Microsoft

Microsoft Teams

Quick Start Guide to join and create a Teams Meeting

Microsoft Teams

Quick Start Guide

The following slides are to provide guidance to your organization on how to create and join a Teams meeting.

Note that some of the features may not be exactly what an end user will experience due to:

Teams policies set at the admin portal.

How the end user accesses Teams (ex: web client vs desktop).

Where the company is at with new features being rolled out from the tenant level.

To keep up with product releases please refer to the message center in the Teams admin portal and the **Microsoft 365 Roadmap**.

Microsoft Teams

Create a meeting invite in Outlook

1. Open your **Outlook Calendar***, click the **Home** tab, and then click the **Teams Meeting** icon (screenshot on the right).

2. Select the **Teams** icon. When you do so, a **Join a Microsoft Teams Meeting** link is created in the body of the invite. If you have an auto conferencing license, a phone number and conference ID will be included.

3. Create a **Title** for your meeting invite.

4. In the **Required** box, enter the email addresses for the people you want to invite to the meeting.

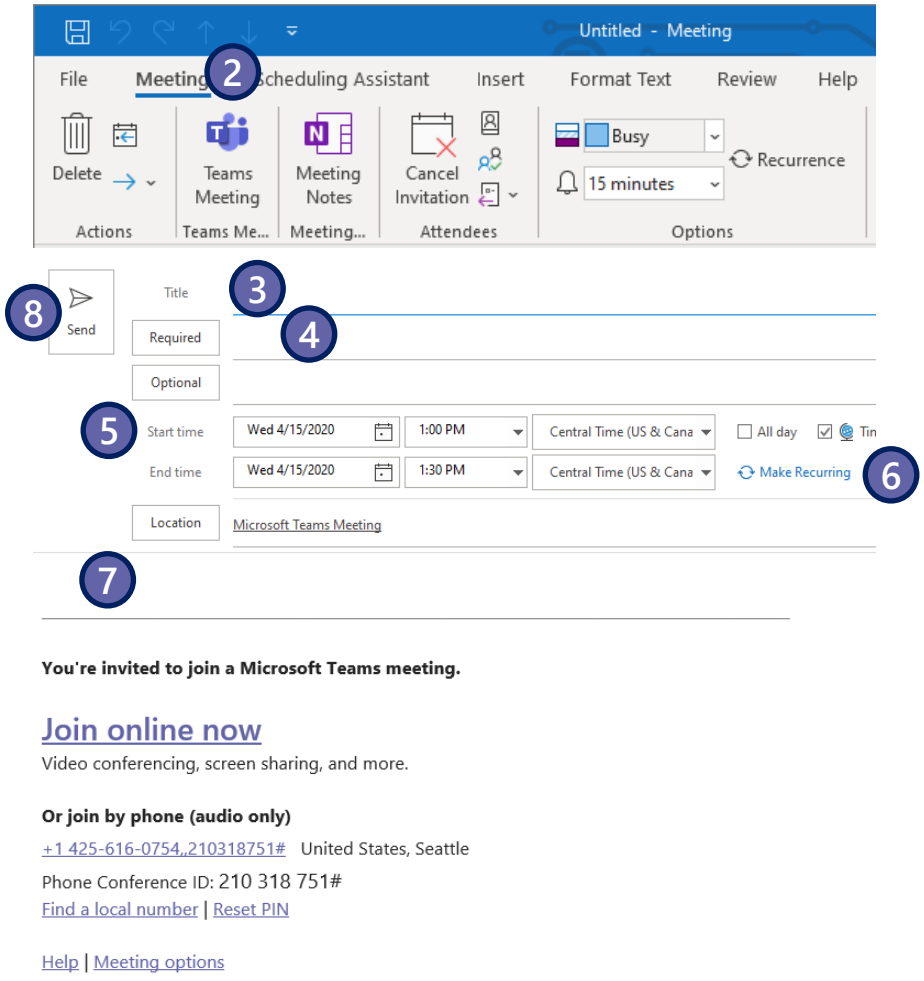
5. Select a **start and end time** for the meeting.

