How to use Discord in a Productive Way

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This manual was prepared by students who have taken the fall Terrascope class and know how hard it can be to organize even when you're all in one place, in order to support the collaboration and communication of your class. It provides an overview of how to navigate and use Discord for teamwork and collaborative purposes.

Discord is a messaging, audio, and video communication platform that offers flexibility and customizability. The company's emphasis is on fostering communities, and it provides direct message, text, and voice channels that allow you a lot of independence in managing communication and sharing. Discord has a lot of functionality that you may discover along the way, but this is here to guide you in getting familiar with its basic uses so that you can jump right into collaborating with your class!

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1. How to start using discord

You can use discord via your browser or a desktop app (which works for Mac, Windows and Linux). The desktop app has a few benefits (you can get notifications, your settings are more easily preserved and it's slightly less buggy), but the browser can be used effectively. To start using discord, go to https://discord.com/new and either download the app or select "Open discord in your browser". You will have to make an account.

It's possible that someone has sent you a link to join a discord server. Clicking this link will prompt you to either download discord or log in on the browser. This is also an acceptable way to start using discord.

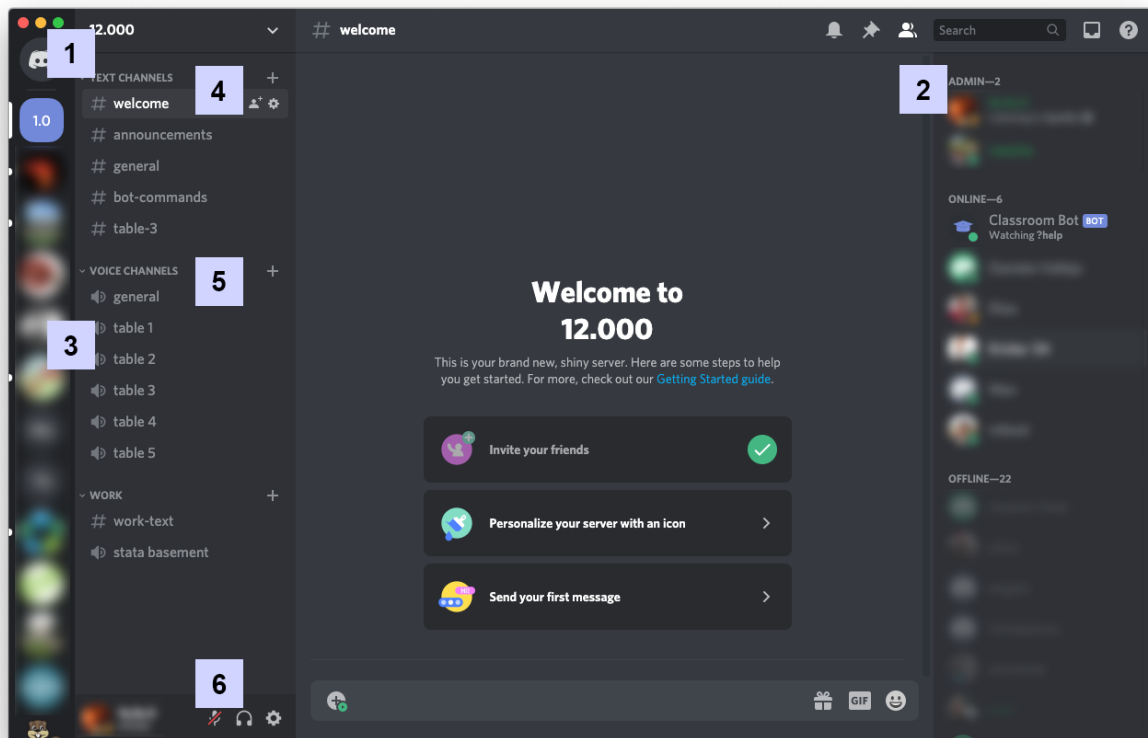# 2. Where and what is everything?

Figure 1: Map of a classic discord screen
1: Discord icon, access to direct messages 2: Right panel with users 3: Circle icons that denote separate servers 4: Text channels 5: Voice channels 6: User settings

