



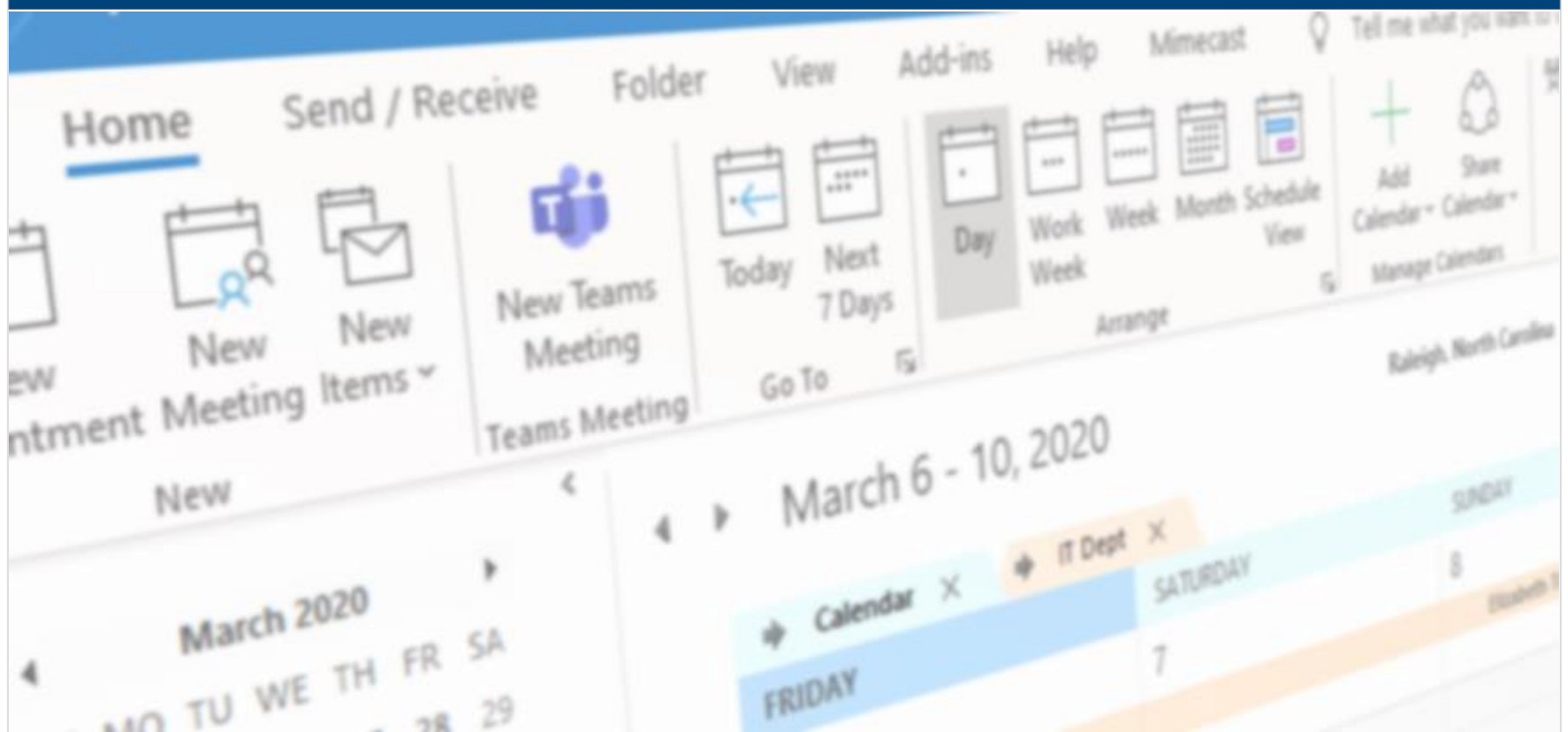
CREATING AND JOINING MEETINGS USING TEAMS



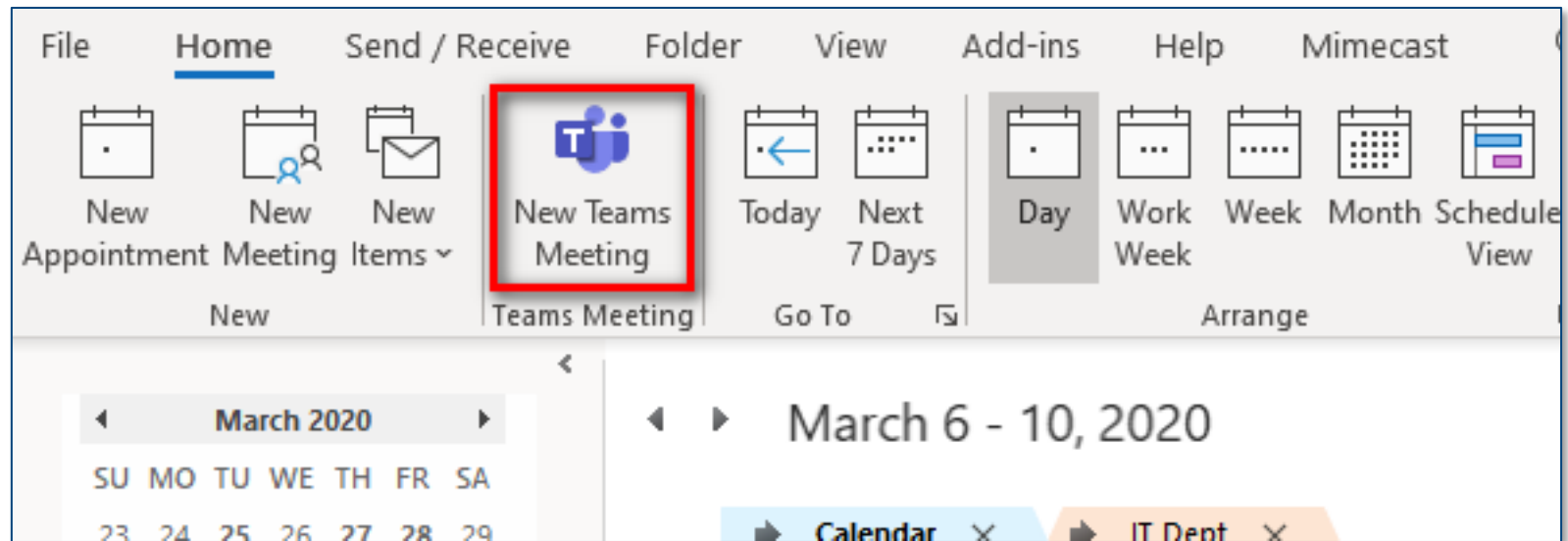
CAPTRUST



CREATING TEAM MEETINGS USING THE OUTLOOK DESKTOP APP



CREATING TEAM MEETINGS USING THE OUTLOOK DESKTOP APP



- In Outlook, open the Calendar tab
- Click on “New Teams Meeting” in the Home tab of the ribbon toolbar

A new window will pop-up and auto-fill the Teams Meeting link, phone number, and Conference ID

Send

Title

Required

Optional

Start time

Fri 3/6/2020 9:00 AM

End time

Fri 3/6/2020 9:30 AM

Location

Microsoft Teams Meeting

[Join Microsoft Teams Meeting](#)

