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 instructions prior to reviewing this guide. These materials can be found at : **https://generalconventionon.org/ms-teams-training**.

We ask that all new 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 are listed below. We will be exploring these apps in detail on the following pages.
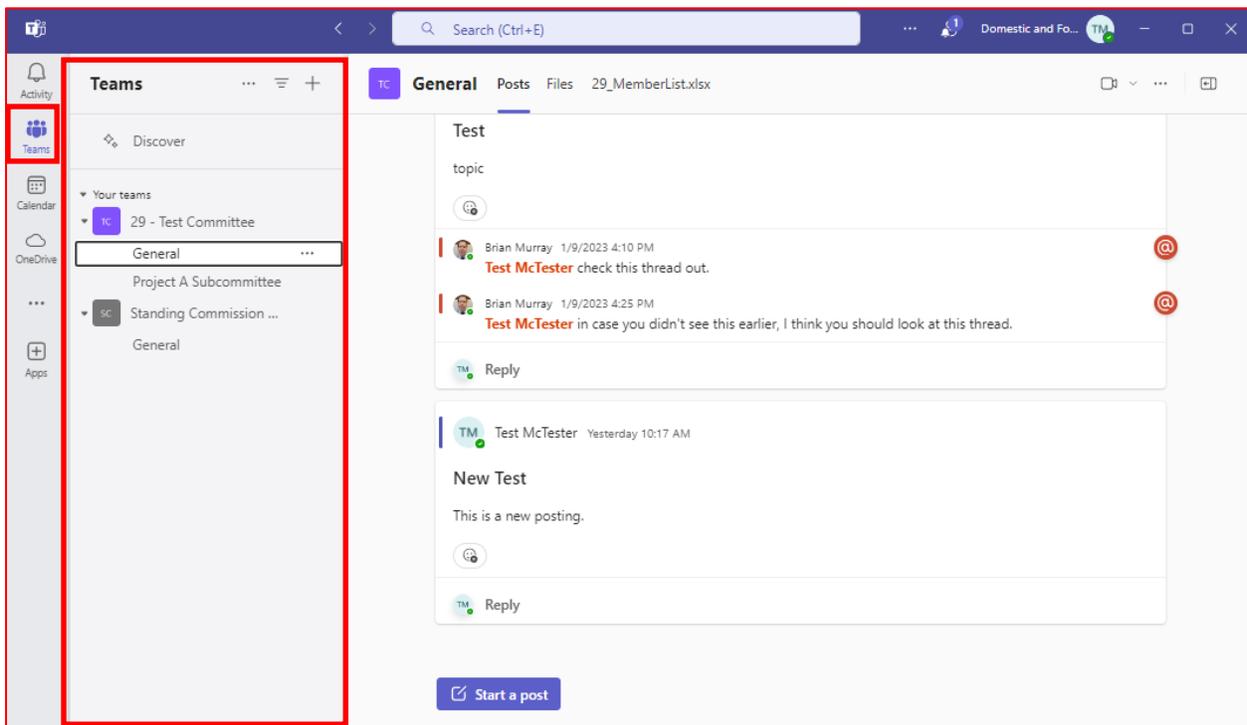
- Teams
- Chat
- Activity

