

NORTH CAROLINA

BAR ASSOCIATION
seeking liberty + justice

Center for Practice Management

The Wonders of MS Teams: Collaboration with Ease

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North Carolina Bar Association

Teams

Good for your functional groups

Web, apps, install

Replace email for internal communication

Project/matter-based focus

Teams - Activity

The screenshot displays the Microsoft Teams interface. On the left is the navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, Files, and Help. The main area is split into two panes. The left pane shows the 'Activity' feed for the 'General' channel, listing various posts and reactions from users like 'RSS', 'Juda', 'courtney.troutman', and 'canastasio'. The right pane shows a chat window for the 'General' channel. It contains several messages, including RSS feeds and a direct message from Catherine Sanders Reach. A 'Scheduled meeting' notification for Monday, March 15, 2021, at 2:00 PM is also visible. A 'New conversation' button is located at the bottom of the chat window.

Activity Feed:

- RSS** 3/9: CPM Admin > General News You Can Use RSS Connection - Digest
- Juda replied** 3/4: Design Your Law Practice: A Pra... > General Awesome! Thank you!
- Juda reacted to your post** 3/4: Design Your Law Practice: A Pra... > General Welcome to our little planning portal. Tell me if yo...
- RSS** 3/3: CPM Admin > General News You Can Use RSS Connection - Digest
- RSS** 3/2: CPM Admin > General News You Can Use RSS Connection - Digest
- courtney.troutman reacted to your message** 2/24: Chat with courtney.troutman I just wrote a 2500 word article on Teams for GP...
- RSS** 2/24: CPM Admin > General News You Can Use RSS Connection - Digest
- RSS** 2/24: CPM Admin > General RSS is now connected to CPM Admin
- canastasio reacted to your reply** 2/22: Test Team > General if you create a library in SharePoint you can embe...
- canastasio mentioned you** 2/22

Chat Window (General):

- Message: The post Six Marketing Tips You Can Do Today appeared first on North Carolina Bar Association.
- Date separator: March 3, 2021
- Message: **RSS** 3/3 9:54 AM
Six Marketing Tips You Can Do Today
Whether your firm has been established for 15 years or 5 days, law firms need to market their services to stay top of mind with potential clients, referral sources and former clients. There are lots of free or low cost tools you can use to make sure that you are getting the word out. Of course, even with free tools... The post Six Marketing Tips You Can Do Today appeared first on North Carolina Bar Association.
- Date separator: March 9, 2021
- Message: **RSS** 3/9 12:14 PM
What You Need to Know About Project Management
Project management is a discipline used in manufacturing and information technology. Recently, law firms have identified project management to manage risk, predict pricing and keep complex matters moving forward. Project management methods focus on assigning and tracking deadlines, identifying milestones and helping to ensure that a matter is completed in a timely manner. The benefits of project management are that... The post What You Need to Know About Project Management appeared first on North Carolina Bar Association.
- Date separator: Today
- Message: **Catherine Sanders Reach** 1:33 PM why no link?
- Notification: **Scheduled meeting** Monday, March 15, 2021 @ 2:00 PM

Teams – Chat

Activity

Chat

Teams

Meetings

Files

Recent

Contacts

Erik, Josh, Julianne, +2 8:47 AM
Julianne: We tell the entire councils that they are on...

Erik Mazzone 8:14 AM
Yeah makes sense. I think we are going to wait to tr...

Hallie Kennedy 2/22
You: I guess during lunch is better because after lun...

Jeremy Williams 2/19
thanks, I may have more questions on that later

Jennifer Shapiro 2/18
👍

Lindsey Crook 2/13
Sweet! I'll come see you around 9:15

Josh McIntyre 2/11
You: No problem finding parking.

Kim Wentworth 2/8
Edward said that there is a feature for a "private cha...

Julianne Dambro 2/5
You: 😊

Vaddrick Parker 1/30
You: Ok, thanks!

Jeremy and Mark 1/30
You: Teams has been working fine for me all day on ...

Glennon Toone 1/30
big fan of this tweet

Suggested

Amber Nimocks

Amy Kemple

Ashley Mills

Erik, Josh, Julianne, Tesha, Vaddrick 6 participants

Conversation Files +

seniorship application. If you have a voicemail from her prior to team this morning, no need to reply to it. If you receive an email or voicemail from her after that time, please let me know.

Yesterday

Yesterday 5:09 PM
This may be a little too late but: https://associationsnow.com/2019/02/makes-young-members-tick/#disqus_thread

What Makes Young Members Tick?
A new benchmarking study focuses on young professionals' views on membership. While many from the Gen Z and millennial generations decide to join association...
associationsnow.com

Julianne Dambro Yesterday 5:17 PM 1
Interesting article. Who knew Instagram was the "it" social tool.

