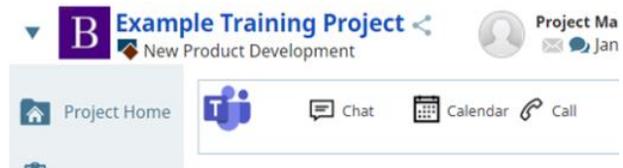


Accolade Connect for Microsoft 365 Quick Reference

Connecting and Managing Accolade-related Teams using Microsoft Teams

- With one click, users can seamlessly initiate Microsoft Teams calls, conversations, and meeting invitations directly from an Accolade project page. These events can include colleagues who are not project members or even Accolade users, allowing the right people to collaborate on Accolade projects.
- From within an Accolade project page, users can automatically create and manage a related project, deliverable, or activity team workspace directly in Microsoft Teams. Project pages can be viewed and edited (depending on Accolade access rights) directly within the Microsoft Teams workspace, Teams can include a combination of Accolade and non-Accolade users, providing a more streamlined way to communicate and collaborate across the organization.

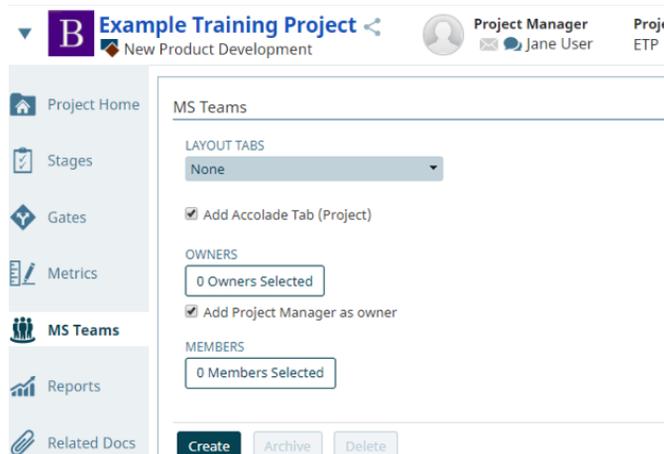


- Click to access related team in Microsoft Teams
- Click to start a Microsoft Teams conversation
- Click to schedule a Microsoft Teams meeting
- Click to start a Microsoft Teams phone call

To create a Microsoft Teams workspace from within an Accolade project, deliverable or activity:

1. Display the project.
 - For project teams, select the MS Teams page in the left navigation panel.
 - For deliverable or activity teams, select the Stages page and click the name of the deliverable or activity.
2. In the MS Teams pane, enter the following:
 - Select the Accolade layouts to appear as tabs in the team workspace.
 - Click **Owners Selected** and select the additional users who can manage the related team in Microsoft Teams.
 - Click **Members Selected** and select the additional users who should be added as team members to the related team in Microsoft Teams.
3. Click **Create** to generate the team in Microsoft Teams.

Important! Be mindful when creating or adding team members to a team related to confidential projects. It is possible to create a team with non-Accolade users as members. Although these members access Accolade directly, they can see the Accolade project name and other content if inadvertently shared by team members.



To archive a Microsoft Teams workspace from within an Accolade project, deliverable or activity:

1. Display the project.
 - For project teams, select the MS Teams page in the left navigation panel.
 - For deliverable or activity teams, select the Stages page and click the name of the deliverable or activity.
2. In the MS Teams pane, click **Archive**.
 - Archived teams are automatically moved from the **Active** list to the **Archived** list in Microsoft Teams. The team becomes inactive in Microsoft Teams, but the contents can still be viewed. If necessary, team owners can reactivate a team from within Accolade by clicking **Unarchived** to move the team back to the **Active** list.

To delete a Microsoft Teams workspace from within an Accolade project, deliverable or activity:

1. Display the project.
 - For project teams, select the MS Teams page in the left navigation panel.
 - For deliverable or activity teams, select the Stages page and click the name of the deliverable or activity.
2. In the MS Teams pane, click **Delete**.
 - Deleting an Accolade-related team in Microsoft Teams means the team and its contents are permanently deleted and cannot be undone. Once an Accolade-related team has been deleted, the option to create a new team will be available within the project, deliverable, or activity.

Important! If an Accolade user is added or removed from a project in Accolade, this change is not automatically reflected in the related team in Microsoft Teams. If a user should no longer have access to team content, the team owner should remove the member through the Manage Teams functionality within Microsoft Teams.