COMMONWEALTH OF MASSACHUSETTS

SKYPE FOR BUSINESS TO TEAMS UPGRADE:
MEETING FEATURES WITHIN MICROSOFT TEAMS

July 2020

Learn more about Microsoft Teams

Microsoft Teams allows you and your colleagues to meet in the way that works best for you. Easily find and share content, track action items, and take notes and recordings—all from within Teams, on any device. Use these best practices to facilitate collaboration before, during, and after a meeting.

Look for the optional self-learning links throughout for further information.

Content:

- Schedule a Teams meeting

- Hold an Ad Hoc meeting using Teams

- Meeting organizer

- Meeting participant

- Teams mobile app

Schedule a Teams meeting

Tip 1: Quickly schedule a meeting from your Outlook Calendar

You can schedule your Microsoft Teams meeting either in Outlook or in Teams. Let's first look at how to manage your calendar in Outlook.

Simply, select **New Teams Meeting** in the Outlook calendar ribbon. You can then add attendees, location, and other meeting details.

Your meeting will appear on your Outlook calendar, as well as your calendar in Teams.
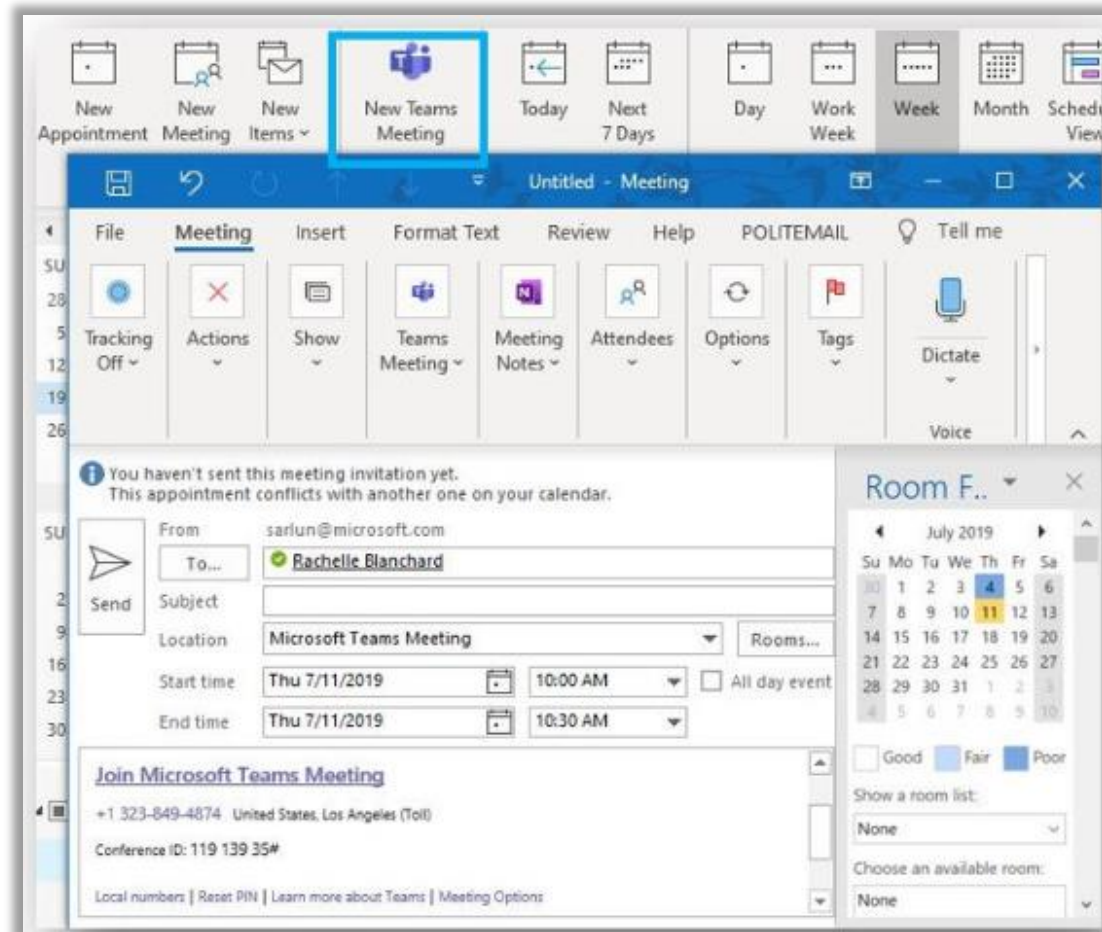
Click here for tips if you need to include a guest to your meeting.