Today

Erik Mazzone 8:18 AM
Thanks. The peer to peer recruitment and referral bonuses were both interesting.

8:22 AM
Also, do we have micro volunteer options? Quick ways to dip a toe in volunteer work without a long term commitment? I know we let folks post on the blog, but other things?

Erik Mazzone 8:23 AM
Yeah mostly through foundation. The pro bono in your pajamas thing from the ABa

8:23 AM
👉

Teams - Presence

The screenshot displays the Microsoft Teams interface. At the top right, a window title bar shows a user profile picture, a minus sign, a maximize icon, and a close icon. Below this, the profile card for Catherine Sanders Reach is visible, including her name and a 'Change picture' link. A context menu is open over the profile card, listing various presence and status options: Available (green dot), Busy (red dot), Do not disturb (red dot), Be right back (yellow dot), Appear away (yellow dot), and Appear offline (grey dot). Below these are 'Duration' and 'Reset status' options. To the right of the context menu, the 'Offline' status is selected and highlighted, with a hand cursor pointing to it. Other options in the profile card include 'Set status message', 'Saved', and 'Settings'. Below the profile card, there is a 'Zoom' section with a minus sign, '(120%)', a plus sign, and a full-screen icon. Further down are 'Keyboard shortcuts', 'About', 'Check for updates', and 'Download the mobile app'. At the bottom of the profile card is a 'Sign out' option. At the bottom of the screenshot, a participant bar shows five icons with names: Erik (green dot), Josh (green dot), Julianne (red dot), Tesha (green dot), and Vaddrick (yellow dot), followed by '6 participants' and an edit icon.

Catherine Sanders Reach
Change picture

- Available
- Busy
- Do not disturb
- Be right back
- Appear away
- Appear offline

Duration

Reset status

Offline

Set status message

Saved

Settings

Zoom (120%)

Keyboard shortcuts

About

Check for updates

Download the mobile app

Sign out

Erik, Josh, Julianne, Tesha, Vaddrick
6 participants

Teams - Calendar

The screenshot shows the Microsoft Teams calendar interface. On the left is a navigation sidebar with icons for Activity, Chat, Teams, Calendar, Calls, and Files. The main area is titled 'Calendar' and shows a weekly view for March 2021. The current date is 'Today', which is March 15th (Monday). The calendar grid shows the following meetings:

Date	Day	Meeting Title	Time	Organizer	Link
March 15	Monday	Scheduled meeting	2 PM - 3 PM	Catherine Sanders Reach	
March 16	Tuesday	Microsoft Teams: All	2 PM - 3 PM	Janet Johnson	https://zoom.us/j/9252912345
March 17	Wednesday	UNC Law class	2 PM - 4 PM		
March 18	Thursday	CSR/ELM one on one	2 PM - 3 PM	Erik Mazzone	https://ncbar.zoom.us/j/92041519608?pwd=dE9aQmhYN3dmcDhRTG9GRS9XNUZRUT09
March 19	Friday	CBA Basic Skills for Newly Admitted Attorneys - March 19	2 PM - 4 PM	Catherine Sanders Reach	