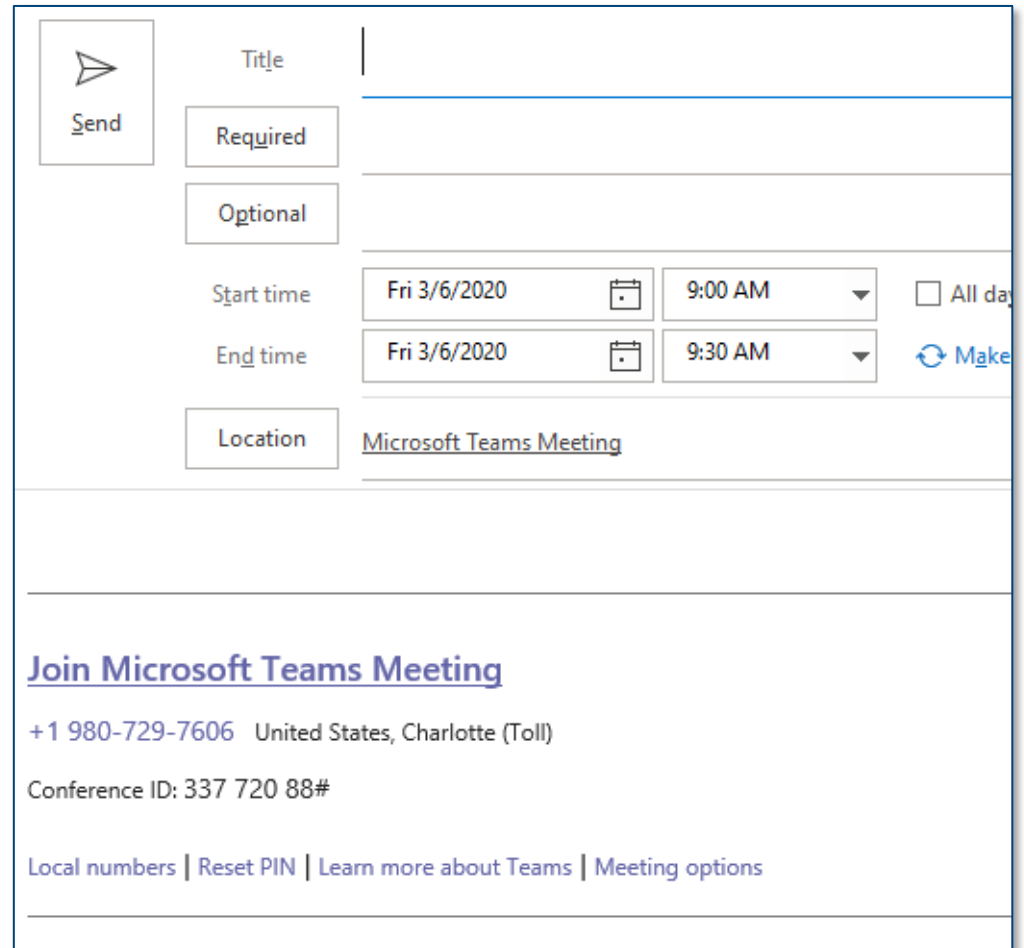
+1 980-729-7606 United States, Charlotte (Toll)

Conference ID: 337 720 88#

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

Once completed, click
“Send” to create the
meeting.

*Note: The conference ID
changes anytime you
schedule a Teams Meeting.
This is not the same as your
“Personal Conference ID”*



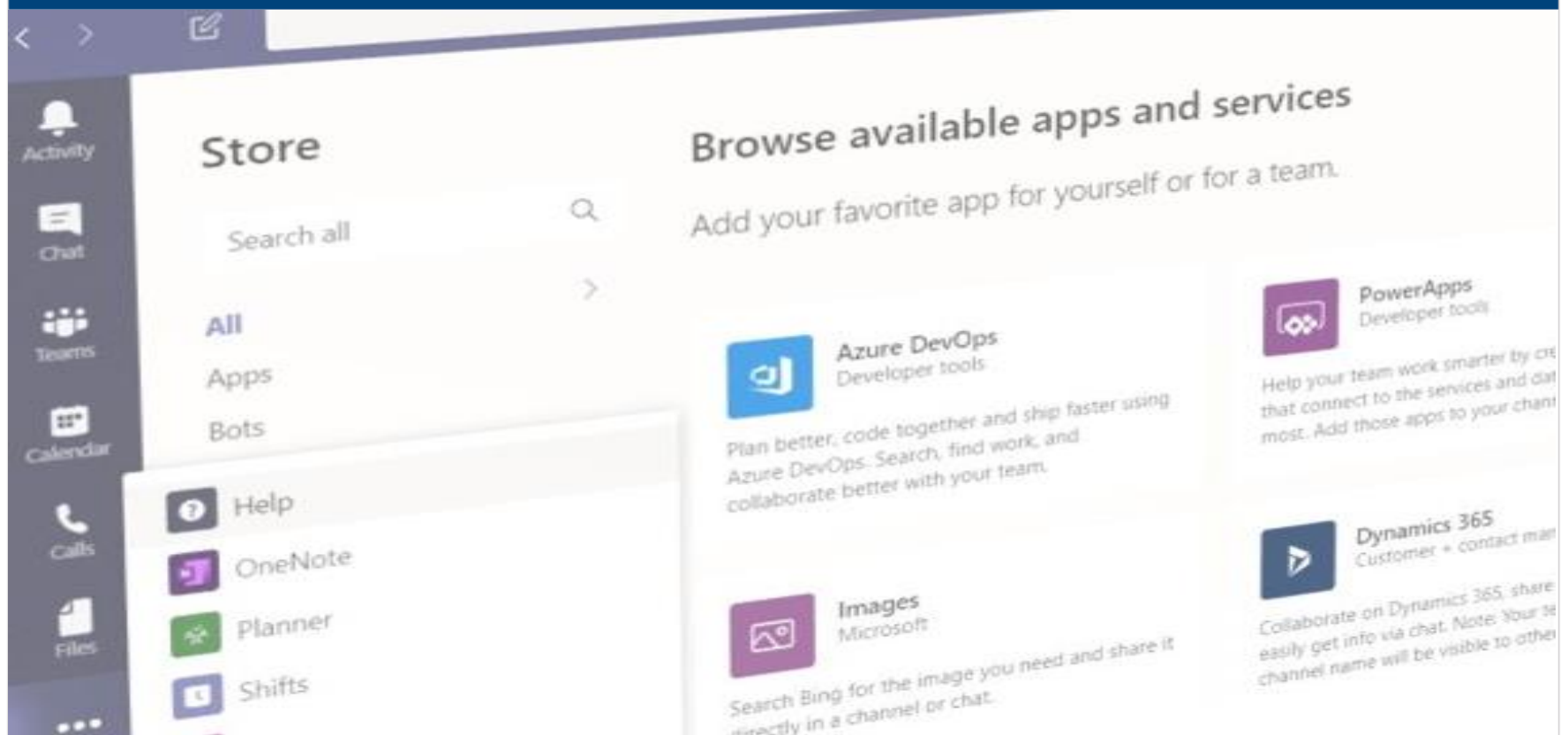
The screenshot shows the Microsoft Teams meeting creation interface. On the left, there is a 'Send' button with a paper plane icon. The main form has a 'Title' field, followed by 'Required' and 'Optional' sections. The 'Start time' is set to 'Fri 3/6/2020' at '9:00 AM', and the 'End time' is 'Fri 3/6/2020' at '9:30 AM'. There is an 'All day' checkbox and a 'Make' button. The 'Location' is 'Microsoft Teams Meeting'. Below the form, there is a section titled 'Join Microsoft Teams Meeting' with a phone number '+1 980-729-7606', the location 'United States, Charlotte (Toll)', and the 'Conference ID: 337 720 88#'. At the bottom, there are links for 'Local numbers', 'Reset PIN', 'Learn more about Teams', and 'Meeting options'.