Schedule a Teams meeting

Tip 2: Schedule a meeting using Teams

Now that we covered managing meetings in Outlook, let's see how to schedule a meeting using Teams.

- Select the **Calendar** icon in the left rail
- Select **+New meeting** in the upper-right corner
- Enter your meeting details
- Select **Scheduling Assistant** to find the best time for required attendees.
- For recurring meetings, open the dropdown menu next to **Does not repeat**. Choose from default options or select **Custom** to create your own cadence.
- When complete, select **Send**

Notes:
- When scheduling a meeting in Teams, you cannot edit meeting options until **after** the meeting is created. We will talk more about this later.
- See the next slide for details on when to complete the 'Add channel' field

Schedule a Teams meeting

Tip 3: Never forget a team member when you schedule a 'channel meeting'

If you need to schedule a meeting with **all** members in a Teams channel, complete the **Add channel** field when you schedule a meeting in Teams.

This is particularly useful for recurring meetings, such as stand-up or status meetings. Find notes, take part in ongoing conversations, and view action items all in one place.

Notes:

- Channel meeting invites will **not** show in your Outlook calendar. The meeting invitation will be published in the channel, visible and open for anyone in the team to join if they choose.
- Include the name of any required attendees. The meeting invite will then appear in the individual's Outlook and Teams calendar.
- A video icon will appear next to that channel's name in the left navigation bar when an active meeting occurring in a channel.

- Select the **Calendar** icon on the left rail and schedule a meeting as described in the prior slide
- Type the name of a channel where it says **Add channel** (under the time and date fields)

Click here to read more.
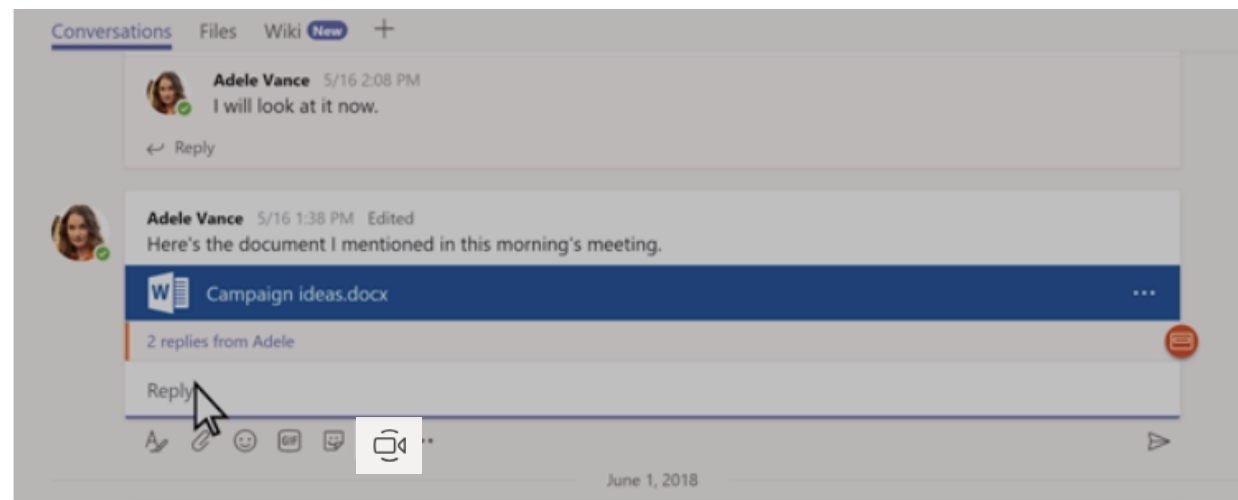
Hold an Ad Hoc meeting using Teams

Tip 4: Create an ad hoc meeting using 'Meet Now'

When talking with a colleague(s) in a channel, use the Meet Now feature to easily meet with those in the conversation for quick collaboration on a topic.