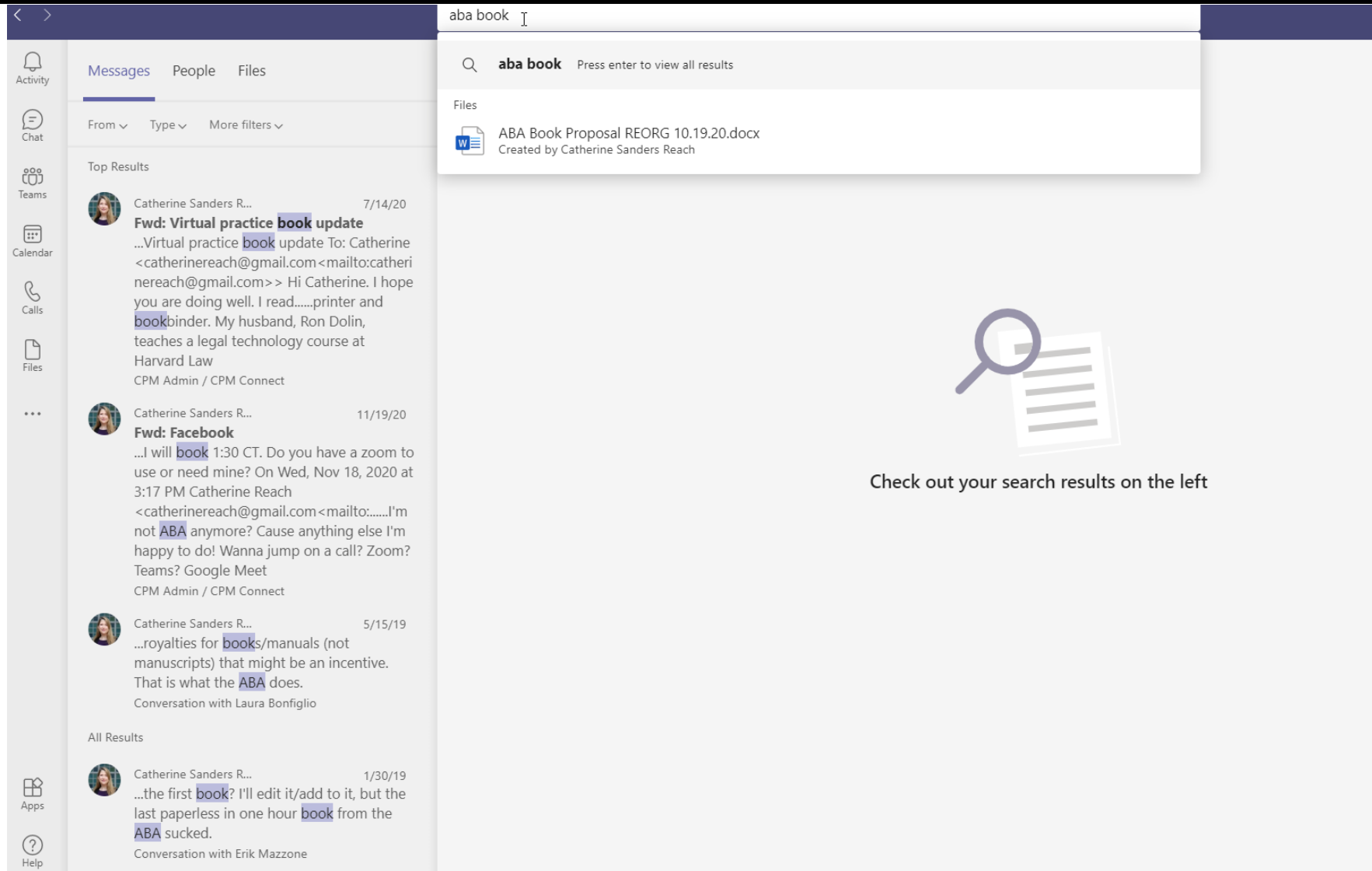
Teams - Files

The screenshot displays the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Meetings, and Files. The main area shows the 'Microsoft Teams' file view. A table lists files with columns for Type, Name, Modified, Modified by, and Location. A context menu is open over the first file, 'CPM Strategic Plan 2019-2020.docx', with the 'Edit in Teams' option highlighted by a mouse cursor.

Type	Name	Modified	Modified by	Location
Word Document	CPM Strategic Plan 2019-2020.docx	2/15/19	Erik Mazzone	/sites/CenterforPracticeMar
PowerPoint	Report.pptx	1/31/19	Catherine Sanders Reach	/sites/CenterforPracticeMar
Excel	ring vs. PMA.xlsx	1/31/19	Catherine Sanders Reach	/sites/CenterforPracticeMar
Excel	enefits for SSF.xlsx	1/31/19	Catherine Sanders Reach	/sites/CenterforPracticeMar

- Edit in Teams
- Open in Word Online
- Open in Word
- Download
- Get link

Teams - Search



The screenshot displays the Microsoft Teams search interface. At the top, a search bar contains the text "aba book". Below the search bar, a dropdown menu shows search results for "Files". The first result is a document titled "ABA Book Proposal REORG 10.19.20.docx" created by Catherine Sanders Reach.

On the left side of the interface, a list of messages is visible. The top results are:

