

USER GUIDE

Conducting Meetings using Microsoft Teams

New York State Teachers' Retirement System

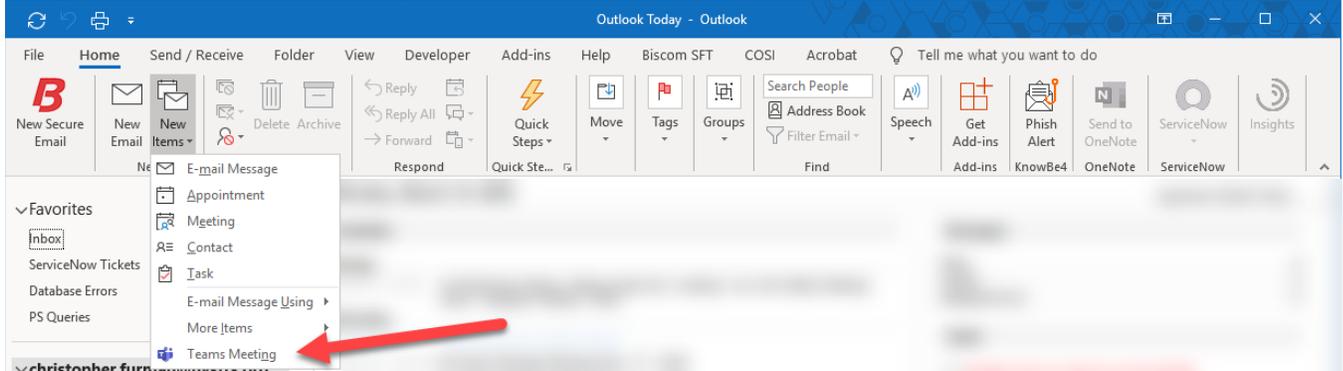
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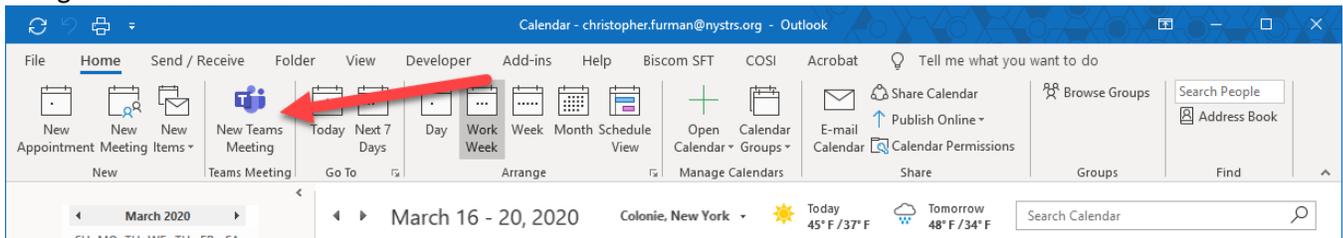
Creating a Teams Meeting from Microsoft Outlook

Teams Meetings can be created using various methods:

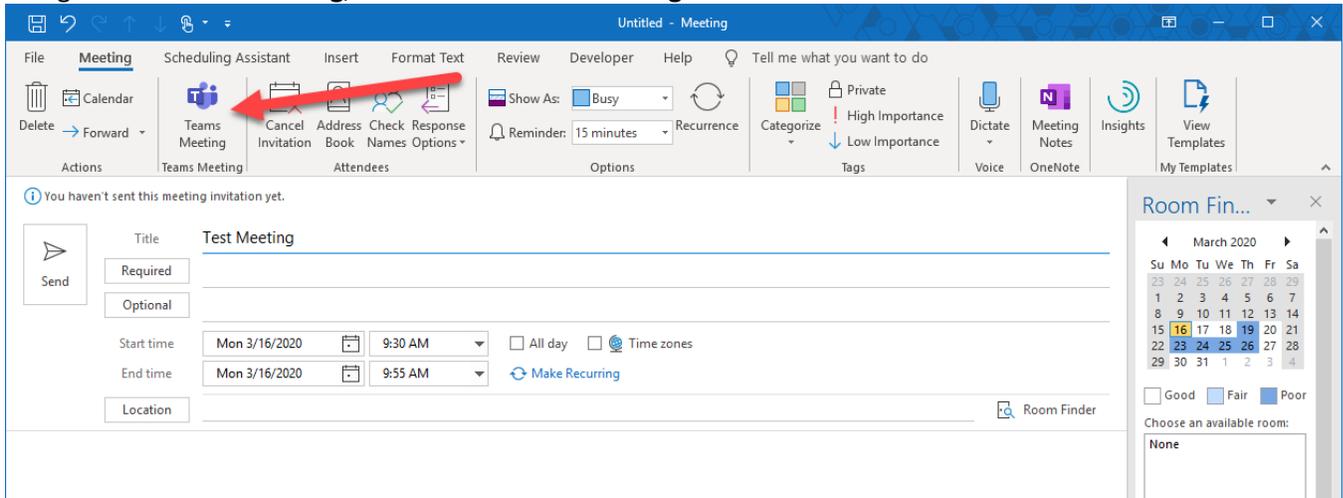
- Using the **Home > New Items** dropdown



- Using the **Calendar > Home** tab



- Using create a **New Meeting**, then select **Teams Meeting**



How to create a meeting:

1. Create a new meeting using one of the methods listed above.
2. Enter in the same information you typically would enter for a meeting:
 - a. *Meeting Title*
 - b. *Meeting Attendees*
 - c. *Meeting Location*
 - i. If you created the meeting by selecting **New Teams Meeting**, the Location is already prepopulated with “Microsoft Teams Meeting”
 - ii. If you created the meeting by selecting **New Meeting** then clicking **Teams Meeting**, the Location will change to “Microsoft Teams Meeting”
3. *Meeting Start Date/Time*
4. *Meeting End Date/Time*
5. *Meeting Details*
 - a. If you created the meeting by selecting **New Teams Meeting**, you’ll see the Teams Meeting information populated in the body.
 - b. If you created the meeting by selecting **New Meeting** then clicking **Teams Meeting**, the *Meeting Body* will initially be blank until you click **Teams Meeting**, when it then populates the Teams Meeting information.

