# WSBA VOLUNTEER GUIDE – TEAMS AND SHAREPOINT

Teams is the most efficient Microsoft 365 tool to work with other volunteers and your WSBA liaison. Teams will allow you to do the following with your group:

- Centralize communications (posts, announcements, replies, etc.)
- Centralize documentation (SharePoint files)
- Centralize collaboration (edit and review document permissions)

**NOTE**: You can access your WSBA volunteer Team using your current Microsoft license OR signup for a <u>free account</u>

### **GETTING STARTED WITH YOUR NEW WSBA VOLUNTEER TEAM**

When your WSBA liaison sets up a team (or invites you to an existing team), you will receive a non-descript email that looks like this:

• **NOTE:** please check your spam folder if you do not see the email (*it will likely go to spam*)

□ - C :			1-23 of 23	< >
Primary	Promotions	<u> </u>	(j) Updates	
🗌 🕁 🗅 Microsoft Teams	You ha	we been added to a team	in Microsoft Teams	8:22 AM

(example shown is for a Gmail account)

When you open the email, you will see this (with a different Team name). Select "Open

Microsoft Teams:	You have been added to a team in Microsoft Teams 🔉 🔤				8	ß	
٢	Microsoft Teams to me 👻		8:38 AM (O minutes ago)	☆	٢	¢	:
		Microsoft Teams					
		Dua added you to the WSBA Sample Volunteer Workspace team!					
		ТЕ					
		WSBA Sample Volunteer Workspace					
		1 members					
		Created for training purposes					
		Open Microsoft Teams					
		• • • • • • • • • • • • • • • • • • •	_				
		Bring your team together Chat 1:1 and with group	ps				
		Create an open, collaborative Outside of open team convers workspace for your team. Use chat privately and share files an channels to granize conversations by topic, area, or anything else.	sations, nd notes ation.				

- o If you have a Microsoft account: Microsoft will ask you to sign-in with account info
- o If you don't have a Microsoft account: Microsoft will guide you to create one

You will then see a WSBA screen initiating the multifactor authentication process (*this is a required WSBA security measure for all WSBA platforms*). Select "**Next**" on the first screen below to proceed:



- On the "Keep your account screen" above, you have 2 options:
  - Select "**Next**" to use Microsoft Authenticator, an app that works with your Microsoft account (*This is a great option if you already use the app*)
  - Select "I want to set up a different method" if you don't want to download an app (*Recommended option*)
    - This guide will demonstrate the recommended option as users who have the app will not experience anything new with this security process

Once you select "I want to set up a different method," you will see this screen providing multiple options. Select "Phone" and then on the next screen, enter your phone number to receive an authentication code to your phone and select "Next:"

Microsoft Authenticator   Approve sign-in requests or use one-time codes     Hardware token   Sign in with a code from a hardware   Sign in with a code from a hardware   Image: Code from a hardware	b Choose a different method $ imes$	Phone
Image: Transmission of the state of the	P Microsoft Authenticator Approve sign-in requests or use one- time codes	You can prove who you are by receiving a code on your phone. What phone number would you like to use?
Phone Get a call or text to sign in with a code	123 Hardware token Sign in with a code from a hardware token	United States (+1) Enter phone number      Receive a code  Message and data rates may apply. Choosing Next means that you agree to the Terms of service and Privacy
I want to set up a different method	Phone Get a call or text to sign in with a code	and cookies statement.

You will be prompted to enter that authentication code. Check your phone for the code, enter the code in the box, and select "**Next**"

• You will see a confirmation screen and you will select "Next" to proceed to Teams

Phone		Keep your account secure
We just sent a 6 digit code to Enter the code below.	Back Next	Phone  Verification complete. Your phone has been registered.  Next
I want to set up a different method		Lindated March 26, 2025 - 2

Updated March 26, 2025 - 2

- Congrats! You officially have verified access to Teams to access your volunteer team. You will be automatically redirected to Teams. You will have the option to access Teams on:
  - o Browser
  - Desktop app (**best practice** requires you to download the Teams app on either your Windows or Mac computer from your designated app installation point)
- Though using the desktop is best practice, it is entirely your preference. The rest of this guide will include screenshots from the desktop Teams app (*the content and layout is identical on the browser*)