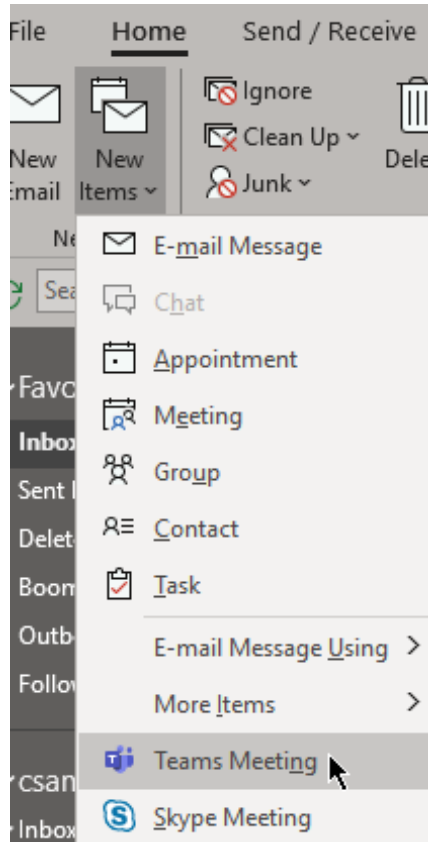
- Message 1:** From Catherine Sanders R... (7/14/20). Subject: **Fwd: Virtual practice book update**. Content: "...Virtual practice book update To: Catherine <catherinereach@gmail.com<mailto:catherinereach@gmail.com>> Hi Catherine. I hope you are doing well. I read.....printer and bookbinder. My husband, Ron Dolin, teaches a legal technology course at Harvard Law CPM Admin / CPM Connect"
- Message 2:** From Catherine Sanders R... (11/19/20). Subject: **Fwd: Facebook**. Content: "...I will book 1:30 CT. Do you have a zoom to use or need mine? On Wed, Nov 18, 2020 at 3:17 PM Catherine Reach <catherinereach@gmail.com<mailto:.....I'm not ABA anymore? Cause anything else I'm happy to do! Wanna jump on a call? Zoom? Teams? Google Meet CPM Admin / CPM Connect"
- Message 3:** From Catherine Sanders R... (5/15/19). Content: "...royalties for books/manuals (not manuscripts) that might be an incentive. That is what the ABA does. Conversation with Laura Bonfiglio"

Below these messages, the "All Results" section shows:

- Message 4:** From Catherine Sanders R... (1/30/19). Content: "...the first book? I'll edit it/add to it, but the last paperless in one hour book from the ABA sucked. Conversation with Erik Mazzone"

On the right side of the interface, there is a large magnifying glass icon over a document icon, with the text "Check out your search results on the left" below it.

Teams - Meetings



New meeting

Title
Rollout Plan for Newsletter

Location
Microsoft Teams Meeting

Start Mar 5, 2019 12:00 PM **End** Mar 5, 2019 12:30 PM **Repeat**

Free: Mar 5 12:00 - 12:30pm, 11:30 - 12:00pm, 12:30 - 1:00pm ... [Scheduling assistant](#)

Details

B *I* U | | | | | Paragraph

What is the plan for rolling out this feature?

Select a channel to meet in
Center for Practice Management / E...

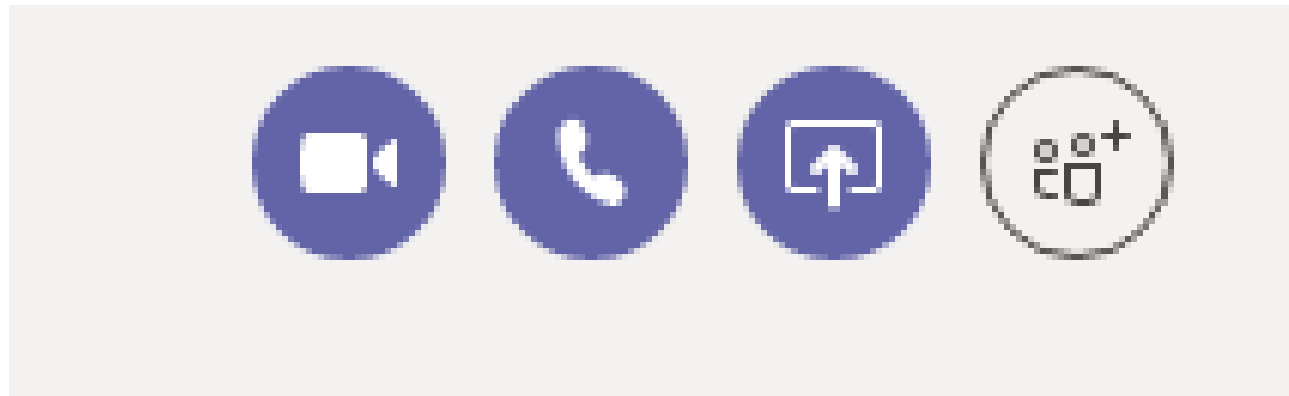
Invite people
Invite someone

Organizer
 Catherine Sanders Reach
csandersreach@ncbar.org

Attendees
 Erik Mazzone
Free

This is a Microsoft Teams online meeting. Everyone can join online.