Send	Title		
	Required		
	Optional		
	Start time	Fri 3/6/2020	9:00 AM
	End time	Fri 3/6/2020	9:30 AM
	Location	Microsoft Teams Meeting	

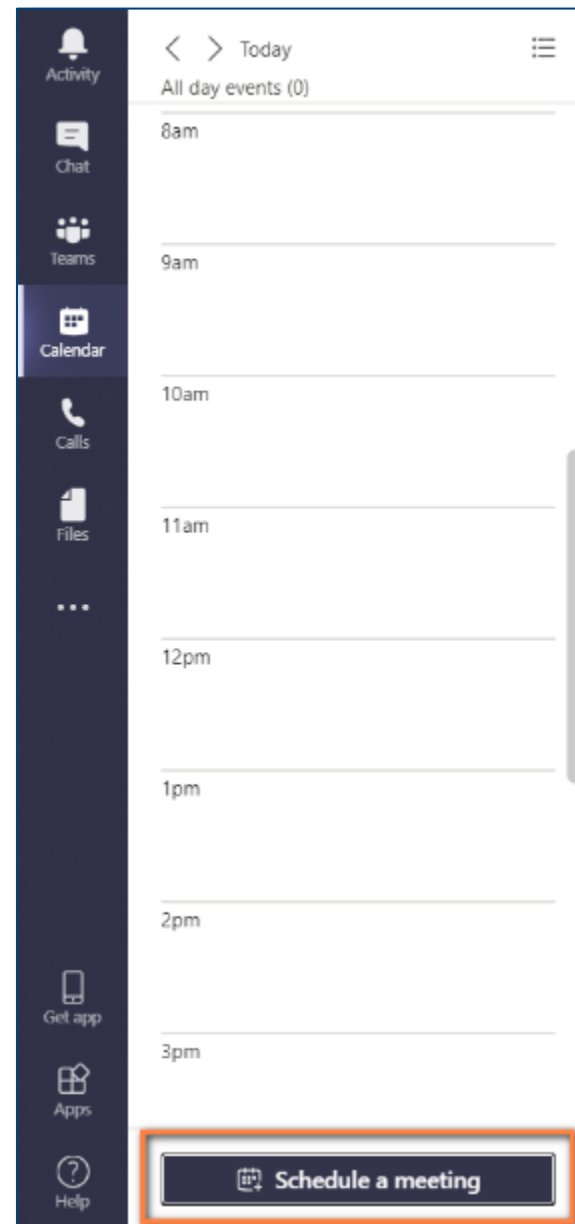
[Join Microsoft Teams Meeting](#)
+1 980-729-7606 United States, Charlotte (Toll)
Conference ID: 337 720 88#
[Local numbers](#) | [Reset PIN](#) | [Learn more about Teams](#) | [Meeting options](#)



CREATING TEAM MEETINGS USING THE TEAMS APP



In Teams, click on the Calendar tab on the left side and click “Schedule a meeting” at the bottom.



CREATING TEAM MEETINGS USING THE TEAMS APP

- Fill out the meeting information and click “Schedule” at the bottom of the screen.

The 'New meeting' dialog in Microsoft Teams. The title is 'Team Meeting'. The location is empty. The start time is May 8, 2019, 8:00 AM, and the end time is May 8, 2019, 8:30 AM. The repeat option is unchecked. The organizer is Dale Broadbent. The attendees list includes techsupport. The 'Schedule' button is highlighted with a red box.

New meeting ▾

Title
Team Meeting

Select a channel to meet in
None (optional) ▾

Location
▾

Invite people
Invite someone

Start
May 8, 2019 8:00 AM

End
May 8, 2019 8:30 AM

Repeat ☐

Free: No suggestions found [Scheduling assistant](#)

Details

B *I* U

Type details for this new meeting

Organizer
Broadbent, Dale
Dale.Broadbent@captrustadvisors.com

Attendees
techsupport
Unknown

Close Schedule

- The next window displays the meeting information, which you can edit, or accept and close.

The meeting details window in Microsoft Teams. It shows the date and time (Wednesday, May 8, 2019, 8:00 AM - 8:30 AM (30 minutes)) and the title (Microsoft Teams Meeting). The organizer is Dale Broadbent. The attendees list includes techsupport. The 'Join' button is highlighted with a red box.

Wednesday, May 8, 2019
8:00 AM - 8:30 AM (30 minutes)
Microsoft Teams Meeting

Join Chat with participants

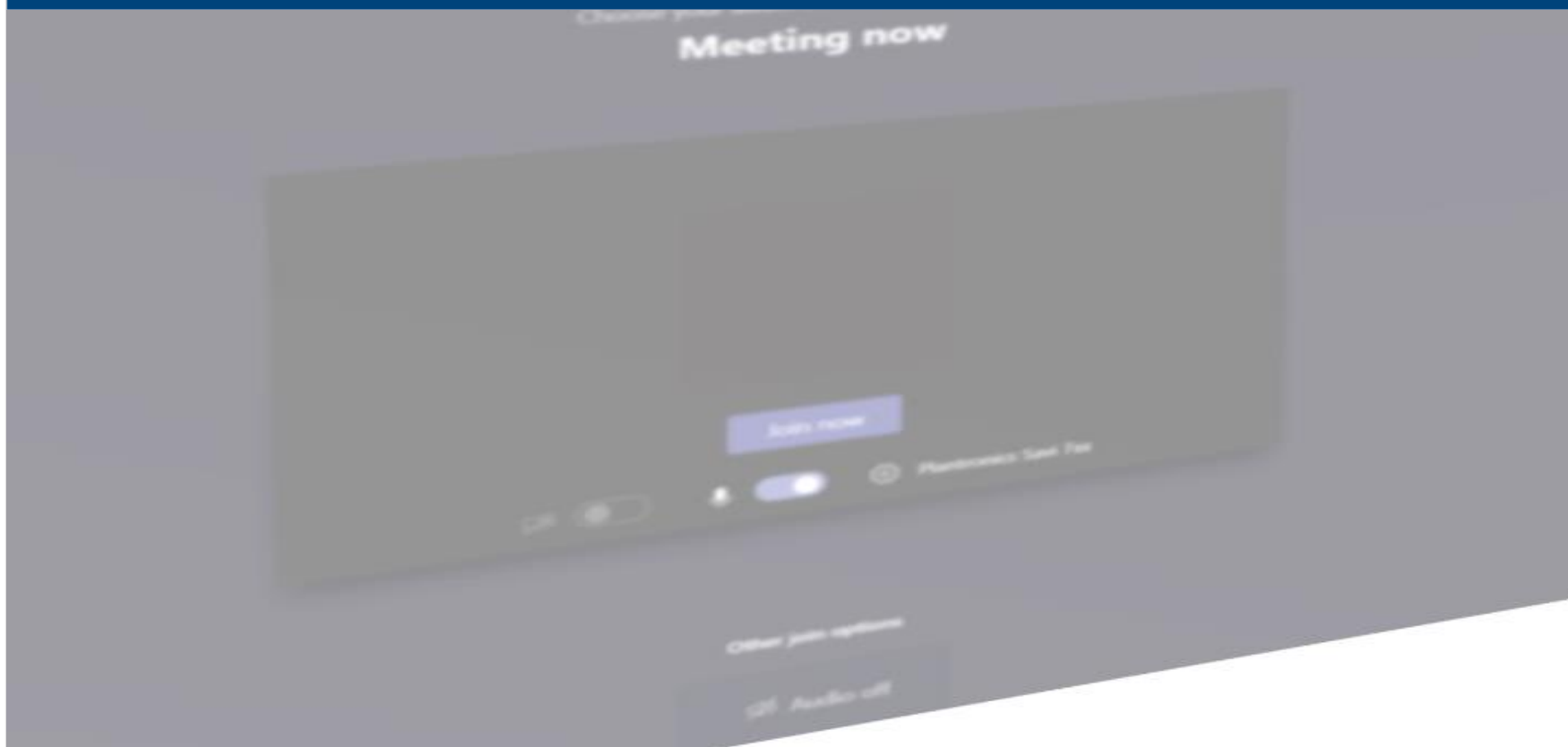
Cancel meeting

Organizer
Broadbent, Dale
Organizer

Attendees
techsupport



JOINING A TEAMS MEETING







JOINING A TEAMS MEETING VIA PHONE

- Dial in via the provided phone number
- Provide the 8-digit Conference ID
- Wait for the meeting to start.

