

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:

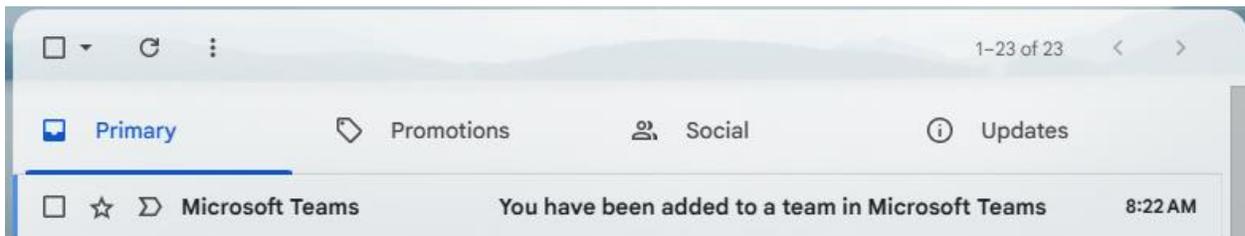
- Centralize communications (posts, announcements, replies, etc.)
- Centralize documentation (SharePoint files)
- Centralize collaboration (edit and review document permissions)

NOTE: You can access your WSBA volunteer Team using your current Microsoft license OR sign-up for a [free account](#)

GETTING STARTED WITH YOUR NEW WSBA VOLUNTEER TEAM

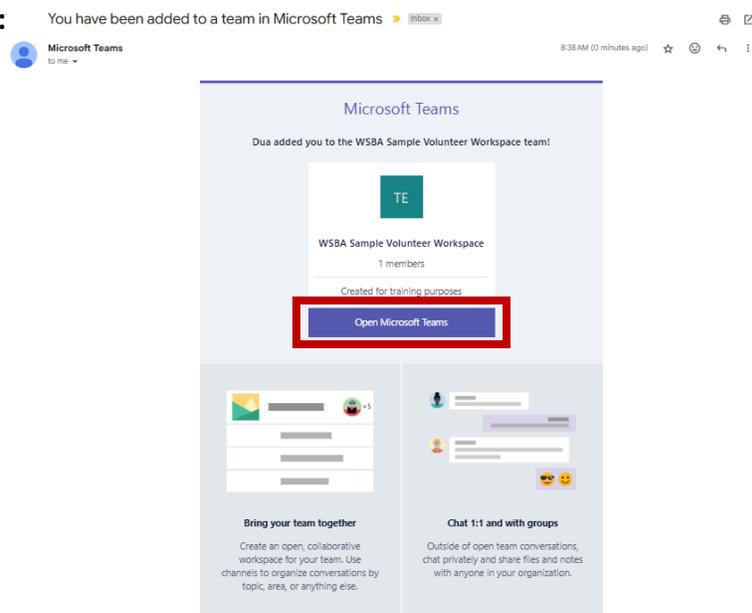
When your WSBA liaison sets up a team (or invites you to an existing team), you will receive a non-descript email that looks like this:

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



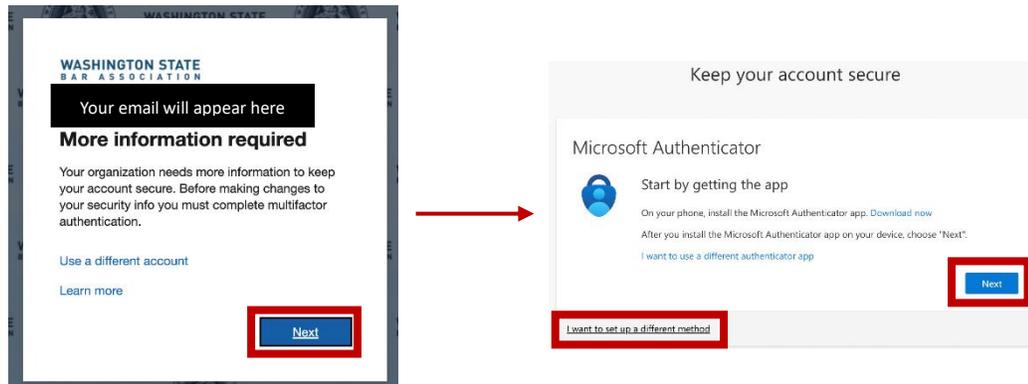
(example shown is for a Gmail account)

When you open the email, you will see this (*with a different Team name*). Select “**Open Microsoft Teams**”:



