MICROSOFT TEAMS

CONTENTS

SCHEDULING A MEETING FROM OUTLOOK

From the home page of Outlook, create the MS Teams meeting by clicking New Teams Meeting.
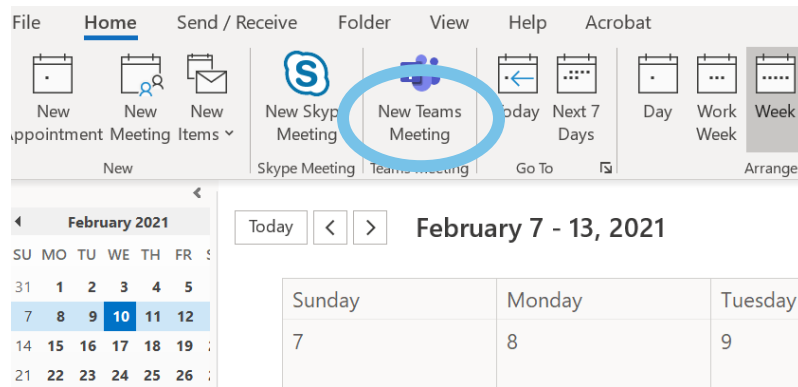
This will open a new meeting invite and generate your meeting link that you will send to the CEC. Add the title (ex: client name, program type, cohort). Edit the date, time and time zone and make it recurring if necessary.
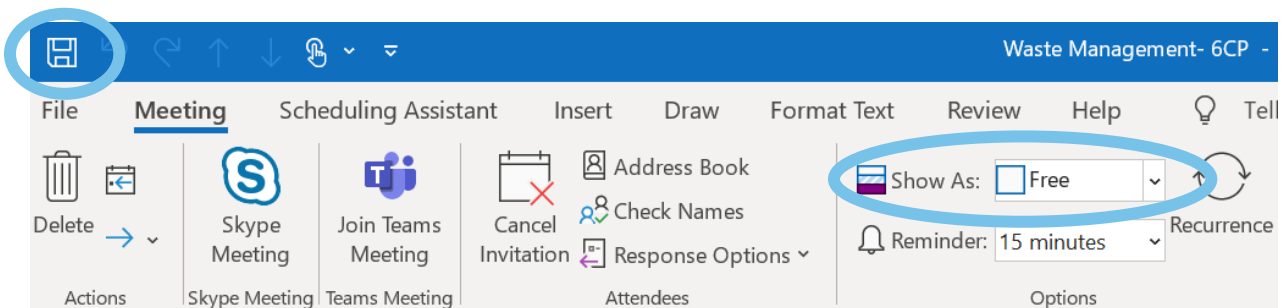

If you don't want the invite to block off your Outlook calendar, be sure to move the Show As drop down to Free. If you are not sending this invite to anyone, simply click on the save icon.
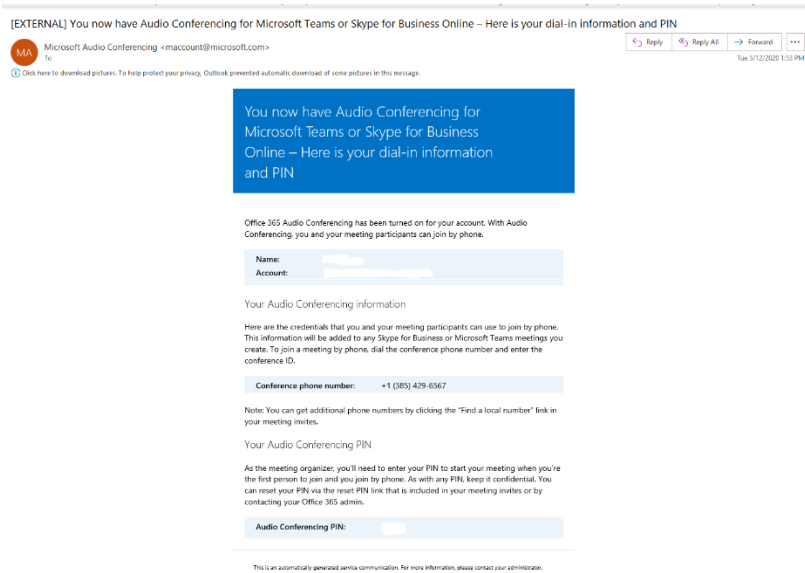
ADDING A CALL IN NUMBER TO YOUR MEETING

Prior to hosting your first MS Teams session, you'll want to request that a dial in number be added to your MS Teams account. You can submit this request to ITsupport@franklincovey.com.

Once call-in license is added to your account, you will receive an email from Microsoft with all the information like the one below.

Once you receive the email, the dial-in information will automatically populate whenever you create a new Teams meeting:

The dial in number is not unique to the user, it is the same number for everyone on our account. However, the conference numbers are unique for each meeting.

You will be issued a host PIN and that PIN is provided in the email from Microsoft.

International/local numbers can be found by clicking on the "Find a local number" link. This is included in the meeting invite and the participants can click on that and find it themselves or the meeting organizer can look it up and paste it into the invite.

To edit your meeting options, open the Outlook calendar invite and click on Meeting options.

Microsoft Teams meeting
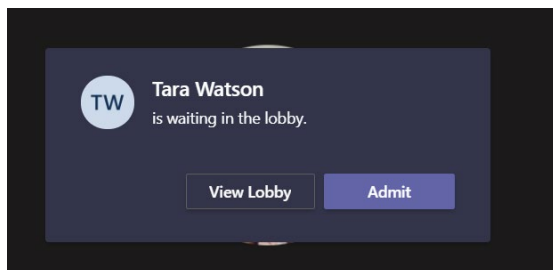
Join on your computer or mobile app
Click here to join the meeting

Learn More | Meeting options |

This will open your web browser.