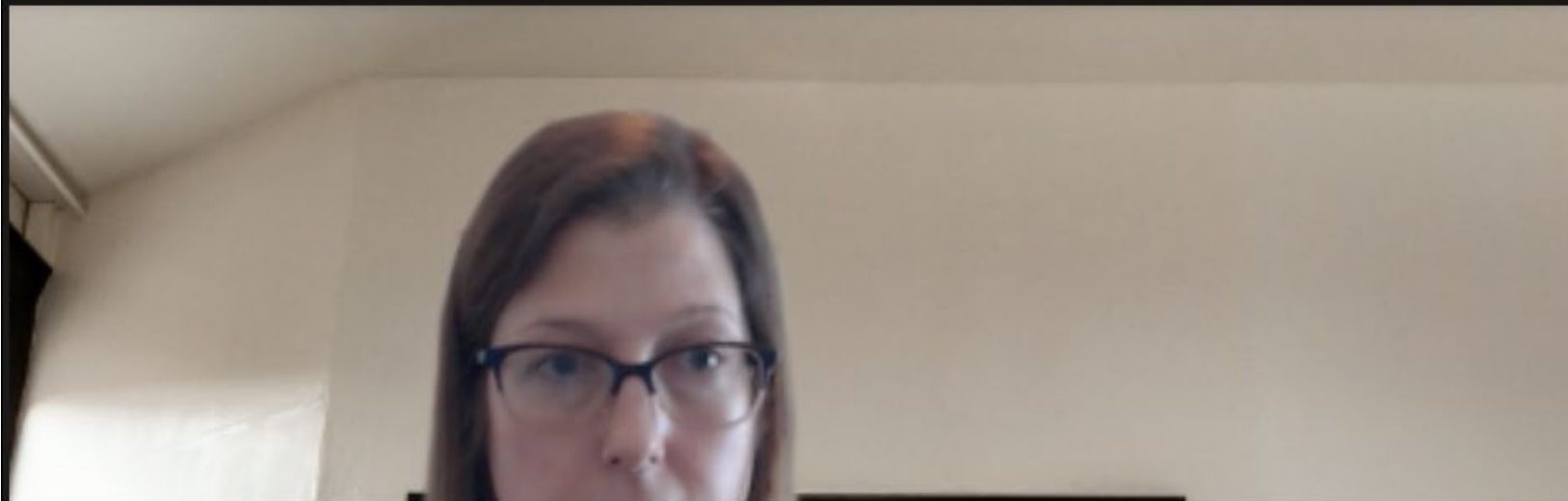
Teams – Audio, Video and Screen Sharing



05:40



Leave ▾



Meeting chat



1:33 PM
why no link? ↻

2:56 PM Meeting started

Include computer sound

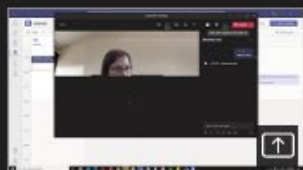
Desktop

Window

Whiteboard

PowerPoint

Browse



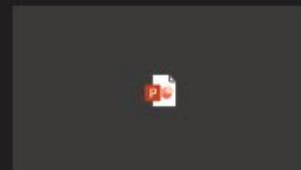
Screen #1



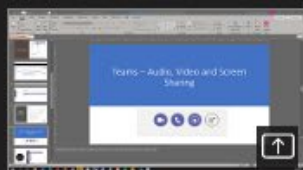
Scheduled meeting | Mic...



Microsoft Whiteboard



MS Teams.pptx



Screen #2



Calendar | Microsoft Tea...