6. If you need the meeting to be recurring, please select the **Make Recurring** icon.

7. Add content to the body of the invite to inform participants of the purpose of the meeting.

8. Double check your information and then click the **Send** button.

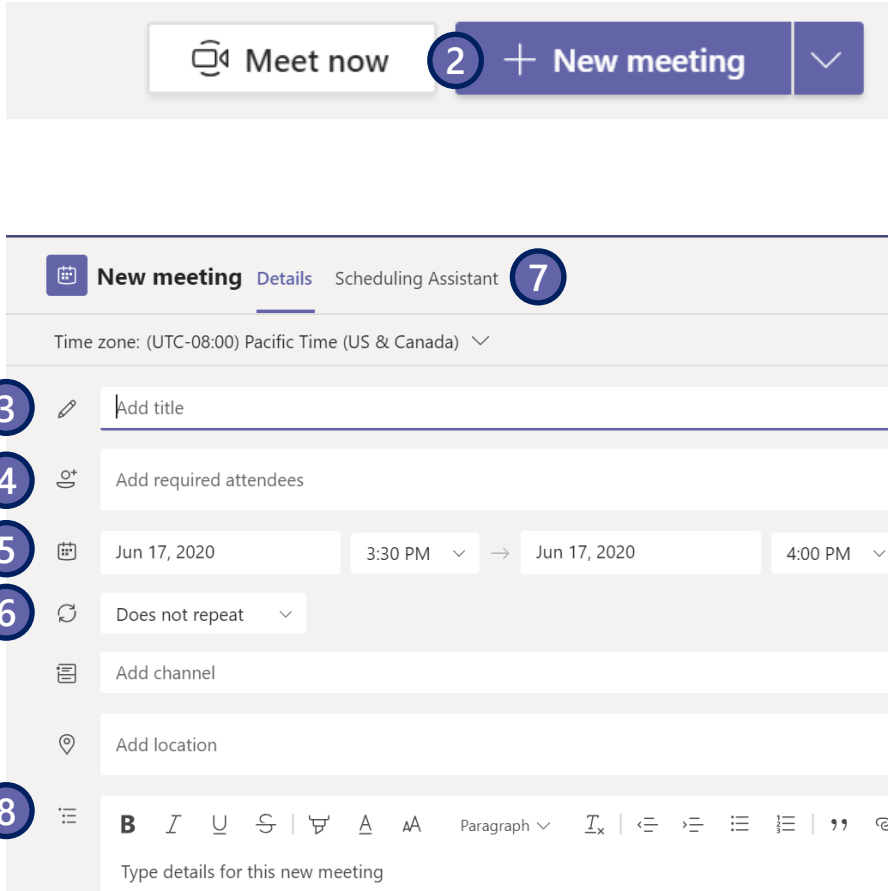
*Your calendar in Teams is connected to your Exchange calendar. In other words, when you schedule a meeting in Outlook, it will show up in your Teams calendar, and vice versa.



Microsoft Teams

Create a meeting invite in Teams

1. Open the Teams client, select the **Calendar** icon located on the left side of the navigational side bar.
2. Select the **New Meeting** button located in the top right corner of the screen.
3. Create a **Title** for your meeting invite.
4. In the **Required Attendees** box, enter the email addresses for the people you want to invite to the meeting.
5. Select a **start and end time** for the meeting.
6. If you need the meeting to be recurring, select the **Does Not Repeat** drop down box and a recurring selection(s) drop down box will appear.
7. For internal attendee(s), select the **Scheduling Assistant** tab (top left) to see if the attendee(s) are available at the time you are proposing.
8. Add content to the body of the invite to inform participants on the purpose of the meeting.
9. Double check your information and then click the **Save*** button.

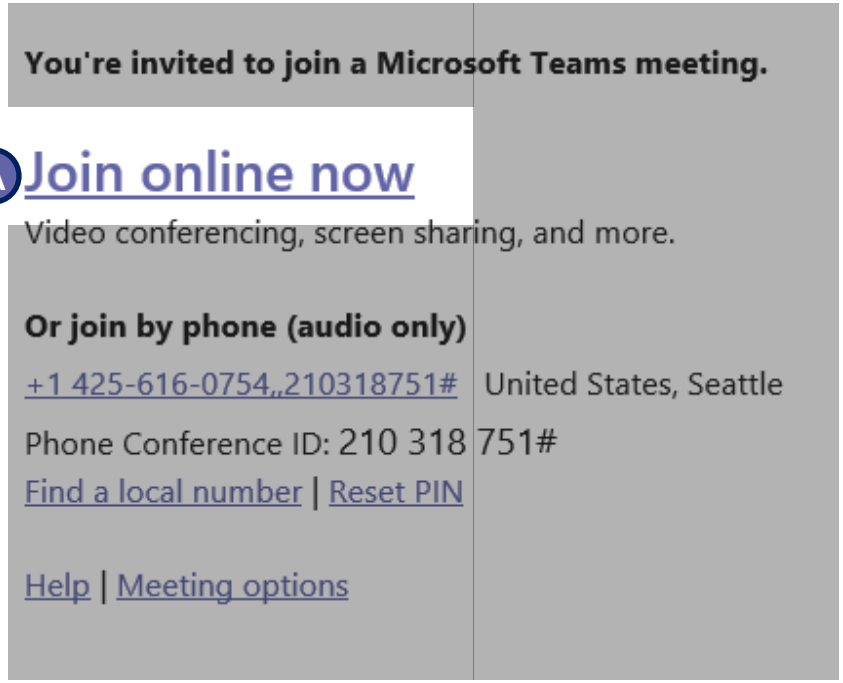


*When you select the **Save** icon the Microsoft Teams Meeting link info is automatically created and sent out in the invite. If you have an auto conferencing license a phone number and conference ID will be included.

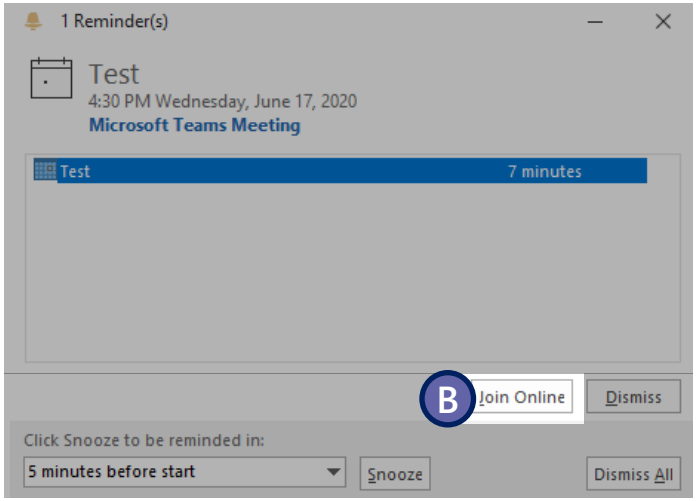
Microsoft Teams

Joining a Teams meeting from Outlook

A Option A:
Click **Join Online Now** link in the meeting request.*



B Option B:
In the meeting reminder click **Join Online.**



*If a conference number appears in the invite, you should only be leveraging the number and ID if you are unable to access the Teams app or Teams through the web.

