

# Manage Online Meetings in Teams

Last revised: Oct 2020  
Last reviewed: Oct 2020  
Next review: Oct 2021

Ministry of SaskBuilds and Procurement

This document provides instructions on how to manage online meetings in Teams, including how to setup, join, view, take notes and share your screen during a meeting.

Teams is an ideal environment for online collaboration using audio, video, chat and file sharing capabilities.

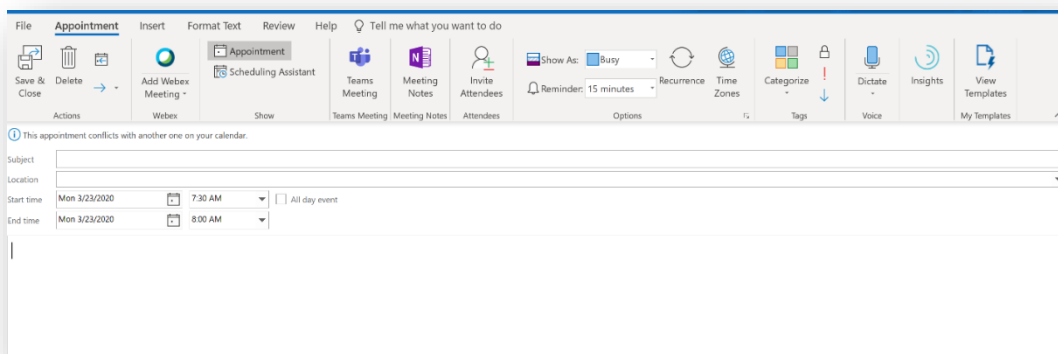


Information about managing online meetings in Teams is available below.

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## 1. How do I set up a Teams Meeting from Outlook (internal and external recipients)?

1. Go to *my calendar*.
2. Create a *new appointment*.
3. Pick the *date and time*.



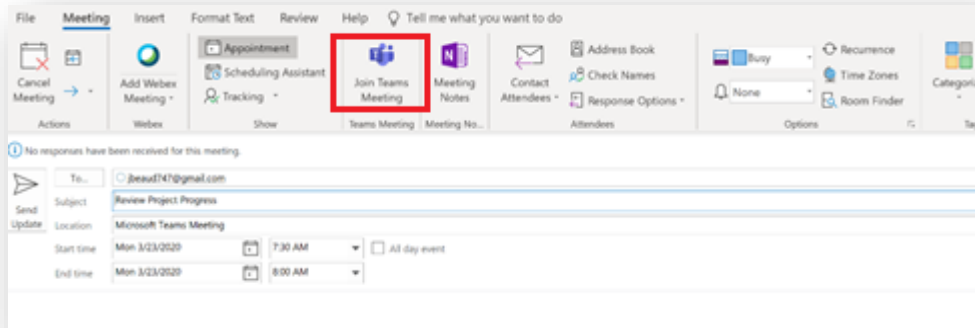
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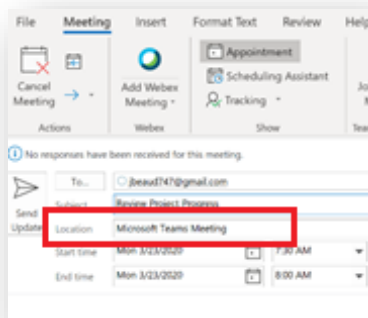
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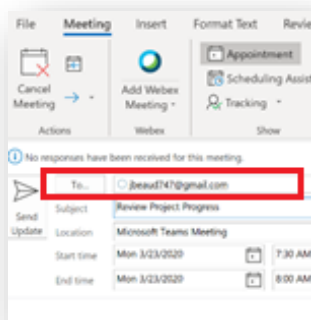
4. Click **Join Teams Meeting** to setup a Teams Meeting.



5. That will fill the location as **"Microsoft Teams Meeting"**.



6. Select **Invite attendee**. Insert the email address of the individual(s) or candidate(s) as per normal.



Note: You can insert both internal and external email address or contacts.

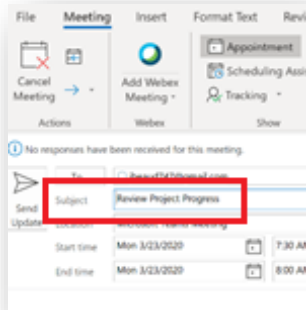
7. Fill in Subject field.

