SharePoint Online
Quick Reference Guide

UNIVERSITY OF
OXFORD

Managing Committees using MS Teams

What does this guide cover?	How to use MS Teams to manage committees
Who is it aimed at?	Anyone with a straightforward requirement to administer a committee

Contents

Introduction

Although a [Committee Template](#) is available in SharePoint Online, often the requirement to manage a committee can be met via MS Teams if your requirements are straightforward.

MS Teams provides a simple, easy to setup method of committee management. If you do not have granular permissions within your committees then this method could be considered.

This Quick Reference Guide describes two options of setting up committees within MS Teams and also provides further tips for configuring your MS Teams Committee Sites.

Option 1: Single umbrella committee team with separate private channels for each committee

This option has the advantage of being very simple to set up and maintain, especially if all committees have the same administrators, and it is very straightforward to administer a committee with basic requirements.

The disadvantages are that it is not possible to restrict access to certain documents within the channel, since permissions are defined in the channel and not by document. Also meetings cannot be scheduled within MS Teams for a private channel.

Below is an example of how to set up a committee in this way.

1. **Create a new Committee MS Team**

Create a new MS Team which will be the umbrella team for all your Unit's committees. This is done by requesting a new team using the Self-Service request in [Oxford Service Manager (OSM) system online](#). Add all committee members for all committees to this umbrella team.
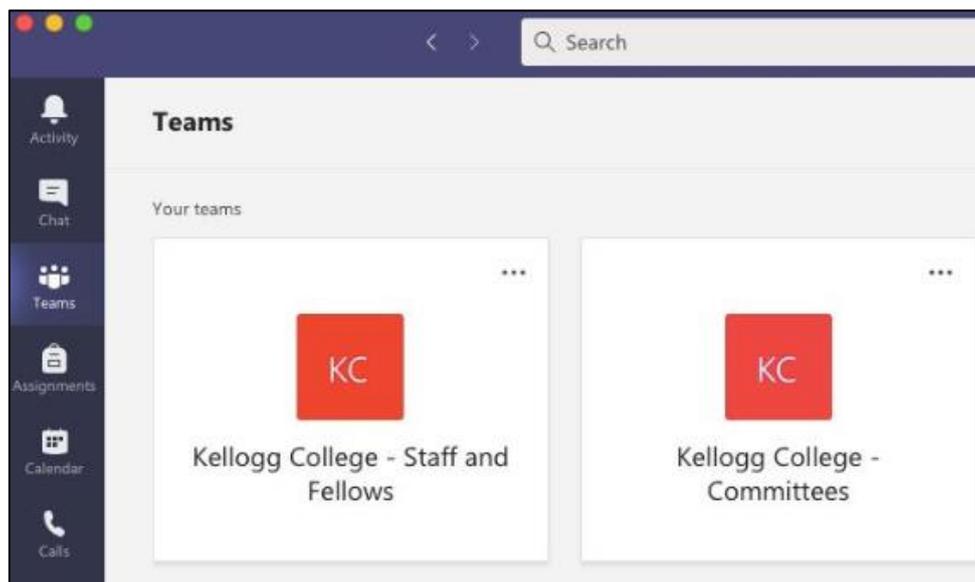
Screenshot showing the umbrella team in MS Teams

2. **Setup Individual Committee Private Channels**

Under the Committees Team set up individual channels for each committee. Make the administrator of the committee a member of the **Site Owners** group. They will then be able to select the committee members and add them to the **Members** group.

In the example below the umbrella team is *Kellogg College – Committees*, and private channels have been set up for each committee within the College.

Please note that each team can have a maximum of 30 private channels and each private channel can have a maximum of 250 members.

Additional note. It's not uncommon for Teams Owners to be 'locked out' of Private Channels by departing members of the Team who were originally assigned as CHANNEL owners. If this happens, you will require authorisation from a senior member of your unit / ITSS01 to get those channels 'unlocked'. Therefore, it is good practice to always ensure that private channels contain AT LEAST TWO of the Teams Owners to avoid this. If you require an area for sensitive data that the current Team owners can't access, consider the above before creating one, or consider putting those items elsewhere away from the Team.