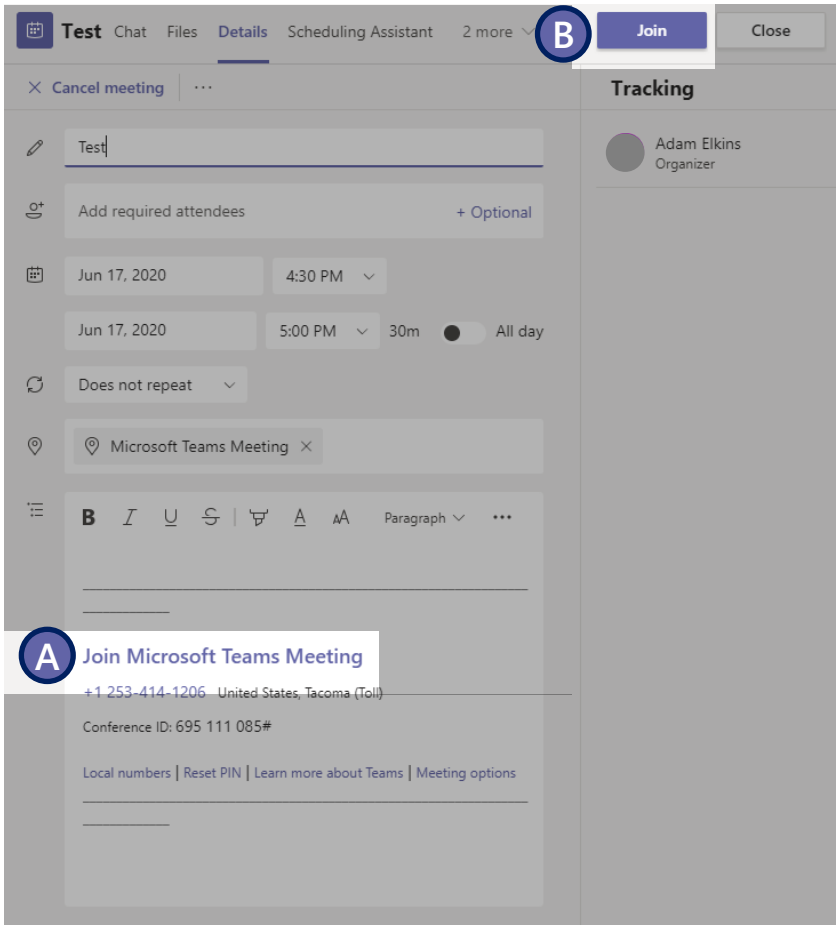
Microsoft Teams

Joining a Teams meeting from Teams

Open the **Teams** client, select the Calendar icon located on the left side in the navigational side bar. Select the meeting invite in the calendar. You have two options to join the meeting:

A Option A:
Select the **Join Microsoft Teams Meeting** link in the meeting invite.

B Option B:
Select the **Join** button located on the top right side of the screen.



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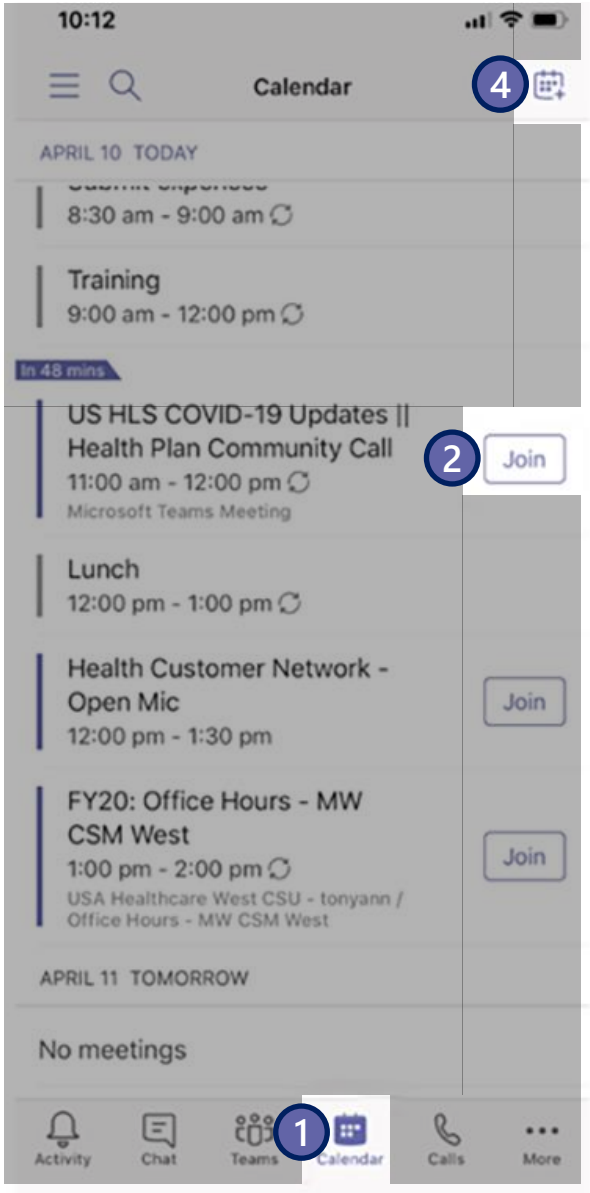
Joining and creating a Teams meeting from the mobile app

1. Open the **Teams** app and select the **Calendar** icon located at the bottom of the screen.
2. Next you will see your meetings listed in your calendar. Find the meeting you want, and then select the **Join** button which will connect you to your meeting.
3. Tap anywhere in the meeting to have the meeting icon bar pop up (ex: mute icon).
4. To create a new meeting invite, select the **Calendar** icon located at the top of the screen.



