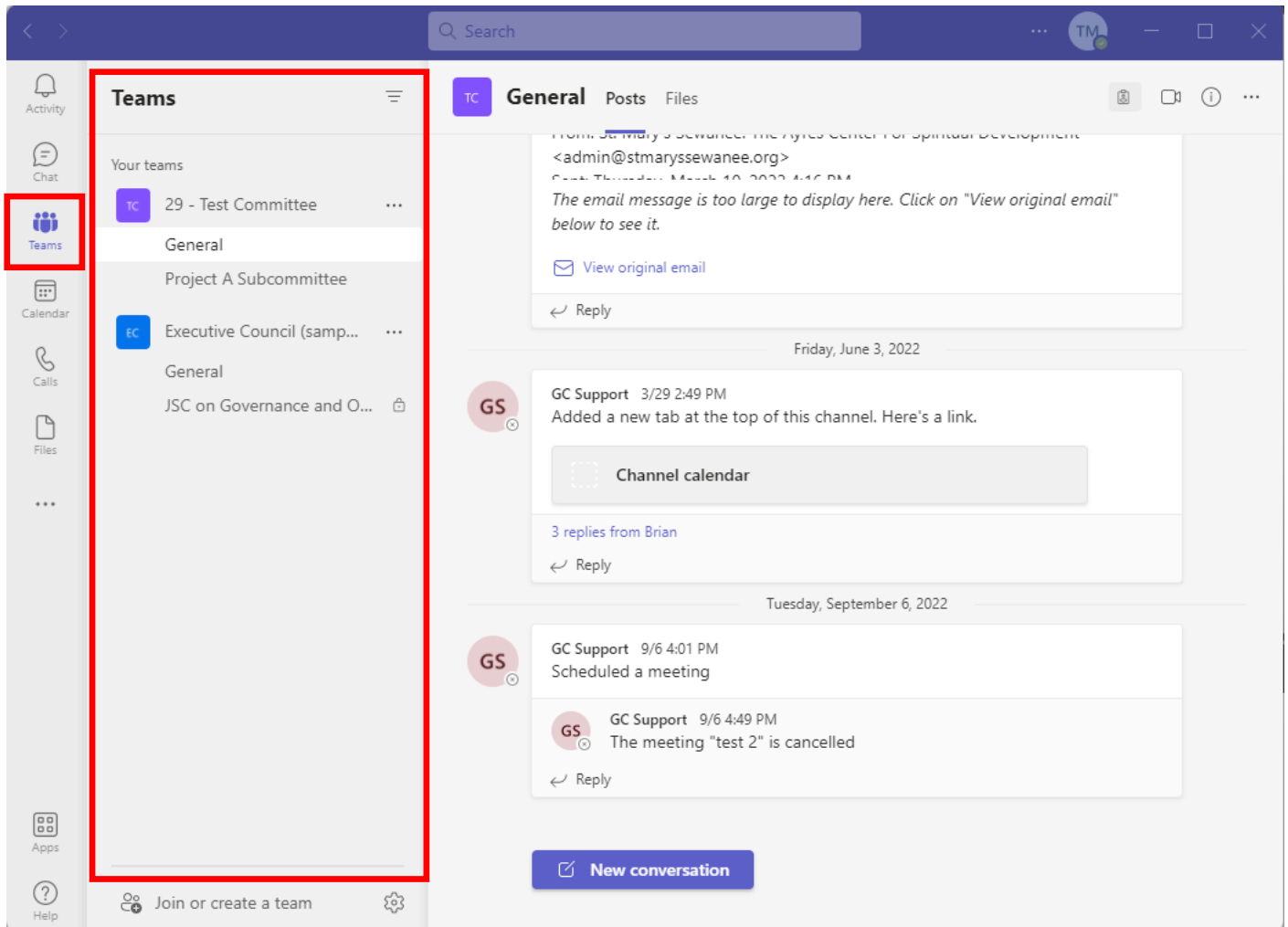
- Teams
- Chat
- Activity
- Files

Note that there are more apps and features available, but users are only expected to be familiar with and use the apps specifically listed above.

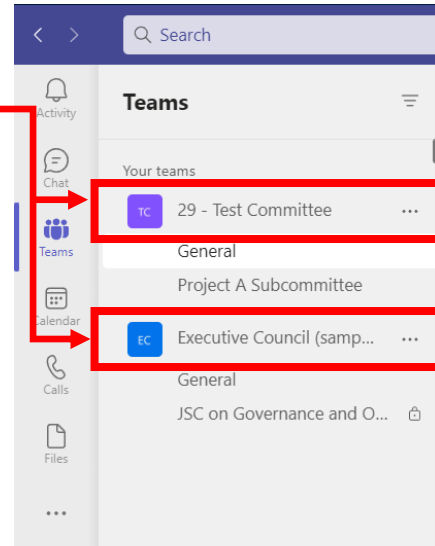


Teams

Overview: The Teams app is where you will be spending the vast majority of your time and the app that loads when you login. In the left panel, you will see a list of any Teams that you are a member of.



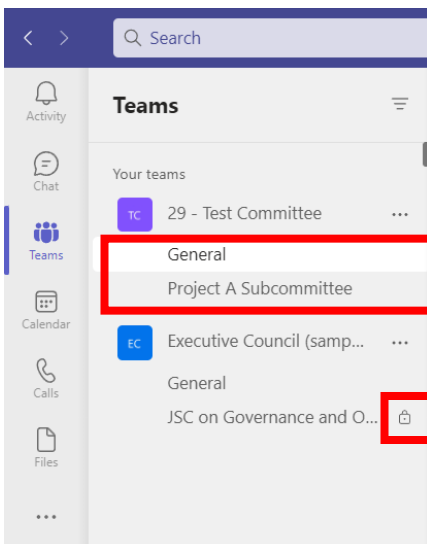
Teams are created for each Interim Body. In this example there are two Teams; “29 – Test Committee” and “Executive Council (sample)”



Teams are composed of Channels, which is where all the activity of that Team takes place.

Channels are nested below the Team name. If you don't see any channels, there may be a dropdown arrow next to the Team name to expand so you can see the list of channels.

Each Team will have a “General” channel. All members of that Team will be included in this channel. For most groups this is where the plenary activity for that Interim Body will take place. Additional channels can be created as needed, such as if your group wants to organize subcommittees. You can request channels for each subcommittee.