To find out more see this webpage from Microsoft on Private channels in MS Teams.
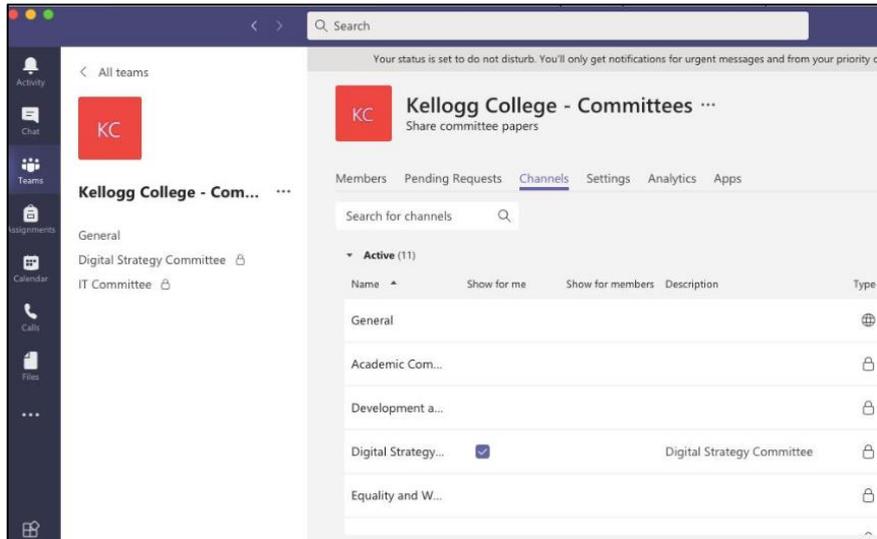
Screenshot showing individual committees set up as private channels within the umbrella team

3. Managing Committee Documents

Each channel as default has a files area which will contain all the documents specific to that committee. If you use a naming convention similar to that in the example below then documents should always be displayed in date order. Alternatively, you can re-order them in Modified date order by clicking on "Modified" and selecting "Newest to Oldest" or "Oldest to Newest". Clicking on "Name" returns them to name order.
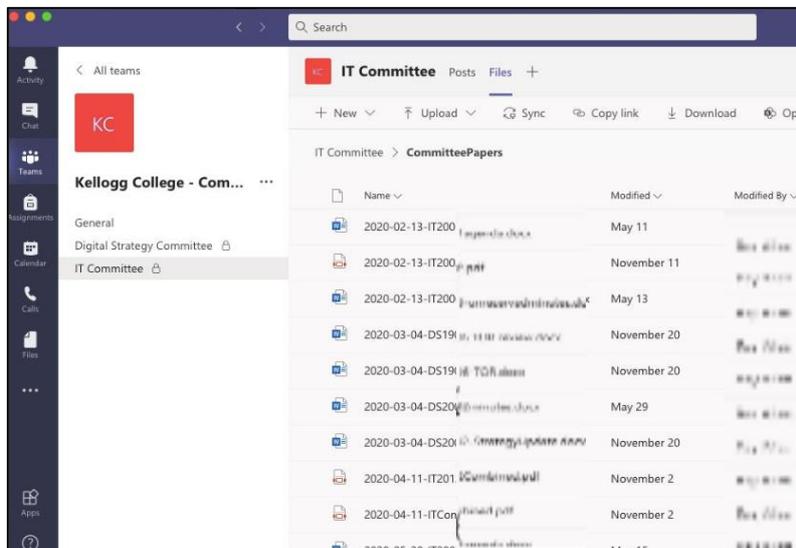
Screenshot showing the naming convention of committee documents

| **Please be aware that:** |
| --- |
| • If you upload documents into a private channel, only the committee members who are members of that private channel will be able to view/edit/download them
• If you upload documents in the Files store in the General area, all members of all committees will have the ability to view/edit/download all of these documents. |

Option 2: Set up each Committee as a separate team with channels to control access to confidential documents

An alternative way of using MS Teams to manage committees is to set each committee up as a separate team. By using this method, the channels within the team can then be used to control access to certain documents.

This method involves more administration in ensuring the correct members are in the correct channels, and some members will be members of multiple channels in the same team. However, it does offer more control over access to documents. Another advantage of this set up is that meetings can be scheduled for the whole team.