Note that there may be additional apps and features listed. You may ignore these as users are only expected to be familiar with and use the apps specifically listed above.
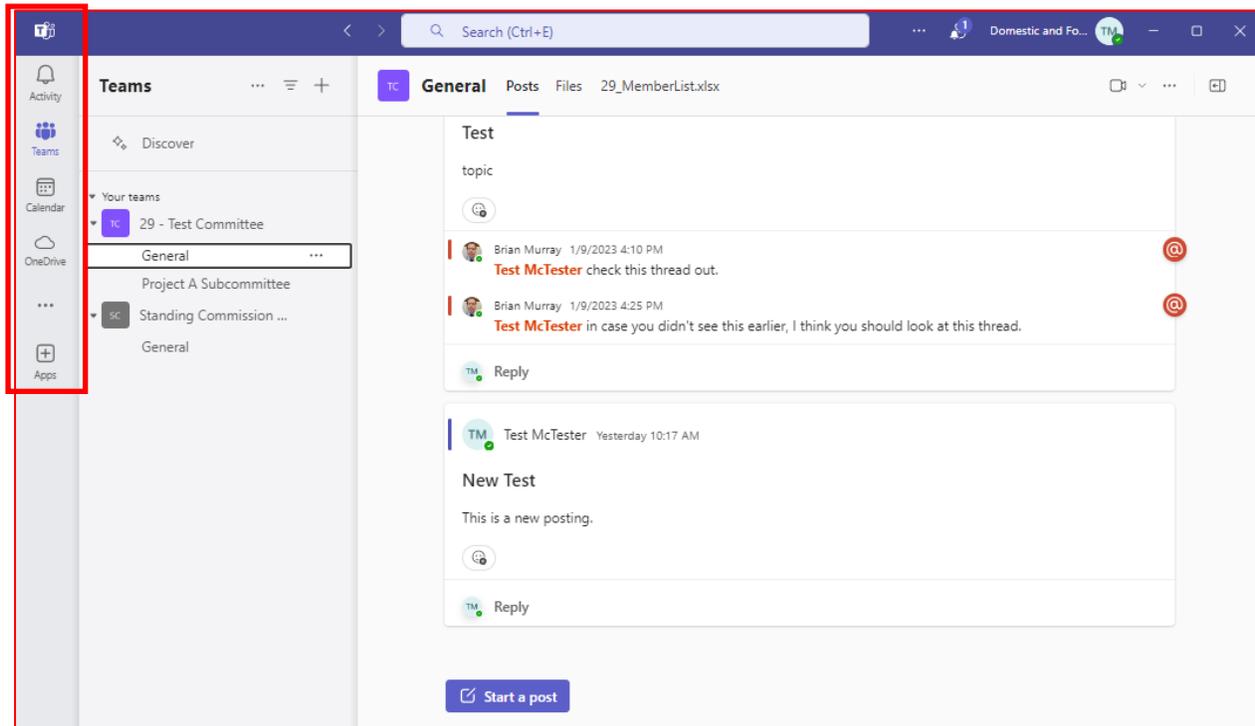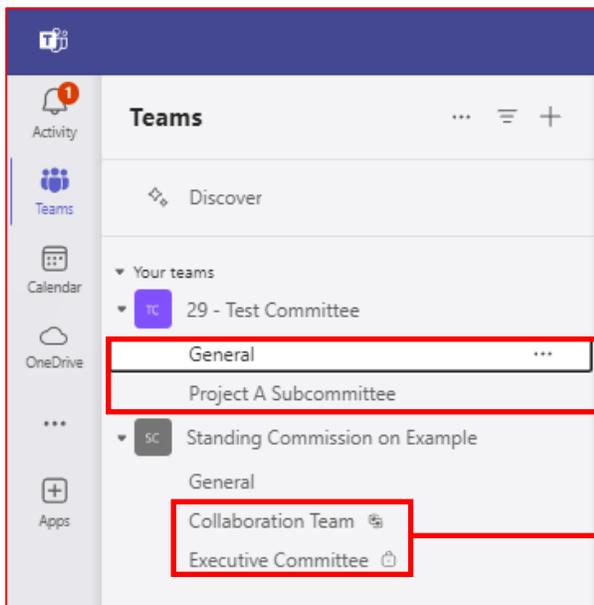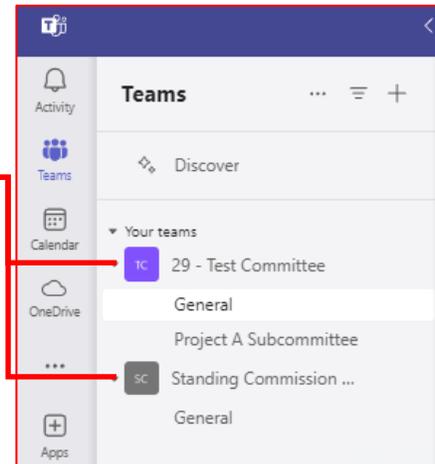
Teams

Overview: The Teams app is where you will be spending the vast majority of your time. It is available on the left sidebar. In the Teams panel you will see any active Teams that you are a member of.

Teams are created for each Interim Body and Legislative Committee. In this example there are two Teams; "29 – Test Committee" and "Standing Commission on Example".

Teams are composed of Channels, which is where all the activity takes place within a Team

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 that 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 group will take place. Additional channels can be created, as needed. A common example for this would be to create channels for subcommittees.

Most channels are public, which means that that all members of the Team will have access to them. There are two special type of channels, however, that can be identified be the icon to right of the channel name.

Private Channel: A lock indicates it is a private channel. This means that only a subset of Team members specifically invited to this channel will have access.

Shared Chanel: A shared channel can either include all members of the Team or just a subset of Team members invited to this channel. What differentiates this from a private channel is that you may also invite people who are not members of the Team to be a member of this channel. Those users will only be able to access this specific channel.

Important: Once a channel is created, you cannot change the type. So a public channel will always be public, and can never be made private or shared (and vice versa).