If you want to use a waiting room, under "Who can bypass the lobby?" select "Only me", this will default the "Always let callers bypass the lobby" to "no". You will see this message:

If you do not want to use a waiting room, select "People in my organization and guests" and for "Always let callers bypass the lobby" select "Yes".

Under "Announce when callers join or leave" select "No."

Under "Who can present?" select "Only me" unless you have a co-host or want the client to be able to present.

Under "Allow attendees to unmute" select "Yes".

Under "Allow meeting chat" select "Enabled".

Under "Allow reactions" select "Yes".

Click Save.

Meeting options

Who can bypass the lobby?	People in my organization and gu... ⌄
Always let callers bypass the lobby	Yes 🔵
Announce when callers join or leave	No ⚪
Who can present?	Only me ⌄
Allow attendees to unmute	Yes 🔵
Allow meeting chat	Enabled ⌄
Allow reactions	Yes 🔵

Save

You will want to turn off the chime feature that dings every time a person enters a new chat. To do this, click on your profile picture, go to "Settings" then "Notifications", disable the "Play sound for notifications". You might instruct your participants to do the same, otherwise it can be disruptive.

Settings   ✕

- ⚙ General
- 🔒 Privacy
- 🔔 Notifications
- 🎧 Devices
- 🗗 Permissions
- 📞 Calls

Email

Missed activity emails   Once every hour ⌄

Appearance and sound

Show message preview   ⚫

Play sound for notifications   ⚫

When joining the meeting your participants will be given three options:

How do you want to join your Teams meeting?

Download the Windows app
Use the desktop app for the best experience.

Continue on this browser
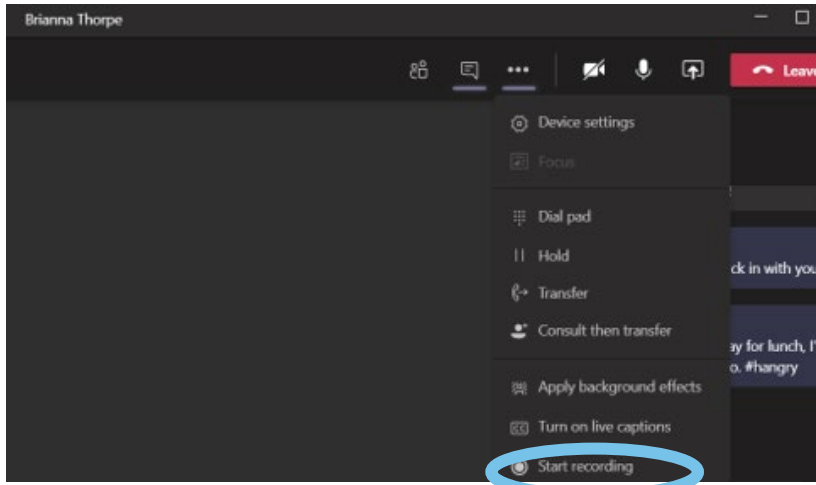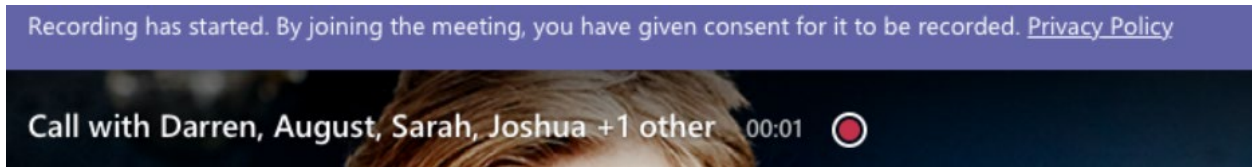No download or installation required.

Open your Teams app
Already have it? Go right to your meeting.

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While in the meeting, click on the ellipses (…), click on Start recording. You will stop the recording the same way.

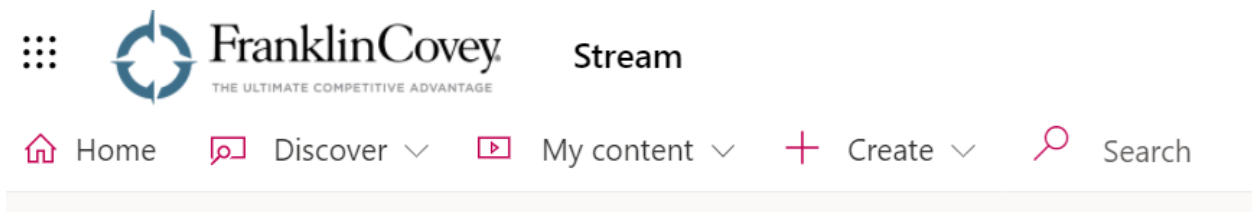Everyone in the meeting is notified that the meeting is being recorded.

You will receive an email with the recording link.

In the body of the email click on "Go to your video now".

This will bring you to Microsoft Stream. Click on "My content" then "Meetings".

There you will see a list of your meeting recordings. Click on the ellipses (…) to obtain a link to share.

Select "Share" and "Copy" the link.

Direct link to video

| https://web.microsoftstream.com/video/31b5c66c-5a6b-448a-8ec0-a8bfa99a2bf2	Copy