- Select **Reply** in a channel conversation
- Select the **Meet now** icon
- Click **Meet now** to invite individuals from the conversation to meet at that moment or **Schedule a meeting** to meet later

Notes:

- If you schedule a meeting, the New meeting dialog box will open to schedule a channel meeting.

- The meeting will appear within the conversation, and all individuals will be able to view and join the meeting.

- Individuals must be added to the 'invite people' field if you want the meeting to be added to their Outlook and Teams calendar.


Click here to watch a short video.

Hold an Ad Hoc meeting using Teams

Tip 5: Meet in a chat

Quickly jump on a call with chat participants when someone has a great idea or the conversation within the chat becomes hard to follow.

Meetings within chat are great for working with a smaller group. You still have the advantage of persistent chat and file sharing, all while keeping context before, during, and after the meeting.

Within the chat, select the **Audio call** or **Video call** icon in the upper-right corner to start a call with everyone in the chat.
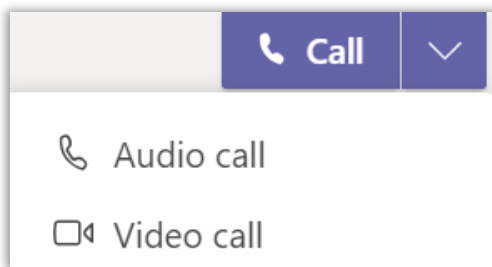
If you're chatting with someone and want to schedule a meeting right from the chat, select the **Schedule a meeting** icon beneath the compose box. In the **New meeting** dialog box that opens, everyone in the chat will already be listed as invitees.
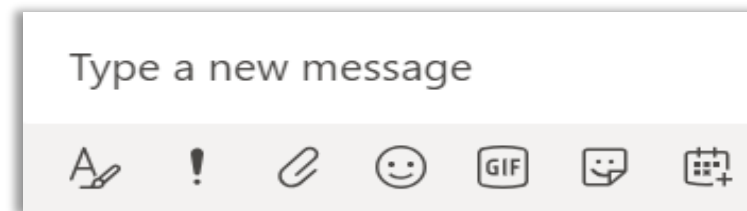
Click here to read more.

Meeting organizer – Meeting options

Tip 6: If you're organizing a meeting in Microsoft Teams, you can access **Meeting options** in the meeting invite to customize settings to determine how people join the meeting and who can present.
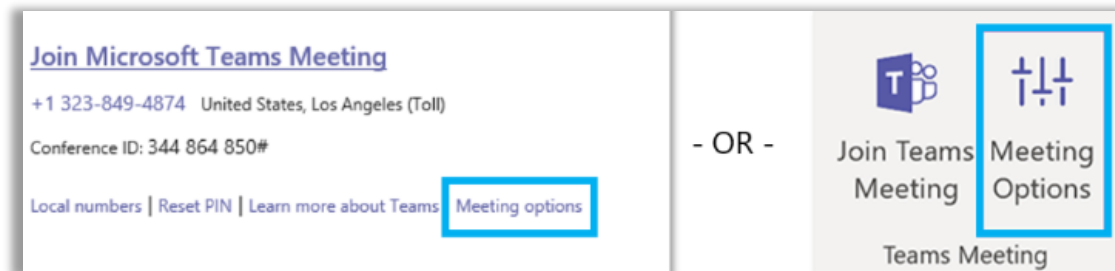
Participant roles – You can decide how much control over a meeting you want to give an individual. Choose from: presenter (full control such as present and mute participants) and attendee (limited control such as submit a question in the chat window).

Meeting lobby - Control how attendees from outside join a meeting (immediately when they click the join meeting link or call in or wait in the lobby for you to admit them). This can enhance your meeting's privacy and ensure you're ready for the attendee.