The content from each channel can be seen in the right panel for the Teams application. At the top of this panel, you will see three tabs. The first two are "Posts" and "Files" and the third will be the member list. Posts is the message board and Files is where all the files for that channel are stored. The member list will be a snapshot of the member list in Microsoft Excel, with contact details. Note that this will not be updated automatically over time, but members can update it, as necessary.
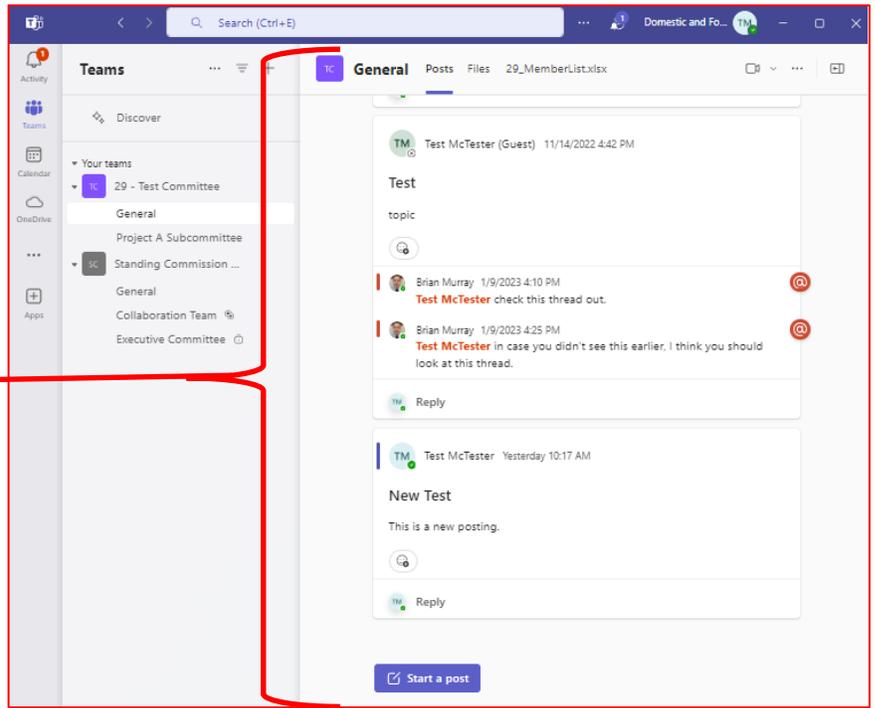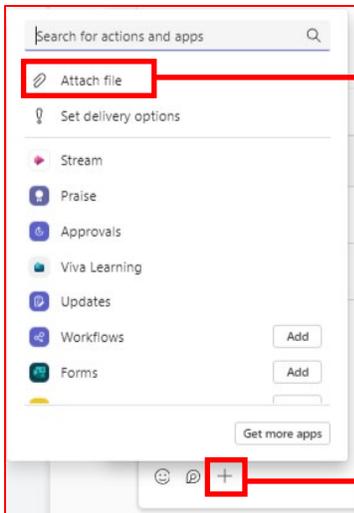

To post a new message click on the "Start a post" button.
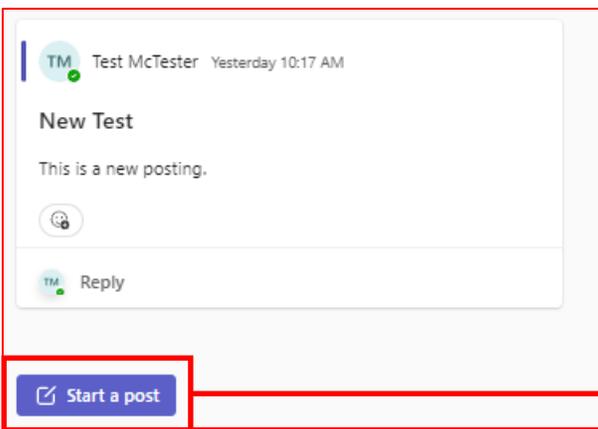
You can add a subject and then author your message. Your subject will be bolded at the top of your message. You have some formatting options available. When you are ready to send, click "Post"
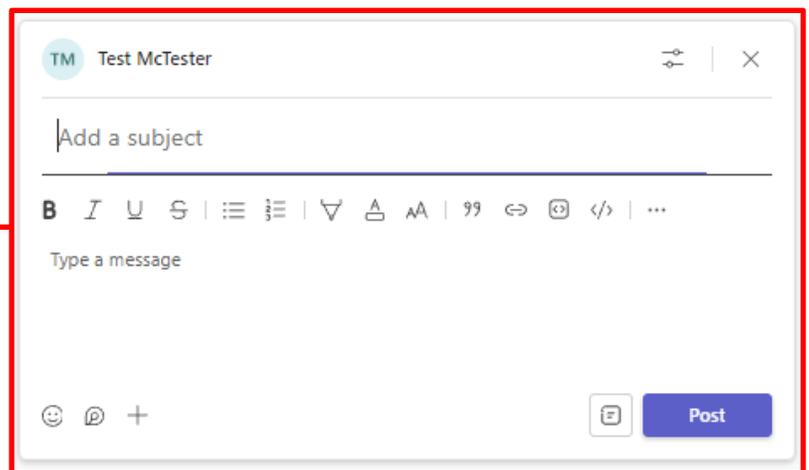
You may also attach documents to a message. To do so, click on the plus symbol in the text editor. Then click on the "Attach file" option in the menu that pops up and select the file from your computer.