IF YOU'RE THE HOST:

- Provide the 8-digit Conference ID
- After the prompt (“If you’re the meeting organizer...”) press *, enter your PIN, then #
- Attendees will be waiting until you start the meeting

 Send	Title			
	Required			
	Optional			
	Start time	Fri 3/6/2020 	9:00 AM ▼	<input type="checkbox"/> All day
	End time	Fri 3/6/2020 	9:30 AM ▼	 Make
Location	Microsoft Teams Meeting			

[Join Microsoft Teams Meeting](#)

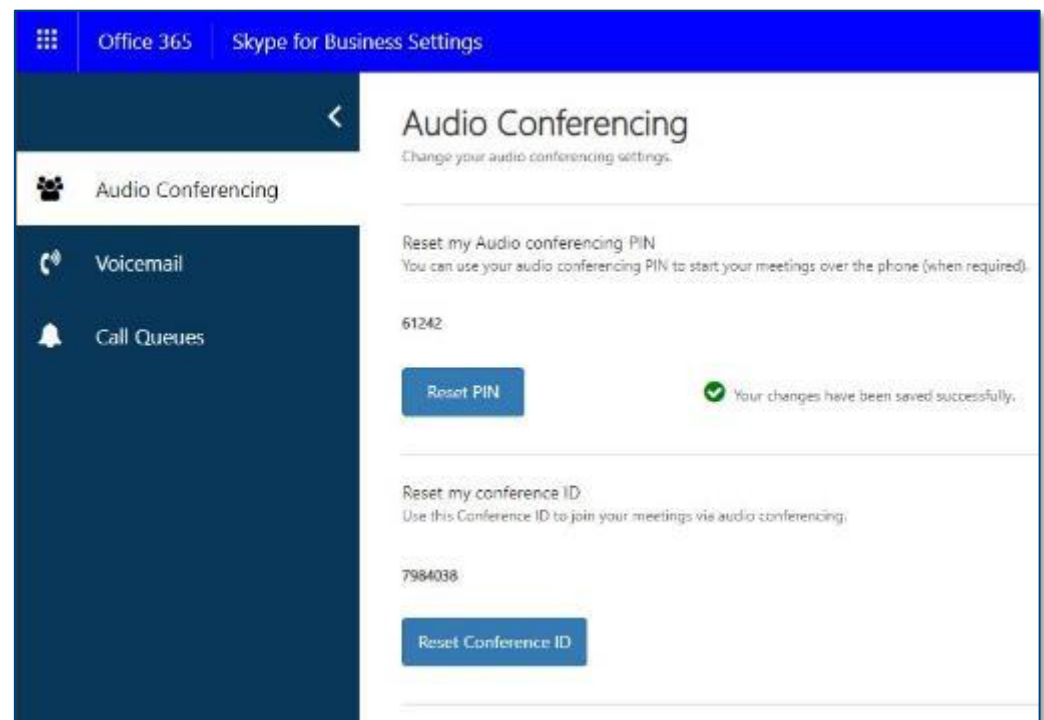
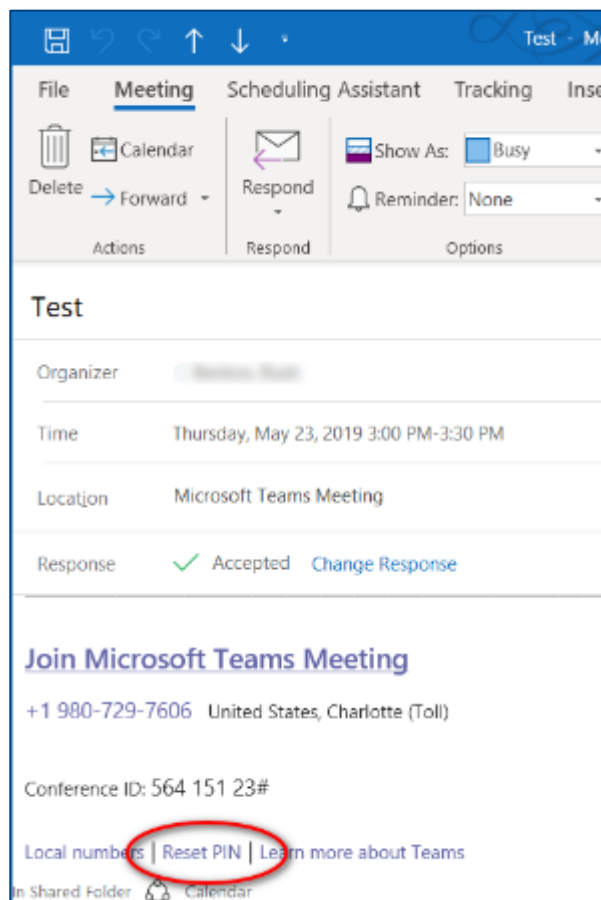
+1 980-729-7606 United States, Charlotte (Toll)

Conference ID: 337 720 88#

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

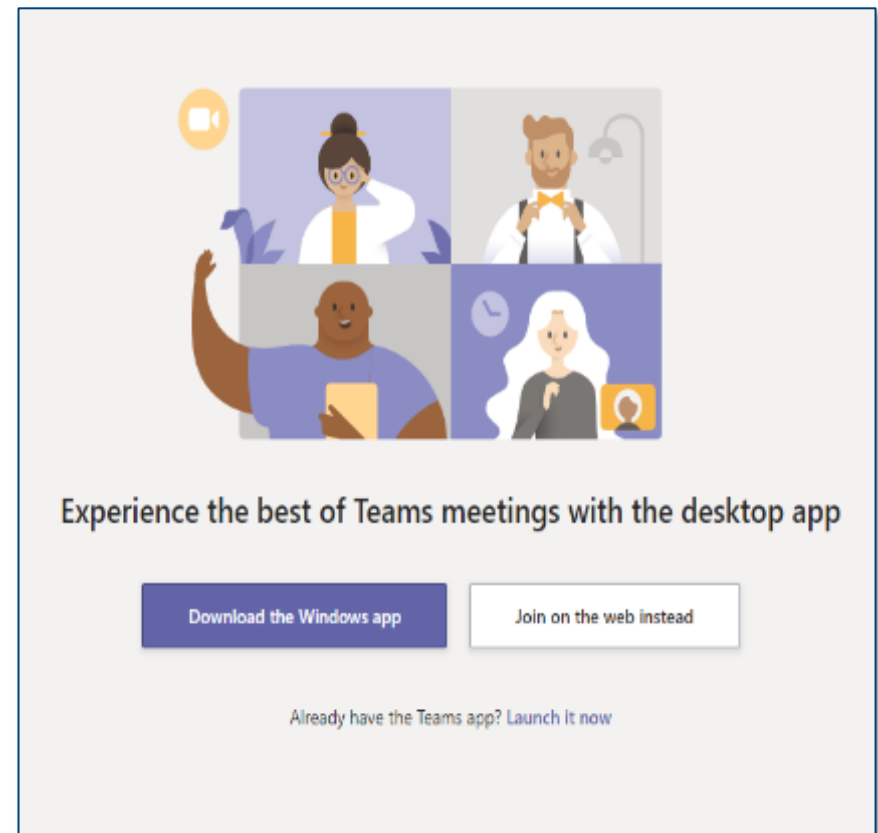
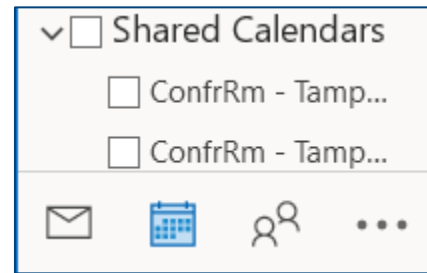
FINDING YOUR PIN

- If you forget your PIN click “Reset PIN” in any Teams Conference email notification.