1. **Set up each individual committee as a new Team**

Each Committee is set up as a new Team within MS Teams. This is done by requesting new teams using the Self-Service request in [Oxford Service Manager (OSM) system online](#).
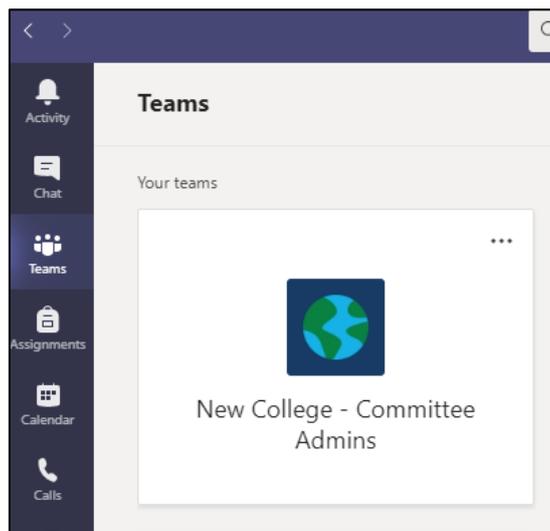
Screenshot showing a Committee Team in MS Teams

2. **Add channels to each team for different security levels**

In this example the Committee has one **General** channel for all members, and a private channel **The Chosen Few** that only certain committee members can see. They can then use this for collaborating on, and sharing, 'reserved' documents.
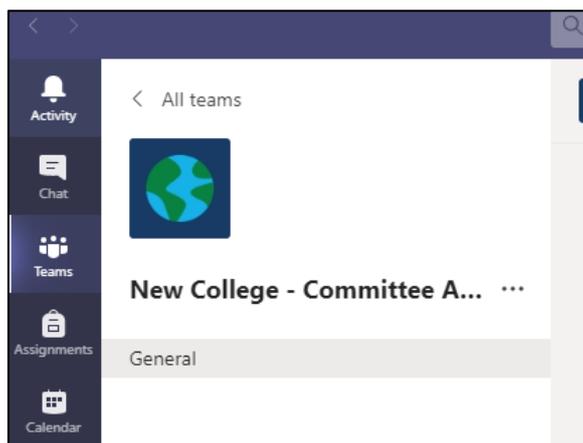
Screenshot showing committee team with one channel that is open to all members
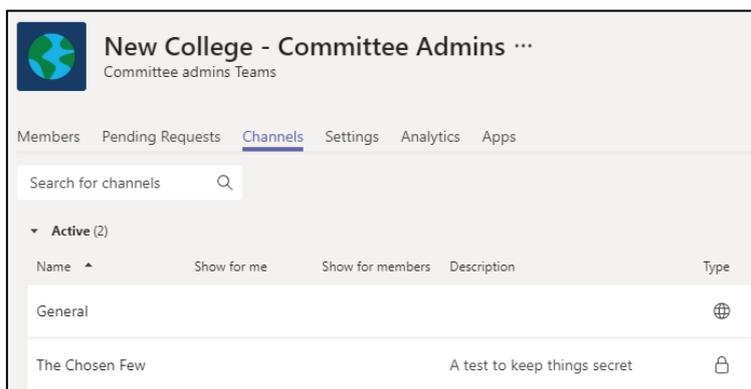

Screenshot showing two channels within the committee team, one of which is private

3. Add members to channels

Add members to each private channel as appropriate. In this example, all members are added to the *General* channel and the executive members of the committee are added to the private channel where they are able to view and edit 'reserved' documents.

4. Sending meeting requests to the Team

In this configuration meeting requests can be sent to all committee members using the calendar in MS Teams.
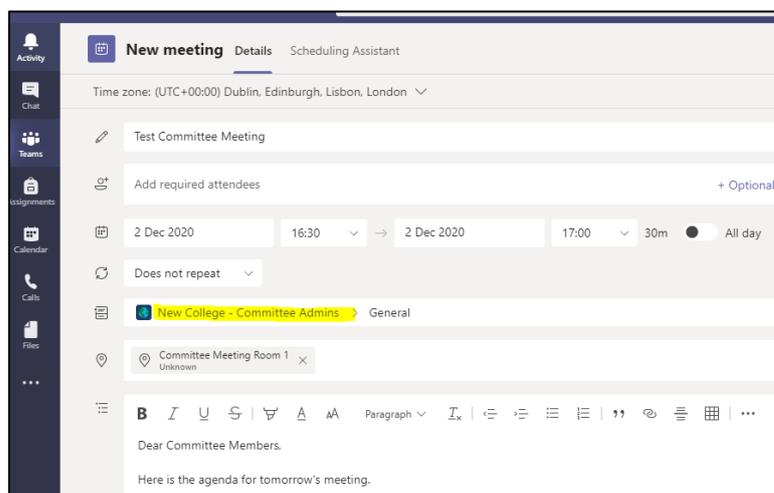
Screenshot showing meeting request sent to the Committee channel

The meeting details are then displayed in the chat for that committee.