In addition to authoring a new message, you may reply to a message that has already been posted. To do so, click on the "Reply" button under a message. A text box will appear and you may type your message.
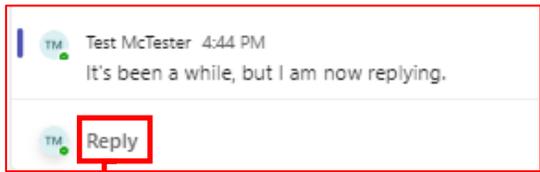
When a message has replies, it will display them nested below the original message. If there are more than three replies, it will display the three most recent replies and there will be a link that indicates the total number of replies. If you click on that link it will open up the complete thread.
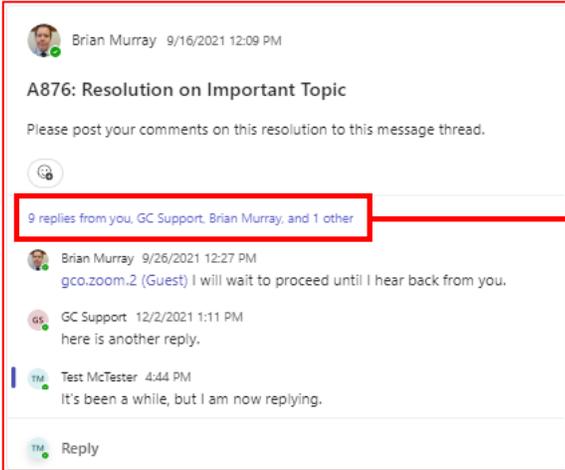
You will now see the entire message and all replies. To get back to the rest of the message board, just click on the "Go to channel" button.
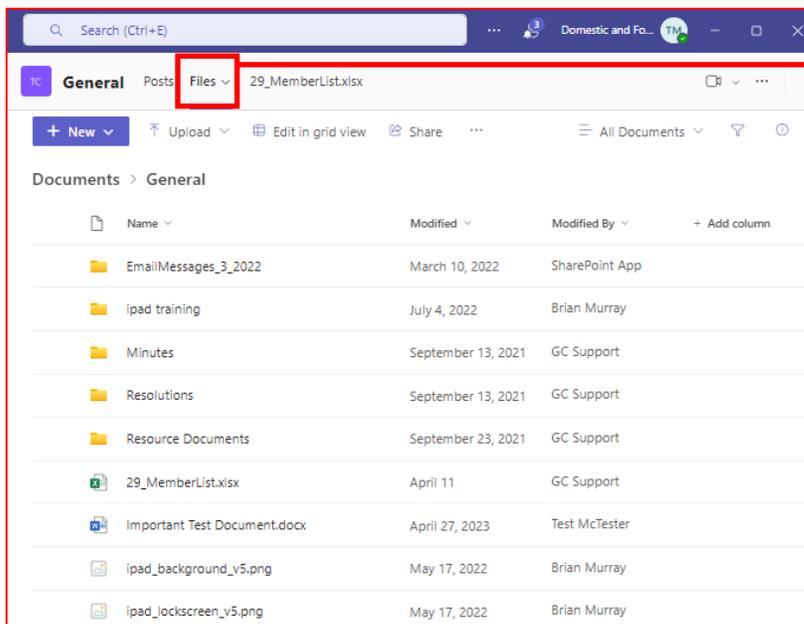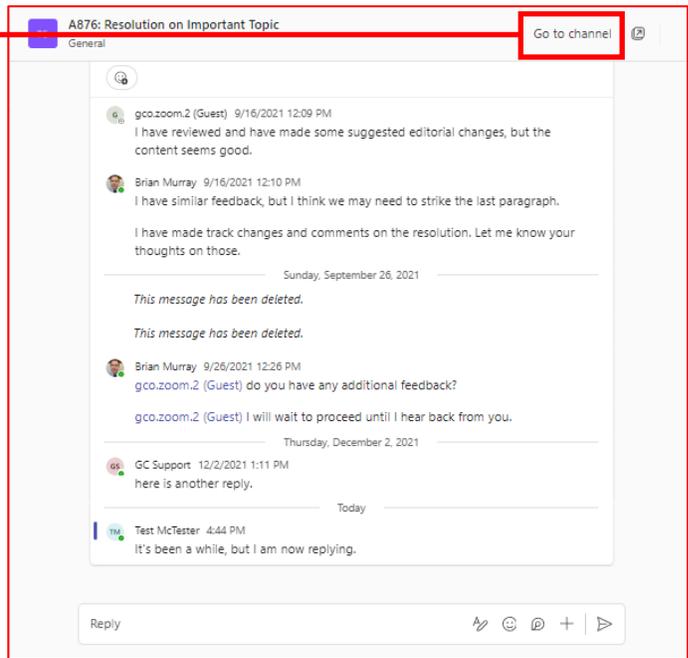
We will now review the "Files" tab. This can be accessed by clicking on tab (indicated above) at the top of the channel. This tab contains all the files within that channel, which include the files that were uploaded directly to the files tab and any documents that were attached to messages. By default, 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 may 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 (Secretaries make good candidates) 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 Microsoft Office document, you will want to open it up directly in Teams. If you try to open up the document in your web browser or the desktop app, your Teams credentials will likely not be recognized, and you will get a permission error. To avoid this, we encourage you to change the default to open documents directly within Teams. To do so, follow the steps below.