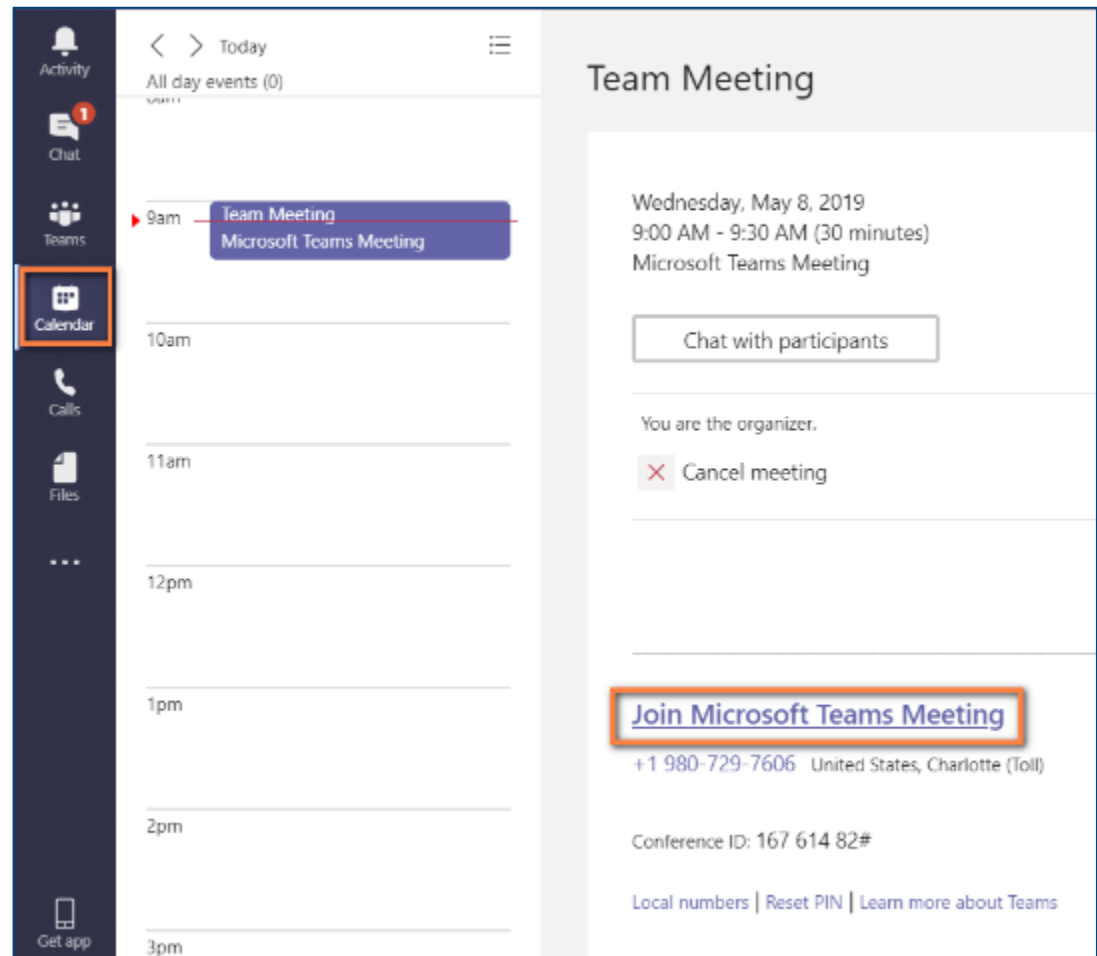
JOINING A TEAMS MEETING VIA OUTLOOK

- Open the meeting via the Calendar tab
- Click on the link that says “Join Microsoft Teams Meeting”
- Choose from the 3 options (see image to right):
- Clients should click “Join on the web...”
- Captrust employees should click “Launch it now.”
- If you are already logged into the Teams application, it will launch you into the meeting using the application.



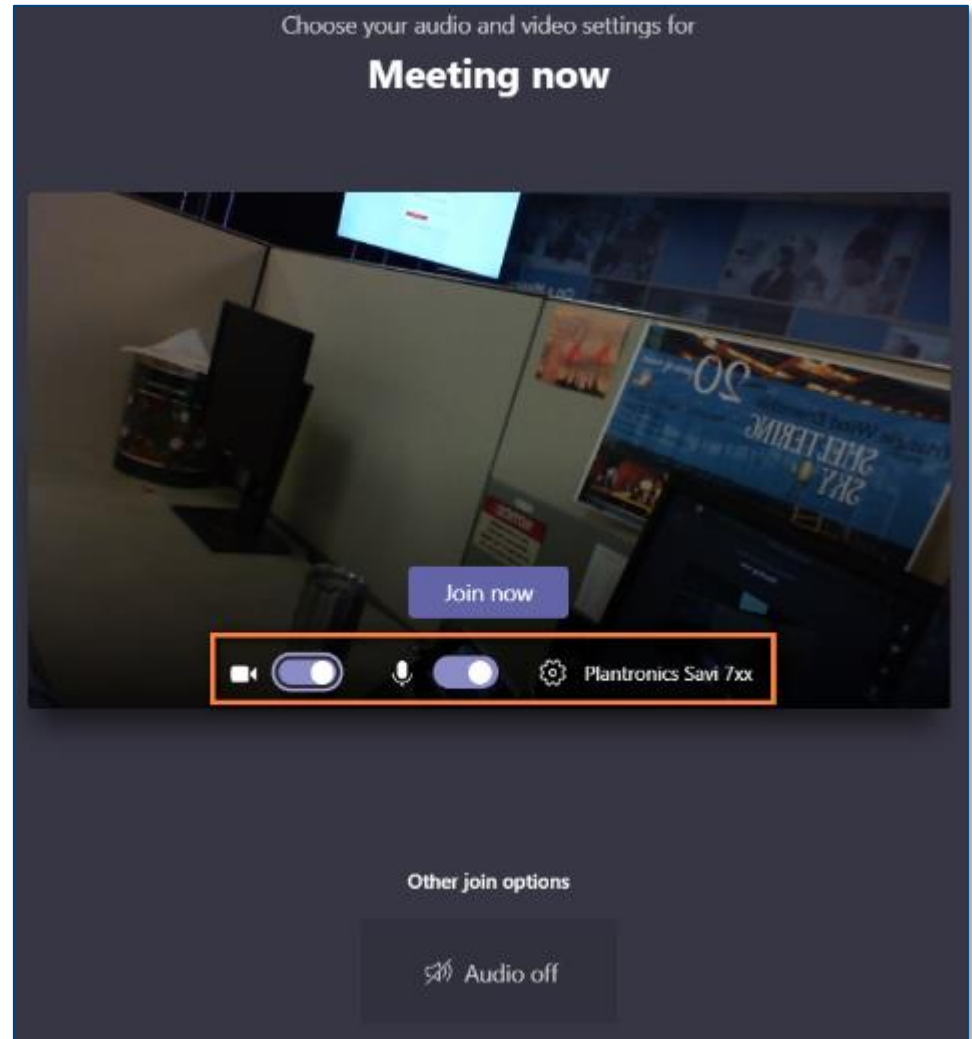
JOINING A TEAMS MEETING VIA TEAMS

- Open the Calendar tab on the left side of your Teams app and locate the meeting
- Click on “Join Microsoft Teams Meeting”



JOINING A TEAMS MEETING VIA TEAMS

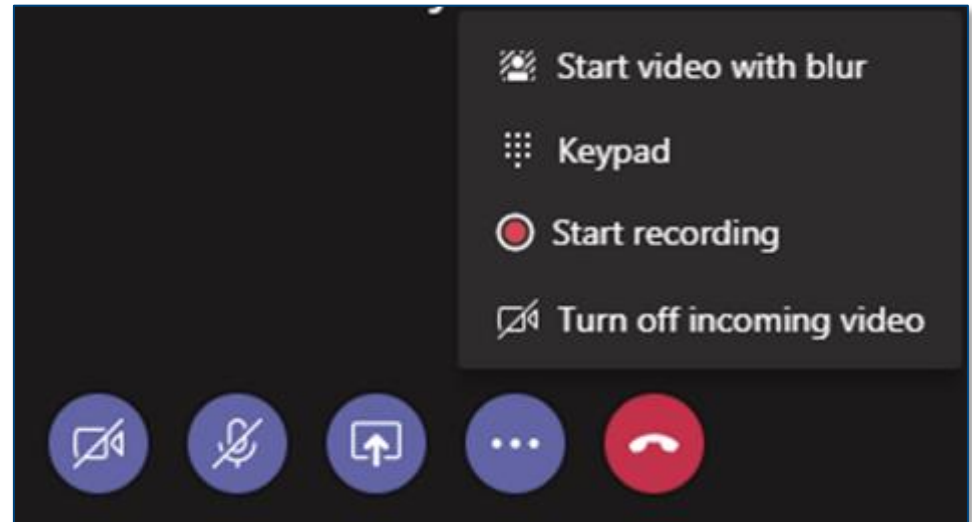
- Toggle the video and/or mic buttons to turn on/off your video and/or mic
- Click the gear icon to choose your volume options
- Once confirmed, click “Join now” to join the meeting
- ***Be sure to join either by mic or phone, but not both.***