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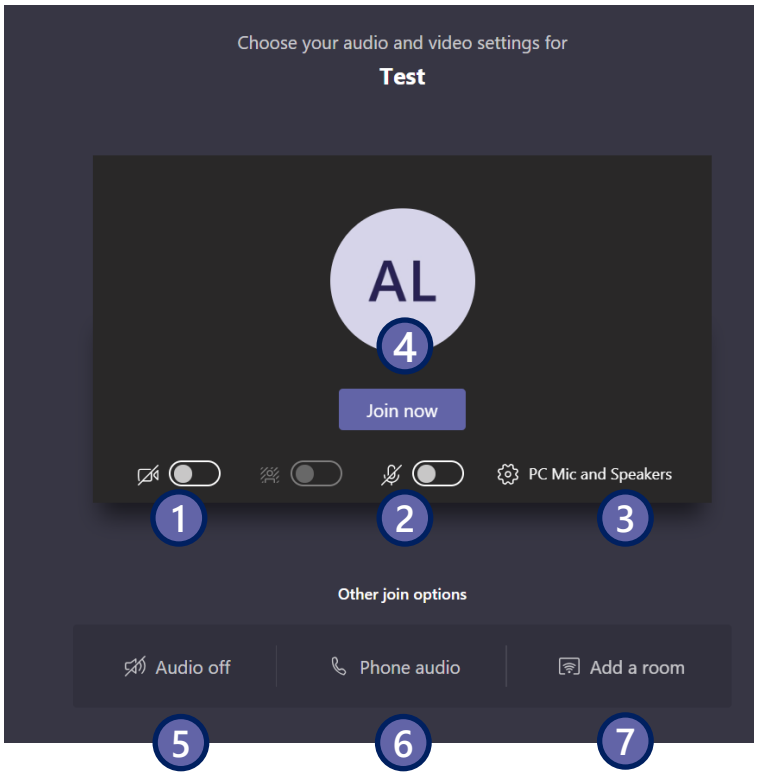
Screen prior to joining a Teams meeting

Next you will see the following screen, in which you will have the following selections prior to joining the meeting.



1

Camera

If you turn on your camera you may notice the icon below. This is to enable background effects. This will **not** be available if you are using the Teams web client.

2

Microphone

If 3 or more people have already joined the meeting, you will be joining the meeting on mute. Select the slider to activate your microphone.

3

Device settings

Select audio device and camera settings to make adjustments to your audio or camera source.

4

Join now

Join and connect to audio using your computer speaker and microphone or a headset connected to your computer (wired/Bluetooth).

Other Join Options:

5

Audio off

Select this option when there's already an active mic and speaker in the same room as you. This will ensure there is no echo.

6

Phone audio

Join and connect to audio using your desk phone or mobile phone. Video will only be displayed on screen. This includes:

- "Call me" option
- Information to dial in manually

7

Add a room

Join and connect audio to a conference room. Your device will connect without audio to prevent echoing.

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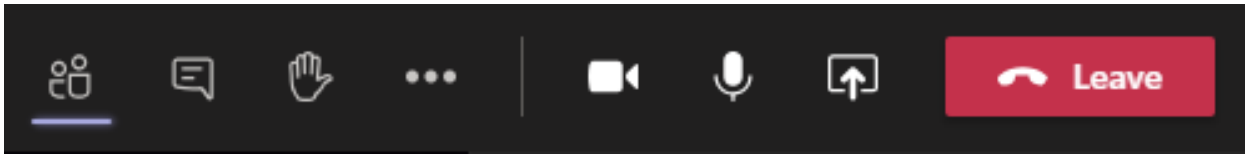
Options available in meeting



Turn camera on/off	Show meeting chat
Mute/unmute sound	Show participants
Share screen: options include desktop, window, specific application	Hang up/leave meeting
More actions	Raise your hand

For more details on Share Screen and More Actions, refer to the next slides.

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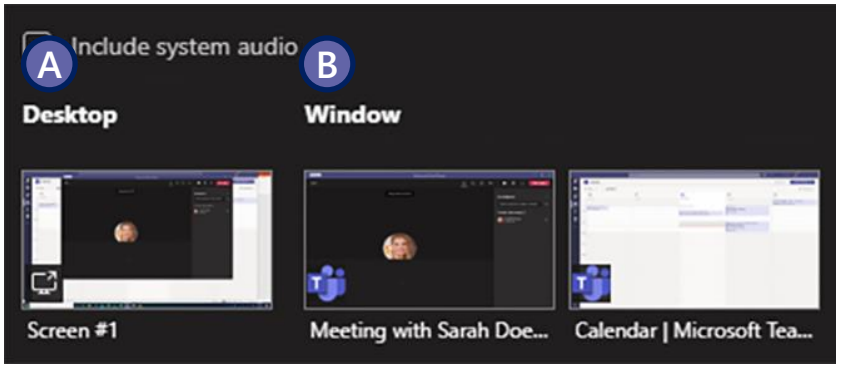
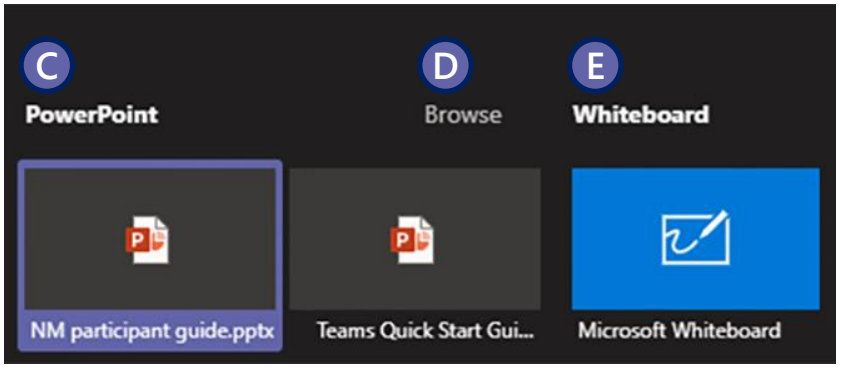
Share Screen icon