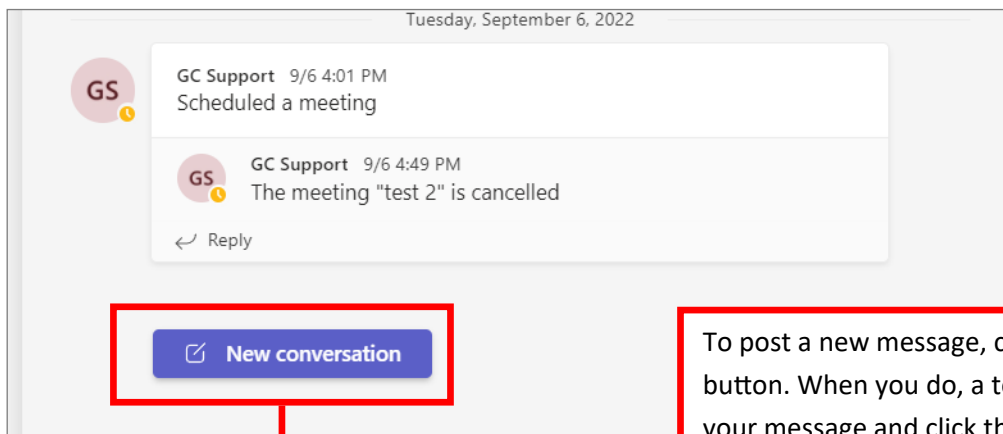
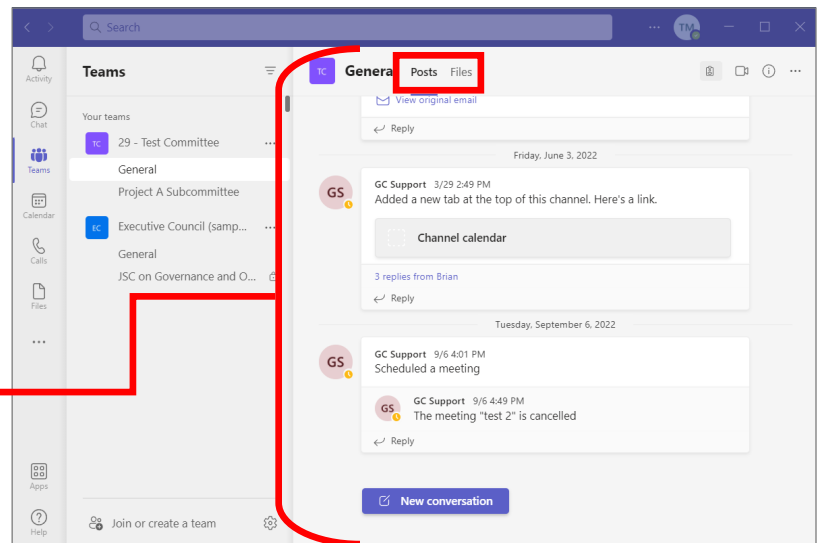


Channels can either be public or private. Public means that anyone on the Team can view the activity in that channel. For most groups we recommend keeping these public. That way you can organize the conversation and files for subcommittee work. However, other members of your body can still see what's going on and reference files, even if they aren't directly involved in the conversation.

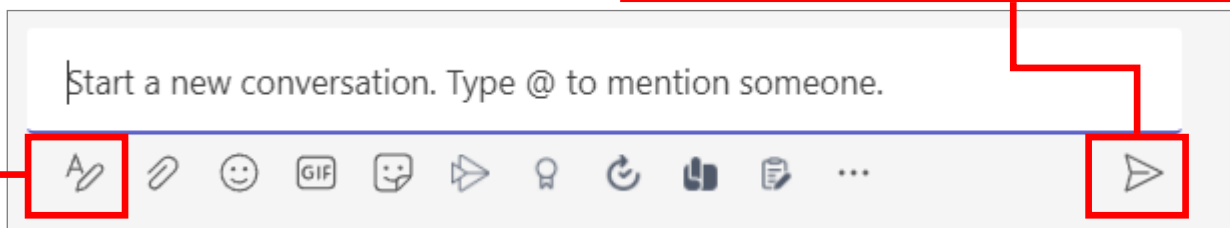
A private channel is a channel that only specified members can access. If you are not a member of that private channel, you can not access it. If you see a lock symbol next to the channel name, it indicates that is a private channel.

IMPORTANT: Once a channel is created you cannot change its visibility. So a public channel will always be public and a private channel will always be private.

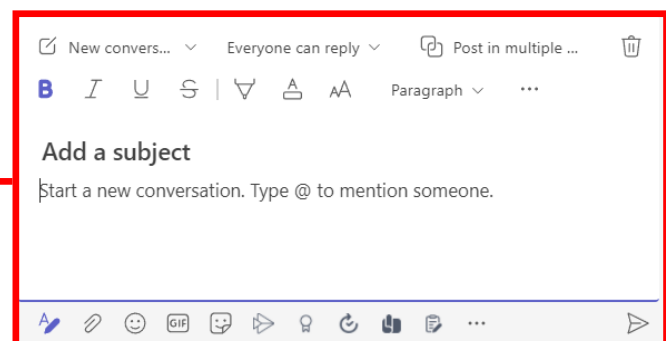
The content from each channel can be seen in the right panel of the Teams application. At the top of this panel you will see two tabs; "Posts" and "Files". Posts is the message board and Files is where all the files for that channel are stored.

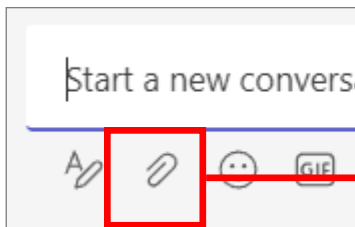


To post a new message, click on the "New conversation" button. When you do, a text box will appear. Simply type your message and click the submit button (or press 'Enter' on your keyboard) to post your message.