NEW MEETING EXPERIENCE

Once you are in the desktop app, you'll want to ensure the "new meeting experience" is enabled. If you don't have the desktop app running, type "Microsoft Teams" in your Windows search field, then click on "Open".
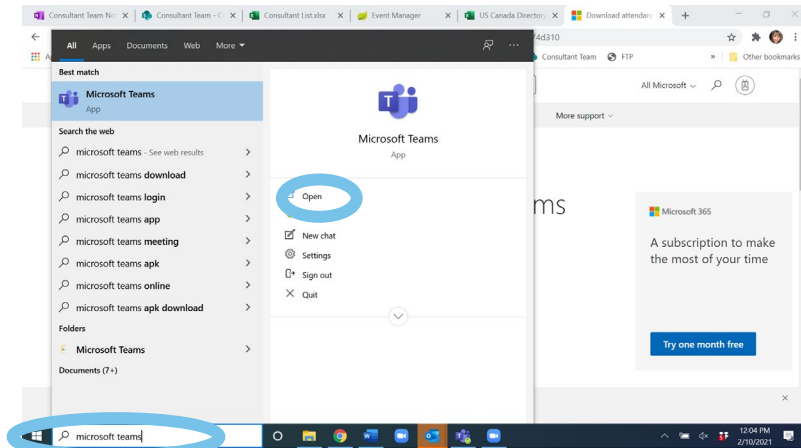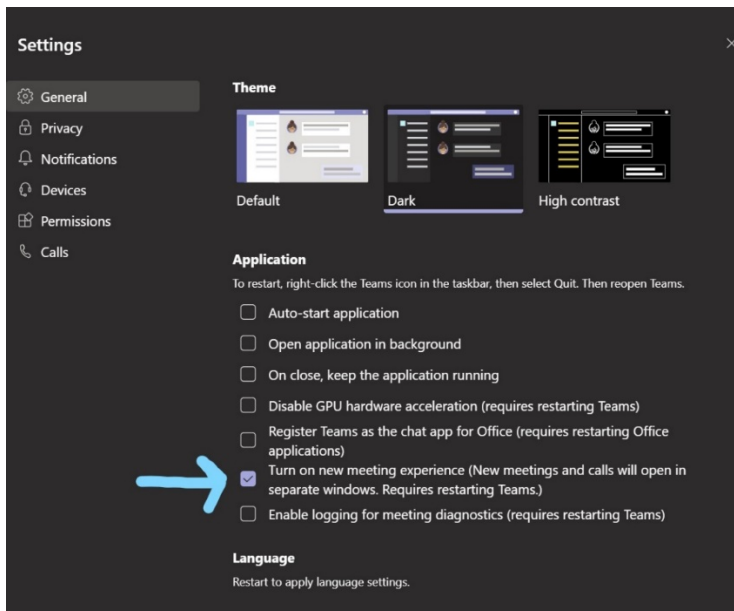

Once open, click on your initials (or profile picture if you have one selected):
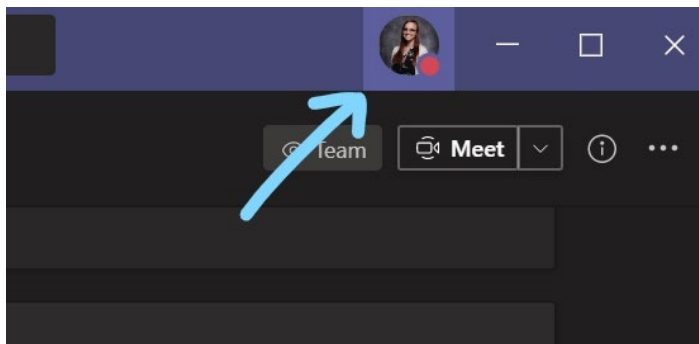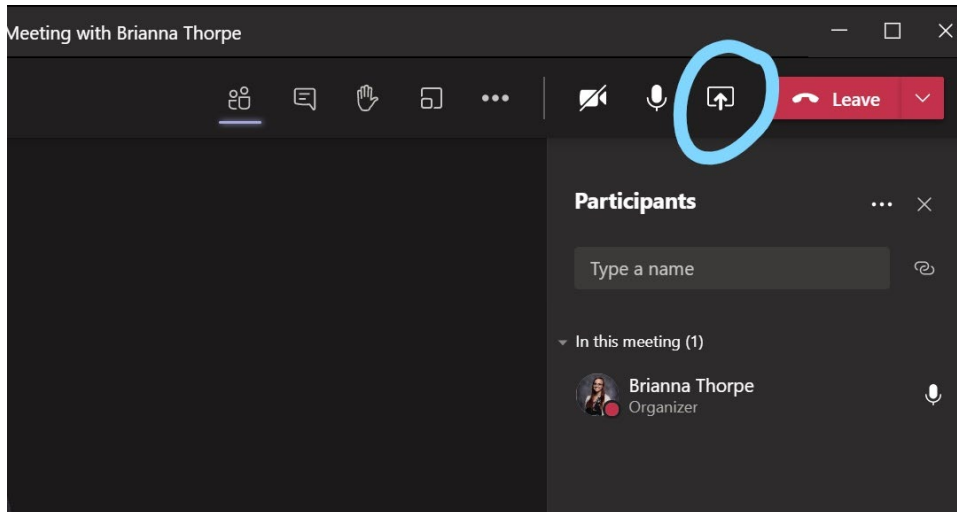

Select "Settings".
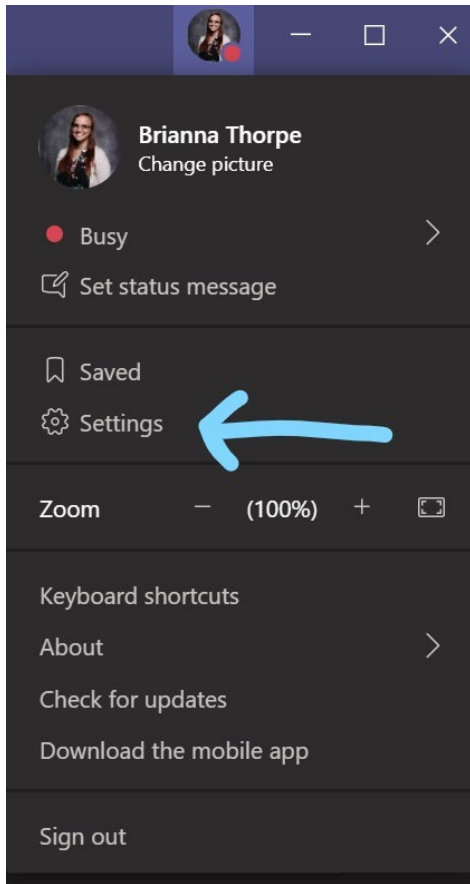
Under "General", ensure "Turn on new meeting experience" is checked.