Screenshot showing meeting details that appear in the channel chat

If the meeting is cancelled then the details are also displayed in the channel chat.
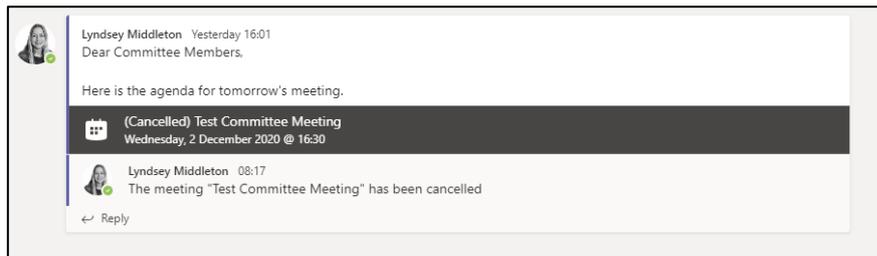

*Screenshot showing details of cancelled meeting in the channel chat*

Please be aware that:
- If you upload documents into a private channel, only the committee members in that private channel will be able to view/edit/download them, and therefore if you need two separate groups within a committee to view a document, you will have to upload it into both private channels, **but this will result in two different versions of the document which will not be synchronised.**
- If you upload documents in the files store in the General area, all of the committee members will have the ability to view/edit/download all of these documents
- Documents and communication can be either moved or copied between any teams you are a member of, and channel messages can be posted in multiple channels / teams at the same time. This will help if you are juggling several committee Teams and want the same content in multiple places, **but will result in two different versions of the document which will not be synchronised.**

## Other tips for configuring your MS Teams Committee Sites

Use of the General Channel and having a Home Page with Committee Details

It can be useful to have a home page with basic details about your committee such as a description of the committee and membership details. This can be done by using a 'pinned' post in the General channel.
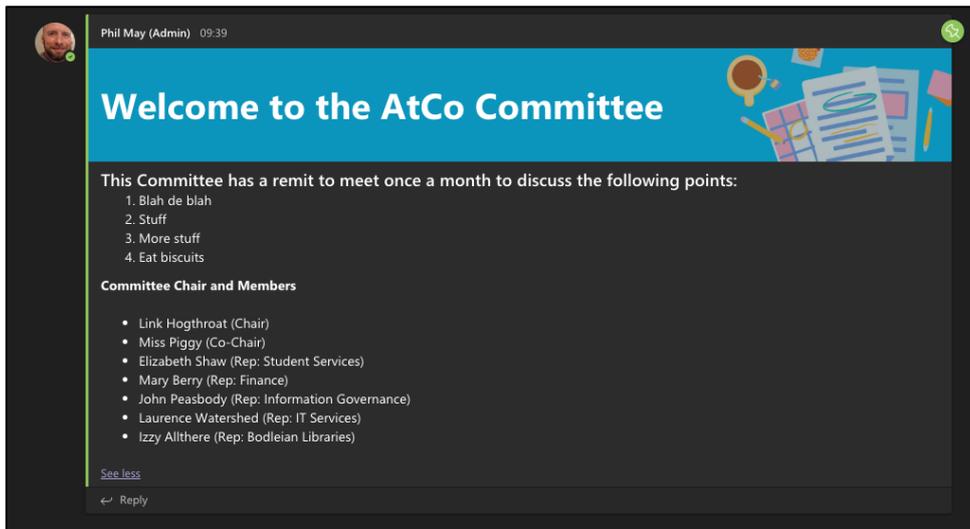
Screenshot showing a pinned post in the General channel

You can do this by selecting the 'three dots' on your post and selecting 'Pin'. This post will then always appear at the top of the general channel.
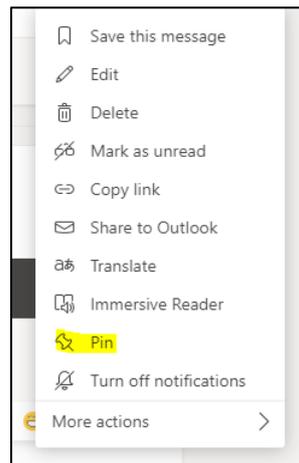
Screenshot showing the 'Pin' option for a Teams post