Freehand by InVision

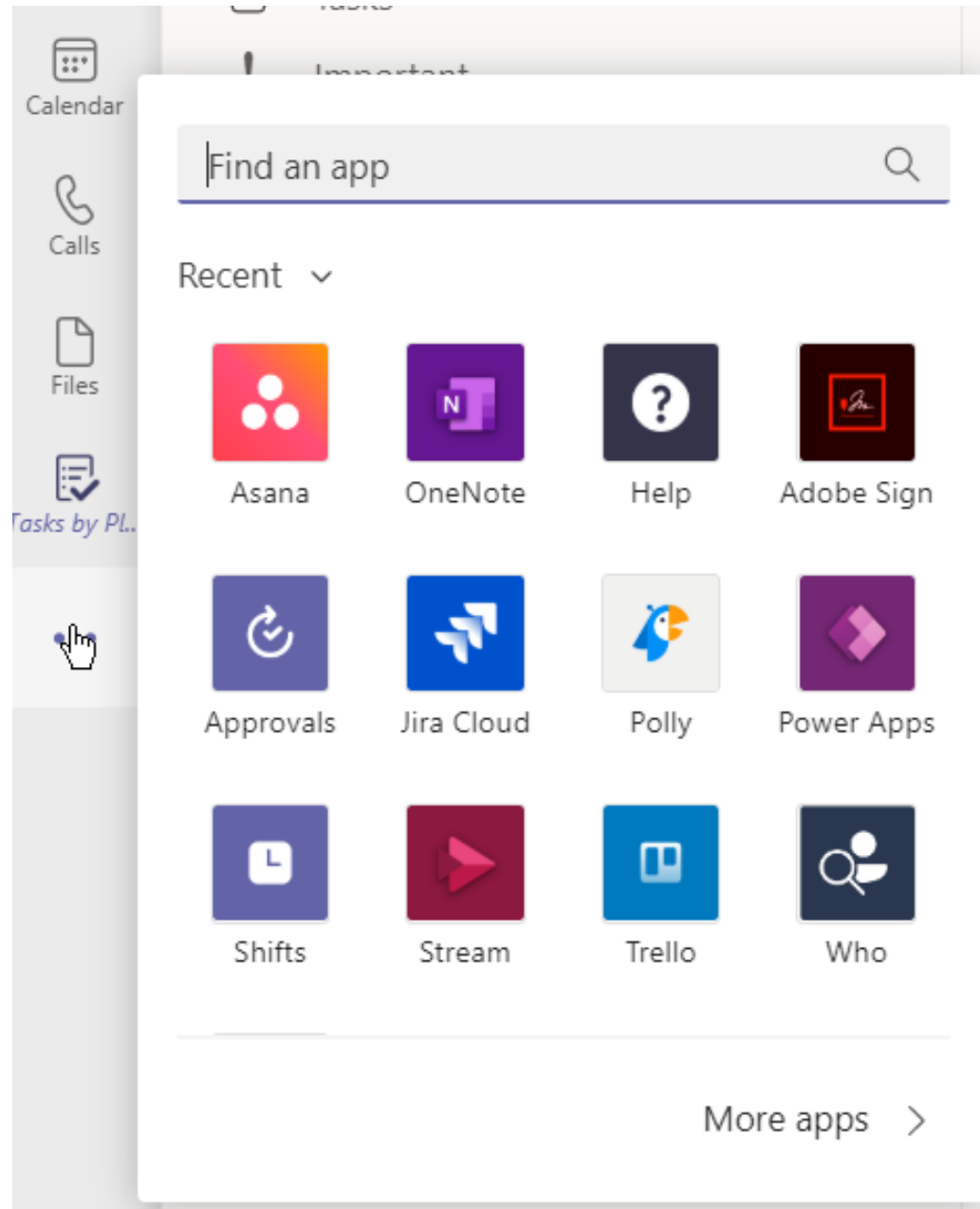


Mining the web 2019 for...

Type a new message



Teams - Apps



Teams – More Apps

Store

- All
- Apps
- Bots**
- Connectors
- Messaging
- Analytics and BI
- Developer and IT
- Education
- Human resources
- Productivity
- Project management
- Sales and support
- Social and fun