SHARING YOUR SCREEN

Once in the meeting, from the top toolbar in the meeting window, select "Share Content".

From the share tray that opens, select what you would like to share, either your Desktop or a specific Window. We do not recommend sharing from the "PowerPoint" or "Browse" sections as this affects embedded video playback. Ensure "Include computer sound" is selected.
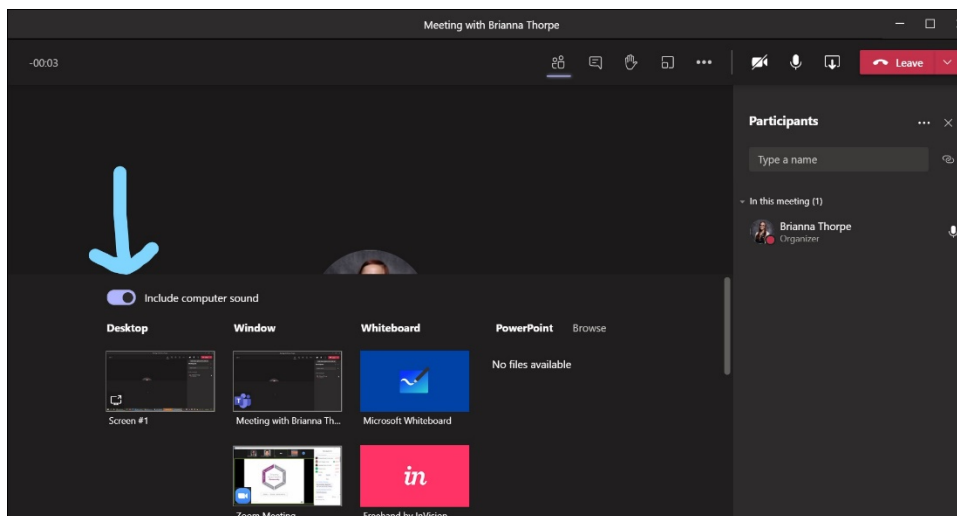
If you forget to select "Include computer sound" when sharing, you can find it on the top toolbar once you have started sharing your screen.
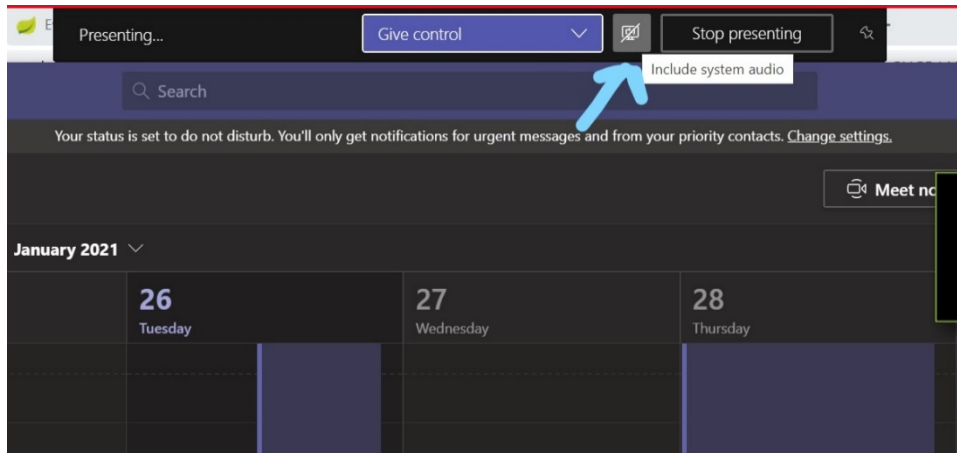
IMPORTANT NOTE: If you are presenting from a Mac computer, including computer sound is not an option.

Choose either **share entire screen or share window** not "PowerPoint -> Browse for file" (this will cause issues for videos where participants will have to manually press play and the video may not play for most.)

POLLS

Go to forms.office.com and click "+New Form"
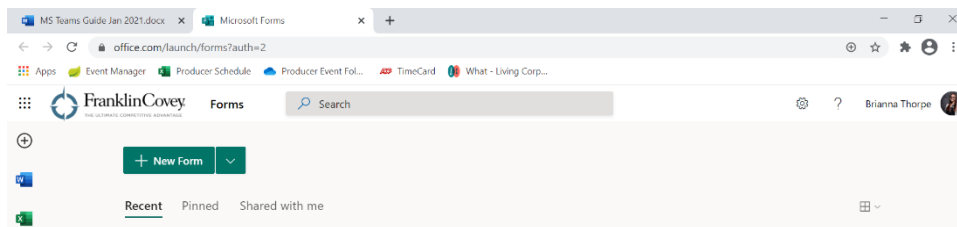
Under the "Questions" tab, add the poll title in the Untitled Form box.
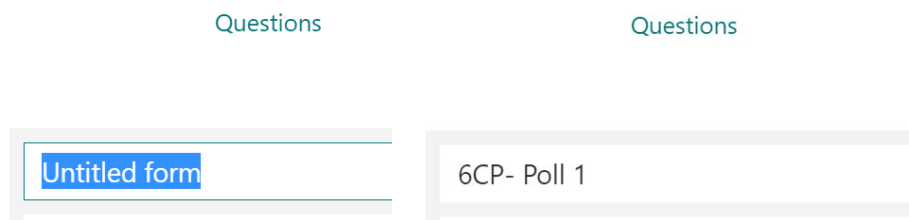
To add a question, click on the "Add new" button.

Then click on the "Choice" box.

Type in your question and answers. To add additional answers, click on "Add option".

To add additional questions, click on "Add new" and repeat the process.

To launch the poll, click the "Share" button (top right) and under the "Send and collect responses" **select "Anyone can respond".** Then copy the link to paste into the meeting chat when you are ready to collect the responses.