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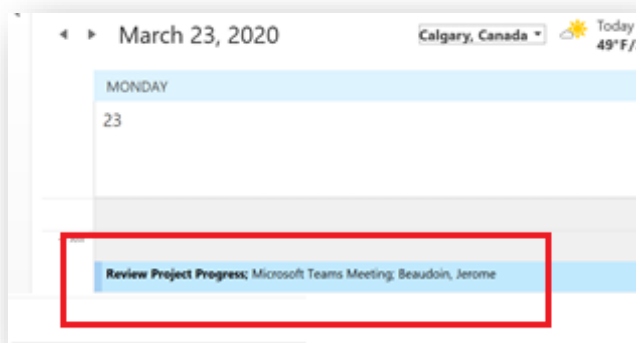
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8. Add your agenda, other content & validate all of the meeting information.
9. Press **Send**.
10. You should now see an invite in your Outlook calendar as identified in this screen.



## 2. How do I manage / authorize presenters and recording of my meetings?

*\*NOTE: to change these settings before sending the invitation, press the CTRL key then click "Meeting Options"*

By default, all Teams meetings are created with the expectation and ability to enable all attendees to share their desktop or program and record their meeting. As the meeting organizer, you can select to change this for each meeting you create.

Simply define who can be a "presenter" for your meeting, and this will also manage who can record the meeting, by following the steps below.

1. Open any Teams meeting from your Outlook calendar. In the "Teams" section of the content, you will see the link "Join Microsoft Teams Meeting", and under that heading, one of the options is "Meeting Options". Select this option to customize the meeting options. Note that these options can also be changed after the meeting has started.

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## Microsoft Teams meeting

**Join on your computer or mobile app**

[Click here to join the meeting](#)

**Or call in (audio only)**

[+1 306-994-8660,,305355958#](#) Canada, Regina

Phone Conference ID: 305 355 958#

[Find a local number](#) | [Reset PIN](#)

[Learn More](#) | [Meeting options](#)

2. You will then be presented with the following web page that looks like this:

The screenshot shows the 'Meeting options' page for an 'Unscheduled meeting' by 'Burton, Robert CS'. The page includes several settings:

- Who can bypass the lobby?** Set to 'People in my organization' (dropdown menu).
- Always let callers bypass the lobby** Set to 'No' (toggle switch).
- Announce when callers join or leave** Set to 'Yes' (toggle switch).
- Who can present?** Set to 'Everyone' (dropdown menu).

3. Select the appropriate options for your meeting as below:

- Who can bypass the lobby? By default, anyone within government's network can bypass the lobby. If you wish to have external callers also bypass the lobby, you can select "yes" here.
- How do I change the recording option? Select the list beside "Who can present?" and there are several options, including "only me" or specific people can be named as a Presenter. Only the Organizer or authorized Presenters are allowed to record a Teams meeting.

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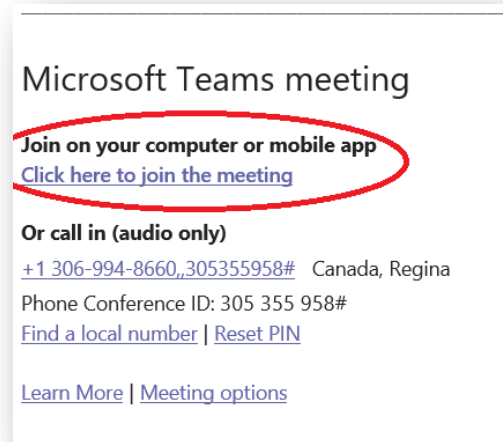
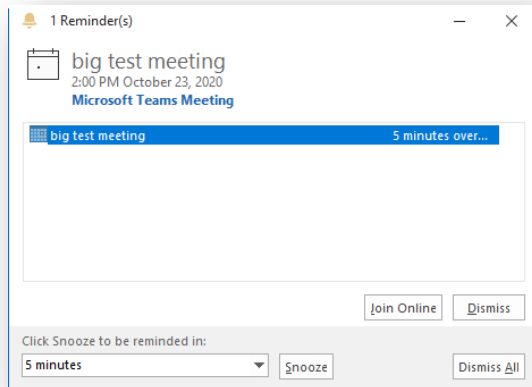
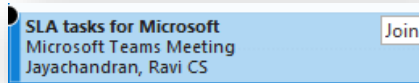
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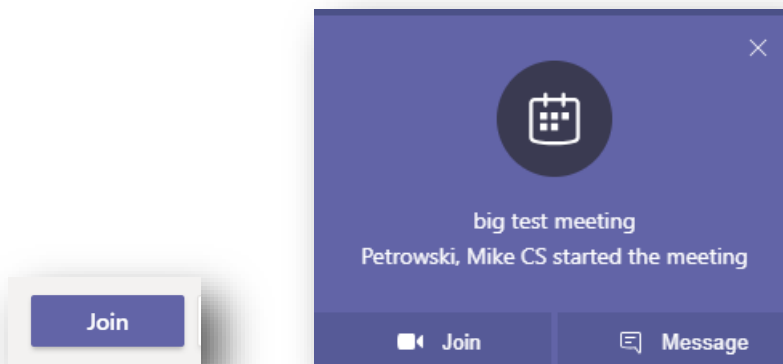
## 3. How do I start or join a Teams meeting?