Discord allows you to both direct message specific people and groups, or to interact with a team of people using a "server." Direct messages can allow you to text, video, and voice chat with a set group of people. Servers are much more flexible and allow for more customization over communication channels and team member controls.
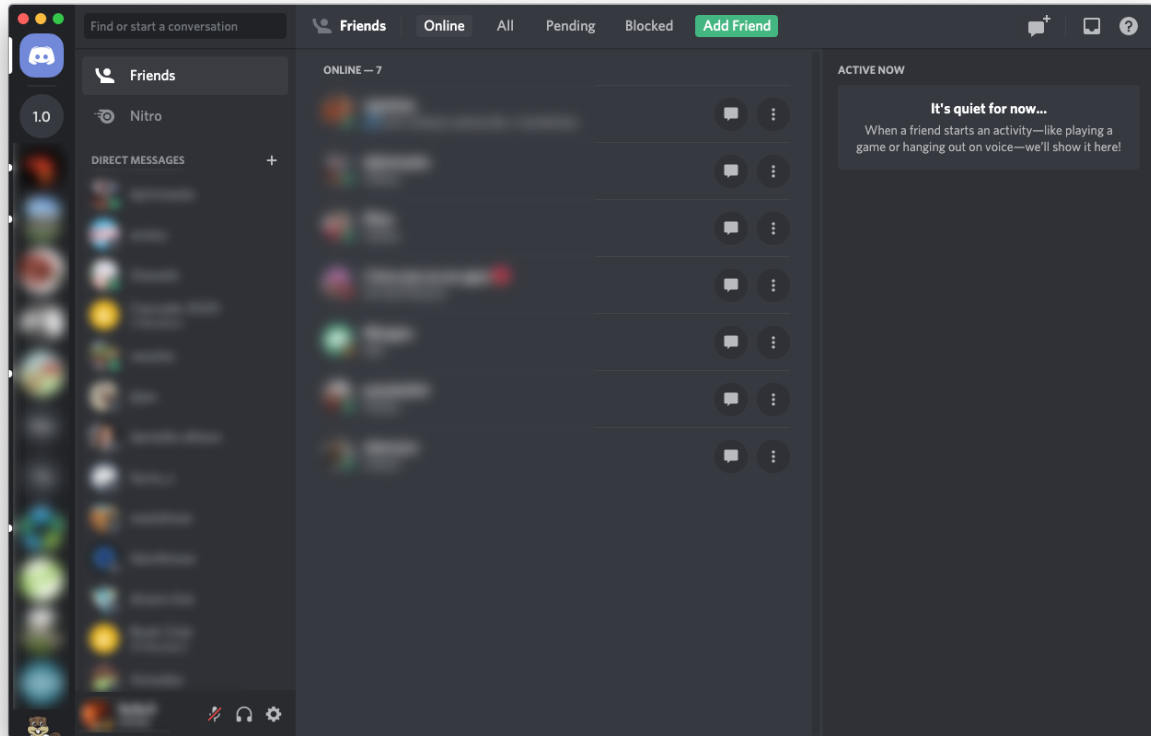
a. Direct messages:

Figure 2: Direct message home screen

You can direct message people who are a) your friend on discord or b) in the same server as you. The direct message screen (Figure 2) can be reached by clicking the discord icon (Box 1 in Figure 1). Your friends will be listed in this menu, as well as any direct message chats that you already have. You can click on their username to start a direct message chat. To start a group message, click the speech bubble with a plus in the top right corner and add up to 10 people total.

You can also start direct messages with people who are in the same server as you. Just click on a person's username on the right panel of a

server (Box 2 in Figure 1) and a message box will appear. Sending a message here will add another direct message to your direct message home (Figure 2). If you can't see this panel immediately, click the people icon directly above Box 2 in Figure 1.

Once you have started a new direct message, your screen will look like Figure 3. Here you can have a text chat, but you can also start video and voice calls (boxed in red in Figure 3). The other two icons boxed in red allow you to view pinned messages and add more people to your direct message, creating a group chat.