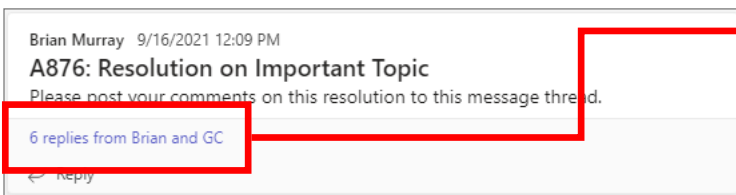
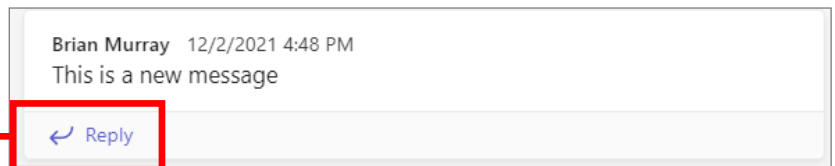
If you would like to utilize more formatting options, click the formatting tool. This will expand the text box and provide additional formatting options. Note that if you hit Enter in this expanded text box it will not post the message, but create a new paragraph. This is helpful for longer messages.



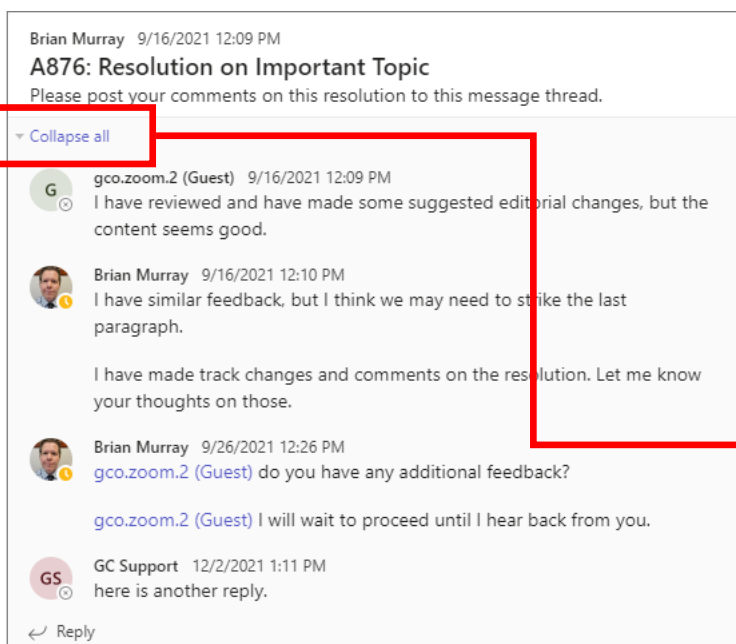


You may also attach a document to a message. In the basic formatting tools, there is a paperclip icon. Click on that button and search your computer for a file that you want to attach to a message. When sharing files with the group, we strongly encourage attaching the document to a message so members know that a document has been uploaded and there is context about what that new document is.

In addition to creating a new message, You may reply to a message that was already posted. To do so, click on the “Reply” button under a message.



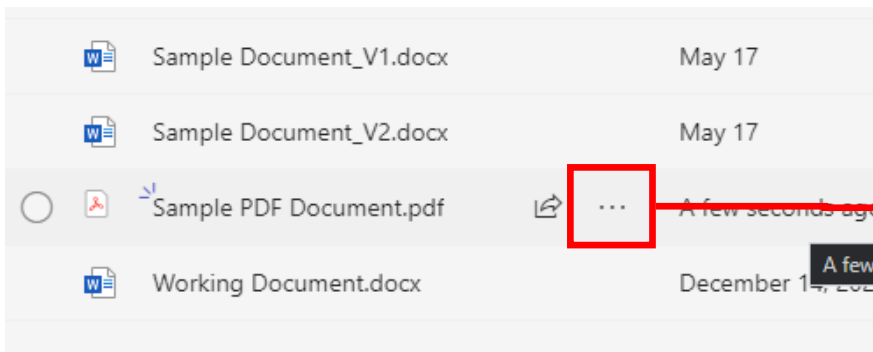
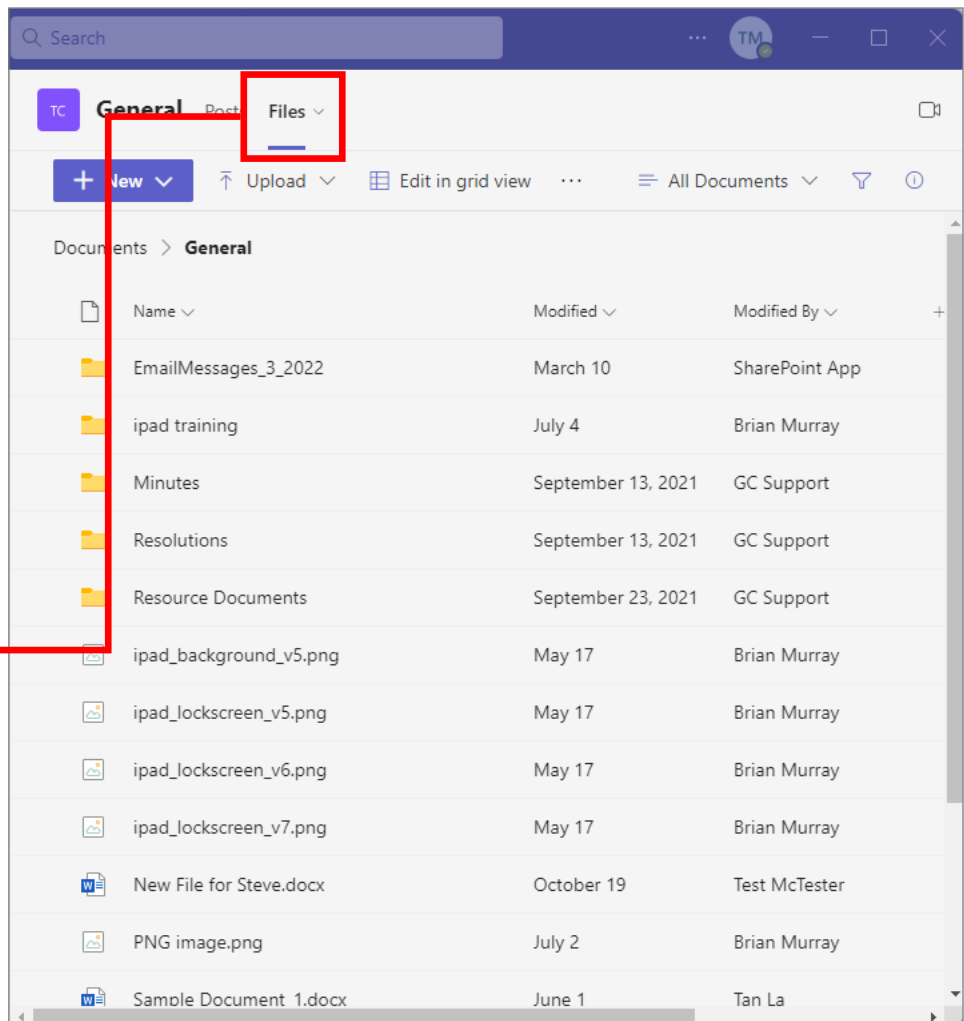
When a message has replies, it creates a thread. You may see a link under a message with a total number of replies. To see all replies for that message, click on this link and it will display all responses.