1. Select the **Share Screen** icon
2. Select what you want to share:
   - A **Desktop** lets you show everything on your screen.
   - B **Window** lets you show a specific app.
   - C **PowerPoint*** lets you show a presentation.
   - D **Browse** lets you find the file you want to show.
   - E **Whiteboard** allows you draw/write on the screen.
3. After you select what you want to show, a purple border surrounds what you're sharing. Double click the item selected to start sharing.

Note that the **Include System Audio** box is unchecked by default. Check if you want to play a video or audio clip as part of a presentation.

*When sharing directly from PowerPoint, Word, etc. the audience may scroll through the pages independently of the presenter (without impacting the presentation). If you don't want people to be able to independently navigate through the PowerPoint file you are sharing, select (it's next to **Stop presenting**) to prevent it.





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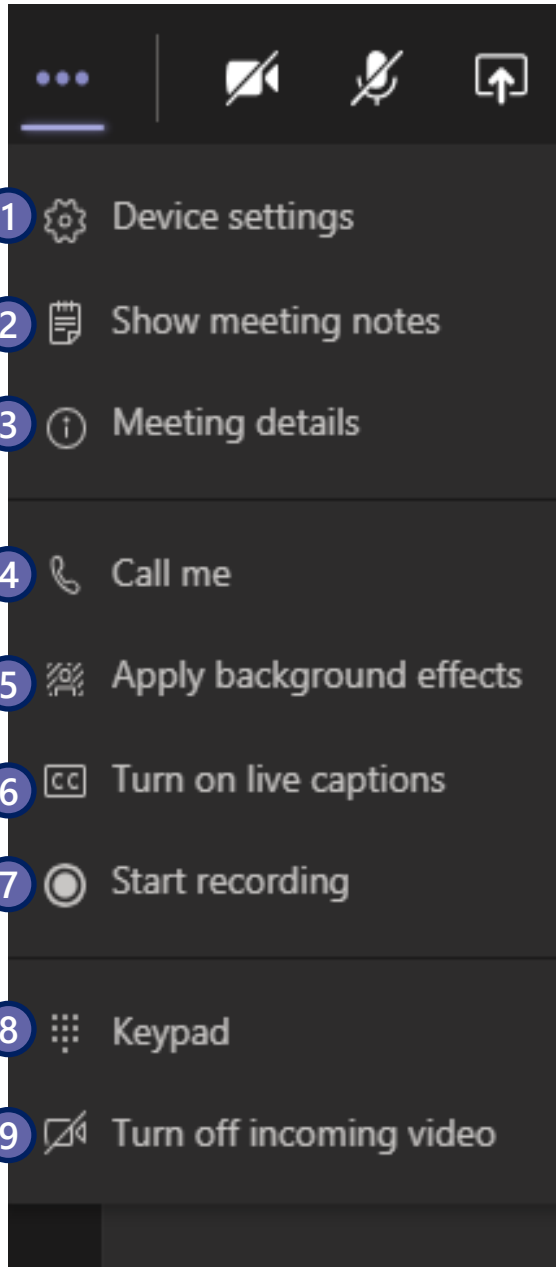
More Actions icon

1. **Device Settings:** Select audio device and camera settings. Set restrictions to allow parties to move through shared presentations on their own.
2. **Show Meeting Notes:** Notes you take are shared with others and are accessible before, during and after the meeting.
3. **Meeting Details:** Join meeting link info/ dial info.
4. **Call Me:** Transfer call to another device.
5. **Apply Background Effects:** Apply blur background or apply a custom background so participants in the meeting are not distracted by what's going on behind you when your camera is turned on.
6. **Turn On Live Captions:** Live captions can make your meeting more inclusive to participants who are deaf or hard of hearing, people with different levels of language proficiency, and participants in a loud place.
7. **Start Recording:** When you record a meeting, a banner will appear, letting attendees know that the recording has begun. You can access the recording after the meeting ends in the meeting chat or in Stream.
8. **Keypad:** Dial out from the Teams meeting using the Teams Audio Conferencing Services.
9. **Turn Off Incoming Video:** Help the quality of the audio on incoming video by turning off video.



Microsoft Teams

External users joining a Teams meeting

The following slides are to provide examples on what an external user will experience when joining a Teams meeting. Anyone can join a Teams meeting as along as they have an email address. Teams can be accessed through Mac, iOS, Android and Windows devices.

As Teams evolves, please continue to refer to the following links below for new feature updates to the application.