1) Click on the ellipses that appears to the right of the file name as you hover over it.
2) Select "Open" in the menu
3) Select "Change default" in the sub-menu.
4) Select "Teams" as the default and click Save.

From now on you will just have to click on the file name and it will open up directly in Teams.

If you are trying to open up a PDF, you should be able to just click on it and it should display in Preview mode. If you get an error, you can always just click on the ellipses to the right of the file name and select "Preview".
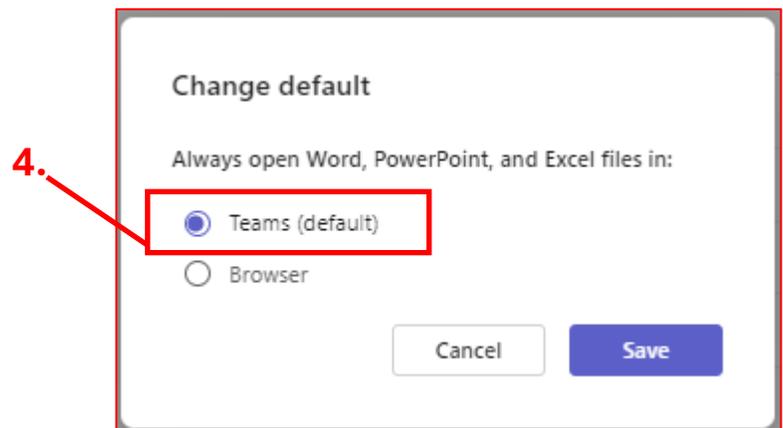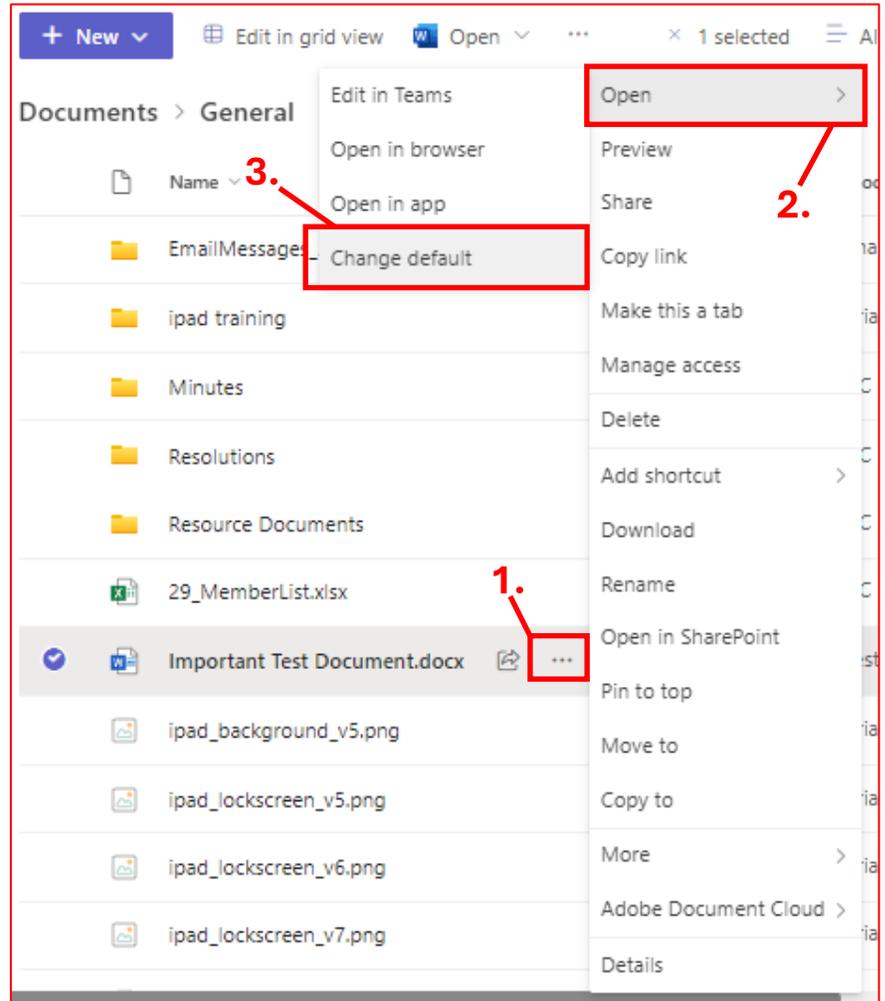
IMPORTANT: When accessing a Microsoft Word, Excel or PowerPoint document within Teams, any changes that are made to this document will be automatically saved by default. So if you make any changes, it will change the document for everyone.