1. There are three ways to join the meeting:
  - a. From the Outlook calendar:



–OR–

- b. from your Teams client:



–OR–

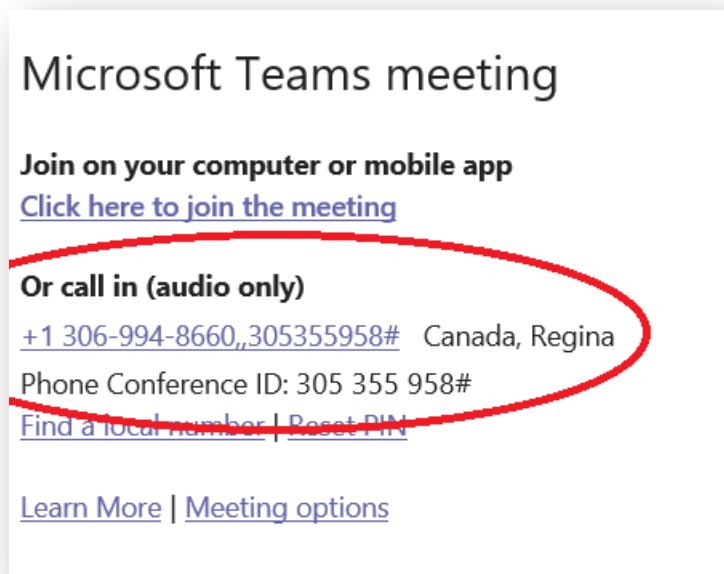
- c. by dialing in from a cell phone or land line

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**\*\*NOTE:** if you join your meeting using the phone number, at least one person internal to GoS needs to start the meeting by clicking the link –OR- you will need to set yourself up with a PIN. Click the “Reset PIN” link in any meeting & follow instructions.

2. When joining the meeting online through Teams, you will be presented with the following screen. Before selecting “Join Now”, manage your audio and video requirements first.

## Toggles / Options:

- Video – toggle off/on to select
- Background Blur – toggle off/on to select
- Microphone – toggle to start muted or unmuted
- Audio Off – if you have joined audio from another device and just want screen sharing plus chat option

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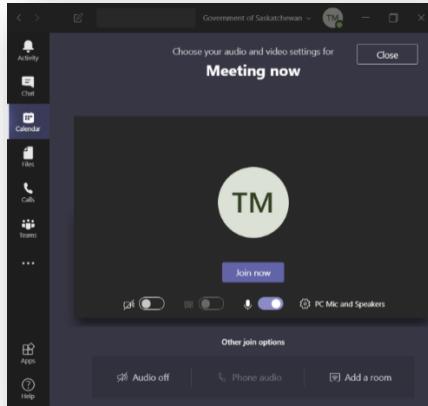
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- *PC Mic and Speakers – select this to set up devices other than built-in, auto detected devices*



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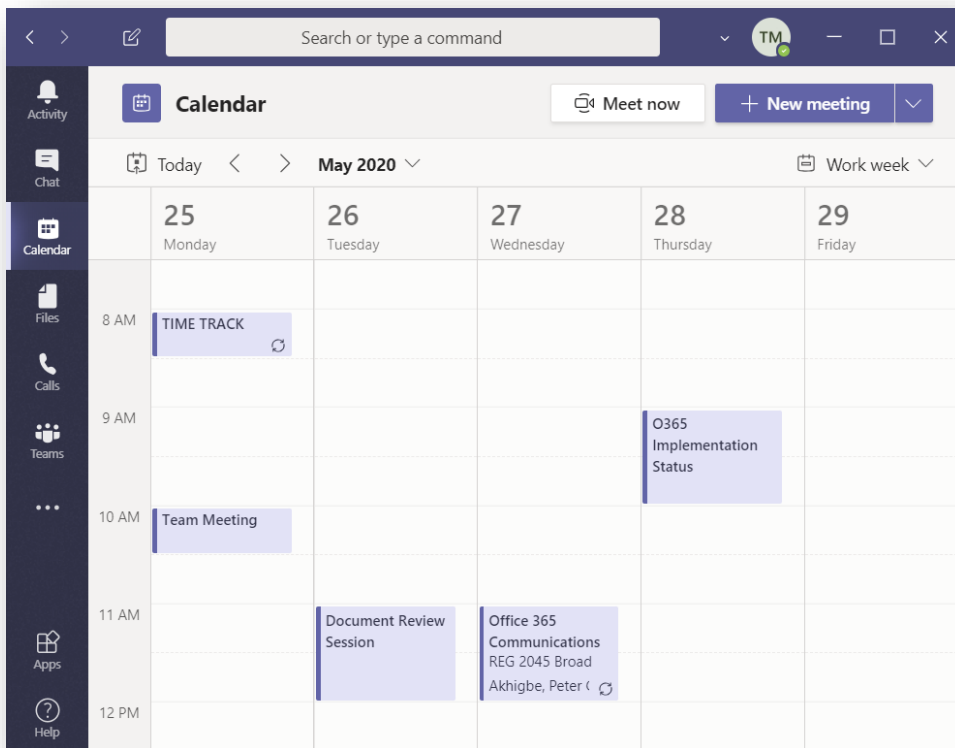
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## 4. How do I view my Teams calendar?