#### YOUR TEAM AT FIRST GLANCE

Getting a foundational understanding of the different access points on your Team will help you more easily navigate the Team and ensure increased engagement with content and Team members. Once you've signed in, you will see this "**Get Started**" message. This is a great opportunity to learn about how to navigate your team. Select "**Get Started**" to proceed:



• **NOTE**: depending on your display, you will either see this screen in dark mode (above) or default mode (white background)

Once you've completed the "Get Started" module, your Team will present with a welcome message:



 NOTE: the rest of this guide will present in default mode (white background) for easier demonstration

Your Team has 4 core parts:

- **Channels**: act as sub-groups or sub-discussions (*ex: Annual Retreat Planning*). This allows for file and post separation, so content is focused just for that sub-gorup or sub-discussion
  - General channel is where general conversations will appear
- Posts: depending on your Team, posts may only be created by Team Owners (your WSBA liaison) or you may be permitted to create posts. Much like social media, you may have the ability to post, reply to posts, and react with emojis
- o Files: an organized, centralized location where all your Team documents live
- Notes: a OneNote notebook that your WSBA liaison may use to centralize notes for your Team



# CENTRALIZED COLLABORATION SHAREPOINT SETUP

Every Team has a SharePoint. This is referred to as a Teams SharePoint and is where all your documents automatically live (*where all the documents in the "Files"* tab above live)

o To access your Teams SharePoint, select the "General" channel and select "Files:"



• Then select the "..." at the top of your documents screen and select "Open in SharePoint:"

Q Search (Ctrl+E)		🙆	- 0 ×
TE General Posts Files ∨ Notes +		External Collaborat	□a ~
+ New ✓ ↑ Upload ✓	Share	$\equiv$ All Documents $ \smallsetminus $	7 O
Documents > General 🛞		Copy link	
	Madified	æ Sync	
	Modified	Add shortcut to OneDrive	+ Add col
≥ 2025 Meetings	21 minu	⊥ Download	
Member Contact Sheet.xlsx	21 minu	🕏 Open in SharePoint	
	1	+ Add Document Library	

 This will open directly to your Teams documents and you will see this screen. Your Team SharePoint will open directly to the "Documents" tab and specifically the "General" folder:

ش	TE TEAM-EXT-	-Sample External Workspace 🕫 Private group   External Collaboration 🏫 Not following 💩 2 memb	bers
Ē	Home	+ New 🗸 🔨 Upload 🗸 🌐 Edit in grid view 🖄 Share 🖙 Copy link 🥁 Sync 🖏 Add shortcut to OneDrive 🚽 Download 🐗 Go to channel 🖷 Export to Excel 🚥 🚍 All Documents 🗸 🏹 🕕	2
	Conversations		
	Documents	Documents > General	
€	Shared with us	Image: Modified System         Modified By          + Add column	۲
$\oplus$	Notebook	2025 Meetings 29 minutes ago Dua Abudiab	
	Pages	Dua Abudiab	
	Site contents		

#### • To see other documents, simply click on "Documents" on the file path

✓ In site library			
🗅 Name 🗸	Modified $ \smallsetminus $	Modified By $ \smallsetminus $	+ Add column
Annual Retreat Planning	41 minutes ago	Dua Abudiab	
🦲 General	March 18	SharePoint App	
Tasks and Timelines	March 18	SharePoint App	
Teams Meetings	March 18	SharePoint App	

- This screen will show all other documents that you have access too (i.e. Annual Retreat Planning files from the Annual Retreat Planning channel)
- Your WSBA liaison will walk you through your particular document structure and what folders to focus on
- NOTE: Accessing your Team files through SharePoint is an *option* you are welcome to access files through Teams. The documents are identical from both access points. We demonstrate both as some volunteers like to bookmark the SharePoint site on their browser for quick access