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 it for drafting documents from scratch.
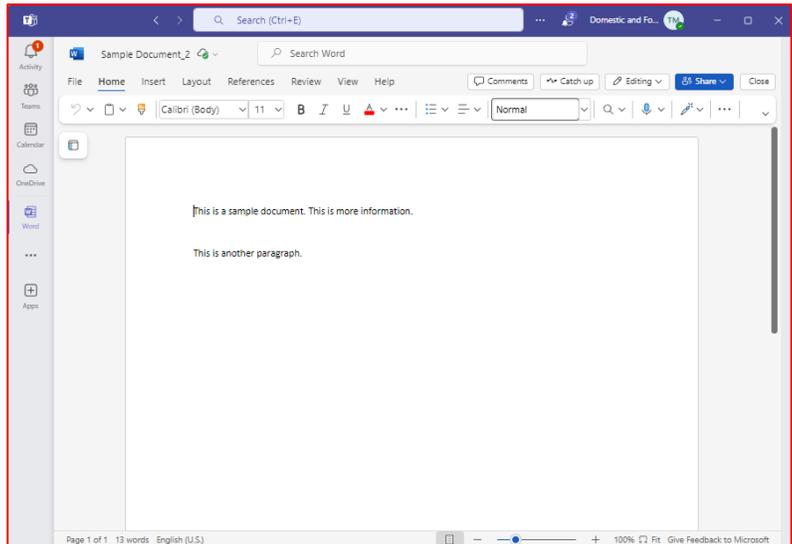
When in a Word document, if you need to make an edit, you can just start editing the document; changes are saved automatically. There is an editing toolbar at the top, which has most of the basic features you would find in the desktop application and should suffice for most use cases.

Word not only saves changes automatically, but it also keeps a record of those change to the 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.
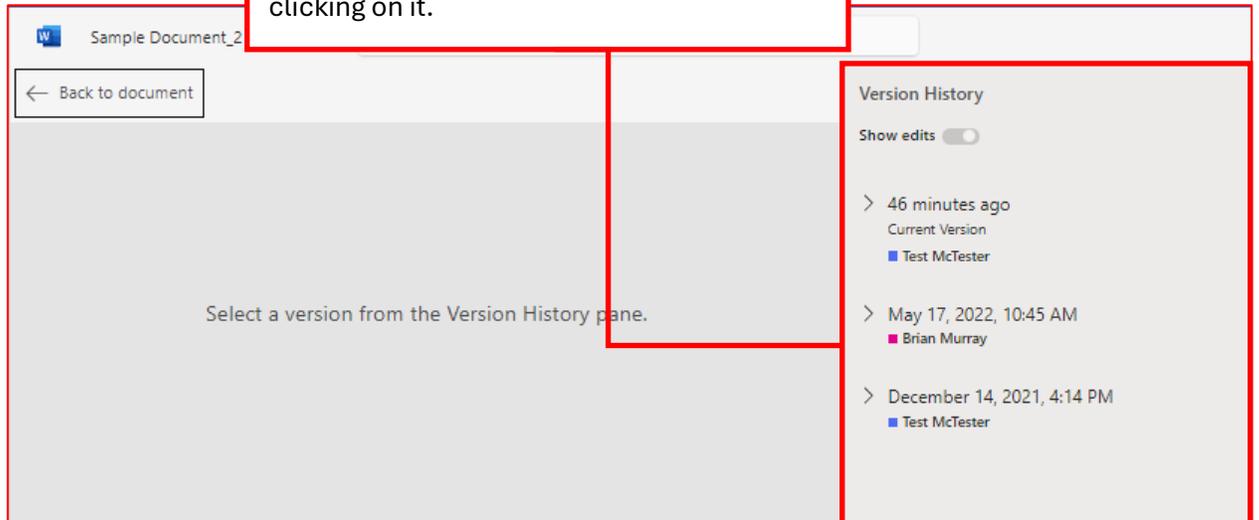
To access these changes,

1) Click on "File" in the toolbar.
2) Click on "Info"
3) Click on "Version History".
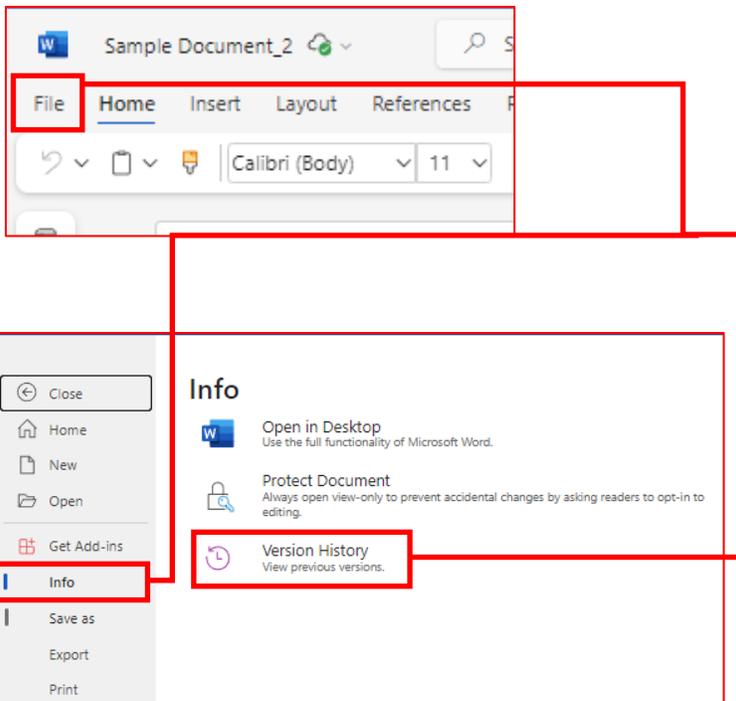
This will open up a side panel with all versions of the document that have been recorded.