Click here for more details on participant roles and lobby.

To access Meeting options,
- Schedule a new meeting in Outlook using the Outlook add-in for Microsoft Teams, or open an existing Teams meeting from your Outlook calendar.
- Select the **Meeting options** link in the meeting invitation body, below the meeting join information **or** select the **Meeting Options** button in the Outlook calendar ribbon.
- A browser window will open with the meeting options.

Join Microsoft Teams Meeting
+1 323-849-4874   United States, Los Angeles (Toll)
Conference ID: 344 864 850#
Local numbers | Reset PIN | Learn more about Teams | Meeting options
- OR -
Join Teams Meeting   Meeting Options
Teams Meeting

Note: If you open an existing meeting and edit the Meeting Options from the Outlook ribbon, you must select **Send Update** for settings to take effect.
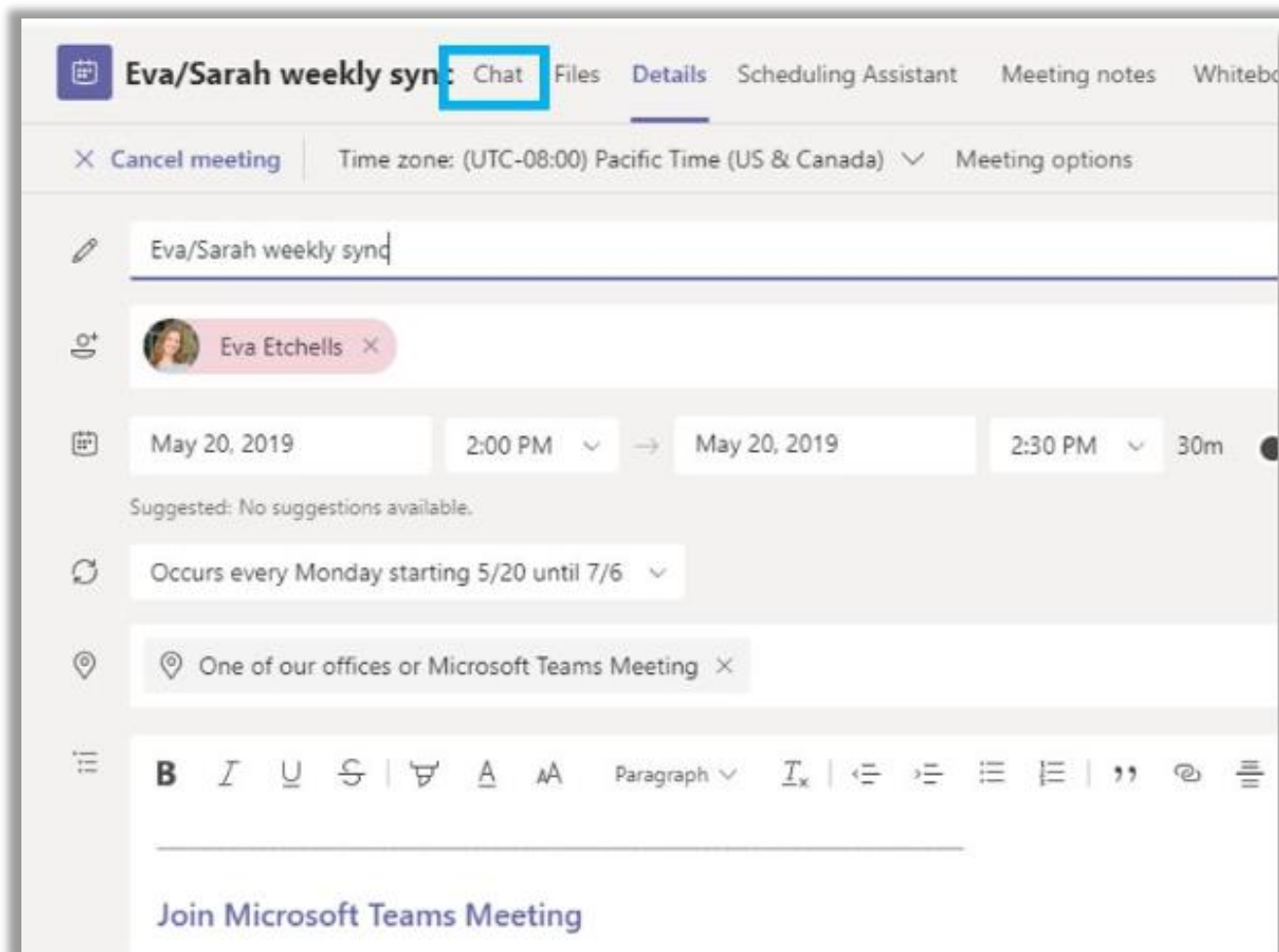
Meeting participant – Collaboration