Microsoft 365 Roadmap

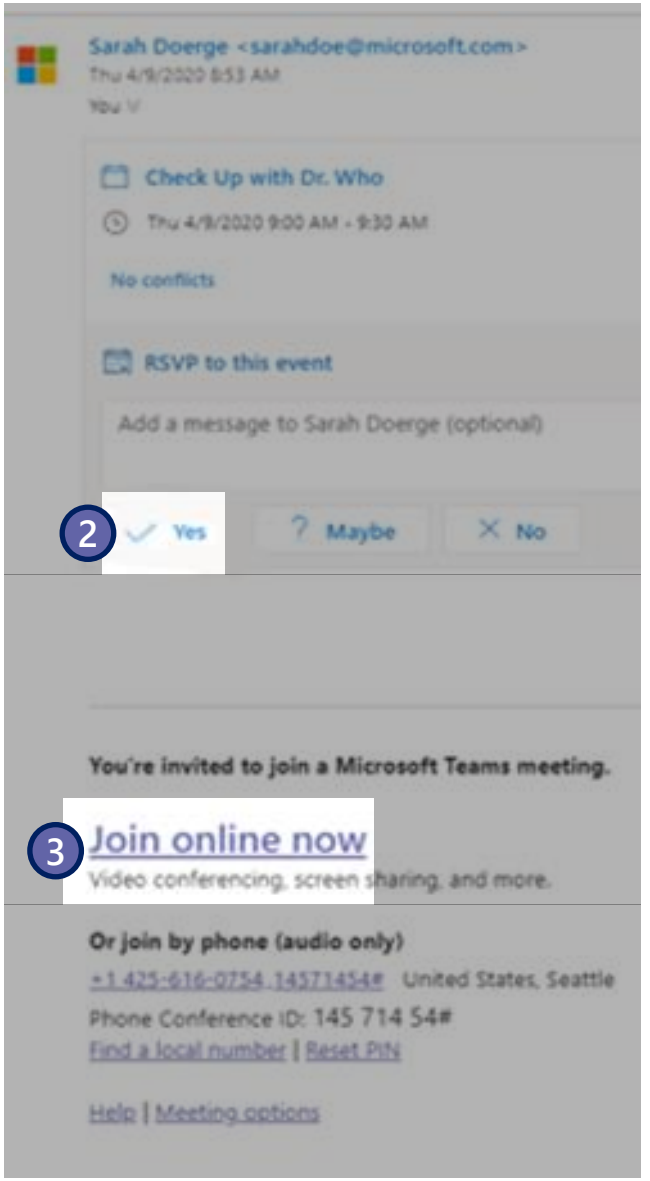
Join a Teams Meeting (Desktop and Mobile)

Joining from desktop as an external user (slide 1 of 3)

1. Teams lets you invite people outside your organization, including those who don't have a Teams license. The only thing that is needed to join a Teams meeting is an email address.
   To the right is a snapshot of what an end user will see in their inbox once a Teams meeting invite has been sent out.

2. To accept the meeting invite, the participant will need to select Yes.

3. If the participant selects the **Join Online Now** link, they will see the screen to the right if they don't have the Teams app installed.



Joining from desktop as an external user (slide 2 of 3)

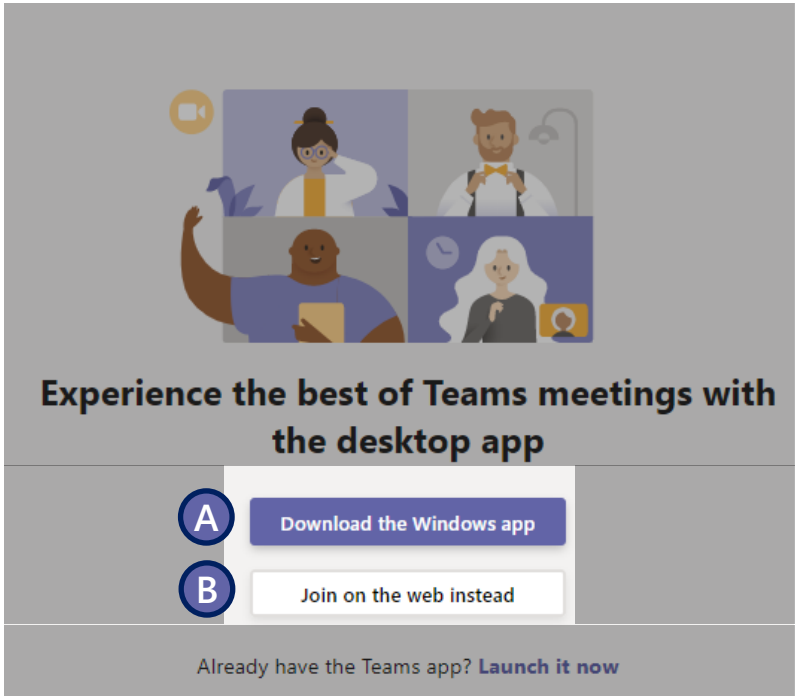
4. The user will have **two options** if they don't have the Teams app:

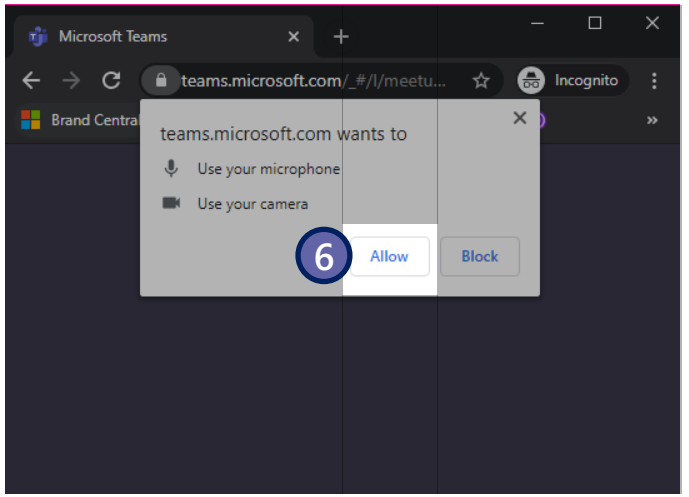
   A Download the Teams App

   B or Join on the Web Instead.
   Supported Web Browsers

5. If the participant selects **Join on the Web** Instead, The participant will then see the following screen below. This is requesting access to the microphone and the camera.