You may access any previous 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 edits" 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 all 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 closes out of a document.

To exit version history, just click "Back to document".
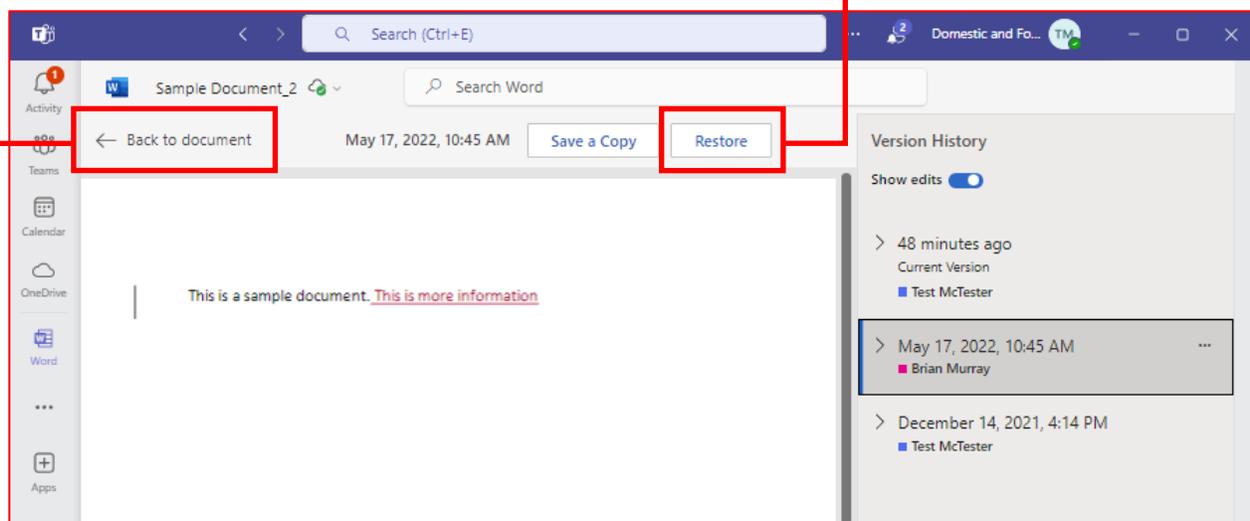
Chat