JOINING A TEAMS MEETING VIA TEAMS

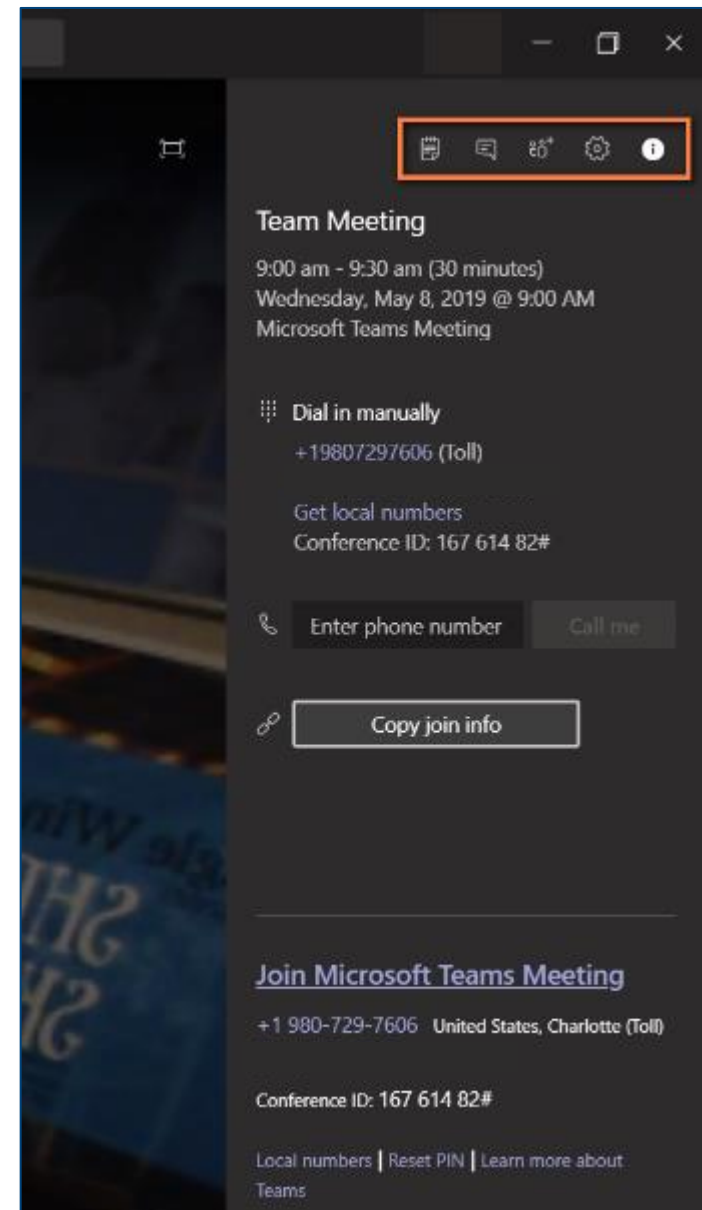
Once you have joined the meeting, you will have options at the bottom of the window to:

- Enable/Disable camera
- Enable/Disable mic
- Screen Share
- Start/Stop recording
- End call



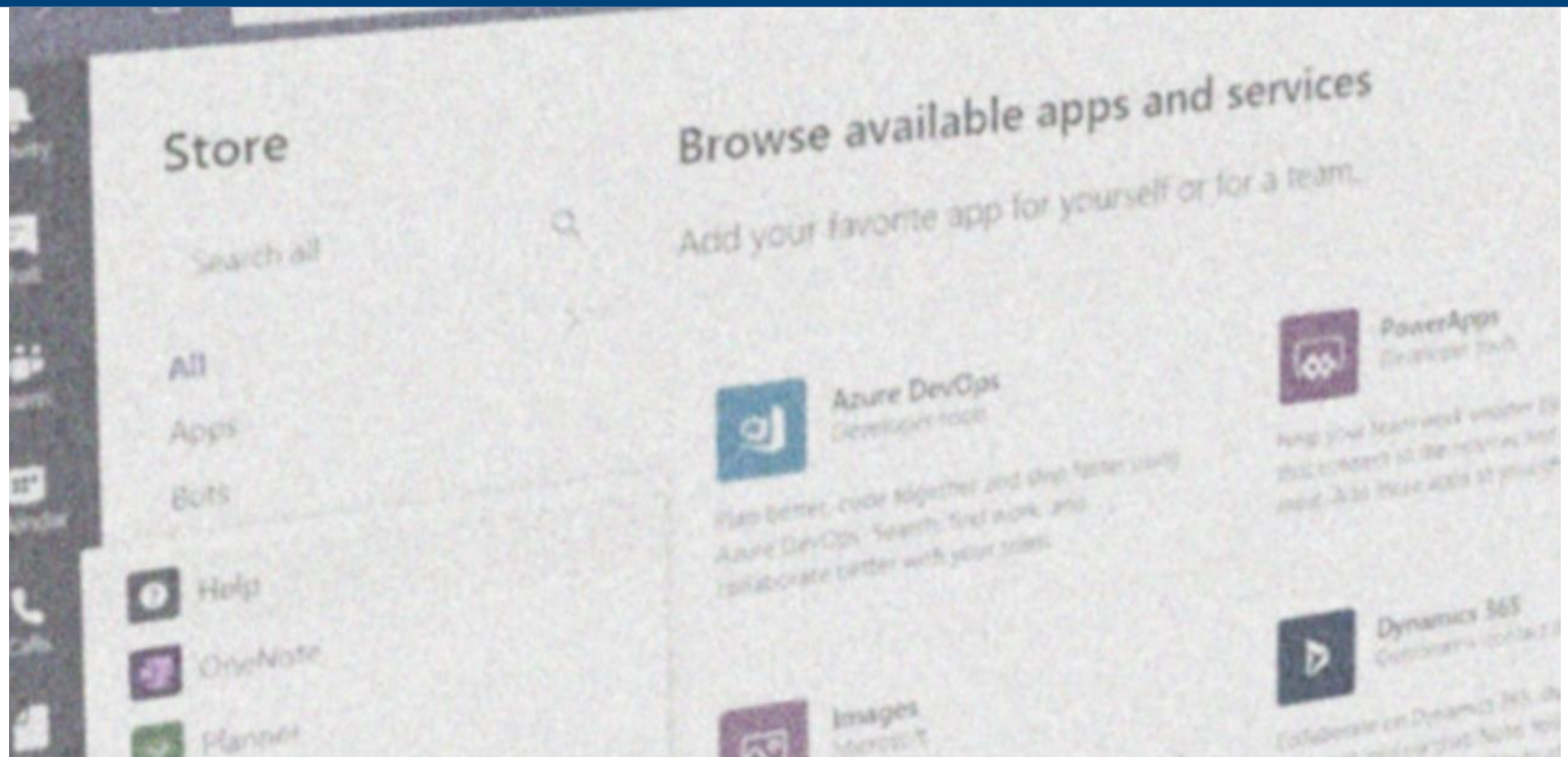
Use the buttons along the top right edge to manage the meeting:

-  Take Notes
-  Chat with other participants
-  View other participants
-  Adjust audio/mic settings
-  Display information (shown)
 - Dial-in number
 - Conference ID