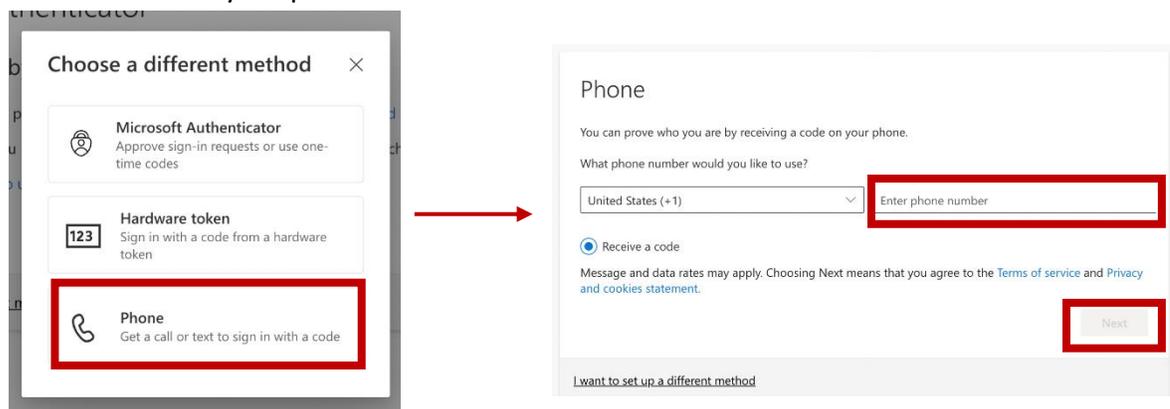
- **If you have a Microsoft account:** Microsoft will ask you to sign-in with account info
- **If you don't have a Microsoft account:** Microsoft will guide you to create one

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:



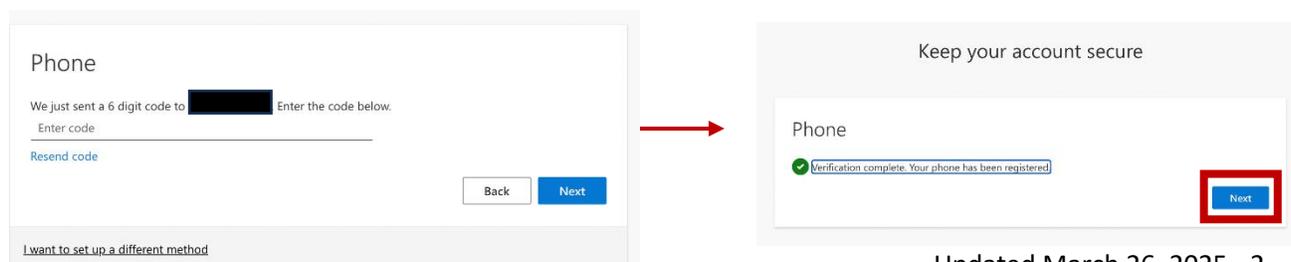
- On the “Keep your account screen” above, you have 2 options:
 - Select **“Next”** to use Microsoft Authenticator, an app that works with your Microsoft account (*This is a great option if you already use the app*)
 - Select **“I want to set up a different method”** if you don’t want to download an 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:”**



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

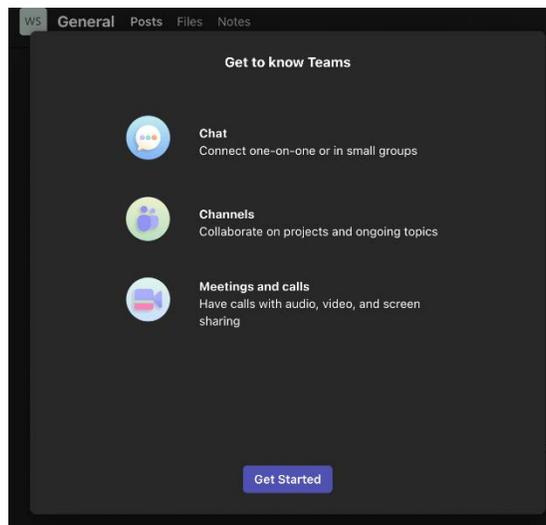
- You will see a confirmation screen and you will select **“Next”** to proceed to Teams



- 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:
 - 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*)

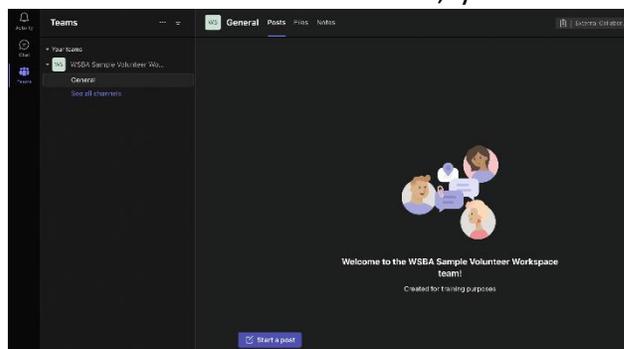
YOUR TEAM AT FIRST GLANCE

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)