In most teams, the General channel is the default channel used for broad team discussions, addition of extra apps and tabs, and usually contains files that should be accessible to the whole team. In this case it could be 'locked off' so only the committee team owners could post or update it, ensuring that the first screen is preserved as shown above, but also that relevant committee business is posted in the channel rather than just chat and comms. The "General" Channel in Teams is the constant, cannot have its name changed, needs to be there in order for the Team to function, and will appear to all members by default.

Using Calendars within MS Teams

Unfortunately, the functionality to use a Teams calendar is still in its infancy, and although there is a calendar associated with the Office365 Group that underpins the Microsoft Team, this is not accessible from within Teams itself.

There are two currently available options for managing the Team calendar, and one future option that will properly integrate the group calendar in Teams at a later date.

Option 1: Use the Group Calendar by making the Team visible to Outlook Clients / Global Address Lists

Currently all Teams are created as "Private" by default, and are hidden from the Global Address Lists (GAL). This is to avoid people being able to email the Teams group via lookup in the GAL and from Outlook Clients (though any groups that a Team Owner / Team Member are joined to – including Teams - will be visible in Outlook Web Access). To use the Group Calendar from Outlook you would need to request that the Team is made visible to Outlook (you will need to contact the Nexus Team) and to use the workaround described in this blog article to integrate a Group Calendar into Teams

Option 2: Use a Channel Calendar in Teams

This may be useful in scenarios where users want to run more than one committee from Teams. Channel calendars are simple calendars that can be added to specific "Public" channels in a team.

There are some caveats to this:

- Channel Calendars can only be used in Teams, they cannot be populated from elsewhere, you can't overlay other calendars from elsewhere onto them, they literally can only be viewed and accessed via Teams and the channel they're created in.
- Channel Calendars cannot currently be set up in Private channels, only "Public" ones, so you can't create permissions / access based calendars.

(Future) Option 3: Proper integration of the Group Calendar with Teams

Although not currently available, this future functionality is worth bearing aware of. As detailed in this UserVoice "Working on it" article, Microsoft are continuing to work on proper integration of an Office365 Group Calendar within Teams: Include Office 365 group calendar in teams – Microsoft Teams UserVoice.

This is a high priority for Microsoft and if this feature arrives, it will be a game-changer for calendaring in Teams and will make provision of a Committee / Meetings solution in Teams a far easier prospect.

MS Teams Permission Levels

It is useful to understand the permission levels in Teams, especially if your committees can involve external guests.

By default Teams has the following permission levels:

- **Team Owner** (similar to "Site Owner" in SPO) has broad access to everything except private channels that the Team Owner is excluded from.
- **Team Member** (similar to "Site Member" in SPO) a user from within the organisation who has access to all (publicly available) materials within a Team except where:
  1) A Private Channel owner has excluded them from the channel membership
  2) Any areas where a Team Owner has specified that members cannot create or update items (set up in specific channel settings menus or in the team's setting menus to affect the whole team).
- **Team Guest** This is how External (i.e. non-University) members of a team are described, e.g. Joan Smith (Guest). Normally they have exactly the same access privileges as a Team Member with the same caveats. There are also certain apps and services under Nexus365 that external committee guests would not have access to, and certain Teams features that would also not be available to them. This table describes the settings for guest access to Teams:

Permissions in Teams	Team member within organization	External user with guest access
Create a channel*	✔	✔
Participate in a private chat	✔	✔
Participate in a channel conversation	✔	✔
Post, delete, and edit messages	✔	✔
Share a channel file	✔	✔
Share a chat file	✔	
Create meetings or access schedules	✔	
Invite an external user to become a guest*	✔	
Create a team	✔	
Discover/join a public team	✔	

Future enhancements and improvements to MS Teams

Microsoft Teams is a constantly evolving product as Microsoft tweaks and changes it to suit the growing needs of Education – who are now fast becoming their biggest worldwide customers for using Teams (some 20 million teams are in use by Education tenancies across the world. The University of Oxford makes its own small contribution to this with our 8000 or so!).