Ask the participants to copy and paste the link into their browser or phone.
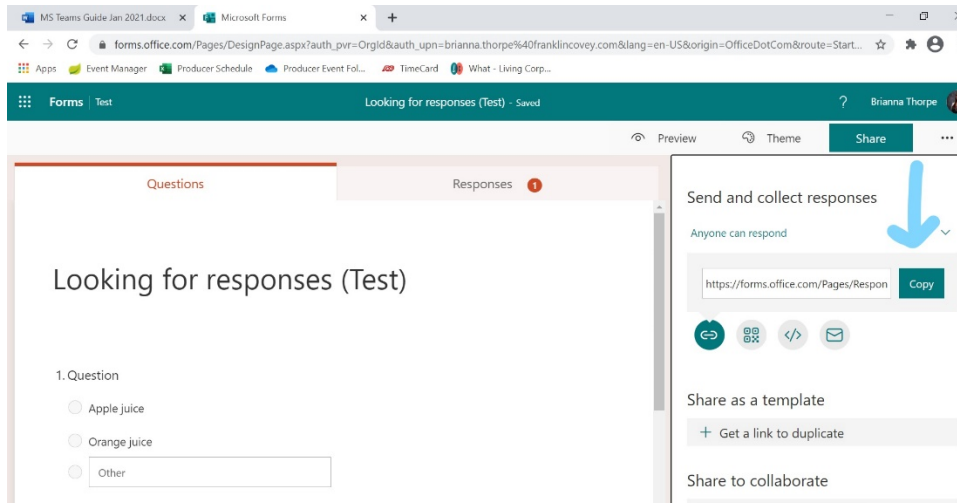
You will need to keep forms open to share the results with participants. Click on the "Responses" tab to show how participants responded and share your screen.
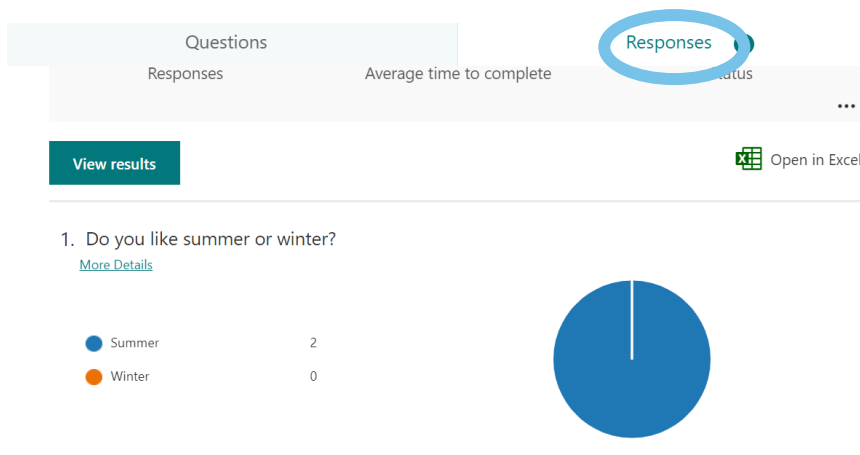
BREAKOUT ROOMS

To see the breakout rooms option within your meetings, you must turn on the new Teams meeting experience (see here).

Make sure all participants, including the meeting organizer are using the latest version of Teams. To check for updates, you (or the participant if they have an MS Teams account) can click on your Profile pic and click on "Check for updates".
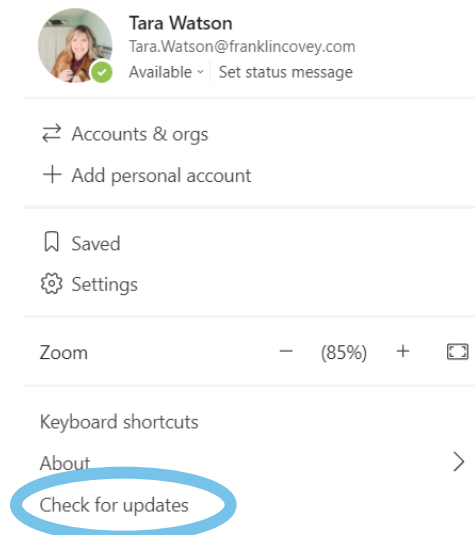
If joining on Android or iOS mobile or tablet, make sure participants go to their App Store and download the latest update.

Once you are in the meeting you should see the breakout room option next to the raise hand control.
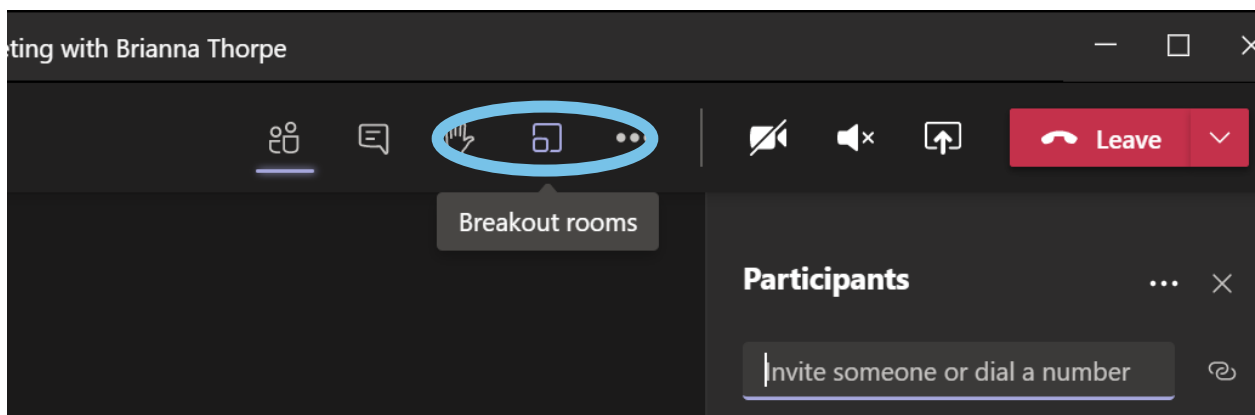
You must be a meeting organizer to see the option. Meeting attendees and presenters will not see the breakout rooms option.