Similarly, if you wish to collapse a thread that has been expanded, you can click the “Collapse all” button.

We will now review the “Files” tab. This can be accessed by clicking on this tab at the top of the channel. This tab contains all the files within that channel, which include the files that were uploaded directly to the files tab and any documents that were attached to messages. By default, files that are attached to messages will be found in the top-level file folder. We encourage you to upload documents by attaching them to a message. Note that you can always come back in and move them within the Files tab later, if needed.

Initially, your group will not have any folders in the Files tab. If you deem it necessary to create folders/sub-folders, we suggest that this be agreed upon and assigned to a single individual (a Secretary would be a good candidate) to manage. Note that all changes that you make in this tab will change it for all members. This is a shared library of documents.

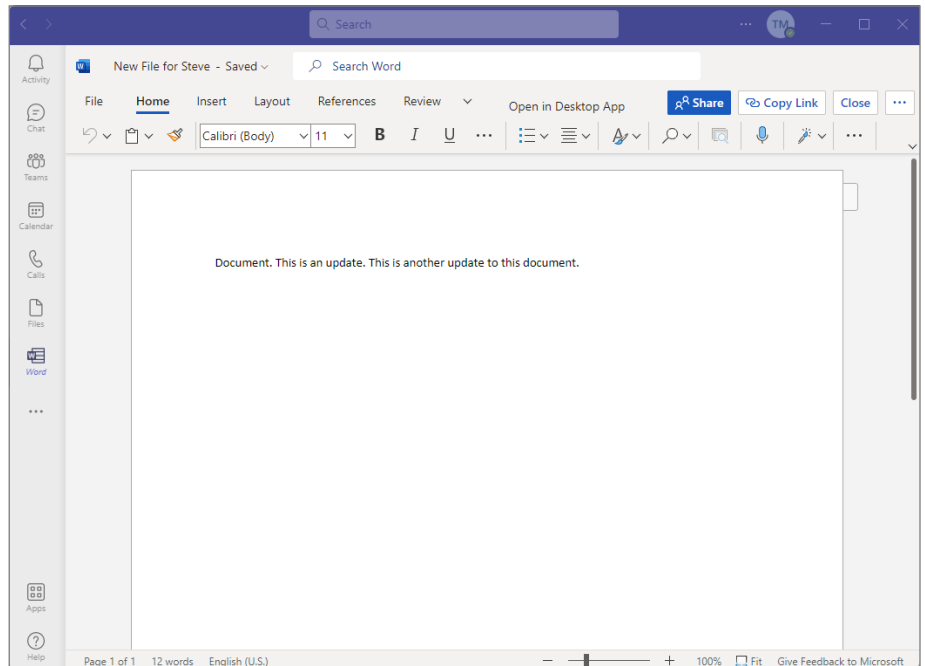


To open a document within Teams, just click on the document. If you receive an error trying to open a PDF, just hover over the document, an ellipses (...) will appear. Click on that and select “Preview”.

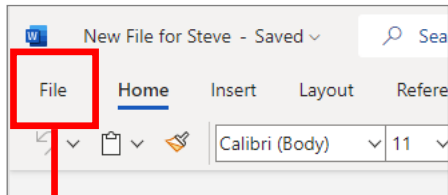
If you have the desktop version of Microsoft Office installed, you may open Word, Excel and PowerPoint documents directly in the desktop app by clicking on the ellipses and selecting Open -> Open in app. Otherwise, it will open directly within Teams.

IMPORTANT: When accessing a Word, Excel or PowerPoint document within Teams, any changes that are made to this document will be automatically saved (unless the file was uploaded as read-only). So if you make any changes, it will change the document for everyone (this also occurs if you open the file on the desktop application).

We recommend drafting your document on your own device before uploading. Teams is great for making tweaks and minor edits directly in the document, but we wouldn't suggest drafting documents from scratch.

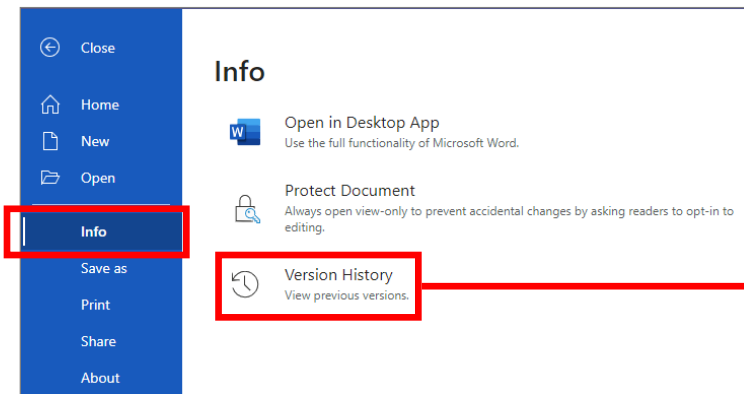


When in a Word document, if you need to make edits, you can just start editing the document. Those changes will be saved to the document. There is an editing toolbar at the top, which has most of the basic features you would find in the desktop application and should suffice for most use cases. However, the desktop application does have some more features available for editing.