The Nexus Team are constantly monitoring new and upcoming features in Teams and we have already mentioned a couple of these in this document but here's a brief summary of those and other features that have particular relevance to how committee business could be conducted in Teams in the future:

- **Group Calendar Integration**. This has already been mentioned above. Though there are various ways to work around the lack of a "proper" calendar in Teams, full integration controlled from directly within Teams via the client or the web version of Teams would make things a lot easier, and would also give users more change to automate committee business using Microsoft Power Automate.

- **Organised meetings in Private Channels**. Again this isn't a feature that currently exists (you can only "Meet now" in a private channel currently) but Microsoft are reworking teams to incorporate this feature. With this, committees could set up "public" meetings in standard channels as normal, or have the choice to conduct "Reserved" business in private channels.

- **Document sharing with granular permissions**. This is something that can only be achieved in Teams through the use of Private Channels (and it's done in a rather non-standard way, by creating an entirely separate SharePoint Online site behind the scenes and assigning permissions there – because any permissions changes in standard teams channels will instantly "break" Teams). However, Microsoft has been discussing proper integration of granular permissions for Teams for a while with "Teams New File Experience" closely matching the sort of granularity you can use in current SPO document libraries.

And finally a warning…

All teams in MS Teams have a SharePoint Online site in the background. It is important that if this site is used, that it is used 'as-is'. Changing the name of anything on the site can break the MS Team, as can changing the permissions on this site or hitting the 'Share' button whilst on the site.

If you wish to share a document, copy the link from through the three dots to the right of the document name and paste it into a document, email or Teams message. Please note that only those with access

granted through the Teams site or private channel will be able to access the document through this link. If you receive an email request to approve access from someone who is not a member of this committee or channel, please do not approve it (so reject the request). Instead consider whether the requestor should be a member of that Teams site or private channel.
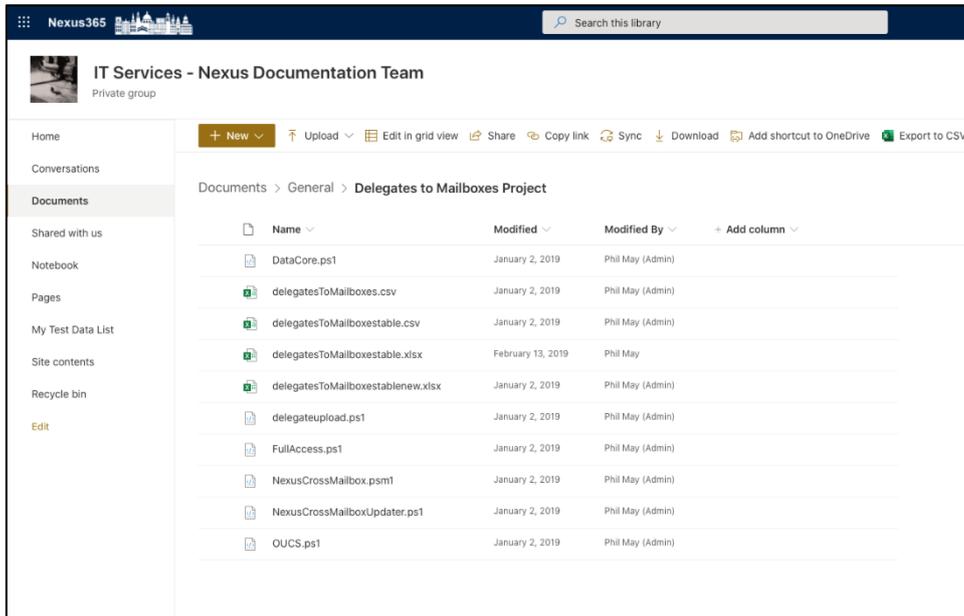
Screenshot of a Teams SharePoint Online content site. Not to be confused with a standard SharePoint Online site!

If you want to prevent requests for access to your site / team, do the following as a Team owner:

1) Go to any files area in Teams, click on the … menu on an item and select 'open in SharePoint'.

2) From the Cog Menu (Site Settings) in the SharePoint site, select "Site Information" then "View All Site Settings"

3) Click on the "Site Permissions" link then click on the "Access Request Settings" icon in the ribbon.

4) Ensure all boxes are unticked. This will not cause any issues with your Team's functionality but will prevent users from requesting access to the site behind teams if they are sent links in error: