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Co-op Board MS365 Onboarding

Background

In January 2023 the Co-op began migrating to MS365 for much of its "office" functionality, things like email, calendaring and file sharing. As a board member, you will have collaborated with Co-op staff and other board members in the past using Sync for files, possibly Google docs, possibly Zoom.

Going forward all of these will be phased-out in favour of this new MS365 environment. The instructions below describe what will happen to get you started in this new environment.
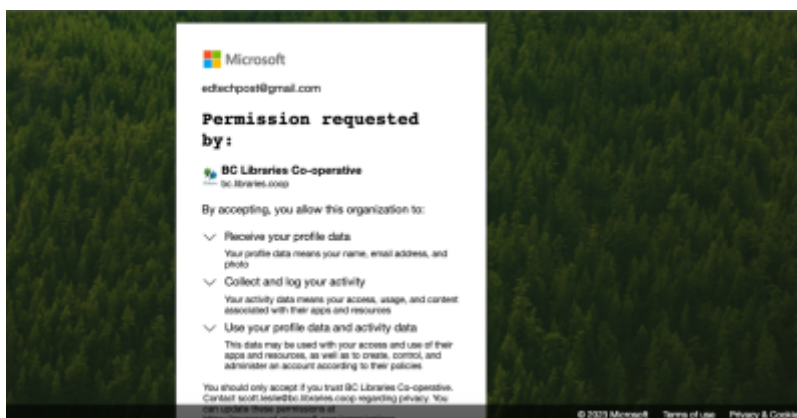
What to Expect

You will get an email invitation sent to the email address you regularly use in correspondence with the board/Co-op executive director. This invitation will be to join the BC Libraries Cooperative MS365 instance from one of the following trusted Administrator accounts: "Jonathan Schatz Admin", "Kev Woolley Admin" or "Scott Leslie Admin".

Your own institution may well already use MS365. If so, you might have slightly different steps to access theplatform, based on whether Microsoft thinks your email address is already associated with an existing MS365 account.

For those whose email already associated with MS account

If your email address is already associated with MS365 (either because your institution licenses it or maybe because you used that email in the past with another Microsoft product like Skype), click the invite email link and log-in with that existing account. You will be redirected to Co-op's terms of use page.

Upon accepting the terms, the browser to cycle a few times as it bounces around within MS365, eventually bringing a pop-up asking if you want to open Teams.

Go to Teams Client or Web.

For those who don't currently use MS365 (and also haven't associated their email with any other MS product)

If your email address is **not** associated with MS365 via your institution nor used in conjunction with any other MS product, there is a slightly different workflow to access the board team site.

When you click on the link in the invite email you receive you will be taken to a page that asks you to generate a one time codee to login. This will result in a second email being sent containing a 6 digit code which you will then enter the Board teams site.

After you enter the code, expect the browser to cycle a few times as it bounces around within MS365, eventually bringing a pop-up asking if you want to open the Teams desktop client.

See next heading.

Teams Client or Web

If you already have Teams client installed, it will be launched. However it might be less confusing if you say no and then choose to open the web version of Teams. This should open Teams, but at first you may get an error message that you don't have access to a channel. ***Ignore that*** and check again, the Board team as well as the sub channels General, Finance and Governance should be there.

By going into those channels, you should see a "Documents" tab. Those should be familiar based on what you were formerly seeing via Sync. You should now be able to open and edit any of these documents. Kevin Millsip will communicate any other ways in which the board will use Teams to collaborate going forward.

Other Initial Affordances of MS365

As the board starts to explore working together in this environment they will find new ways of collaborating, but to begin we implemented one in particular we believe will help, email aliases for the board as a whole and the two working sub-committees, Governance and Finance. We have added all board members to the appropriate lists, so to send a message to them simply email any of the following:

- board@bc.libraries.coop
- board-governance@bc.libraries.coop
- board-finance@bc.libraries.coop

Long term, your access will likely be direct to specific documents via emailed links, however if you ever need to come back to the main Board Teams site, go to https://bit.ly/bclibrariescoop-board

What to do if you have issues

In the event that you have any difficulties logging in to the Microsoft environment or the Teams site

specifically, please email `sysop@bc.libraries.coop` with the subject "MS365 - [brief issue description here] " and describe the issue with as much detail as you can in the body of the message. Someone on the systems team will respond promptly and try to help fix the issue.

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Permanent link:
https://wiki.libraries.coop/doku.php?id=public:ms365:board_onboarding&rev=1679347905

Last update: **2023/03/20 21:31**