You can search for different chats or friends or add new friends by using the search box in the top left corner. Search for people using their usernames. You can use this same box to search for specific channels within servers, which will be described below.
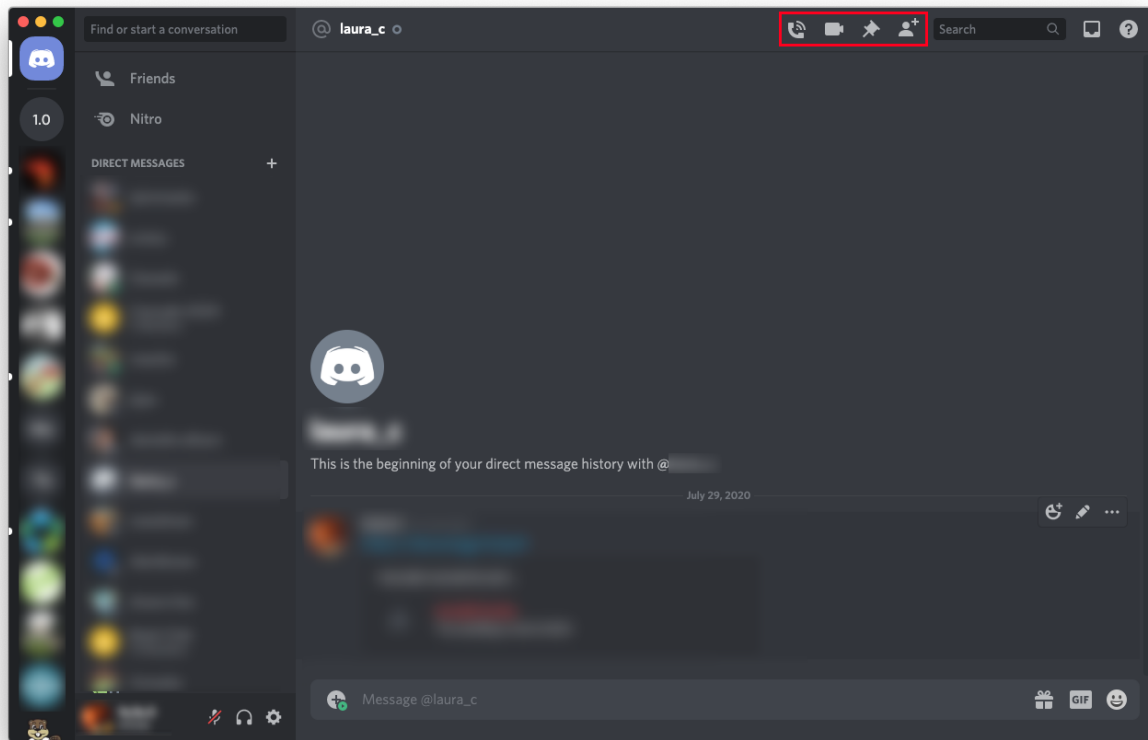

Figure 3: A direct message with one person or a group of people.

b. What is a server?

A server is a platform for communities and teams to communicate. It allows you to interact as a large group, but also to divide into teams and communicate within smaller groups. If you have multiple servers, you can change between them by clicking the circles by Box 3 in Figure 1. Figure 1 shows what a server may look like when you first log in. Servers allow for both text and voice communication. Text channels are next to Box 4 in Figure 1, and voice channels are by Box 5. You can use text and voice channels concurrently.

Using roles (described below), channels can be either public to all server members or only viewable by certain people. If you have administering privileges, you can create channels by using the + next to text channels or voice channels. When creating a new channel, you can adjust whether it is a public or private (restricted) channel. Channels can be organized by dragging the name of the channel up or down.

c. What are roles?

As shown in Box 2 of Figure 1, some usernames are listed under "admin" and some are listed under "offline." For each server, different people can be assigned different roles (admin, student, instructor, etc). People with different roles can have different powers, such as the ability to make and rename channels, assign other people to roles, or the ability to see different channels. Roles can be assigned by clicking a username on the right panel of the server (Box 2 of Figure 1). People can have multiple roles at once.

d. Where are settings?

Your personal settings are by Box 6 in Figure 1. Here, you can mute / deafen (mute all other sound) yourself, as well as find more detailed user settings. Specific server settings can be found in the dropdown menu next to the server name (just above Box 4 in Figure 1). The most important settings will be listed in a later section. If you are creating your own server or have administering privileges, it is recommended that you look through all of the server settings carefully, since these will adjust the experience for all users.

3. Basics of using a server

    a. Text channels

To see the messages sent to text channels, simply select one of the channel names (ex: # welcome in Figure 1). Chats are saved and new members to a server can see old chats. Like in direct messages, you can send files and photos and links, and you can pin specific messages.

You can choose to notify only certain people in text channels using @s. Here are some useful ways to notify people, but these should be used with care.

- @everyone - sends a notification to everyone in the server (should be used sparingly)
- @here - notifies everyone who has discord open on their computer
- @<username> - notifies a specific person
- @<role> - notifies everyone who has a specific role in the server

Emojis can be used to react to text messages - right click on a message to add a reaction. You can also pin messages and quote messages using this right click menu. Quoting messages allows you to respond directly to a certain message or phrase.
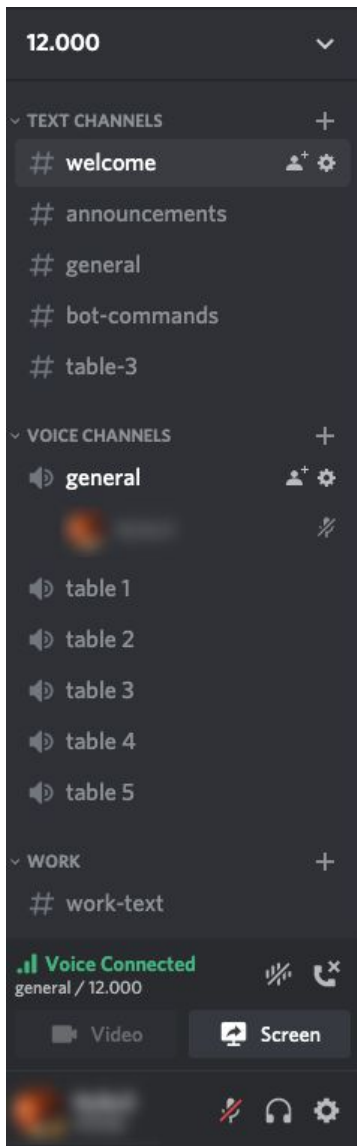
b. Voice channels