Tip 8: Every meeting has its own associated chat (which automatically includes all meeting attendees). As you can chat before the meeting even starts, this can be a great way to request meeting content from coworkers, post an agenda, and more.

To chat prior to the meeting, open the meeting from the calendar in Microsoft Teams (under **Meetings**) and select **Chat with participants**.

You will see any other available meeting features next to Chat. If applicable, use **Files** to upload an agenda or document. Click **Meeting Notes** to collaborate on notes and action items and **Whiteboard** to brainstorm ideas.

Click here to read more about taking and accessing meeting notes.

Meeting participant – Video sharing

Tip 9: Use video to engage in the conversation with others. If you like, you can choose or upload a background image to show behind you or blur the background.

To select a background before your meeting begins, toggle on **Turn video on**, then select the **Background settings** icon. You'll be presented with background options to choose from. You can also add a background once the meeting has started. From the meeting control bar, select **More actions** [**...**] then **Apply background effects**.

Note: Be mindful that background blurring might not prevent sensitive information behind you from being visible to other meeting participants.
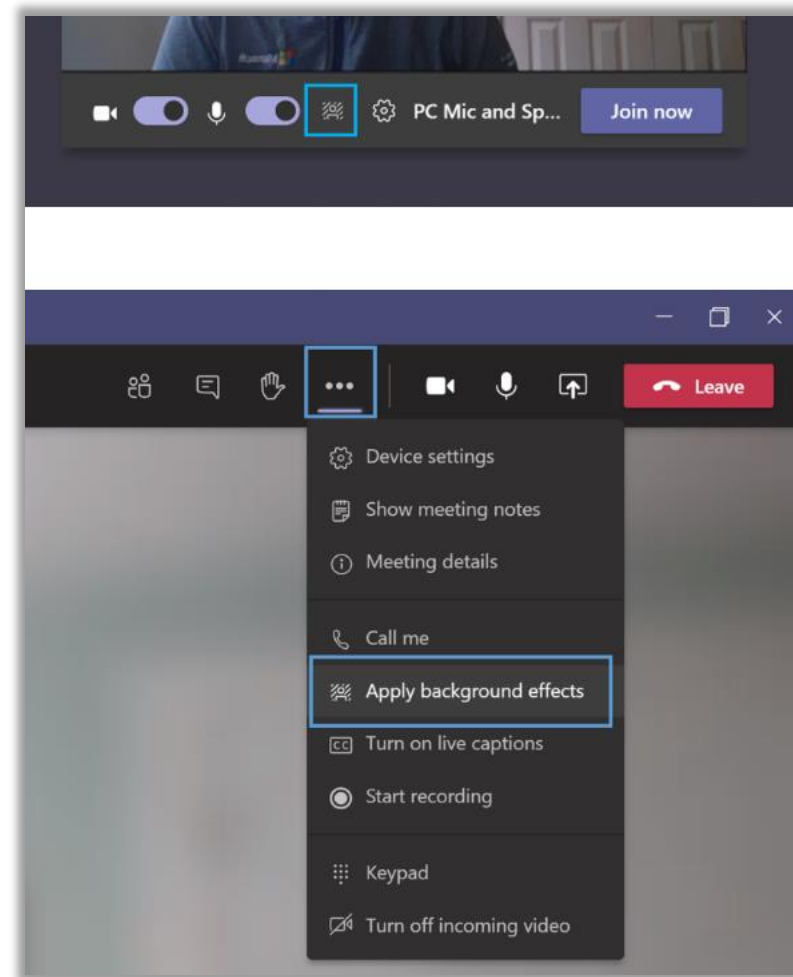

Read more here.