1. All meetings you have created or accepted will show in your Outlook calendar, but you can also see your Teams meetings through the Teams client.





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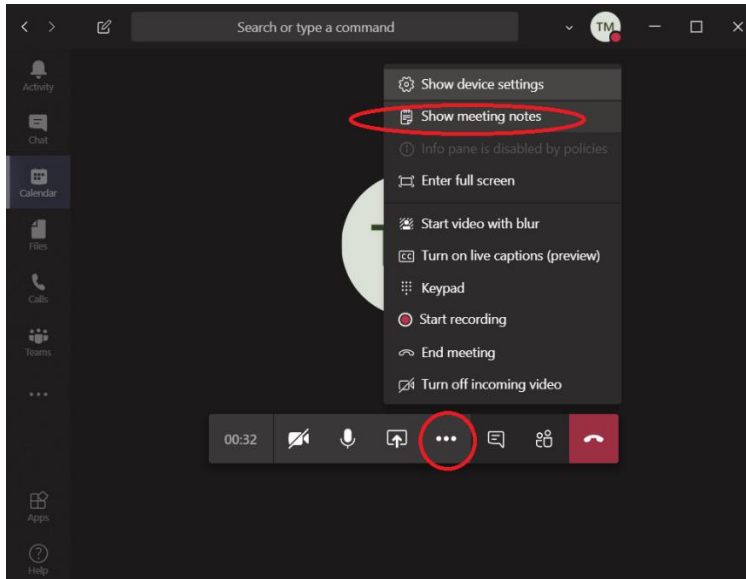
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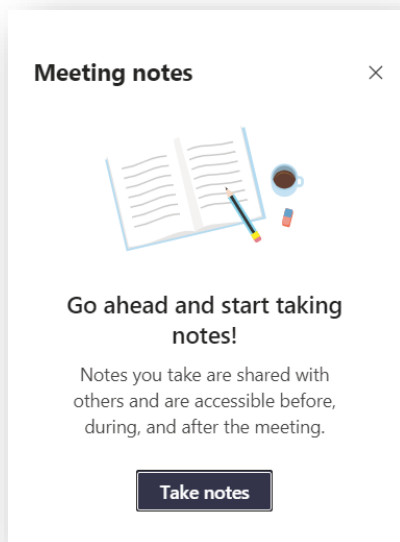
## 5. How do I take notes during a meeting?

1. *Once you have joined the meeting, on the Teams meeting window, hover your mouse over the screen and look for the meeting management menu. There will be an ellipsis (...) to select which will bring up a menu.*

*Select the menu item **Show meeting notes**.*



2. *You will then see the **notes**.*



*Select the **Take notes** button and you will be presented with a location to take notes about the meeting which will always be associated with the meeting.*

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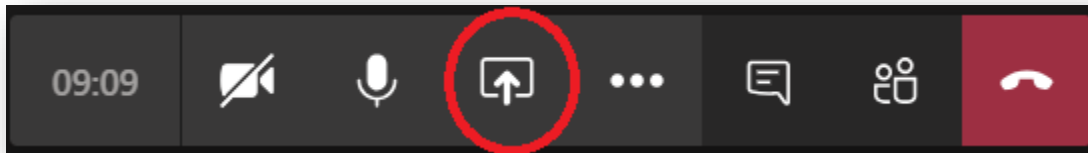
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## 6. How do I share my screen with meeting participants?

1. When connected to a meeting, in the Teams meeting window, you will see the meeting management toolbar. If you do not see it, hover your mouse over that screen to activate it.



2. In that toolbar, look for the “share” button. When you press it you will be shown the following options in your share window:
  - Desktop: If you have more than one, you can select which desktop to share, participants will be able to see anything that happens on that desktop.
  - Window: Any window you currently have open is able to be shared and participants will only see what is presented in the window you select to share and nothing more. For example, if you share your MS Word window, if you minimize it, users will see nothing until you bring MS Word back up on your screen.
  - PowerPoint: If you have a PowerPoint file open, you can share that.
  - Whiteboard: you can select Whiteboard to activate a digital whiteboard to share with/interact with your participants.