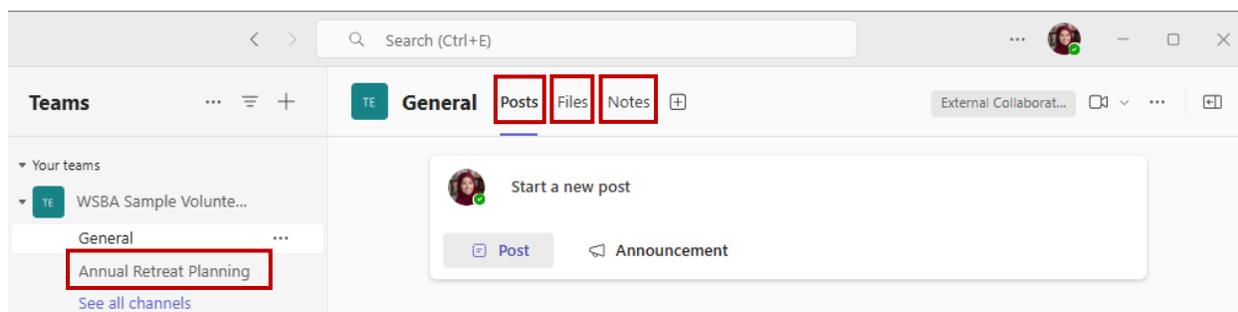
Once you've completed the “**Get Started**” module, your Team will present with a welcome message:



- **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-group 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
- **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

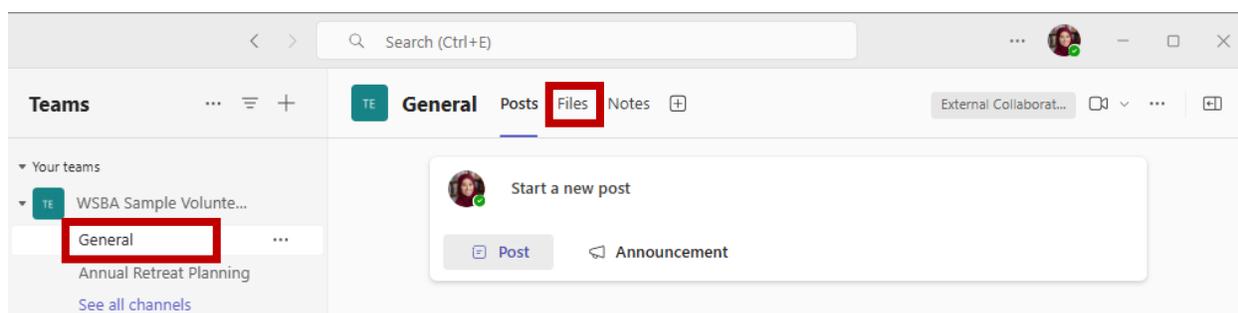


CENTRALIZED COLLABORATION

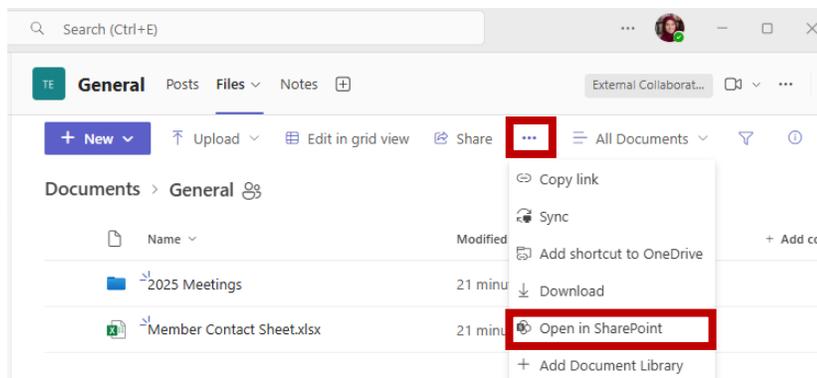
SHAREPOINT SETUP

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*)

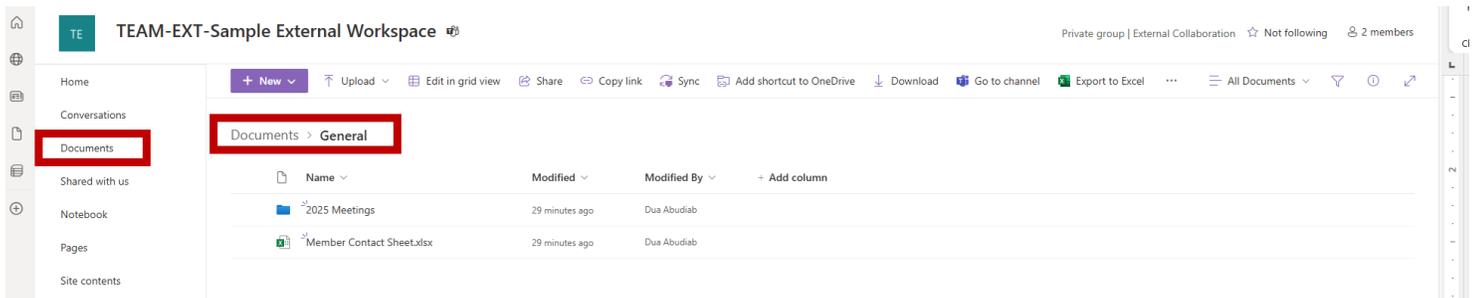
- To access your Teams SharePoint, select the **"General"** channel and select **"Files:"**



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



- 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:



- To see other documents, simply click on “Documents” on the file path

▼ In site library

Name	Modified	Modified By	+ 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