Making the Best Use of Teams for YOUR Library

About Teams:

Microsoft Teams is a workspace for real-time collaboration and communication, meetings, file, and app sharing, and even the occasional emoji! All in one place, all in the open, all accessible to everyone.

Rationale for Adoption:

Adopting Teams as your **communication and collaboration** hub makes for a pleasant, efficient, and streamlined work experience. When Covid turned the world upside down and everyone was quickly figuring out how to work together without being together a lot of really great tools came through to make that need a reality. Whether you are communicating with staff that you don't see every day, or communicating from the front desk to the staff work area, Teams chat keeps you in communication with your colleagues near and far!

When it comes to **collaboration, sharing documents, working together** on a single document, or meeting online—this is made easy and seamless through Teams. Participating on system teams, or accessing your own local Team—by developing Teams as your digital workspace all of your notifications are in one place, which makes **multi-tasking and productivity** a cinch!

Teams is a great place to **organize and store shared documents**. It can be a home for your policy manual, work schedules, staff forms, program plans, event calendars, and more! You can control who has access to what by making Channels Open or Locked to specific team members. Information management is made easy with shared (or private) File Folders, Planners, Calendars, etc.

Succession planning is improved by the adoption of a shared space that is not connected to a single staff member. Information is findable, searchable, browsable, and ownership can be transferred when the time comes to hire new staff or management.

Best Practices for Channels and Access

View Sample Team

Channels to Include:
- **General** (automatically created) – Makes a great Daily Log Space!
- **Collection Management**: This is a great place to maintain documents relating to Collection Development, Maintenance, and Management: Weeding lists and schedules, Selections, Patron Requests, ILL, How-tos, etc.

- **Finance** (Locked Channel): This is a good place to keep budget info, invoices, book-keeping, timesheets, vendor/ service provider information, banking info... anything budget or money related!
- **Human Resources**: This is a good place to keep employment information: Staff Policies, Orientation, Useful Templates, job descriptions, and more!
- **Leadership** (Locked Channel): You would keep this folder locked. It would include Employee files, contracts, planning docs, and other confidential information that would be shared amongst current and future leadership members only.
- **Library Board:** This is a good place to keep Board information: Monthly Reports, Agendas and Minutes, Board Contact Info, Board Orientation Info, Official Copy of Policy Manual, etc
- **Marketing:** This is a good place for social media and marketing content.
- **Programs and Community Engagement:** This is a great place to keep program plans, event calendars, community contact info, and planning documents.

Suggestions for Useful Apps to add to your Teams Page and Channels:

- **Microsoft Planner** – This is a great app for creating work-flows and task management. NLLS uses it for our STEAM Kit Dashboard. This could be great for tracking weeding lists, circulation tasks, and more!

- **Canva** – Teams can use Canva to create presentations, videos, graphics, posters and more – then share them with the world!

  The Canva app for Microsoft Teams keeps everyone in the loop, with all your key design updates in one place. Without ever having to leave Teams, you can:

  o Be notified in Teams whenever someone comments, shares or requests access to your designs
  o Share a Canva link and a card appears, inviting your team to preview designs or collaborate with you.
  o Flip through all the pages of a Canva design, get feedback and share ideas - all without ever having to leave Teams!
- **Excel** – This is a great app to embed in your General Channel for displaying your daily schedule
- **Calendar** – great for tracking events, staff vacations, room bookings, etc.
- **OneNote** - great for sharing/ taking meeting notes, tracking work plans, action items, etc.
- **To Do –** Great for task management to ensure that daily, weekly, monthly assigned tasks are completed.

General Suggestions:

1) **Download a Copy VS Open in Desktop App**

When you are working on a shared document and don't want to work "online" you can open the document in Desktop App and it will continue to save to the shared document.

If you want to work offline AND have a personal version of a shared document, then you would Download a Copy and continue to work from the desktop.

2) Unlocking a Locked Channel

Unfortunately, you can't unlock a locked channel. Once a channel has been locked it cannot be unlocked, but, you can create a *new* channel and move/copy all the contents there.

3) Access Management

When you are sharing documents to the Team, you can control whether members can View, Edit, or Own documents. You can **Manage Access** via the 3 dot menu beside each item in a Channel files page. Simply left click on the 3 dots, select <Manage Access> and make your selection of access level.

4) Teams Meetings for Non-members

Did you know that you can invite Non-organizational members to meetings via Teams? Well, you can! Simply set up the meeting to take place on teams and invite them as you would any other meeting. They will be able to join via computer, phone, or other personal device. Goodbye Zoom, hello TEAMS!

5) Pin Conversations

Is there a contact that you find yourself reaching out to on a daily or weekly basis? Pin that conversation to the top of your Teams Chat page so you don't have to search for it.

6) Teams Layout

For a more comfortable view of your Teams App, make sure you have selected the Layout: "List View" so that you can see all of the Teams you belong to in one place and can switch between them more quickly. To do this, go to the Top Right Corner and Click on your system name or picture. Go to <Manage Account> then, <General> and Select the Layout <List View>.

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