Overview: The Chat app is deigned 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 the 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 groups as we whole, you may want to consider keeping that conversation in Teams as well.
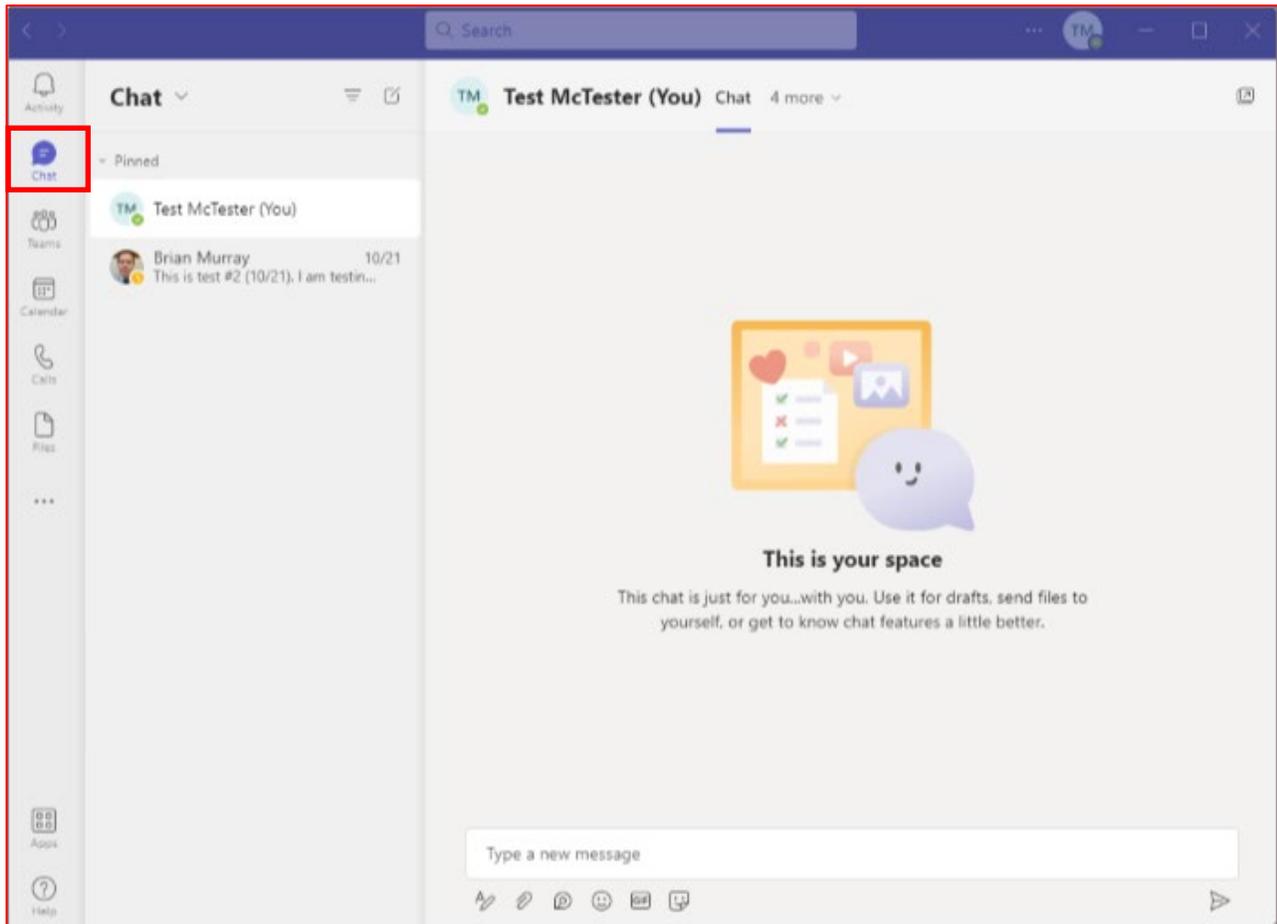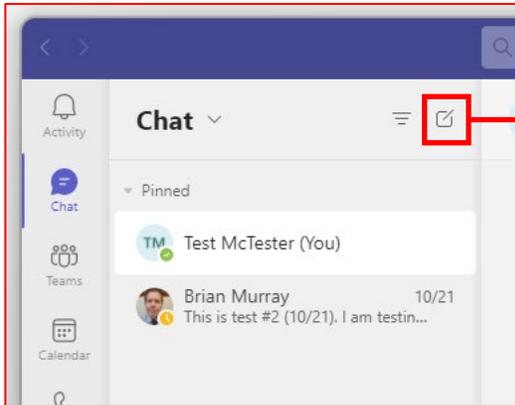
To start a new Chat with someone, click on the "New chat" button. It looks like a square with a diagonal line through it.

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

A chat thread with 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.
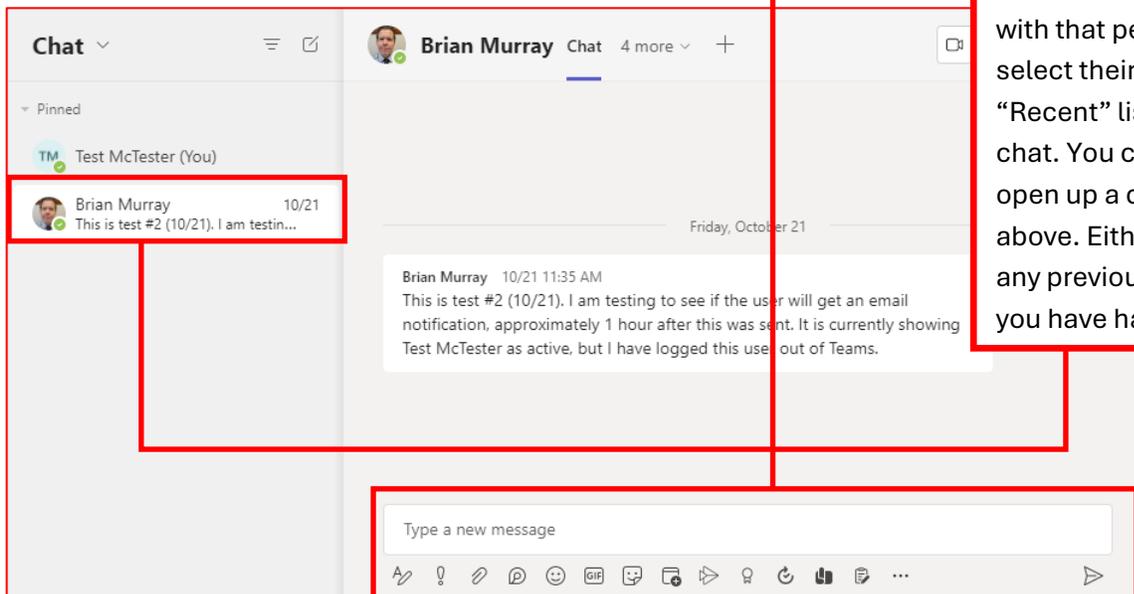
Activity

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.