Once you click the breakout room button, a box will pop up asking how many rooms you need and if you'd like to assign participants automatically or manually. The "automatically" option will tell you how many people per room based on the number of rooms you select.
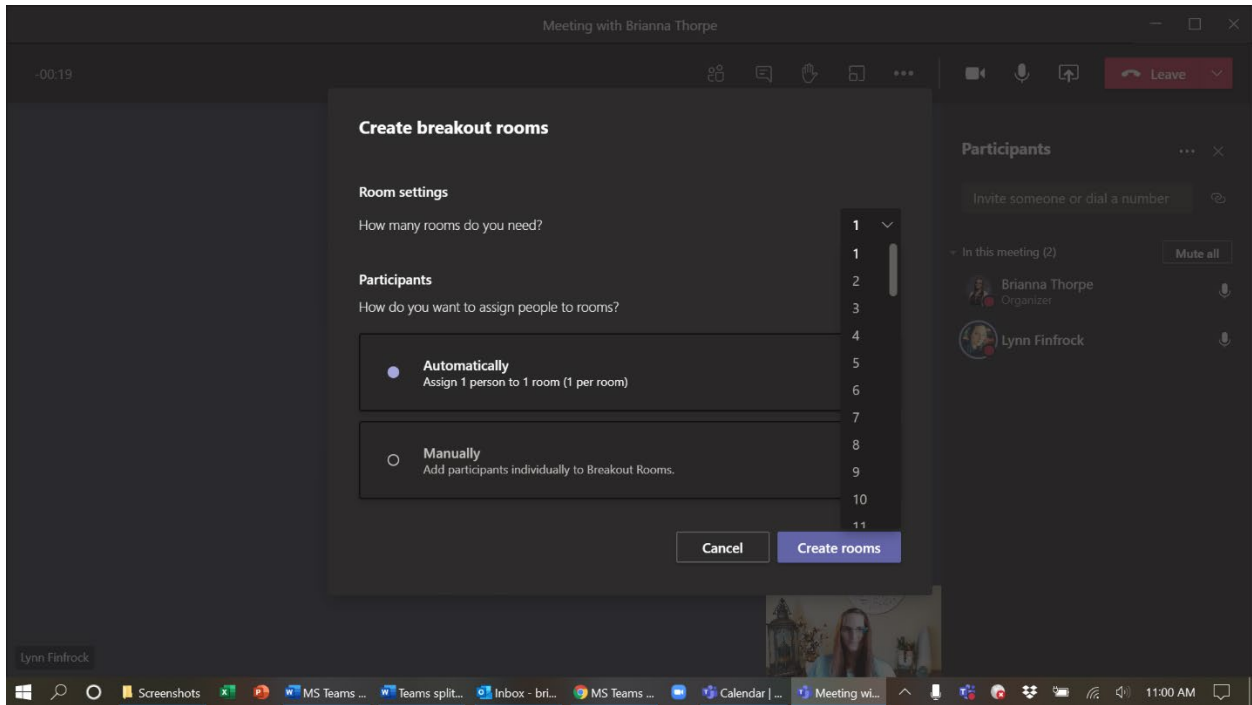
After you click "Create rooms," a breakout rooms window will open where you would normally see the participant or chat windows.
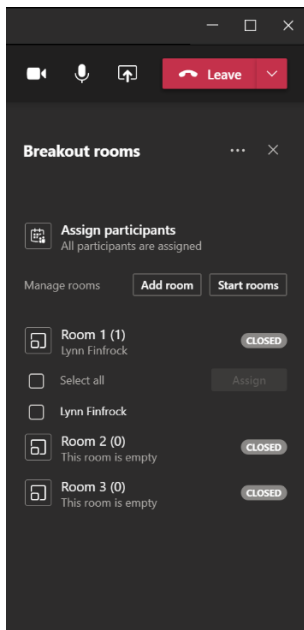
This window will allow you to see who has been assigned to each room, as well as any participants who have not been assigned (under "assign participants").

If you click on the ellipses on the right side of the breakout rooms window, you will see options to recreate the rooms (this will delete the current rooms and take you back to the original popup window to select how many

rooms you'd like) and for rooms settings. This is also where you can broadcast a message ("make an announcement") once the rooms have been opened.
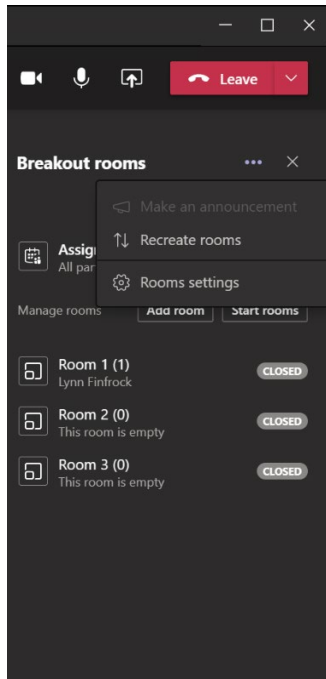
In the settings, you can choose to have participants automatically taken to their breakout room or give them the option to accept the invitation themselves. You can also allow participants to return to the main meeting.
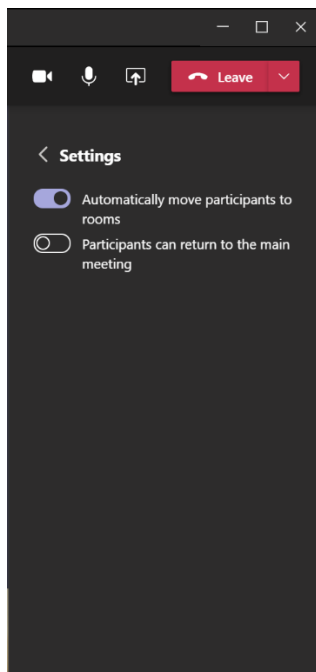
If you need to reassign participants once rooms have been organized or started, you can click on the arrow next to the room they're in to see a list of who is in that room. Select who you need to move and then click "Assign." This