[Join Microsoft Teams Meeting](#)

+1 518-732-6274 United States, Albany (Toll)

Conference ID: 737 453 410#

[Local numbers](#) | [Reset PIN](#) | [Learn more about Teams](#) | [Meeting options](#)

New York State Teachers Retirement System

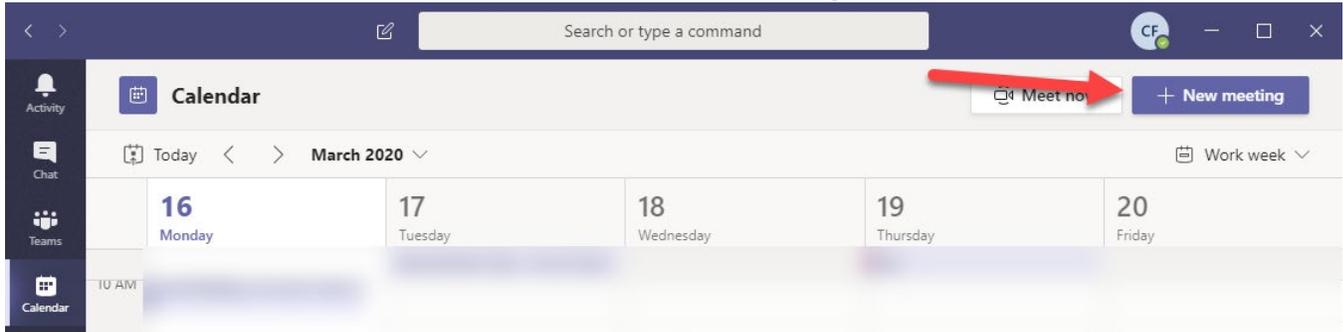
[Help](#) | [Legal](#)

6. Once you have entered all relevant information, click **Send** to publish the meeting.

You have now created a meeting that includes Microsoft Teams information.

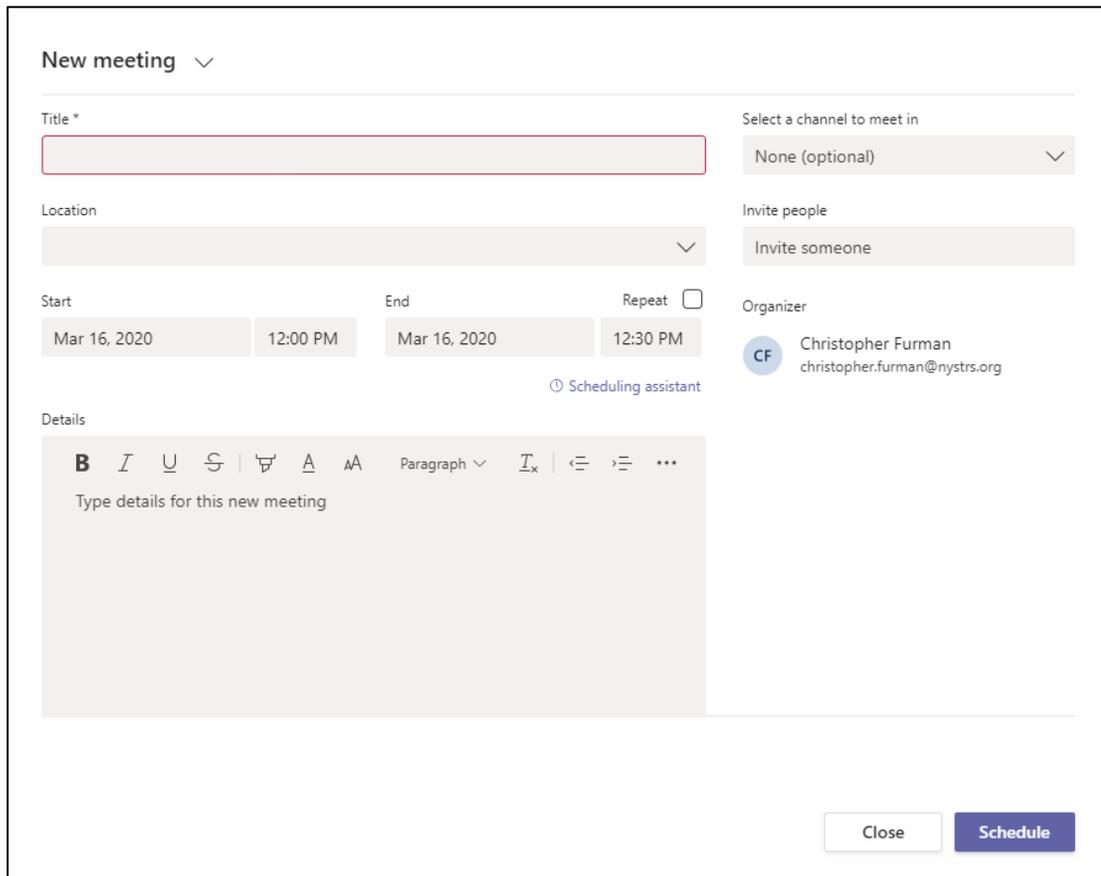
Creating a Teams Meeting Directly from Microsoft Teams

1. In **Microsoft Teams**, select the **Calendar** tab, then select **New Meeting**.



2. Enter the information for the meeting you wish to populate:

- a. *Meeting Title (required)*
- b. *Meeting Start Date/Time*
- c. *Meeting End Date/Time*
- d. *Meeting Details*
- e. *Invite People*
 - i. To invite people, enter their name into the *Invite someone* field. The field has auto-complete functionality. Once you have found the name of the person you want to invite, click on their name. They will appear in a list below your name (as Organizer).

A screenshot of the 'New meeting' dialog box in Microsoft Teams. The dialog is titled 'New meeting' and contains several fields and options. The 'Title' field is required and is currently empty. The 'Location' field is also empty. The 'Start' and 'End' fields are set to 'Mar 16, 2020' at '12:00 PM' and '12:30 PM' respectively. The 'Repeat' option is unchecked. The 'Organizer' field is filled with 'Christopher Furman' and 'christopher.furman@nystrs.org'. The 'Details' field is a text area with a rich text editor toolbar. At the bottom right, there are 'Close' and 'Schedule' buttons.

3. Once you have entered all relevant information, click **Schedule** to publish the meeting.

Joining a Teams Meeting from Microsoft Outlook

1. Open the Meeting from Outlook.
2. In the body of the meeting, click on **Join Microsoft Teams Meeting**.

The screenshot shows the Microsoft Outlook interface for a meeting titled "Test Meeting". The ribbon includes "Meeting", "Scheduling Assistant", "Tracking", "Insert", "Format Text", "Review", "Developer", and "Help". The "Meeting" ribbon has several groups: "Actions" (Cancel Meeting, Forward), "Teams Meeting" (Join Teams Meeting), "Attendees" (Contact Attendees, Address Book, Check Names, Response Options), "Options" (Show As: Busy, Reminder: 15 minutes, Recurrence), "Tags" (Categorize, Private, High Importance, Low Importance), "Voice" (Dictate), "OneNote" (Meeting Notes), and "My Templates" (Insights, View Templates).

The meeting details pane shows the following information:

- Title: Test Meeting
- Required: [Empty field]
- Optional: [Empty field]
- Start time: Mon 3/16/2020, 10:00 AM
- End time: Mon 3/16/2020, 10:25 AM
- Location: Microsoft Teams Meeting

The meeting body contains the following text:

Join Microsoft Teams Meeting

+1 518-732-6274 United States, Albany (Toll)

Conference ID: 737 453 410#

Local numbers | Reset PIN | Learn more about Teams | Meeting options

New York State Teachers Retirement System

Help | Legal

A red arrow points to the "Join Microsoft Teams Meeting" link.

On the right side, there is a "Room Fin..." pane with a calendar for March 2020 and a "Room Finder" section. The "Room Finder" section shows "None" as the available room. Below it, there is a "Suggested times" section with the following options:

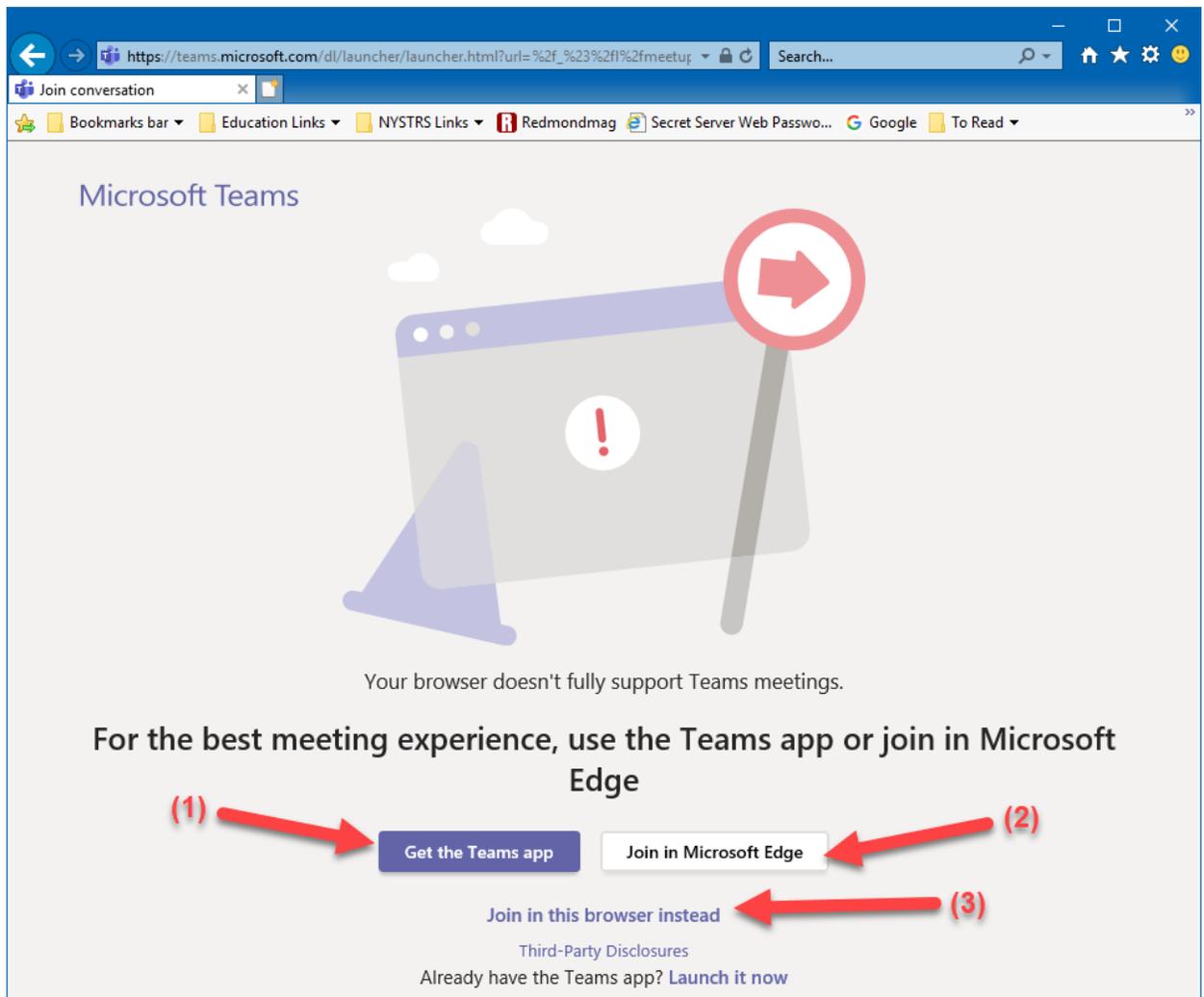
- 10:30 AM - 11:00 AM (No conflicts)
- 11:00 AM - 11:30 AM (No conflicts)
- 11:30 AM - 12:00 PM (No conflicts)
- 12:00 PM - 12:30 PM (No conflicts)
- 12:30 PM - 1:00 PM (No conflicts)

At the bottom left, it says "In Shared Folder Calendar - christopher.furman@nystrs.org".

3. You will be directed to a webpage created for your meeting. Prompts will be different dependent upon your default browser.

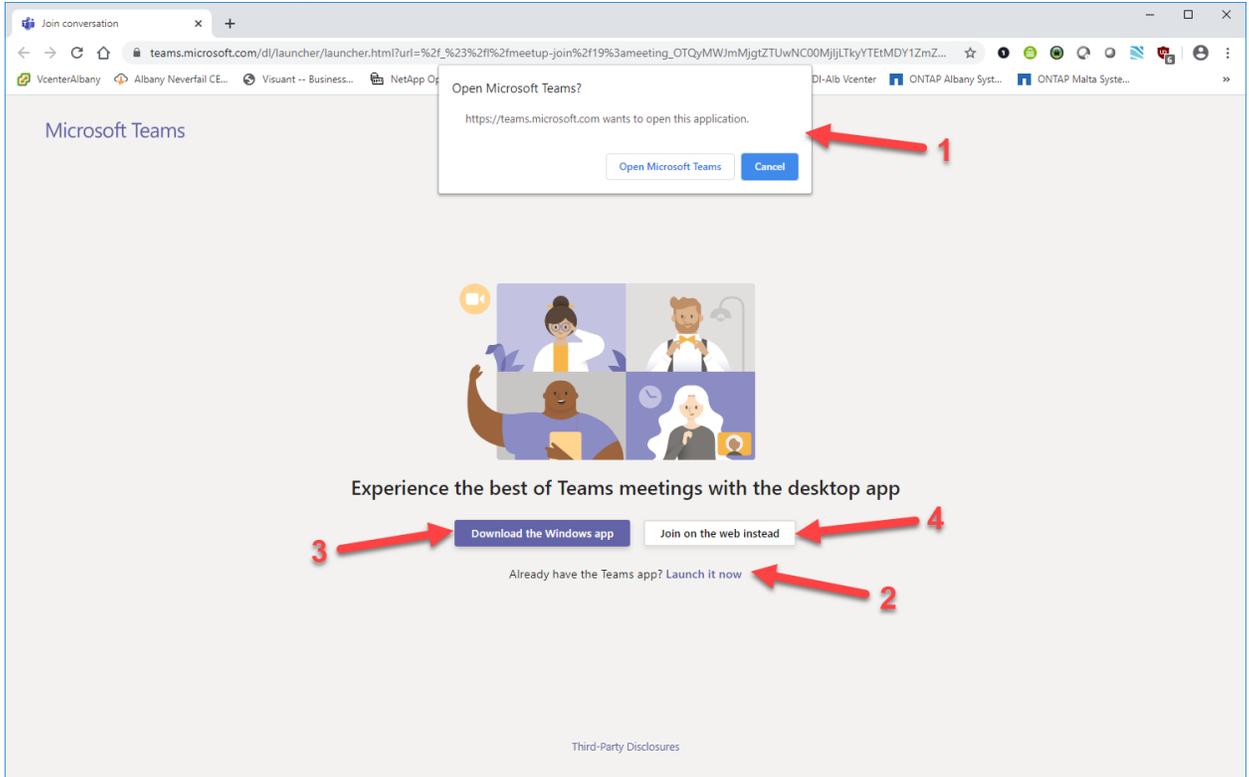
Default browser is Internet Explorer

- a. If Teams is installed, the meeting will also appear in the Teams application, and **you can disregard this webpage.**
- b. If you do not have Teams installed, you can use this webpage to either **get the Teams app (1)**, **Join in Microsoft Edge (2 - if that is installed on your device)**, or **Join in this browser instead (3)**.



Default browser is Google Chrome

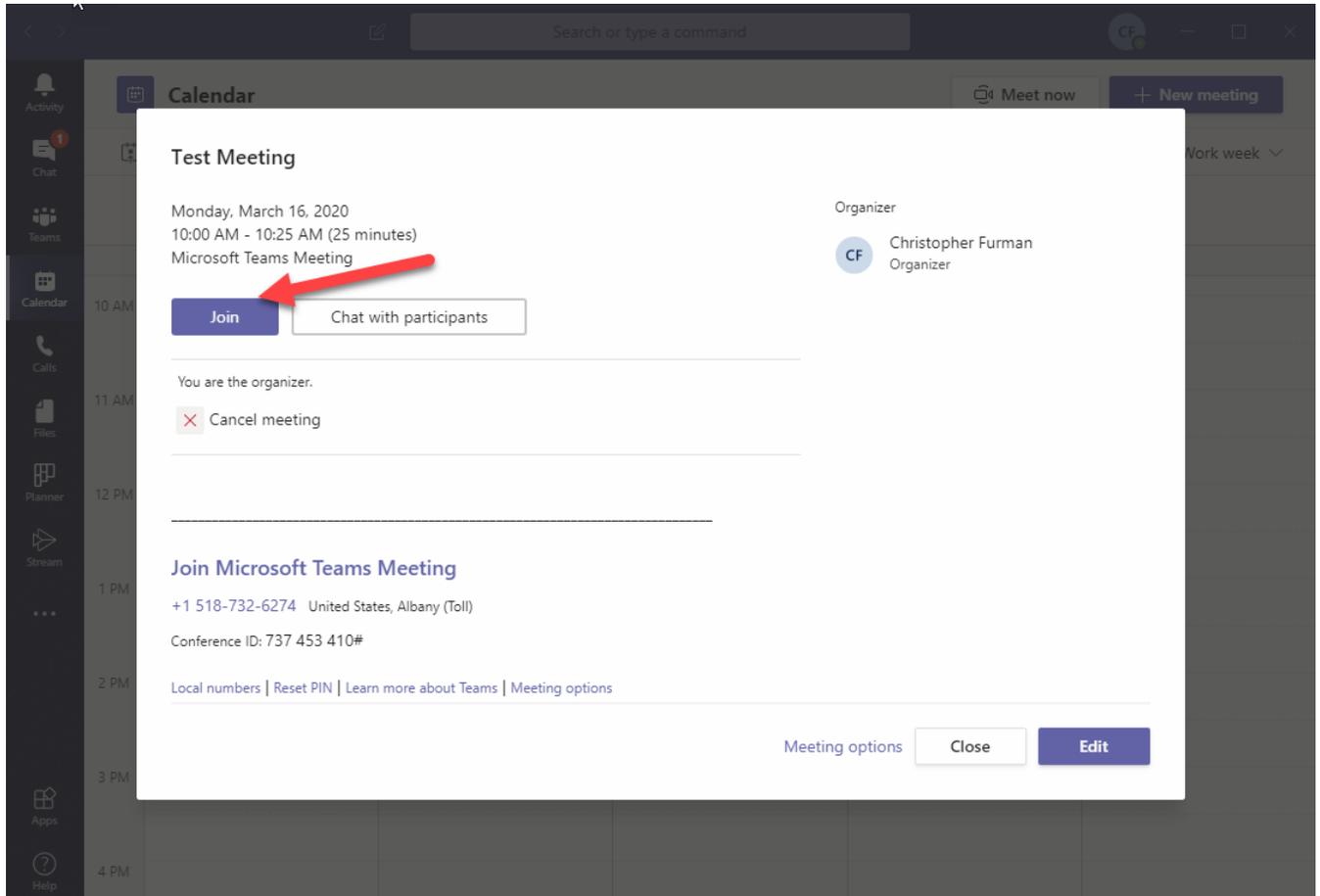
- a. If you already have Teams installed, you will receive the **popup** asking you to **open the meeting using Microsoft Teams (1)**. You can also use the **Launch it now** link near the bottom of the page (2). If you do not have Teams installed, you can use this webpage to either **get the Windows app (3)**, or to **Join on the web instead (4)**.



You are now ready to enter the meeting using Microsoft Teams.

Joining a Teams Meeting Directly from Microsoft Teams

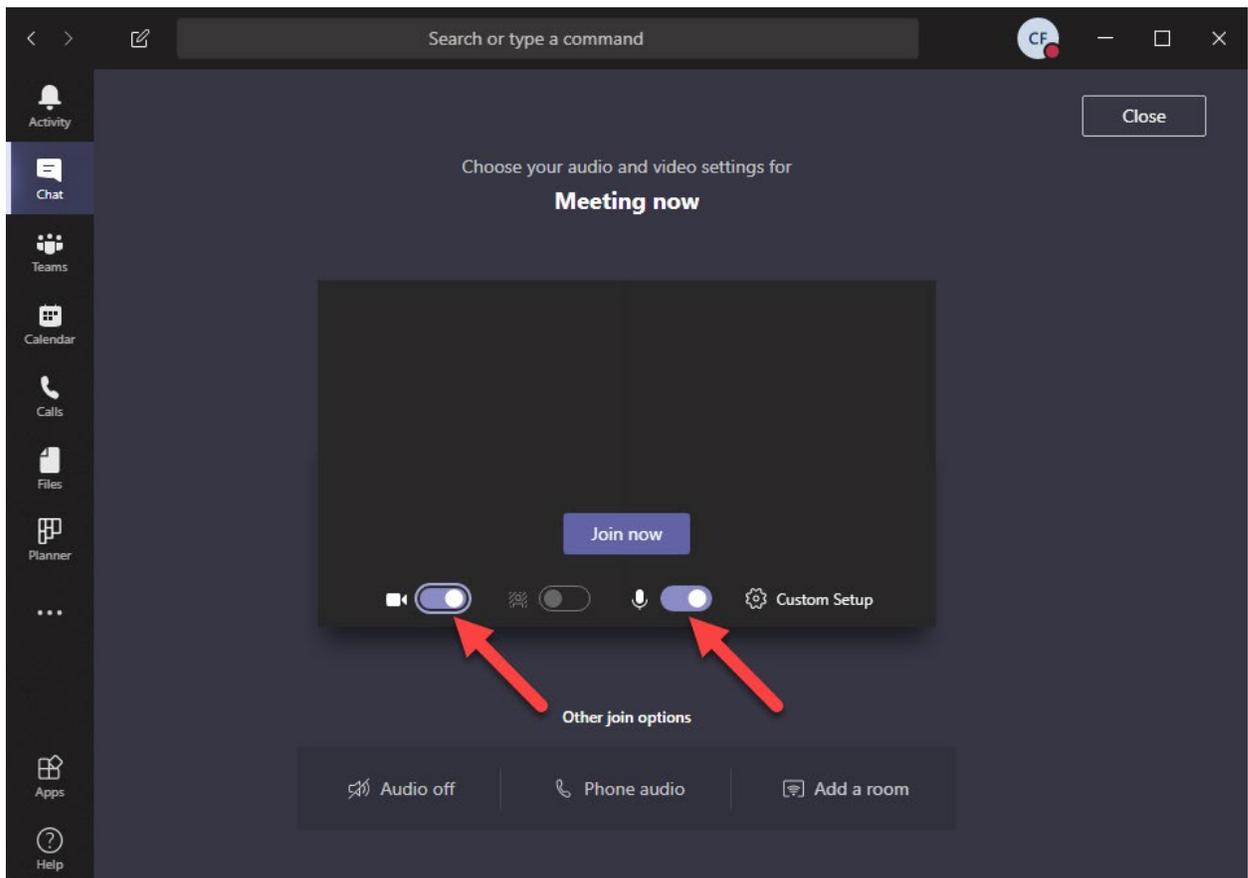
1. Select the **Calendar** tab
2. Open the Meeting you wish to join.
3. Select **Join**.



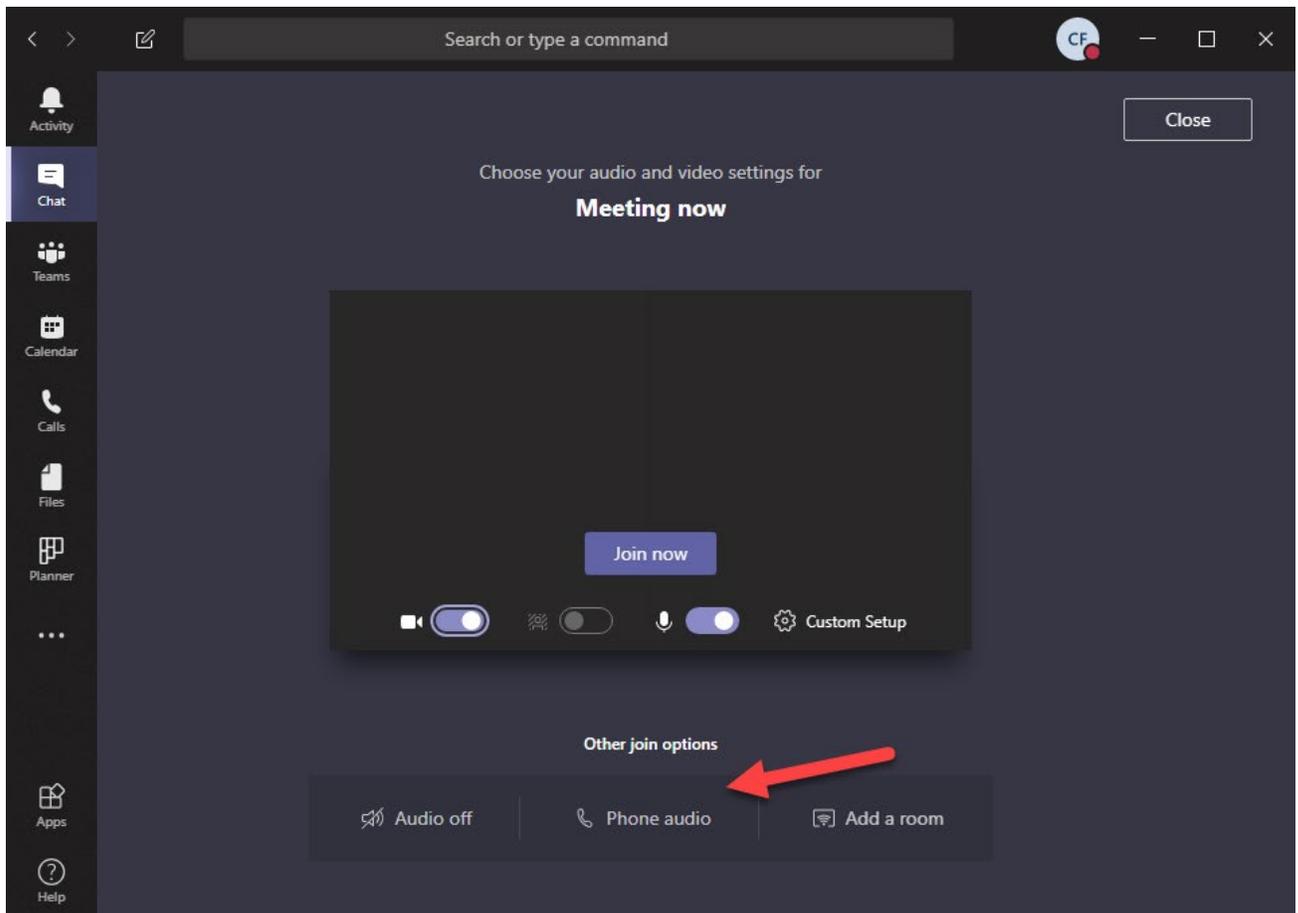
You are now ready to enter the meeting using Microsoft Teams.

Joining a Microsoft Teams Meeting

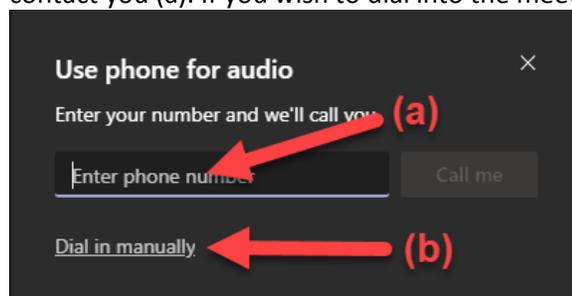
1. Inside the **Microsoft Teams** application, you will see the meeting open under the **Chat** tab.
 - a. If it is your first time using Microsoft Teams, the following settings will be displayed:
 - i. The **Camera** option may be set to **On** by default. This feature will use the webcam on your computer (if applicable) to communicate with everyone in the meeting. While this feature is available, we are recommending that **this feature should be turned Off**. To turn this **Off**, move the slider to the left.
 - ii. The Microphone option may be set to **On** by default. This feature will use the microphone on your computer to communicate with everyone in the meeting. While this feature is available, we are recommending that **this feature should be turned Off**. To turn this **Off**, move the slider to the left.



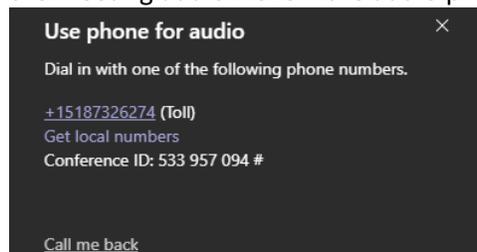
2. To join the meeting using a phone to communicate during the meeting, click **Phone audio** to enter the meeting.



- i. You will join the meeting.
- ii. You will be prompted to enter a *phone number* (including area code) for the meeting to contact you (a). If you wish to dial into the meeting manually, click **Dial in manually** (b).

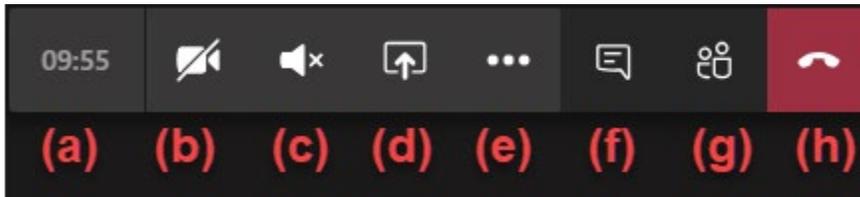


- iii. If you selected **Dial in manually**, you will be given information to call into the meeting to hear the meeting audio. Follow the audio prompts to connect to the correct meeting.

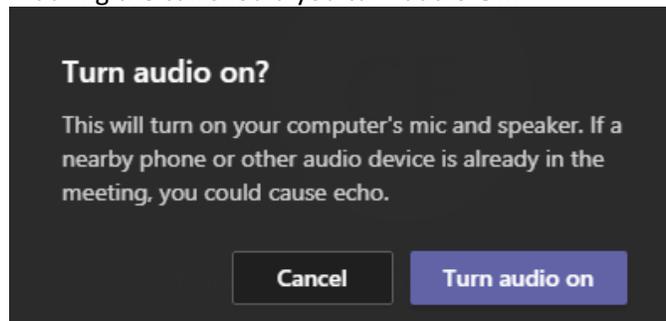


Functions During a Teams Meeting

As part of a Teams Meeting, there are various features that are available:

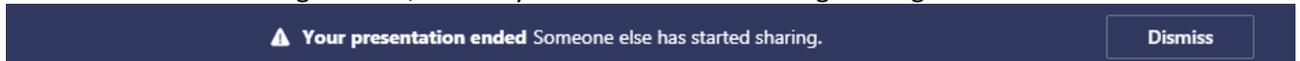


- a. Indicates the current length of the meeting
- b. Toggles the computer's webcam **On** and **Off** (not currently recommended)
- c. Toggles the computer's audio **On** and **Off** (not currently recommended)
 - i. You will be prompted with the following warning when you toggle the audio from **Off** to **On**. Please note the warning message you receive regarding possible echo that may occur during the call should you turn audio **On**:



- d. Shares your screen with the meeting. You will be given options as to what you would like to share with the meeting, such as:
 - i. Your entire desktop
 - ii. One specific window/application
 - iii. One specific PowerPoint presentation

Note: Anyone connected to the meeting can share their screen with the participants. However, only one person can share their screen at a time during the meeting. If someone is currently sharing their screen, that user's screen sharing will end, and they will receive the following message:



- e. More options. This functionality provides additional options for the meeting, such as:
 - i. Toggling the meeting in and out of Full Screen mode
 - ii. Toggle on and off Meeting Notes
 - iii. Toggle on and off Meeting Details
- f. Show conversation. This functionality allows the meeting to conduct a Teams Chat during the meeting.
- g. Show participants. This functionality will display all participants currently in the meeting.
- h. Hang up. This will disconnect you from the meeting.

Mute attendees

In meetings of more than 5 people, anyone who joins the meeting after it has started will automatically be muted to reduce the noise in the meeting. However, if there is a need to mute a specific attendee from the meeting, you can do that by:

1. Select **Show Participants**.
2. Right click on the person you wish to mute, then select **Mute participant**.

Pass screen sharing control

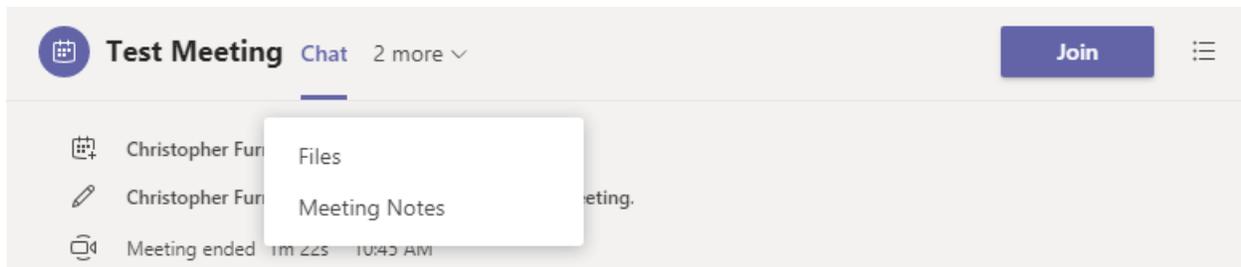
If, during the meeting, you need to give control of your screen to another meeting participant, you can do that by:

1. Select **Share desktop**.
2. From the Currently Sharing dialog box, select the **Give control** dropdown menu, and select the individual you wish to give control.
 - You can take control of your screen back by following the same steps but select **Take back control**.
 - If another participant in the meeting is sharing their screen, you can ask to take control of their screen by selecting **Request control**. Then, the person sharing will approve or deny your request. Once you are done, select **Release control** to return the control back to the participant sharing their screen.

Meeting Conclusion

At the end of the meeting, you will be able to see the following (which will be detailed in other user guides):

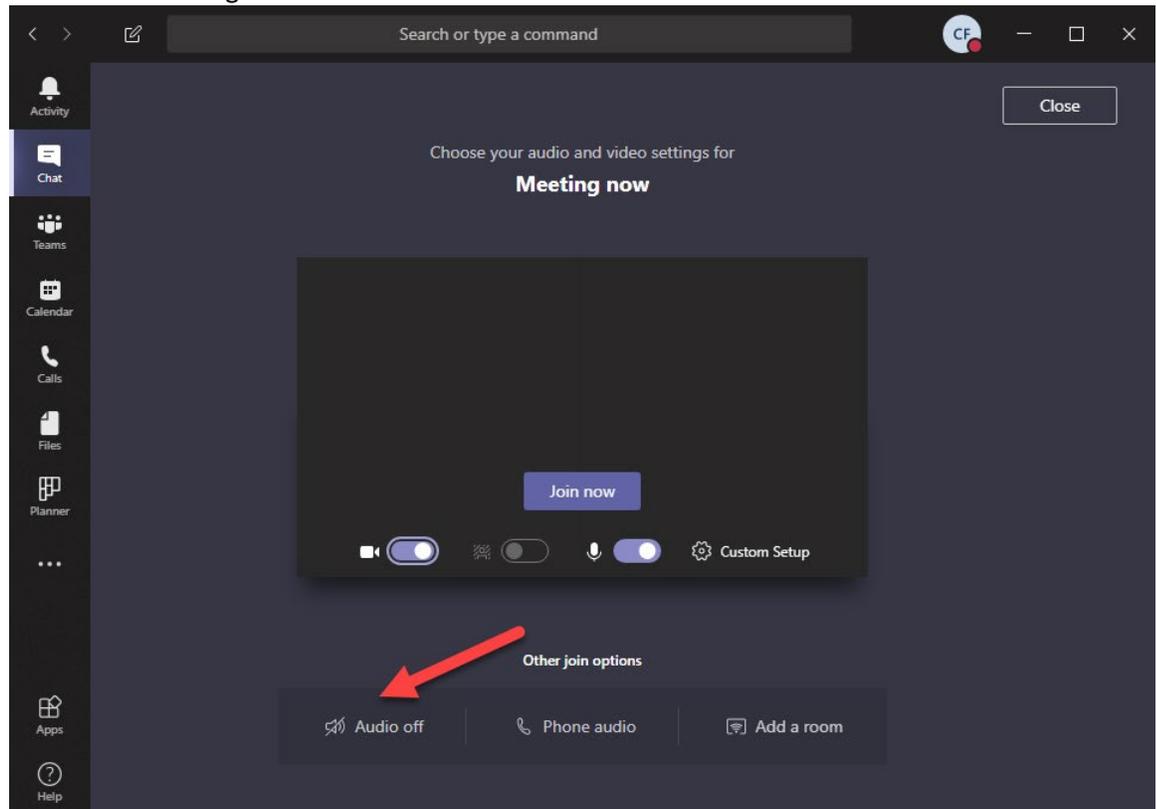
1. Any communications that have taken place during the meeting using **Teams Chat**
2. Any **Meeting Files** that were shared during the meeting
3. Any **Meeting Notes** that were taken during the meeting



