

Microsoft Teams Meeting Job Aid



Teams Meeting Elements

Schedule a Teams Meeting

The basic elements of a Teams meeting are:

1. Title
2. Attendees
3. Date, Time, Recurrence
4. Details
5. Meeting Notes, Follow up tasks

Schedule a Teams Meeting

A screenshot of the Microsoft Teams 'New meeting' interface. The interface is divided into several sections. At the top, there are tabs for 'New meeting', 'Details', and 'Scheduling Assistant'. Below the tabs, there are various settings like 'Show as: Busy', 'Category: None', 'Time zone: (UTC-06:00) Central Time (US & Canada)', 'Response options', and 'Require registration: None'. The main area contains several input fields: 'Add title' (marked with a red circle 1), 'Add required attendees' (marked with a red circle 2), 'Date and time' (marked with a red circle 3), 'Add channel', 'Add location', a rich text editor (marked with a red circle 4), and 'Add an agenda' (marked with a red circle 5). On the right side, there are options for 'Who can bypass the lobby?', 'Record and transcribe automatically', and 'More options'. A red arrow points to the 'Scheduling Assistant' tab.

Title

Once scheduled, your meeting will be added to both your Teams and Outlook calendars. Add a descriptive **Title** for the meeting, see element 1, for visibility and clarity. Example: Holiday Schedule Review is more descriptive than Quick Meeting. Use the drop-down list in **Response options** and retain Request Response and Allow Forwarding.

Attendees

Click into the **Attendees** field, see element 2, and begin typing the name of the first attendee and select from the list. Add any additional people needed for the meeting following the same process.

Date, Time and Recurrence

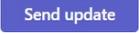
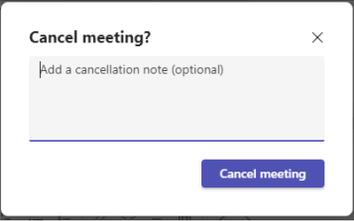
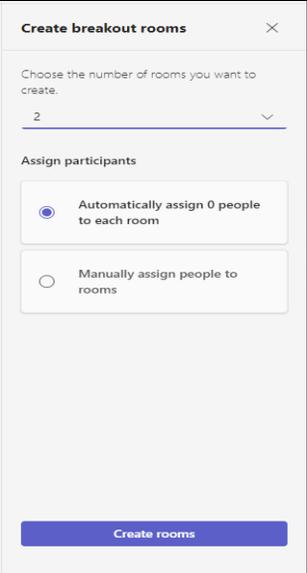
MS Teams meetings default to 30 minutes in length and the current date. Choose a new **date** for the meeting by selecting the calendar icon. Change the length of the meeting, see element 3, using the drop-down list to select a **start** and **end time**. Set a meeting **recurrence** if applicable. You can also use **Scheduling Assistant** to view the availability of all Attendees.

Details

Add **details** or create an agenda, see element 4, for the meeting. Use the available formatting tools to add lists or a table.

Meeting Notes and Follow up tasks

Use this section, see element 5, to add **meeting notes** during the meeting and set follow up tasks from the meeting. This section can also be accessed after the meeting to add notes follow up tasks.

Schedule a Meeting from a chat	Meet Now
<p>Create a meeting from a chat</p> <ol style="list-style-type: none"> 1. Select the chat 2. Use More options in upper right-hand corner or 3. Select + in the Type a message field 4. Follow the steps above to schedule a meeting. 	<p>Create an impromptu meeting with Meet Now. Select Calendar</p> <ul style="list-style-type: none"> ▪ In Chat , choose a conversation and select Meet now at the top of the conversation to meet with other members of the chat.
Edit a Meeting	Cancel a Meeting
<p>Change the date, time or add attendees for a meeting before it occurs.</p> <ol style="list-style-type: none"> 1. Open the meeting in question 2. Update the day or time for the meeting. 3. Add attendees if needed 4. Click . 	<p>If needed, a meeting can be canceled.</p> <ul style="list-style-type: none"> ▪ Locate the meeting on the Calendar ▪ Double click to open ▪ Select Cancel in the upper left corner <p>In Cancel meeting? add a note if needed</p>  <ul style="list-style-type: none"> ▪ Select Cancel meeting and all attendees will receive notification of the cancellation. ▪ The meeting will also be removed from their Outlook and Teams Calendar.
Meeting Options	
<p>When a meeting starts, several interactive tools are available for attendees to participate.</p> 	
<ul style="list-style-type: none"> ▪ Chat with other participants during the meeting. ▪ View who's attending the meeting using People. ▪ Have a question while someone is speaking? Use the Raise feature to indicate you have question. ▪ Hear something great? React with an emoji. ▪ You can adjust your viewing screen using View. ▪ Any notes added when the meeting was created? Access them by clicking Notes. 	
Create Meeting Break Out Rooms	
	<p>To create breakout rooms for the meeting, you must be a Meeting Organizer or presenter.</p> <p>Create Breakout rooms</p> <ol style="list-style-type: none"> 1. Select Rooms 2. Use the drop-down list to indicate the number of rooms to create. <p>Assign participants to a Room</p> <p>Choose how participants will be assigned to a Room by selecting</p> <ol style="list-style-type: none"> 1. Automatically assign X people to each room or 2. Select Manually assign people to rooms. <p>Note: You won't be able to automatically assign people to Breakout rooms later in the meeting.</p>