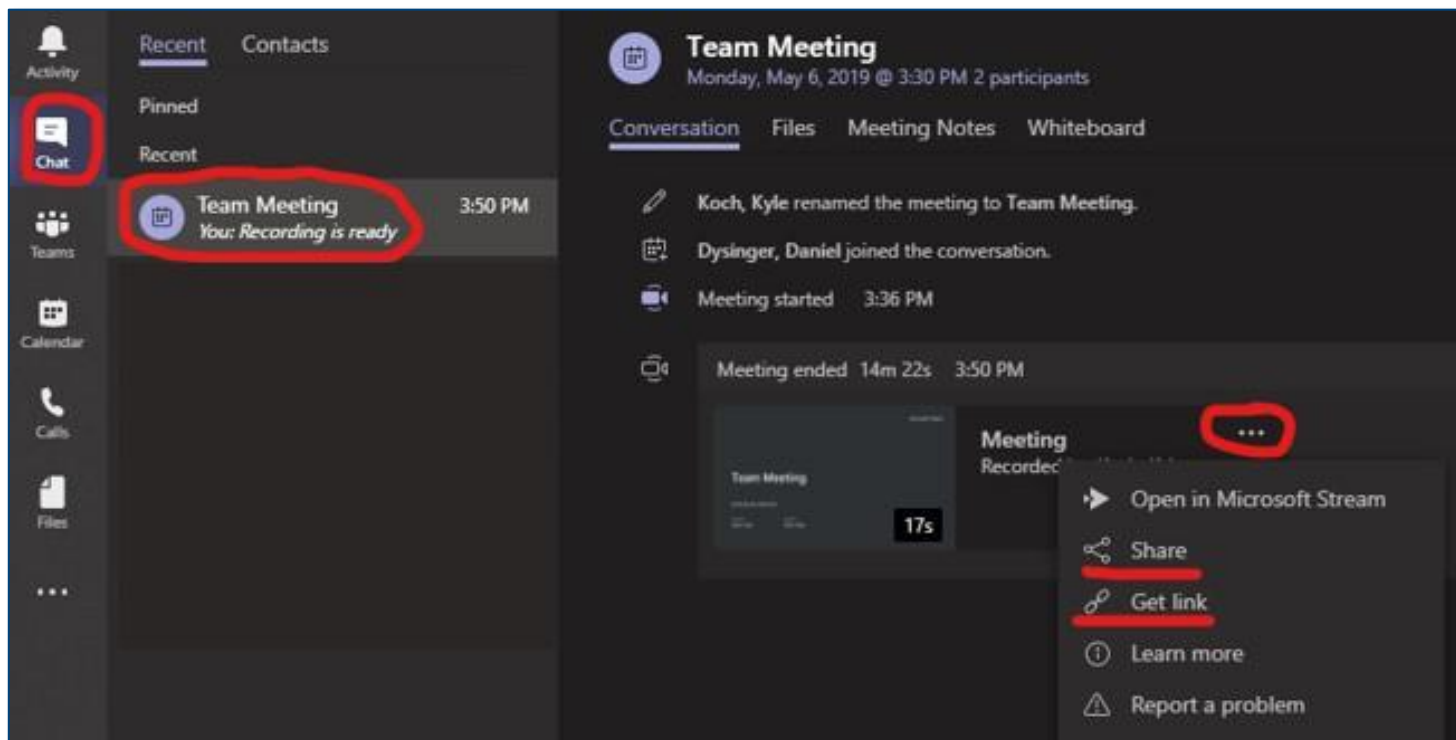


AFTER THE MEETING



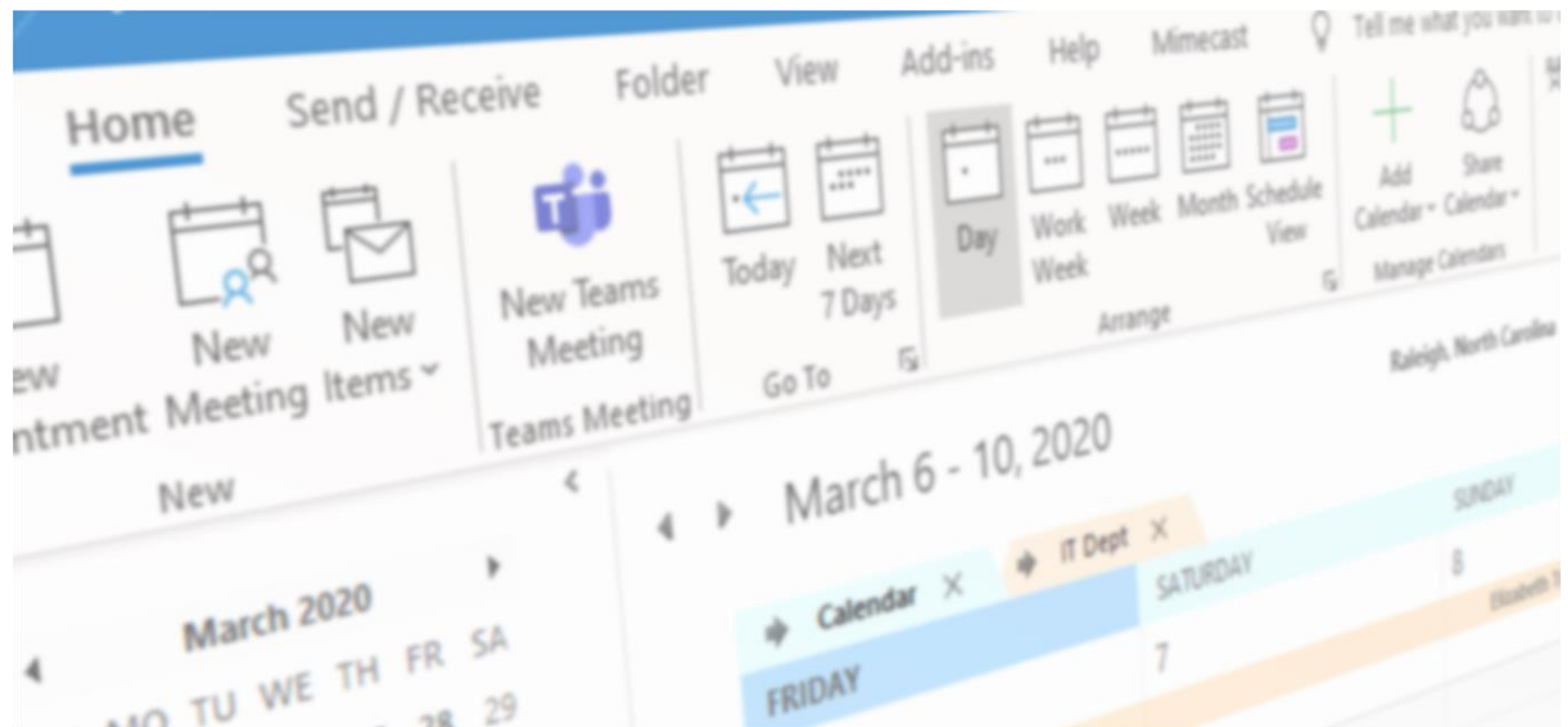
FINDING AND SHARING RECORDED MEETINGS

1. Click on “Chat” on the left side and locate the recent meeting
 2. Under the conversations tab (under  and next to the recording) click on the ellipsis to reveal the following options to share:
- **Share:** Creates a unique link to share to anyone in the company (and provides the option to stop sharing)
 - **Get Link:** Creates a unique permanent link that can be copied and sent via email.