Frequently Asked Questions:

- What if I still need a conference room for a meeting that I'm also using Microsoft Teams?
 - You can change the **Location** of the room to a physical conference room should you need to use a conference room.

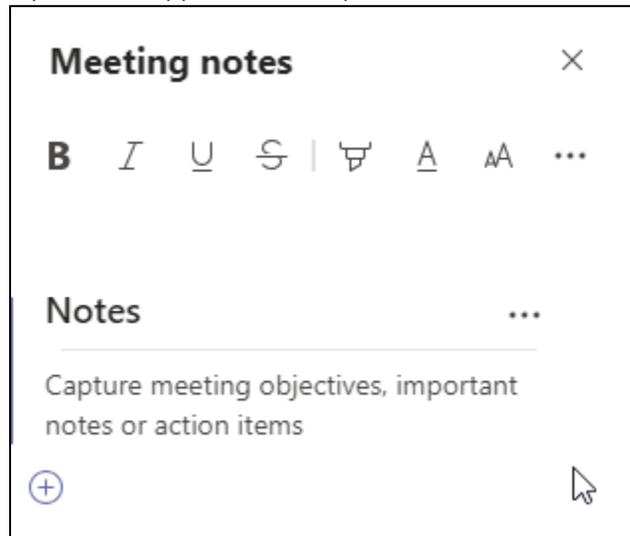
- I'm hearing an echo in the audio of my meeting. How do I get rid of it?
 - If you are Telecommuting and logging in remotely on your personal computer, the speakers for that device should be turned down or muted.
 - If everyone is connecting to the meeting using a phone, have all participants ensure that the audio option in the meeting is turned off. Participating in the meeting using your phone and having the audio on in the meeting will cause the echoing effect.
 - Before the meeting



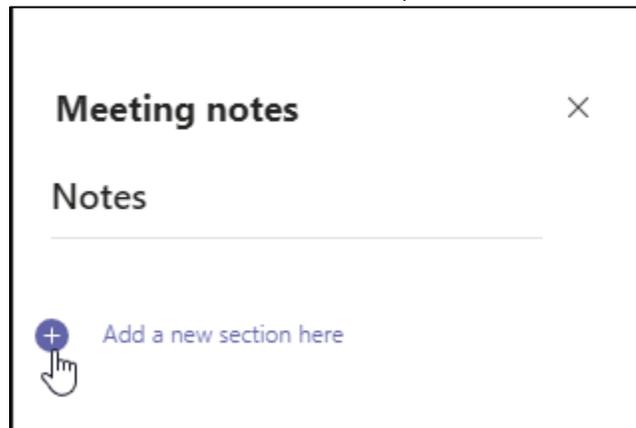
- During the meeting



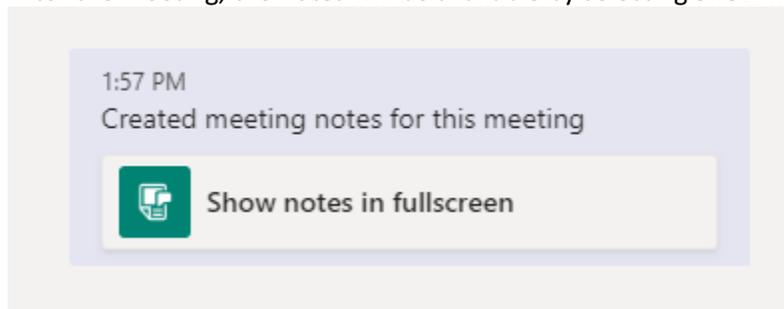
- Is there a way to capture meeting information within Teams?
 - Once you are in a meeting, go to **More options ... > Show meeting Notes** in the meeting controls. In a side panel to the meeting, a tab will open for Meeting Notes. Once it appears, start typing!
 - A panel will appear at the top of the section to format and lay out the text.