will give you a drop down with options of where to assign them. "Unassigned" will leave them in the main meeting once rooms are started.
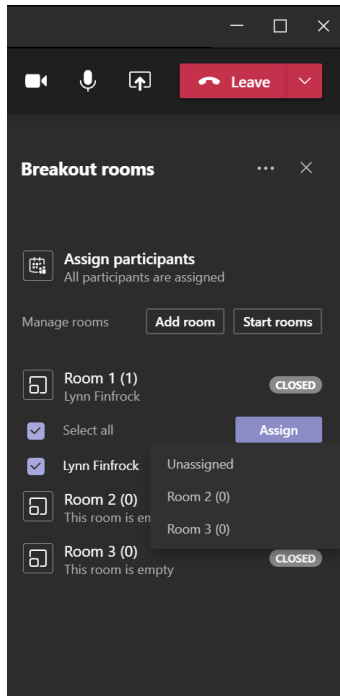
Features available for Organizer:

- Meeting organizers can manage rooms and hop between rooms freely.
- Setup breakout rooms during an active meeting.
- Create up to 50 breakout rooms in a single meeting.
- Rename rooms to the title of your choice.
- Reassign room participants from one room to another before as well as while the rooms are open.
- Room transition: as an organizer, you can decide if participants get moved to the room. automatically when you open the room, or, if they need to click to confirm the move. The "auto-accept" setting is available per meeting.
- Send an announcement that will show up as a meeting chat message in each room.

Features available for the participants:

- Join breakout rooms from web, desktop, iOS, iPads, Android mobiles and tablets. Note that organizers cannot move participants who joined via Desk phones or Teams devices join to a breakout room, they can stay in main meeting as their breakout room.
- Participants join the room as presenters, so they can present, share Whiteboard, etc. freely.
- Participants cannot add others to meeting chat, copy meeting details, nudge others to the meeting, or use "call me back".
- Hopping between rooms: Meeting participants cannot hop back to main meeting or between rooms on their own. They must wait for the meeting organizer to pull them back to the main meeting.
- Chat during the breakout session. Chat shared during meeting are viewable for room participants.
- Chats, files, and recordings: Participants have access, but only the meeting organizer has access to the links – if link is shared by meeting organizer, then participants will have access.

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- Multi-device join: breakout room is not supported when the participant joins the same meeting and same account from multiple devices.

Where and when can I set up breakout rooms?

- You can set up breakout rooms after you join the meeting as the organizer. You can bulk create rooms at the start, or manually add or remove rooms.
- You can set up breakout rooms from the desktop client, but not in mobile and web.
- Microsoft plans to enable the ability for you to set up breakout rooms before the meeting- coming soon.

When can I assign participants to breakout room?

- You can assign participant when you are setting up the rooms. You can do so manually before the rooms open or reassign participants to a different room while the room is open.
- You can also auto-assign the participants to rooms when you first set up the rooms in the meeting.

ANNOTATE/WHITEBOARD

Annotate:
MS Teams does not currently have an annotate feature. Please watch this video for a potential work around.

Whiteboard:
As of now, anyone *outside* of FranklinCovey cannot see or use the whiteboard. This feature is coming soon. For an internal meeting, follow the instructions below.
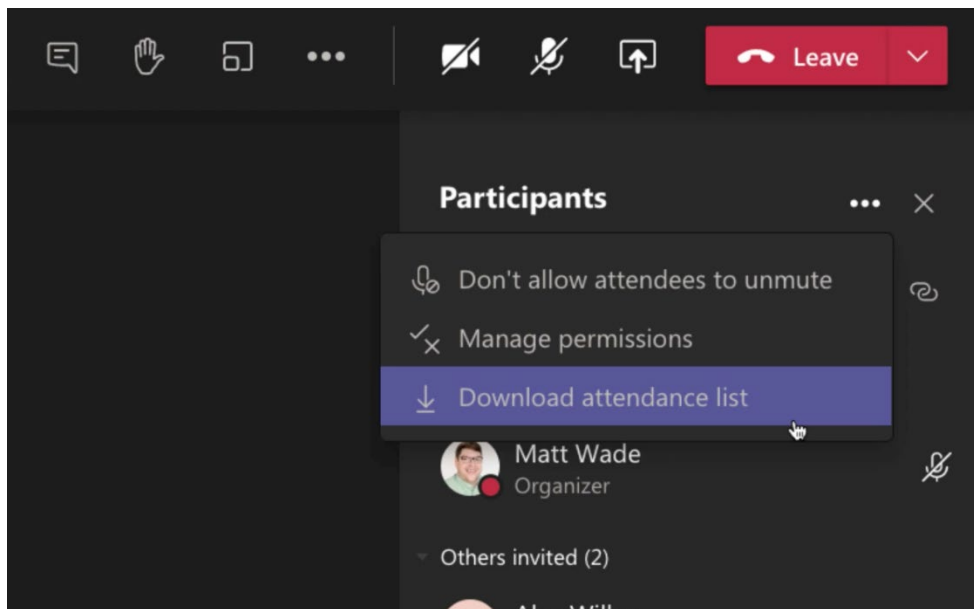
While in the meeting, click on the "Share" icon. Then click on the whiteboard tile, bottom right. Currently only the meeting host can draw/add text to the whiteboard.
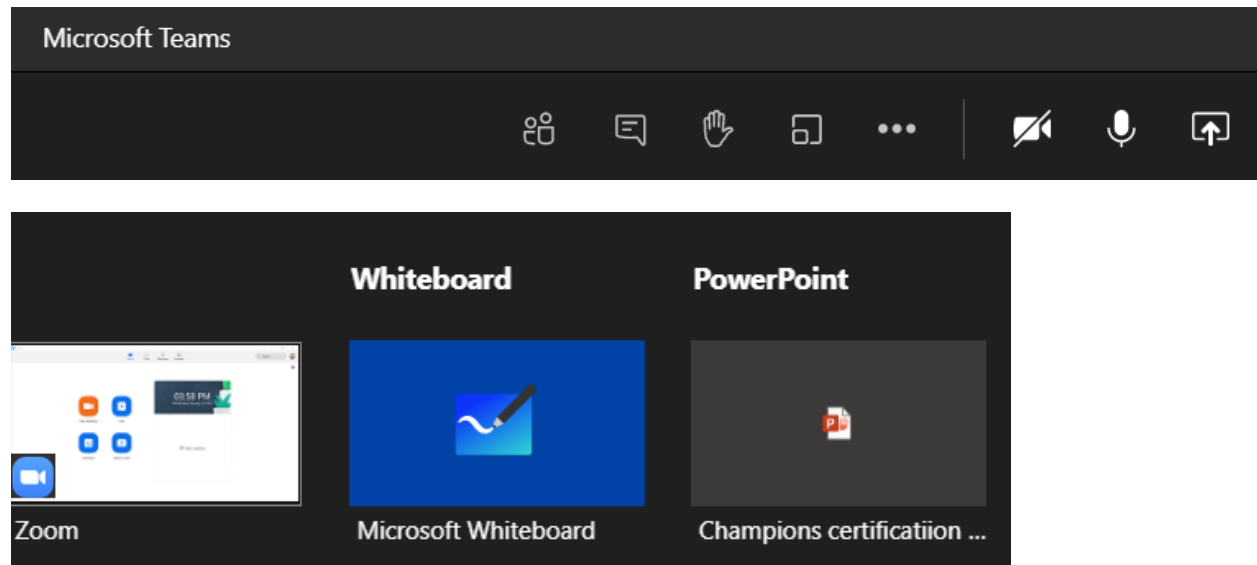
ATTENDANCE REPORTING