<p>piece of contact information into a rich data profile. Now it is all available through the...</p>	<p>our service you can remotely interact your team mates, run scheduled standup meeting...</p>		<p>work from home. Extract vacation reports and much more. Send 'help' to @attendancebot t...</p>
<p>OfficeAmp Communication</p> <p>Open and resolve tickets right inside Teams. View tickets on a Kanban Board, download reports and much more.</p>	<p>iTrainer365 EN Training + tutorial</p> <p>iTrainer365 chat-bot is a winner in the international competition of Microsoft Office 365 solutions (Hack Productivity 2018)...</p>	<p>YellowAnt Productivity</p> <p>YellowAnt is an intelligent assistant bot that lets you create powerful event or command triggered automations and manage your wor...</p>	<p>LawToolBox Productivity</p> <p>LawToolBox is an all-in-one court rules calculator and deadline management system provider that offers deadline solutions used ...</p>
<p>Haldor Education Education</p> <p>The application gives customers of Haldor to get the full Haldor experience in Teams for Education. It contains the dashboard for your...</p>	<p>Leo Human resources + recruiting</p> <p>Get helpful advice to become a better manager. Leo, the Officevibe bot, will send you frequent messages with articles, tips, and...</p>	<p>Bonusly Human resources + recruiting</p> <p>Bonusly is a fun, personal recognition and rewards program that enriches your company culture, improves employee engagement, an...</p>	<p>Workbot Workflow + business management</p> <p>Eliminate app hopping and integrate all your cloud apps right from Teams. - Get relevant, personalized notifications that you can act o...</p>
<p>Forms Productivity</p> <p>Easily create surveys, quizzes, and polls.</p>	<p>AVA Productivity</p> <p>Say hello to AVA, AvePoint's Virtual Assistant! Our handy help desk assistant is a new addition to the AvePoint family, and we hope...</p>	<p>Sapho Productivity</p> <p>Sapho makes it easy for employees to use Microsoft Teams to work with internal applications and databases, as well as cloud...</p>	<p>Suttna Project management</p> <p>Suttna, your remote team assistant. Suttna will give your team a set of tools to enhance the productivity. The main focus is to automate...</p>
<p>Crewhu Human resources + recruiting</p> <p>Crewhu: Utilize our 1-click survey to increase response rates, improve customer service and celebrate small wins on a daily basis; Our...</p>	<p>Clarizen Productivity</p> <p>Clarizen delivers secure, cloud-based collaborative work management solutions built on the vision of business agility. Our intuitive...</p>	<p>SignEasy Productivity</p> <p>SignEasy: Extend your Microsoft Teams experience with SignEasy. Sign documents or request signatures directly from your Teams...</p>	<p>Zenefits Human resources + recruiting</p> <p>View your Zenefits org chart within Microsoft Teams.</p>
<p>Talla Workflow + business management</p> <p>Talla automates keeping your knowledge base up-to-date, relevant, and organized, so you don't have to. Your company's knowledge is...</p>	<p>busuu quizbot Education</p> <p>Hi! Hola! Bonjour! Learn a language from the comfort of your chat window using our Quizbot. Test your understanding of English...</p>	<p>TINYpulse Communication</p> <p>Responding to surveys is easier than ever with the TINYpulse app for Teams. Get notified and anonymously respond to your regular pulse...</p>	<p>StubHub Lifestyle</p> <p>Finding tickets to sports, concerts and theater as easy as chatting with your friends.</p>
<p>SIMON</p>	<p>Woobot</p>	<p>AIアシスタントボット</p>	<p>ApproveSimple</p>



Teams – Workspaces/Channels

- Creating a New Team
- Channels in Teams
- Organizing Your Team Channels
- Adding Tools to a Channel
- Permissions
- Automations
- Channel Meetings

Teams - Workspaces

The screenshot displays the Microsoft Teams interface. On the left is a dark navigation pane with icons for Activity, Chat, Teams, Meetings, and Files. Below these icons is a list of teams. The 'NCBA/F' team is selected and highlighted in blue. Below it, the 'General' channel is also highlighted. Other teams visible include 'MX Dept', 'MX Directors', 'BLO', and 'Center for Practice Management'. Each team entry has a small icon and a three-dot menu to its right.

The main area on the right shows the chat window for the 'NCBA/F' team, specifically the 'General' channel. At the top, there are tabs for 'Conversations', 'Files', and 'Wiki'. A link is shared in the chat: <https://ncbarblog.com/home-2/calendar/>. Below the link is a preview card for a 'Calendar' post from 'ncbarblog.com' with the text 'Visit the post for more.' and the NCBA logo. A 'Reply' button is visible below the link.

Below the link, there are two system messages: 'Hallie Kennedy joined the team.' dated January 22, 2019, and another system message dated January 24, 2019. Below these, there are two messages from 'Mark Bryant' dated 1/24 10:44 AM. The first message says 'FYI from CIT, this is not affecting us:' with a 'Reply' button below it. The second message says 'We have received a report that Century Link is experiencing a regional outage impacting Rale restoration and as a result, phone support to our NOC is not available. Even though you are n at ServiceDesk@carolinasit.com or go straight to our portal at <https://support.carolinasit.com> ; inconvenience and will update you when the phones are working again

Teams - Channels

The screenshot displays the Microsoft Teams interface. On the left is a navigation sidebar with icons for Activity, Chat, Teams, Meetings, and Files. The 'Teams' section is expanded, showing a list of teams and channels. The selected team is 'Center for Practice Management', and the selected channel is 'Email Weekly Newsletter'. The main content area shows the channel header with the team name and channel name, followed by tabs for Conversations, Files, Wiki, and Weekly eNewsletter Project Pl... The 'Wiki' tab is active, displaying a 'Content Sources' section with two items: '1. Resources' and '2. Contents and layout'. Below this is a 'Resources' section containing a list of links.

Center for Practice Management > Email Weekly Newsletter

Conversations Files Wiki Weekly eNewsletter Project Pl...