Meeting participant - Screen sharing

Tip 10: For the best sharing experience, use the Teams desktop app. After joining a meeting or making a call:

- Select the **Share** or **Open share tray** icon in the meeting controls.
- Select what you want to share:
  1. Desktop lets you show everything on your screen.
  2. Window lets you show a specific app.
  3. PowerPoint lets you show a presentation.
  4. Browse lets you find the file you want to show.
- After you select what you want to show, a red border surrounds what you're sharing.
- Select **Stop sharing** to stop showing your screen.

Note: If you share a PowerPoint file, rather than your desktop, meeting participants will get some additional capabilities, like the ability to move between slides without interrupting the presentation.
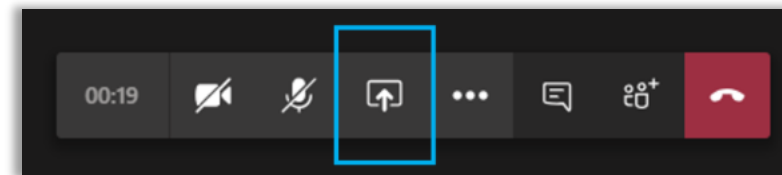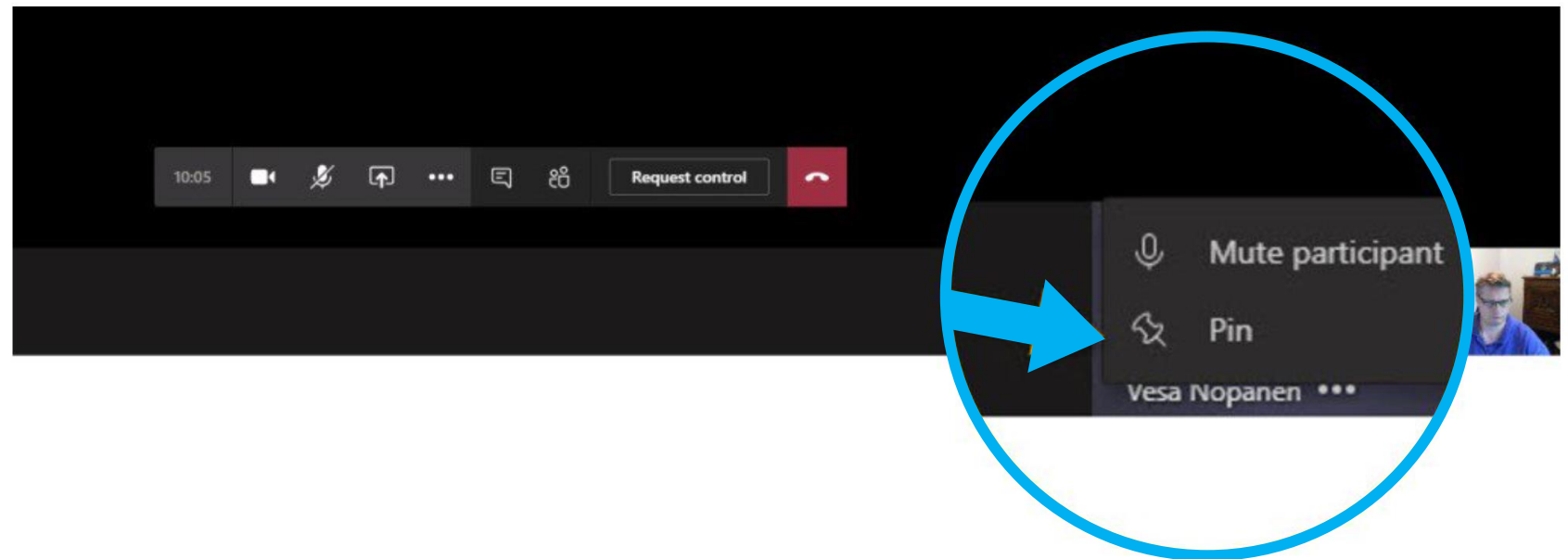
Click here to watch a short video.