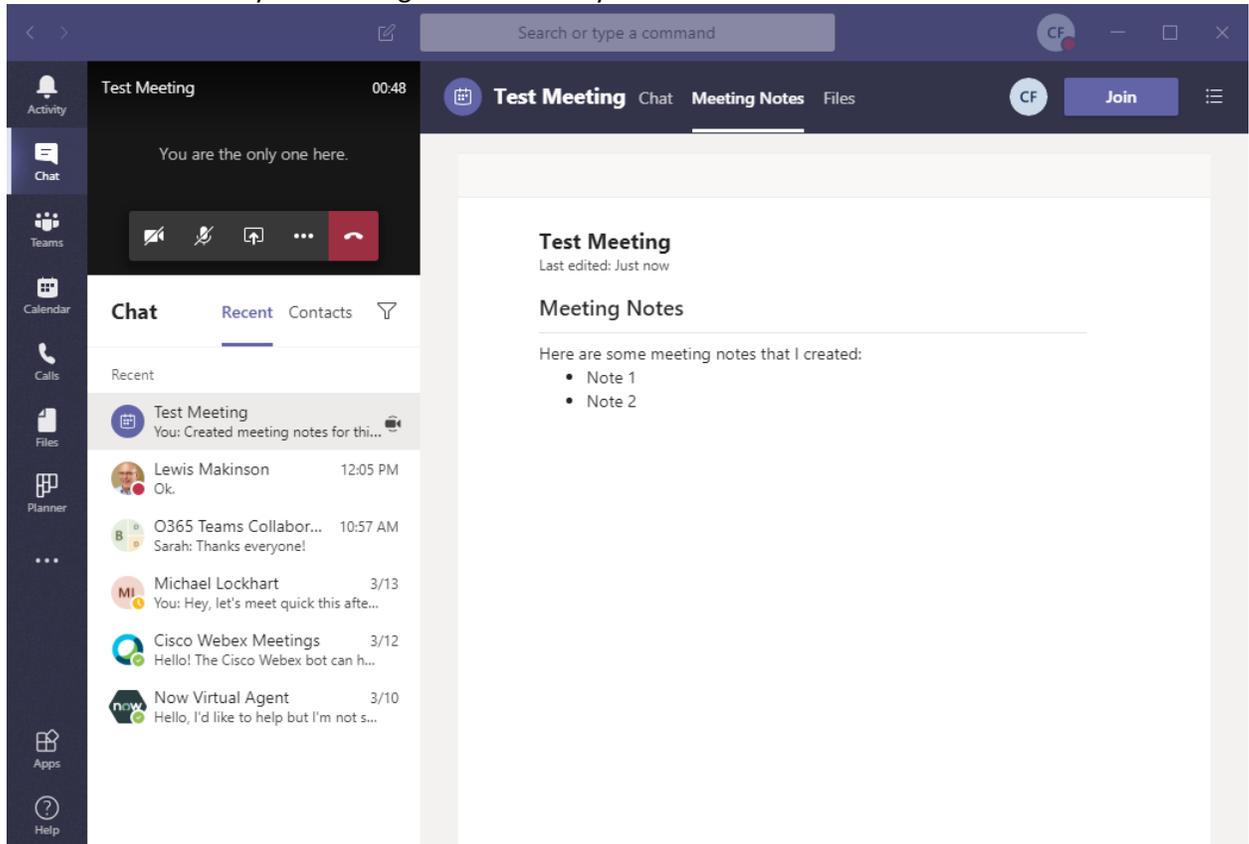
- To create a new section for notes, select **Add a new section**.



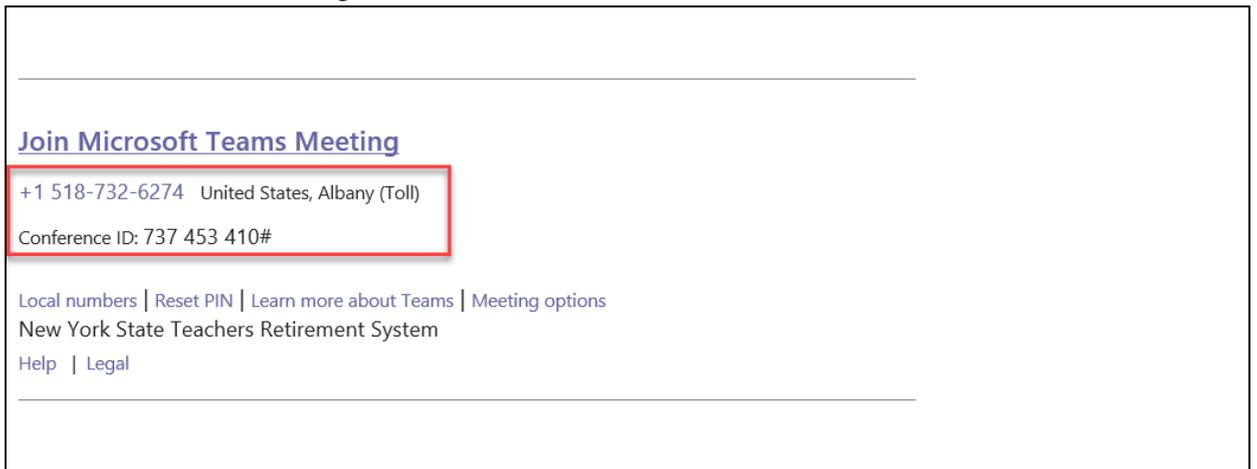
- If you need to assign a specific note to a participant, you can use @mentions to draw their attention to the item.
 - After the meeting, the notes will be available by selecting **Show notes in fullscreen**.



- Can I do anything else in Teams while I'm connected to a meeting?
 - Yes! You can continue to use Teams during a meeting. Just click outside of the meeting, and you can check on what's going on in your calendar or catch up on your messages.
 - When you click away from a meeting, it becomes a smaller window at the top of the app. Click that window to return to your meeting in an instant if you need to.

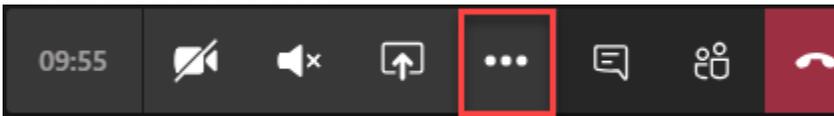


- If I joined the meeting before dialing into the meeting, where do I find the information to call in?
 - If the meeting was sent to you through Microsoft Outlook, you can find the phone number and Conference ID in the meeting invite.

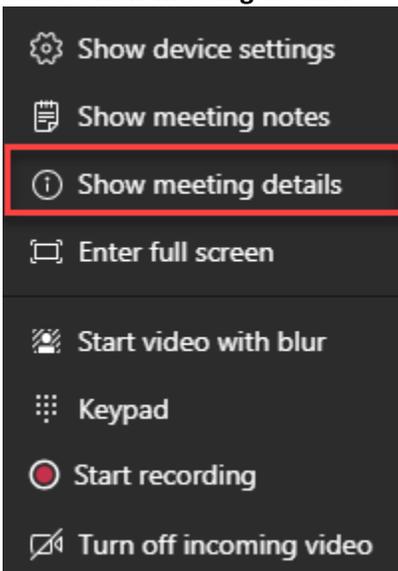


- If you received the meeting request from teams, select **More actions**, then select **Show meeting details**. In the window that appears, you can find the phone number and Conference ID to connect to the meeting.

Select the **More actions** button.



Select **Show meeting details**.



See the meeting information

The screenshot shows the Microsoft Teams interface during a meeting. The main area displays a large blue circle with the initials 'CF' and the text 'You are the only one here.' Below this is a control bar with icons for mute, video, screen share, chat, and call. On the right, a 'Meeting details' panel is open, showing the meeting name 'test', duration '10:30 AM - 11:00 AM (30 minutes)', and date 'Tuesday, March 17, 2020 @ 10:30 AM'. Two red boxes highlight the dial-in information: the top one shows 'Dial in manually' with the phone number '+15187326274 (Toll)', a link for 'Get local numbers', and the 'Conference ID: 921 700 100 #'. The bottom one shows the 'Join Microsoft Teams Meeting' link, the phone number '+1 518-732-6274 United States, Albany (Toll)', and the 'Conference ID: 921 700 100#'.

Search or type a command

Activity

Calendar

Chat

Files

Teams

CF

You are the only one here.

02:37

Meeting details

test

10:30 AM - 11:00 AM (30 minutes)
Tuesday, March 17, 2020 @ 10:30 AM
Microsoft Teams Meeting

Dial in manually
+15187326274 (Toll)
[Get local numbers](#)
Conference ID: 921 700 100 #

Enter phone number Call me

Copy join info

Join Microsoft Teams Meeting
+1 518-732-6274 United States, Albany (Toll)
Conference ID: 921 700 100#