Figure 4: Voice channels

There is no limit to the number of people in a voice chat. Join a voice channel by clicking its name (ex: table 1). Once you have joined a voice channel, your username will appear below the channel name, along with any other users in the voice channel. Switch between voice channels by selecting the channel names. You can type in text channels (or use other parts of discord in general) while staying connected to a voice channel.

Voice channels can be used as video channels as well. Discord only supports 25 people sharing their video at once. To enter a video call, select the Video button at the bottom of Figure 4. To share your screen, select Screen and choose the correct window to share. You can share both video and a screen at the same time. The Video and Screen options only appear when you are connected to a voice channel.

When you share your screen, a red "LIVE" label will appear next to your name in the voice channel. People can then click your username to watch the stream (view your screen). You can remain on a video call while also messaging text chats at the same time, but you will only see one face at a time. To return to the full video chat, click the voice channel name again. The default setting is a grid view, but you can pin one video or one screen share to zoom in on. Sharing audio while you screen share is only available on the Windows desktop client, however you can install a music bot (like Rythm or Groovy) to play music from various sources.

You can mute other members of voice chats by right clicking on their username in the voice channel (for yourself) and if you have administrator permissions you can mute people (for others as well). You can also adjust

their individual volume if they are too loud or too quiet, and this will only affect the volume balance for you. You can mute yourself (or deafen yourself) with the buttons right next to your username by Box 6. Disconnect from a voice channel by clicking the phone with an x directly above the Screen button in Figure 4.

4. Important settings

a. Audio settings

If you select the gear (settings) symbol by Box 6 in Figure 1, many different settings will appear. Under App Settings on the left, select Voice & Video. This is where you can troubleshoot sound by testing your microphone, changing input / output devices, and more advanced sounds / camera settings. If you want to decrease background noise in a voice chat, you can select "Push to Talk" instead of "Voice Activity." This allows you to set a keybind that will turn on your microphone - you will be muted unless you press that keybind.

b. Organizing Channels

You can organize your various text and voice channels by using categories (Boxes 4 & 5 in Figure 1). Create new categories under the dropdown menu next to the server name. You can set categories to be public or private, just like the channels themselves. The category will then appear below the text / voice channel sections, and you can move channels between different categories by dragging the channel names up and down.

c. Roles

New roles can be created by administrators of a server by going to server settings under the server name dropdown menu (next to Box 1 in FIgure 1). Select "Roles" on the left menu. To make new roles, press the plus button directly above the list of current roles. Here you can adjust various powers for a specific role, most importantly server administration privileges. Look through these settings carefully if you are creating a new

role. Remember that assigning people different roles can allow you to restrict people from seeing certain channels or categories.

d. Changing username and picture

Change your username in the server by right clicking on your own username in the right panel (Box 2 of Figure 1) and selecting Change Nickname. It is recommended that members use a recognizable username (name or kerberos). You can also change your nickname if you are in a voice channel by right clicking on your username in the channel. Edit your picture by selecting user settings (by Box 6 of Figure 1). In the "My Account" Menu, you can select Edit and then "change avatar" by hovering over your current picture.

e. Managing notifications

Discord has published their own manual for managing notification settings in case you want more detailed instructions: https://support.discord.com/hc/en-us/articles/215253258-Notifications-Settings-101

To summarize notification settings: you can change how often you receive notifications from none at all to getting a message every time something new is posted. Mute full servers by right clicking the server icon by Box 3 in Figure 1. Mute specific text channels by right clicking the channel name. You can also choose to change notification settings instead of muting the full channel - this will allow you to be notified only if somebody sends an @ message. Server administrators can set default notification preferences in the dropdown next to the server name.

For creating a new server for classroom use, discord has their own brief manual and classroom template: https://blog.discord.com/how-to-use-discord-for-your-classroom-8587bf78e6c4. You can use this template to start a new server for a new class and adjust it as necessary.

There is a lot more to discord than in this manual - bots, integrated music, enhancements that you have to pay for, and more. Feel free to look through discord's own support documentation (https://support.discord.com/hc/en-us) or explore the various settings on your own.