Meeting participant – Pin participants

Tip 11: If you want to keep one person in view the entire meeting—say, the presenter—you can "pin" that participant, so their video fills the meeting stage and always shows, regardless of who's currently talking.

Simply select the ellipsis (**...**) next to the participant's name. Then, select **Pin**.
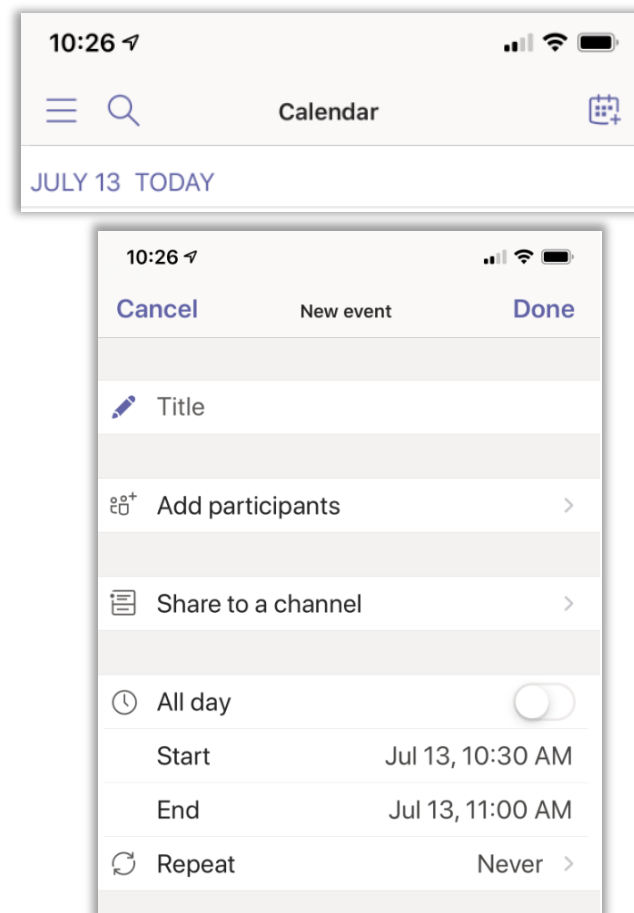
Teams mobile app

Tip 3: Schedule a meeting on the go.

You can schedule a meeting directly from the Teams mobile app in a few simple steps.

Select the **Meetings** icon in the bottom navigation, then select the **Schedule a meeting** icon in the upper-right corner.