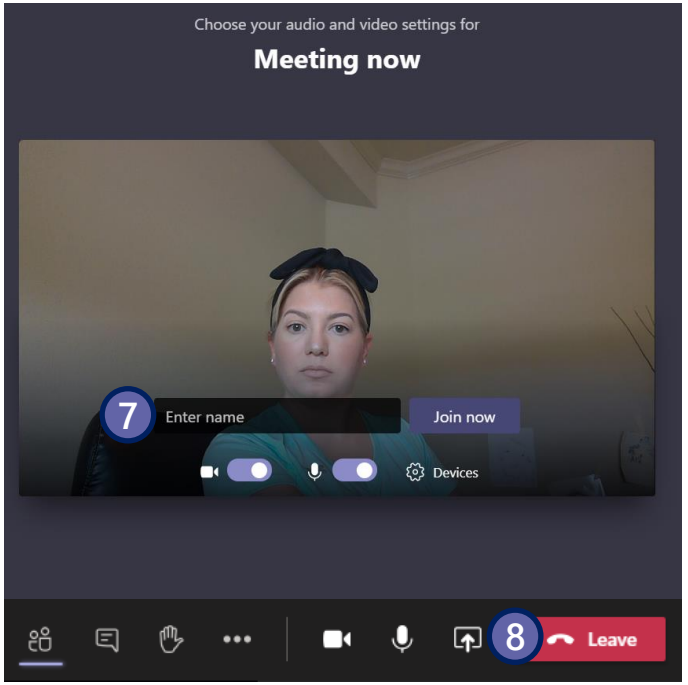
6 Select **Allow**.





Joining from desktop as an external user (slide 3 of 3)

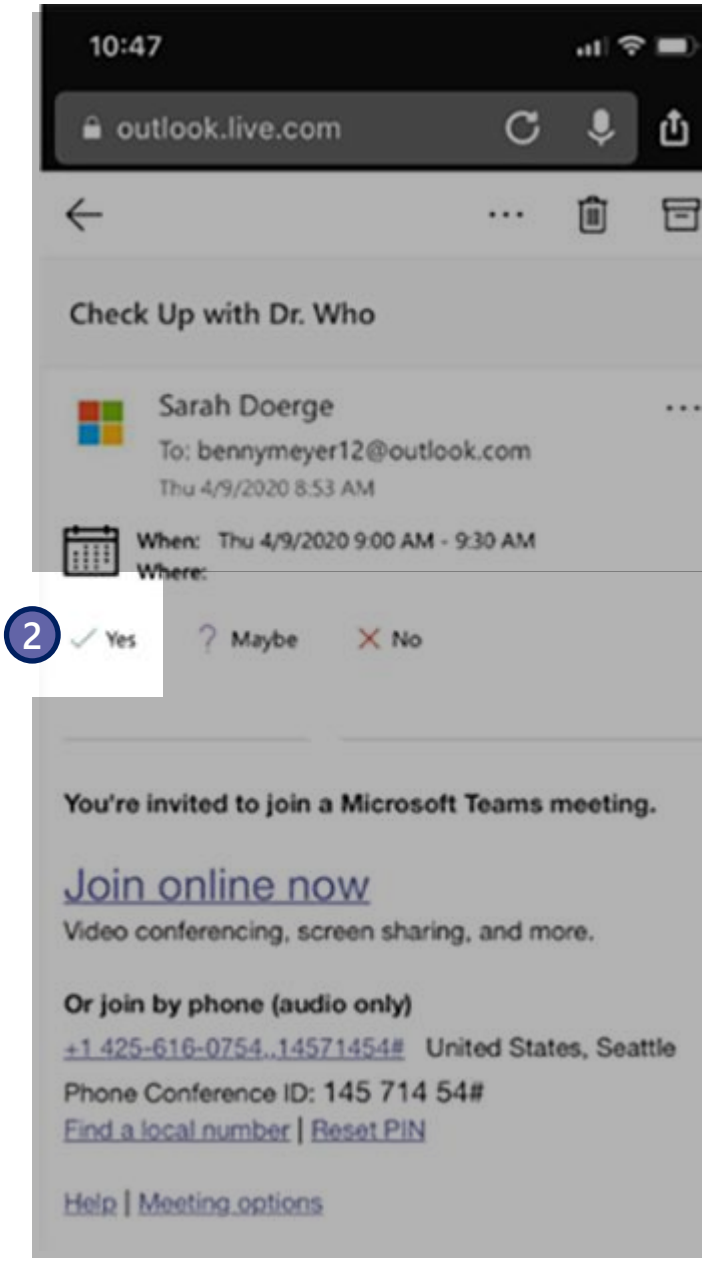
7. Next the participant will see the following screen. They will need to input their **Name** and select the **Join Now** button.
   - They will also have the option to turn off the camera and/or mute themselves prior to joining the meeting.
8. To leave the meeting, select the **Red Phone** icon listed in the user bar.