Content Sources

- Resources
- Contents and layout

Resources

- Recomendo <http://recomendo.com/>
- ABA Journal Tech Monthly: http://www.abajournal.com/stay_connected/newsletter
- ABA Journal Daily Newsletter http://www.abajournal.com/stay_connected/newsletter
- Flipboard Tech <http://flip.it/0INBYQ>
- Legaltech News Daily Alert <https://store.law.com/Registration/MyAccount.aspx?target=EmailPref&promoCode=LT&permissionsUnit=ALMPUB&email=catherinereach%40grnology%20News&cn=20190131&src=EMC-Email&pt=Daily%20Alert#/EmailPref>
- AboveTheLaw: https://info.breakingmedia.com/hs/manage-preferences/unsubscribe?d=eyJYYSi6ImNhdGhlcmV1ljoZjRmZjJkYmYtYmE5NC00ZmU3LTgxN2UtODhmNmM5YWY2NDI1Irm_medium=email&utm_content=69354824&_hsenc=p2ANqtz-9Ga-LNLLKvW7nw28LMoPmKOUUIGUOqjF9D9OkR85D895ILzd91qYK3aI78Kako-V72WN83F0Znkv
- LegalTech Startup Focus: <https://tinyletter.com/CharlieUniman>
- PC Magazine What's New Now and Small Business Update: https://www.pcmag.com/newslettutm_source=email&utm_campaign=whatsnewnow&utm_medium=title
- Lawtomatic <https://tinyletter.com/gteninbaum>
- My Feedly collection <https://feedly.com/catherinereach>

Teams – Channels - Tabs

The screenshot shows a Microsoft Teams interface. At the top, the channel name is 'CPM Admin > General ...'. Below it, a navigation bar contains tabs: 'Conversations', 'Files', 'Meeting Notes', 'Planning Notes', 'CPM Projects', and 'CPM Calendar'. The 'CPM Calendar' tab is selected and highlighted. The main content area displays a calendar grid with dates from 11 to 17. Below the calendar, the title 'CPM Calendar' is shown, followed by the profile of Catherine Sanders Reach, Director of the Center for Practice Management. There are two tabs: 'Upcoming' (selected) and 'Past'. A 'Sync calendar' button is visible on the right. The calendar entries are as follows:

Date	Event	Details
Wed, Aug 21, 2019 9:00 AM – 10:00 AM	Learning Objectives webinar	webinar Take notes in shared Meeting Notes here: Meeting Notes
Wed, Sep 18, 2019 9:00 AM – 10:00 AM	Learning Objectives webinar	webinar https://cpm.ncbar.org Join Microsoft Teams Meeting...
Wed, Oct 16, 2019 9:00 AM – 10:00 AM	Learning Objectives webinar	webinar

Teams Resources

Microsoft Teams video training - Office Support

https://support.office.com/en-gb/article/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7?ui=en-US&rs=en-GB&ad=GB&fbclid=IwAR3ujbBu168VK2G1Tv_5o8-rnSrO9sUD_mmonhq8ht5fSqzAqQ1cc6NKwdc

Turn on or turn off guest access to Microsoft Teams | Microsoft Docs

<https://docs.microsoft.com/en-us/microsoftteams/set-up-guests>

Helping Email Addicts Adjust to Microsoft Teams | LinkedIn

<https://www.linkedin.com/pulse/helping-email-addicts-adjust-teams-jamie-laporte/>

Microsoft Teams vs. Slack: What's the Difference?

<https://www.pcmag.com/article/349274/microsoft-teams-vs-slack-whats-the-difference>

Microsoft Teams: impressive new meeting features to rival Slack - The Verge

<https://www.theverge.com/2019/3/19/18272357/microsoft-teams-video-background-customization-whiteboard-live-events-features>

Teams Resources

What's new in Microsoft Teams

<https://techcommunity.microsoft.com/t5/Microsoft-Teams-Blog/What-s-new-in-Microsoft-Teams-the-Enterprise-Connect-feature/ba-p/>

Electronic Frontier Foundation calls out Slack on retention policies – how does Teams compare? OnMSFT.com
<https://www.onmsft.com/office365/electronic-frontier-foundation-calls-out-slack-on-retention-policies-how-does-teams-compare>

End user training for Microsoft Teams

<https://docs.microsoft.com/en-us/microsoftteams/enduser-training>

Add A Meetings Calendar to Microsoft Teams

<https://techcommunity.microsoft.com/t5/Healthcare-and-Life-Sciences/Add-A-Meetings-Calendar-to-Microsoft-Teams/ba-p/774961>

QUESTIONS?

Email Catherine at
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