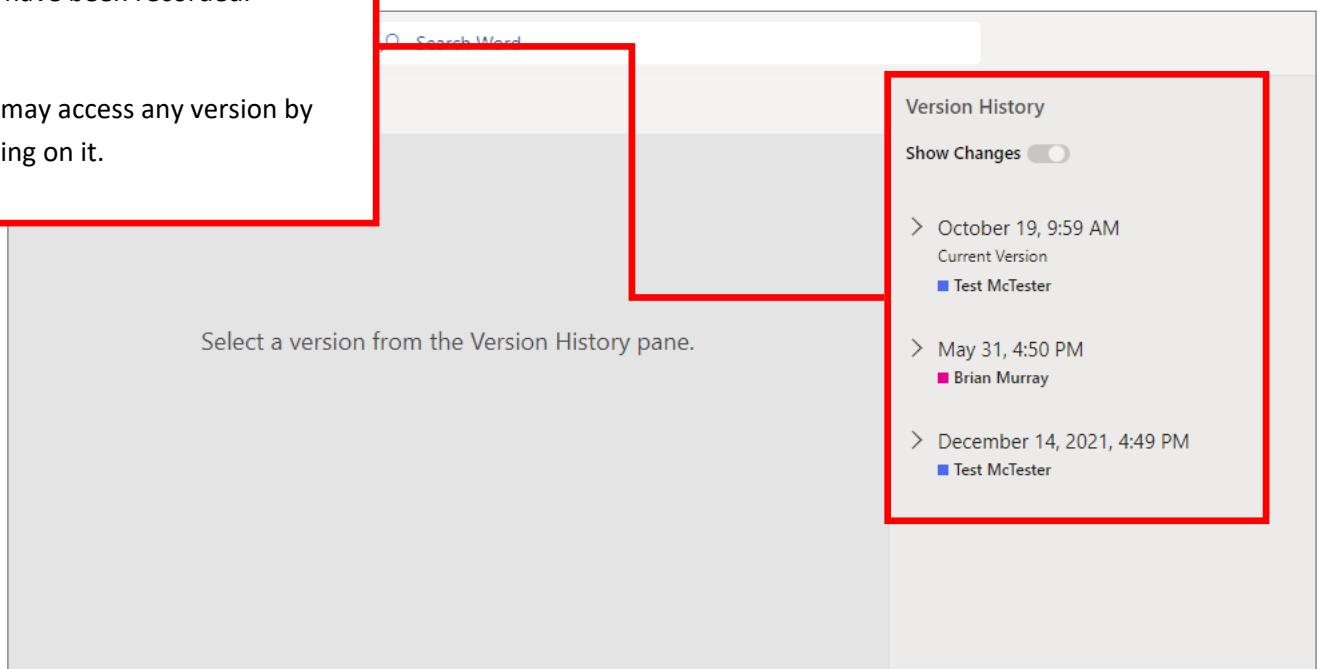
Word not only saves changes automatically to documents within Teams, but it also keeps a record of all changes to that document over time. So if someone accidentally changes a document, you can effectively “undo” that change. This is also a helpful tool to make edits within a single document instead of uploading multiple versions of the same document.

To access these changes, click on “File” in the toolbar. Then Click on “Info” -> “Version History”.



This will open up a side panel with all versions of the document that have been recorded.

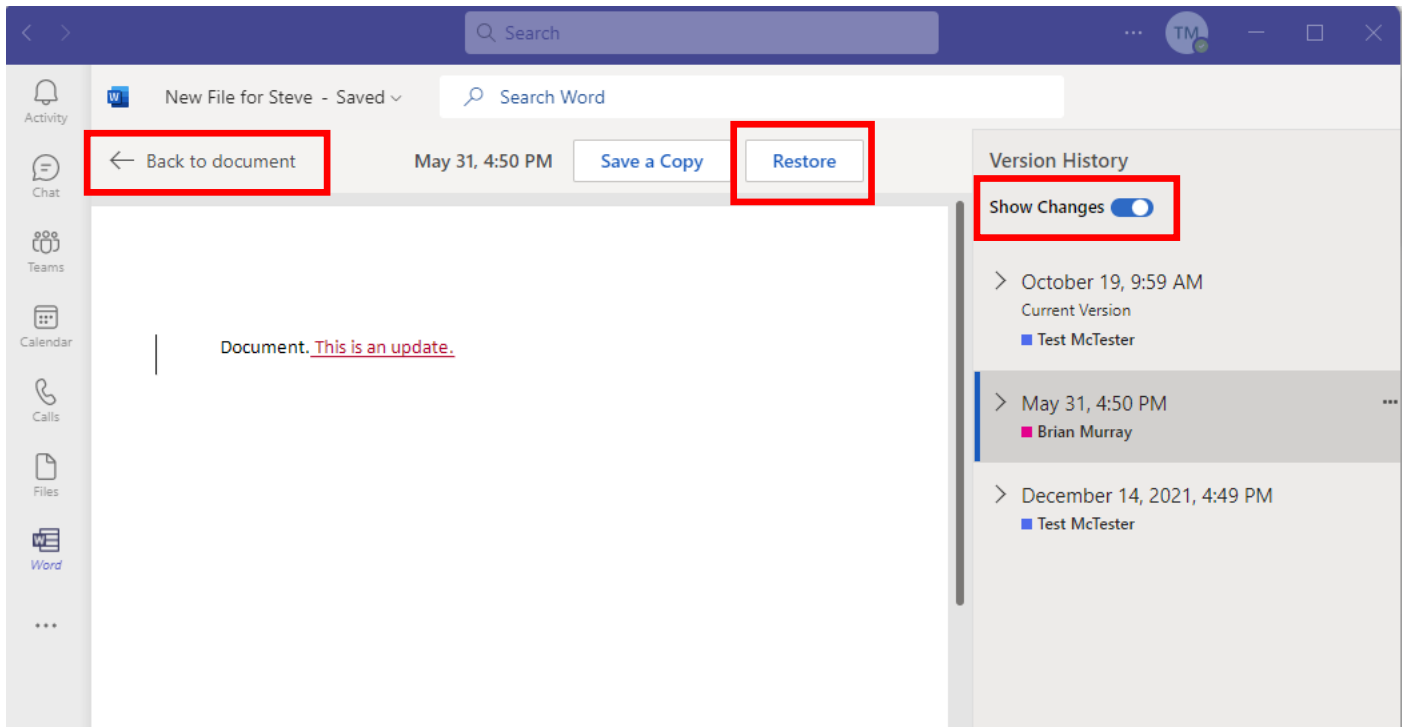
You may access any version by clicking on it.