If you need to access **Meeting options**, simply:
- Select the **Calendar** icon. Open an existing meeting.
- Select **Meeting options** below the meeting details (you may need to select **See more** first).
- A browser window will open with the meeting options. **Note**: Only Google Chrome or Firefox are supported at this time.
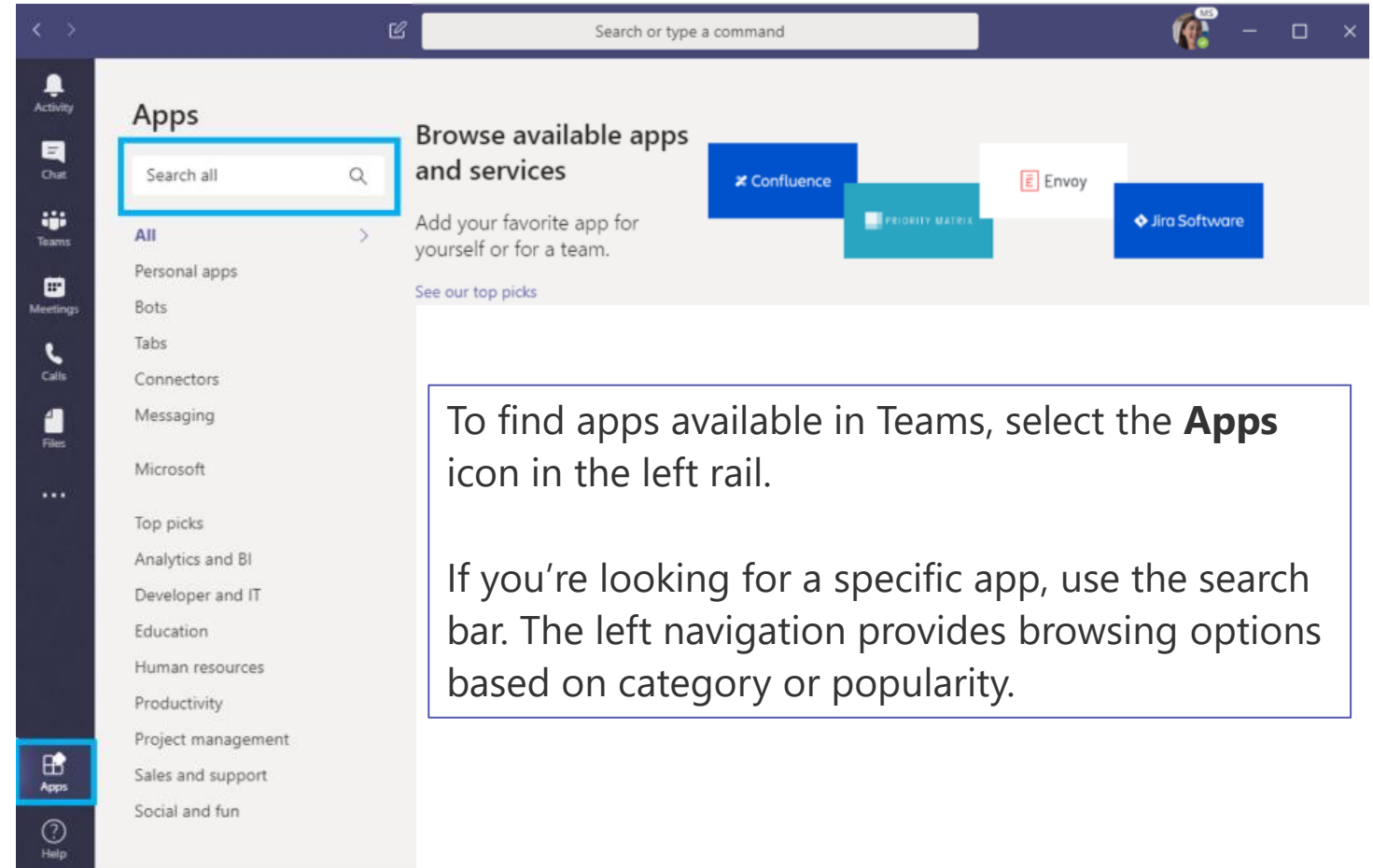
Click here to read more about scheduling a meeting or channel meeting using the Teams mobile app.

Teams mobile app

Tip 1: Set up your apps within Teams.

Apps within Teams can only be added from the Teams desktop or web client. Once you've added the app there, you can then use it in Teams mobile.

For example, if you want to use Planner, you need to add it to Teams on the desktop app first before you can use it on your phone

To find apps available in Teams, select the **Apps** icon in the left rail.

If you're looking for a specific app, use the search bar. The left navigation provides browsing options based on category or popularity.

Teams mobile app

Tip 2: Join a meeting with the click of a button.

The Teams mobile app makes joining meetings remotely even easier. Just tap the **Meetings** icon in the bottom nav, and then select **Join** next to your upcoming meeting. You can then choose your audio and video settings.

Tip: If a meeting doesn't have a Join button next to it, open the meeting by tapping on it. If a Join button is not present in this view, tap **See more** to view the full description. You'll then be able to join via the **Join Microsoft Teams Meeting** link.

Click here for short tips on what you can do after joining a meeting.