Joining from mobile as an external user (slide 1 of 3)

1. Teams lets you invite people outside your organization, including those who don't have a Teams license. The only thing that is needed to join a Teams meeting is an email address. To the right is a snapshot of what an end user will see in their email inbox once a Teams meeting invite has been sent out.

2. To accept the meeting invite the participant will need to select **Yes**.

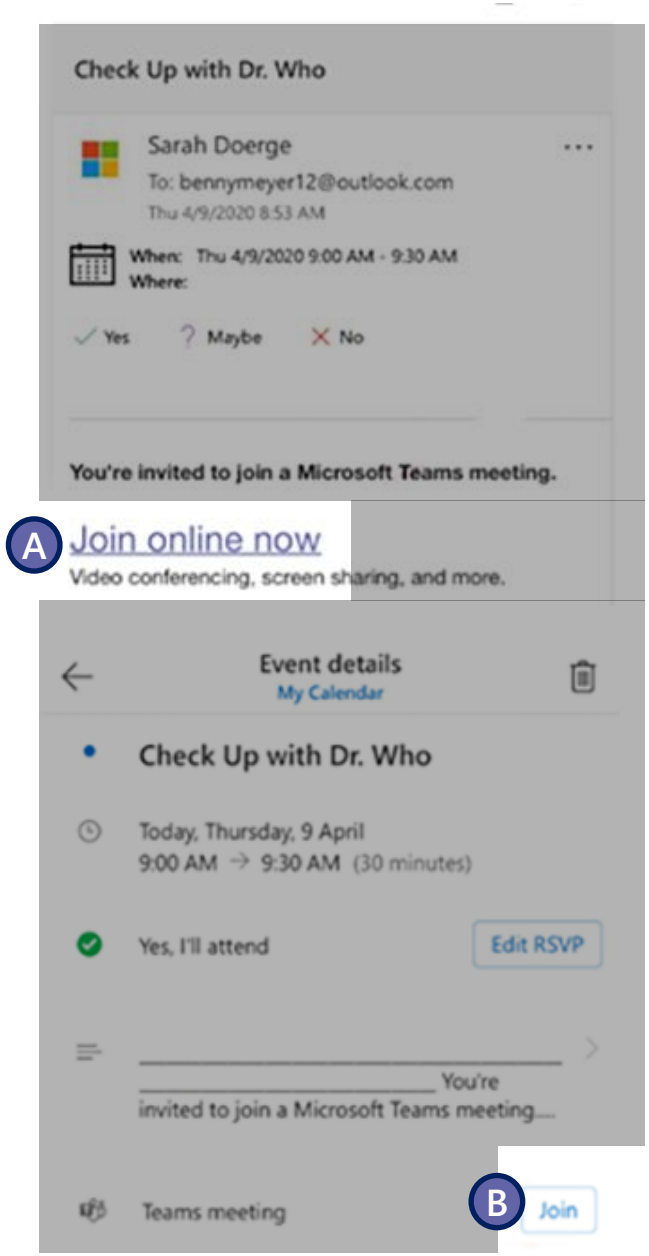


Joining from mobile as an external user (slide 2 of 3)

3. To join the meeting the participant can select:

A Option A:
Join Online Now link listed in the email or

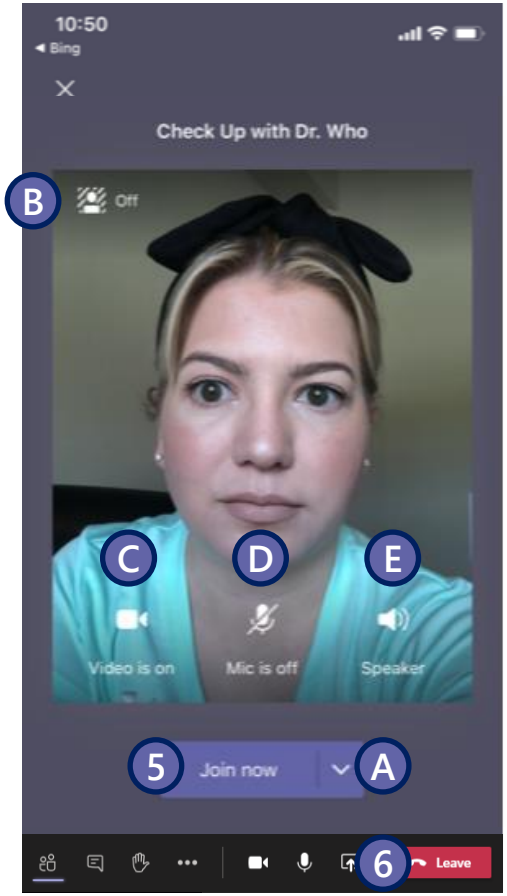
B Option B:
Join button listed in their calendar.



Joining from mobile as an external user (slide 3 of 3)

4. If the participant does not have the Teams mobile app, they will be directed to a screen to **download the app.**

5. Next the participant will see the following screen. To join the meeting, select the **Join Now** icon. The participant has the following selection options prior to joining the meeting.

   - A **Join now** – Select to join the meeting with current meeting options
   - B **Blurred background** – Select this option to blur the background of your video call
   - C **Camera** – Select this to turn your camera on or off
   - D **Microphone** – Select this button to turn your microphone on or off. If it's off, others will not be able to hear you
   - E **Speaker –** Turn your speakers on in order to hear the conversation

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