When you click on a previous version, it will show you what that version looked like and will highlight any changes between that version and the previous version. There is a toggle button to turn off “Show Changes” as well.

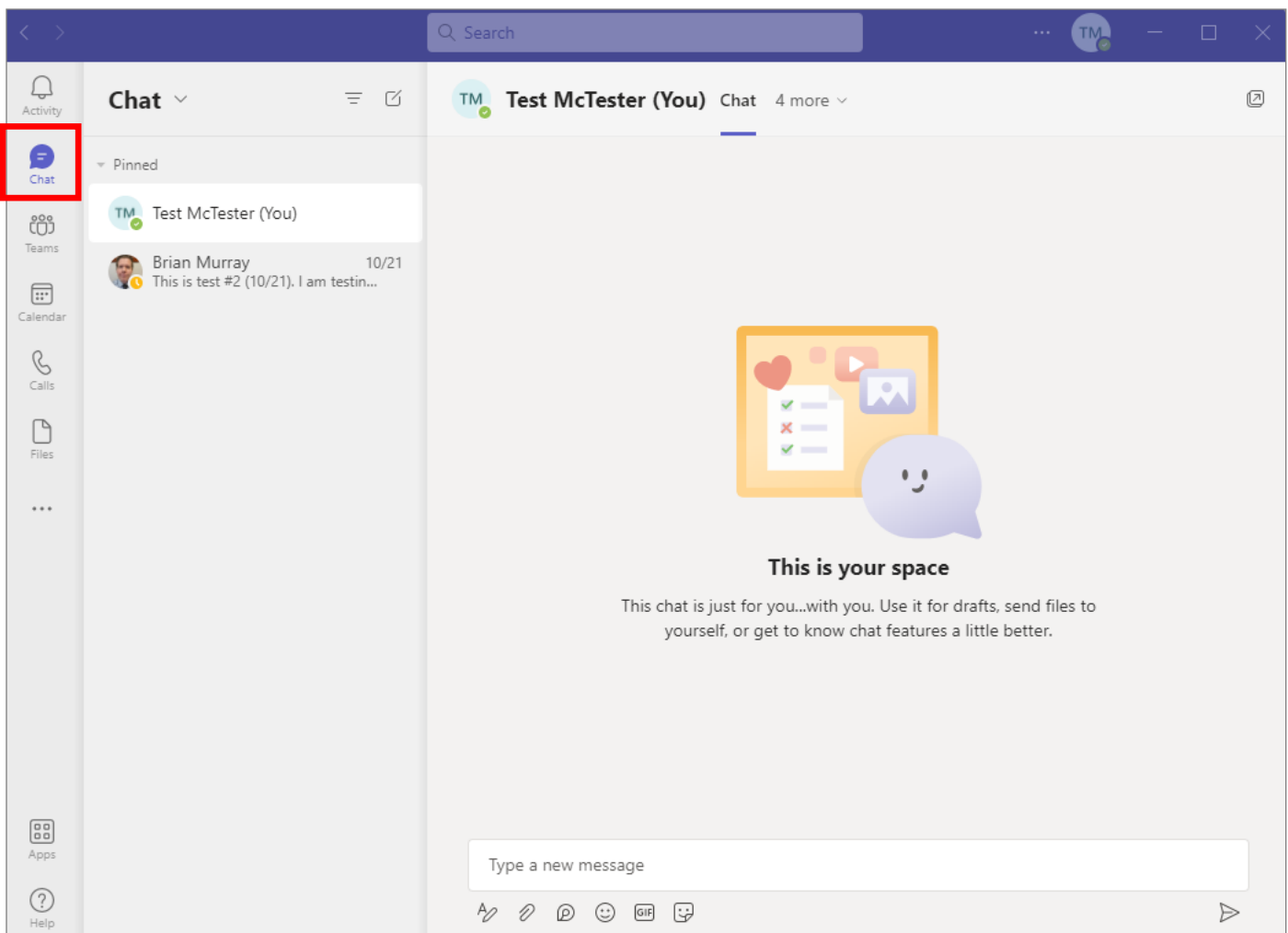
There is also a button to “Restore”. What this does is make this version the current version (overwriting any changes that occurred thereafter). The historical changes are still available in the version history even after you have restored to a previous version. No versions are lost. Note that a new version is created when a user has closed out of a document.

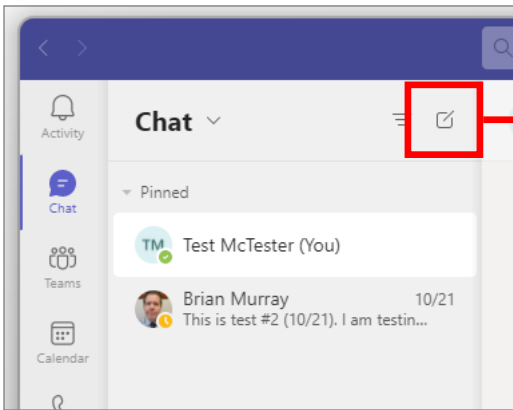
To exit version history, just click “Back to document”.



Chat

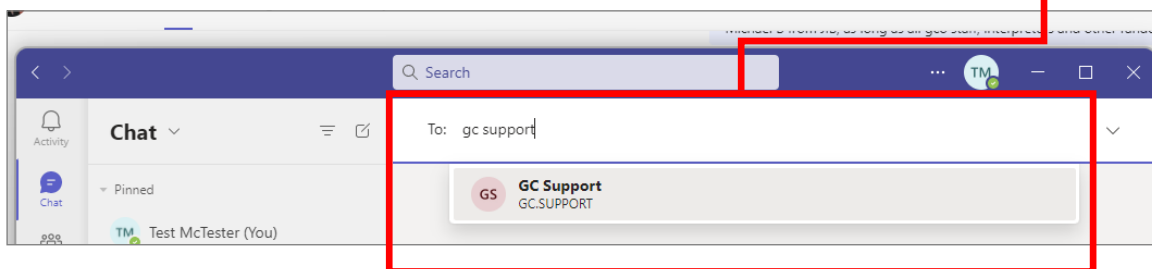
Overview: The Chat app is designed as a place to have one-on-one conversations. It functions similar to the Posts tab, except that the conversation is private between the individuals engaged in conversation. No one outside of those involved can view that conversation. Note that all group conversations should still take place within the Teams app and if individual chats might benefit the group as a whole, you may want to consider keeping that conversation in Teams as well.