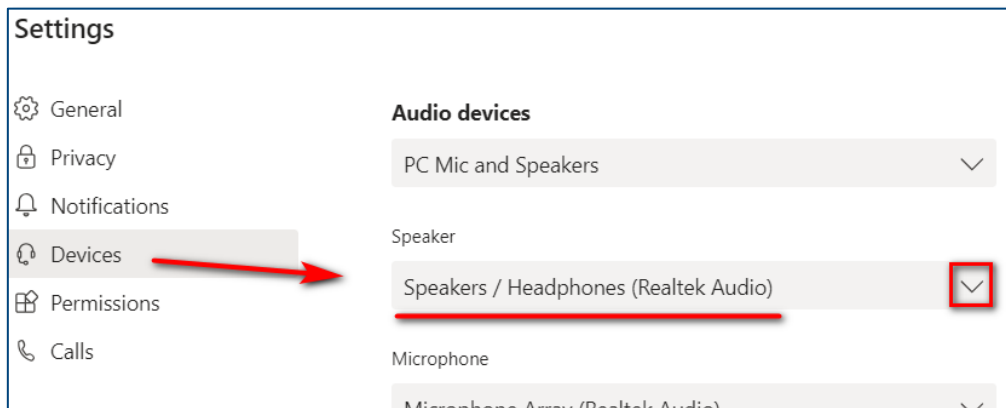
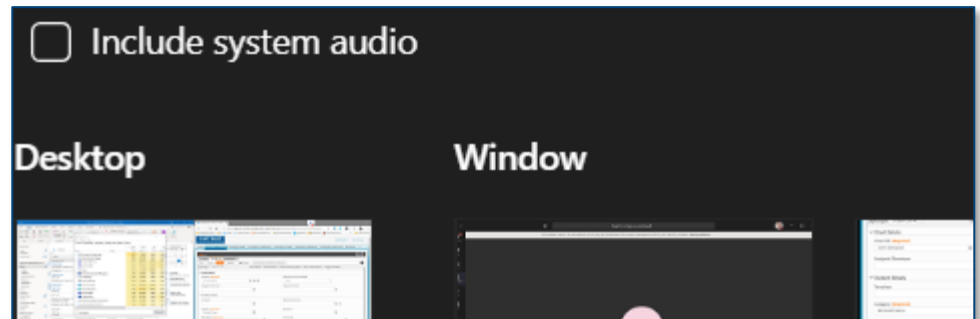


TROUBLESHOOTING



Presenters

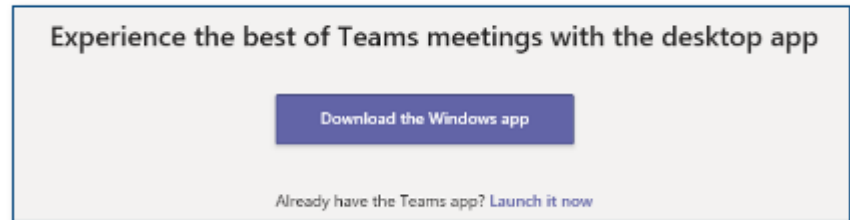
- ***Don't wait until the meeting starts to check for issues!*** Ask an attendee you know to join the meeting early so the presentation can be tested.
- Turn off all non-essential programs on the presentation pc before starting the meeting. This avoids any notifications and other distractions from interrupting the meeting.
- If you intend to share a video, make sure “Include system audio” is checked in the upper left of the sharing screen ->
- If you have been muted on the phone, press *6 to unmute.
- If you have muted the computer, but audio is still being heard, keep in mind Teams has its own audio settings separate from Windows -
Check Teams audio settings to see what it is sending sound to and mute that as well.



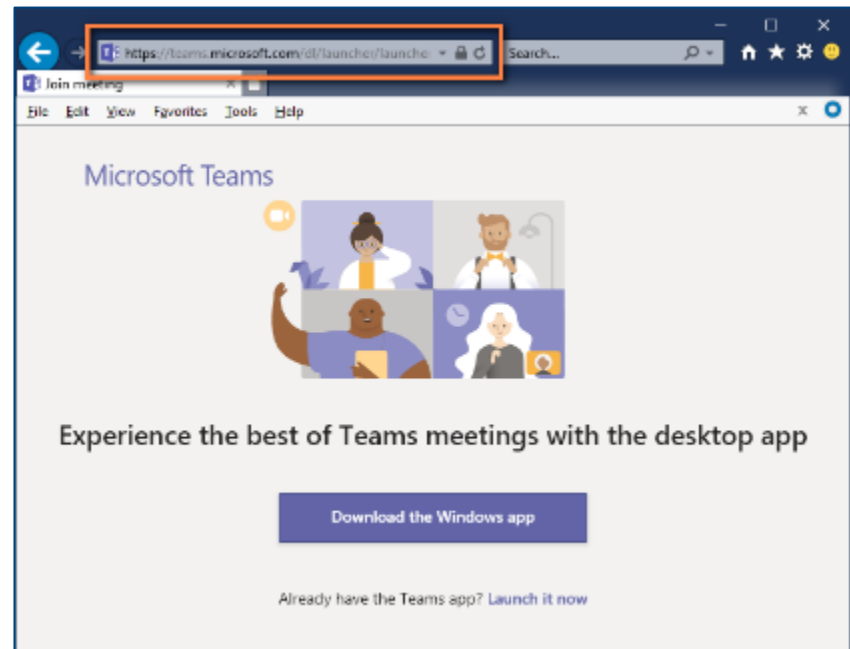
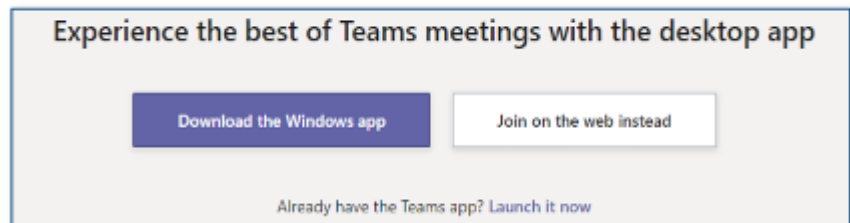
NO OPTION TO “JOIN ON THE WEB INSTEAD”

- You may want your audience to join the meeting in a web browser to keep things simple, but if their default browser is set to Internet Explorer, that option will not be available.
- The easiest method to address this is to have the user click once in the URL bar at the top (outlined) and select the entire URL (ctrl+A). Have them type ctrl+C to copy it, then ctrl+V to paste it into the URL bar of Chrome and hit the enter key.
- Keep in mind the web interface does not allow the attendee to share their desktop or webcam.

Internet Explorer:



Other Browsers:



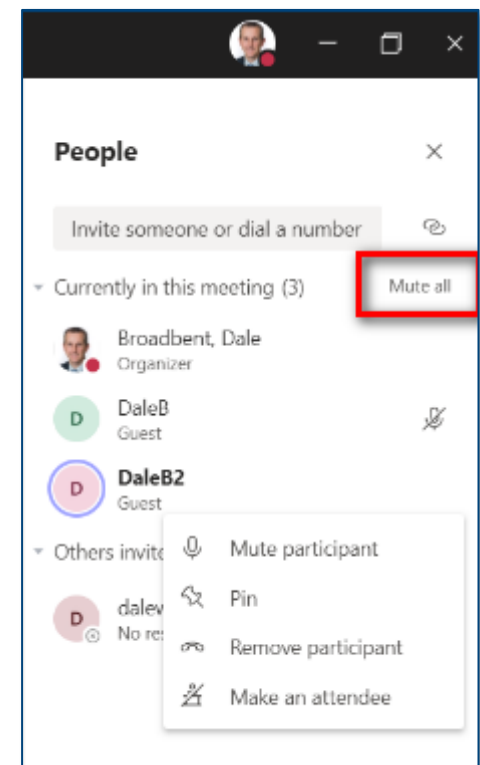
DEALING WITH AUDIO FEEDBACK DURING A MEETING

When you have a lot of people attending a meeting via Teams, you should have someone volunteer (or be assigned) to monitor the meeting. This means they have the Teams application running and tuned into the meeting while the meeting is ongoing.

This person's primary job is to manage the participants. If audio feedback is encountered, this person can mute the individuals responsible by clicking "Mute all" at the top of the attendee list. This will mute everyone's mic simultaneously. Callers dial *6 to unmute.

If the problem is due to conditions in the conference room and you've already muted all participants, then that means the problem is related to the presenter's computer and the fact there are multiple audio sources in the room playing at the same time. An example would be when the Teams meeting is displaying on a TV while a conference phone is also dialed in concurrently.

Solution: mute the TV.



"Mute all" button shown in the participant list. For list location see slide 16