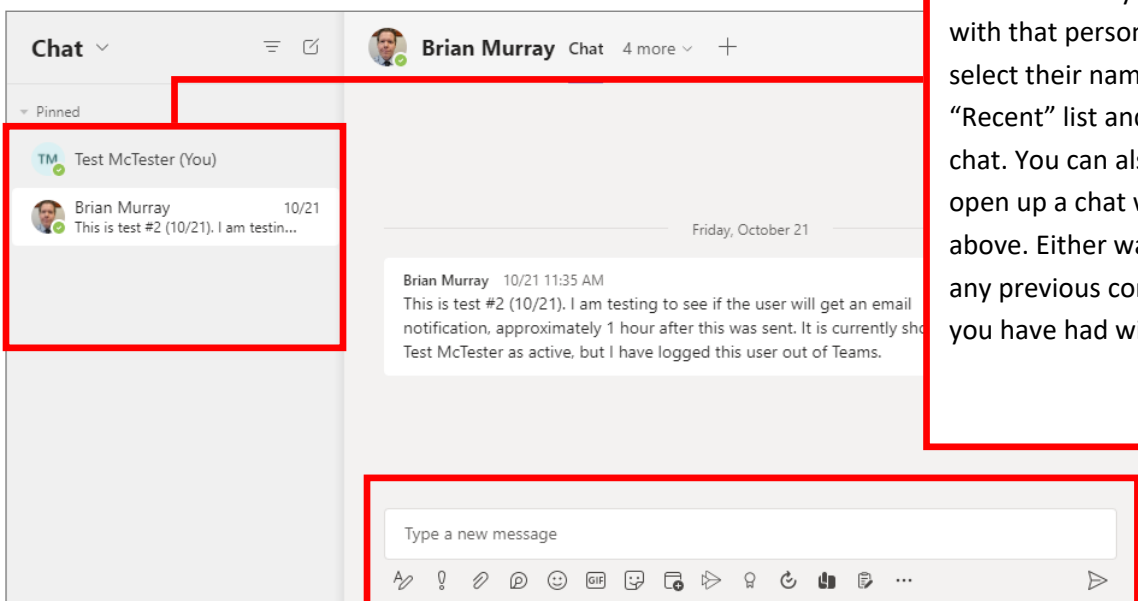
To start a new Chat with someone, click on the “New chat” button. It looks like a square with a diagonal line through it.

A “To:” box will pop up. Start typing in the name of the person you wish to chat with. Their name will pop up below. Click on that name. Then start chatting.



A chat thread will open for that user and a text editor (like the one in Posts) will appear and you can author a message.

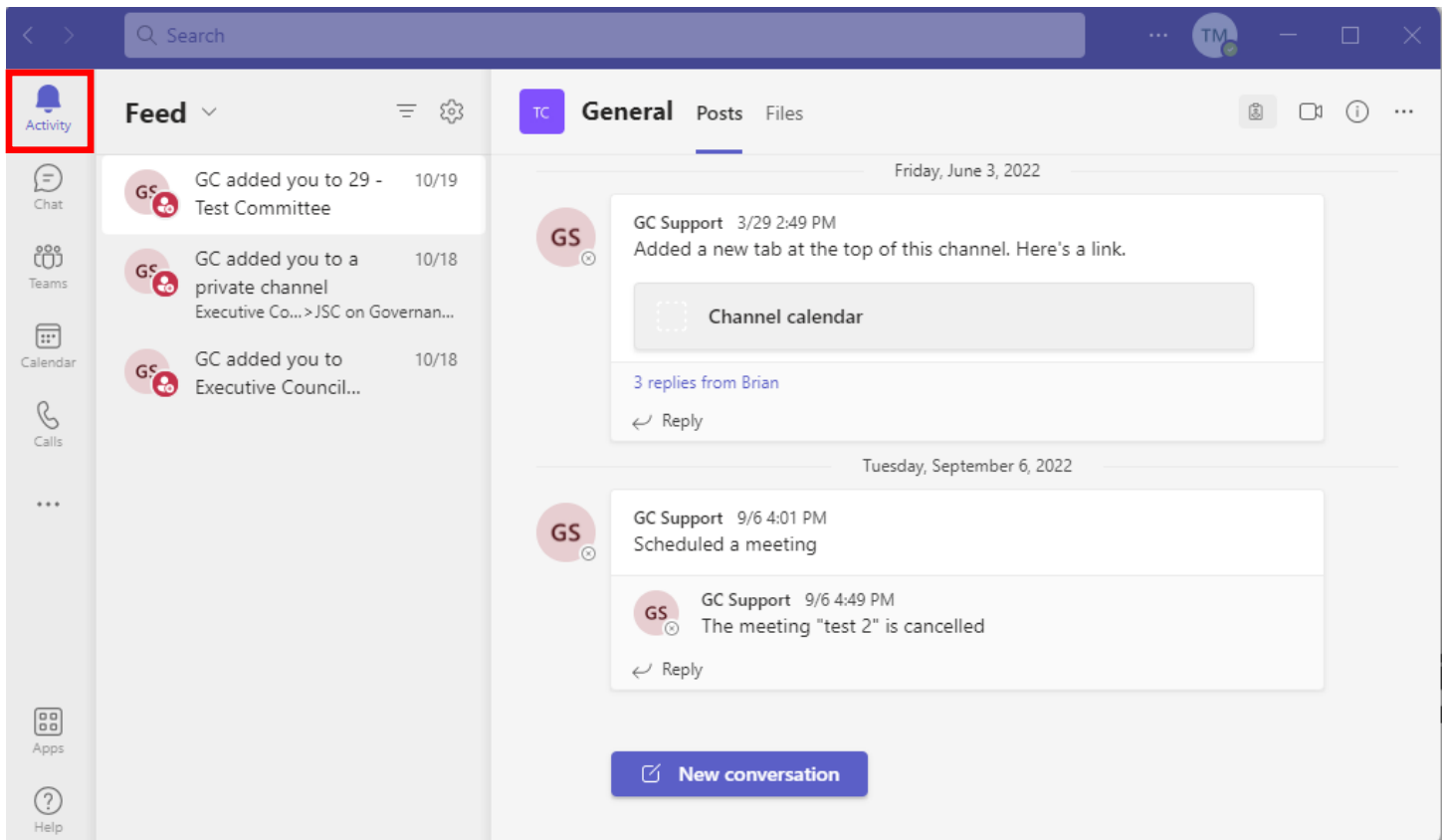
The next time you wish to chat with that person, you can just select their name from the “Recent” list and continue your chat. You can also choose to open up a chat with the method above. Either way, you will see any previous conversation that you have had with that person.



Activity

Overview: This app will simply show you any recent activity, including notifications of new messages, replies to messages, reactions to messages and files being uploaded. Note that the activity being displayed will depend on your notification settings. If you updated your notification settings, as recommended, you should see everything here.

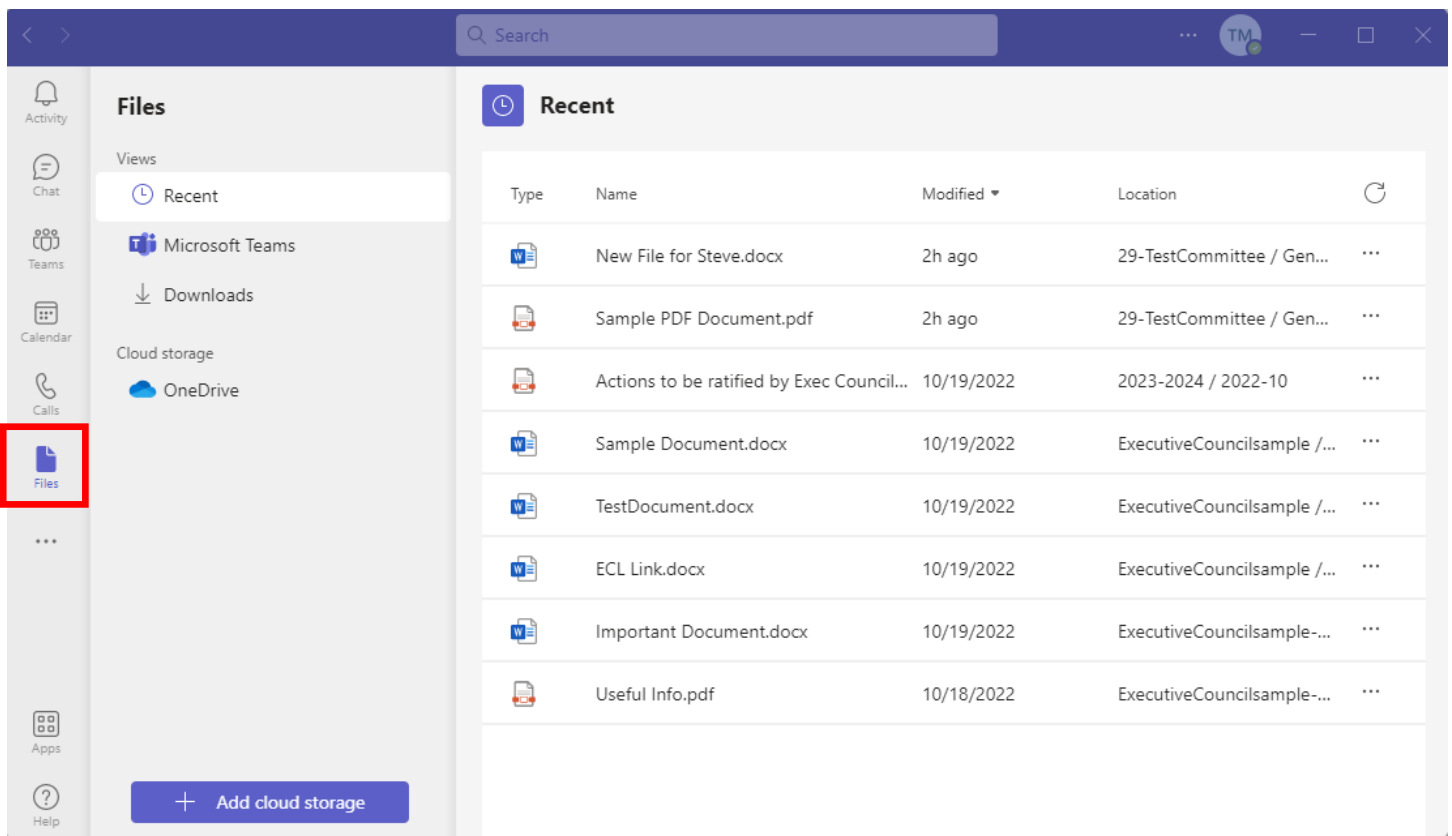
Activity shows up in the Feed, with the most recent activity on top. If you click on an activity in the Feed, it will take you to where that activity took place in Teams. It's a good way to see what you have been missing recently.



Files

Overview: The Files app is on the left sidebar, which is often confused with the Files tab within a Channel. The Files tab displays the files for a particular channel, whereas the Files app display the most recently edited or accessed files amongst all your Teams, Channels and Chats.

It is a convenient place to find a file that you know you edited recently, but can't remember exactly where you saved that file.



| Type | Name | Modified | Location | |
|---------------|---|------------|-----------------------------|-----|
| Word Document | New File for Steve.docx | 2h ago | 29-TestCommittee / Gen... | ... |
| PDF Document | Sample PDF Document.pdf | 2h ago | 29-TestCommittee / Gen... | ... |
| Word Document | Actions to be ratified by Exec Council... | 10/19/2022 | 2023-2024 / 2022-10 | ... |
| Word Document | Sample Document.docx | 10/19/2022 | ExecutiveCouncilsample /... | ... |
| Word Document | TestDocument.docx | 10/19/2022 | ExecutiveCouncilsample /... | ... |
| Word Document | ECL Link.docx | 10/19/2022 | ExecutiveCouncilsample /... | ... |
| Word Document | Important Document.docx | 10/19/2022 | ExecutiveCouncilsample-... | ... |
| PDF Document | Useful Info.pdf | 10/18/2022 | ExecutiveCouncilsample-... | ... |