During the meeting:

Open the participants pane, click the ellipses to the right of *Participants*, then click download attendance list.

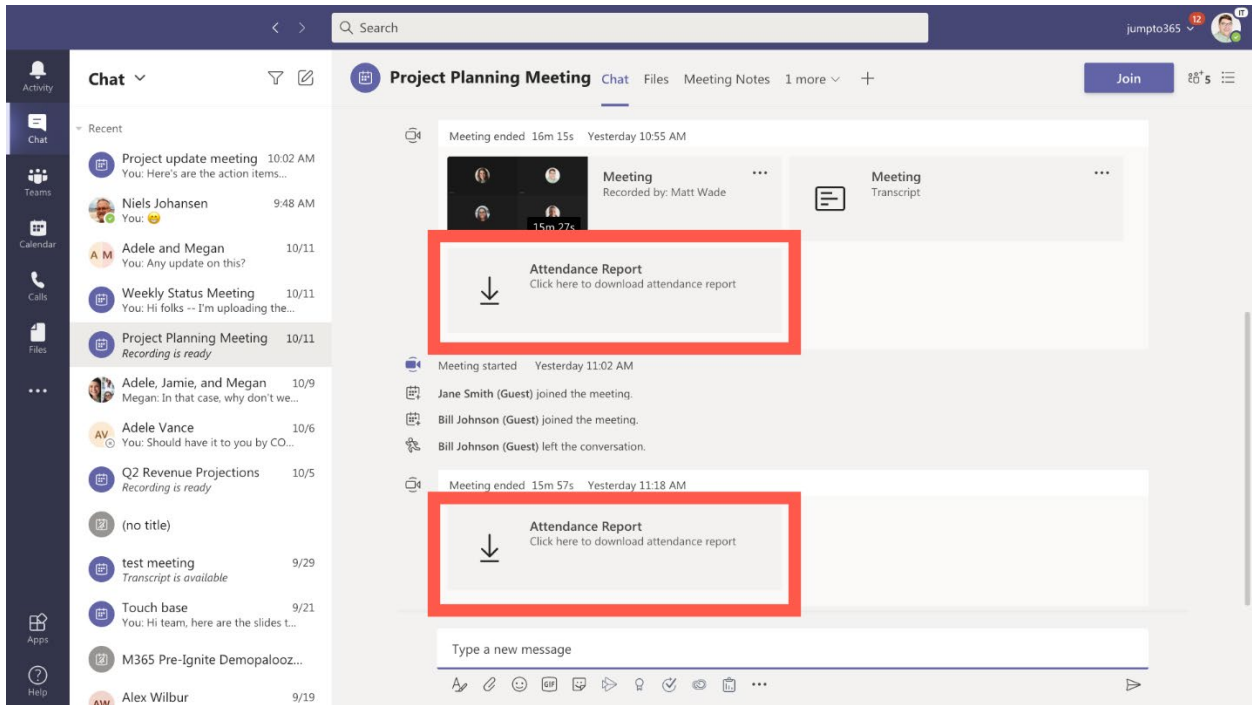The file will be downloaded to your computer's default downloads folder. It will download as a CSV file.

Double click on the file to open and save it to your computer.

After the meeting: (Note: this feature is not yet enabled, it's coming soon)

Once the meeting concludes—meaning everyone has left—the attendance report will automatically show up in the meeting chat, visible only to the meeting organizer. That means nobody else sees this particular box other than the organizer. If you've recorded the meeting or enabled live captions, the attendance report will be grouped with the recording and transcript. This may take a little while to show up (20 minutes to an hour).

From here you can download the file. The file will be downloaded to your computer's default downloads folder. It will download as a CSV file. Double click on the file and save it to your computer. To edit the data in the file, open Excel and open the CSV file. Make your edits and save.

You can also find the file in the *Files* app in Teams via the *Downloads* folder.
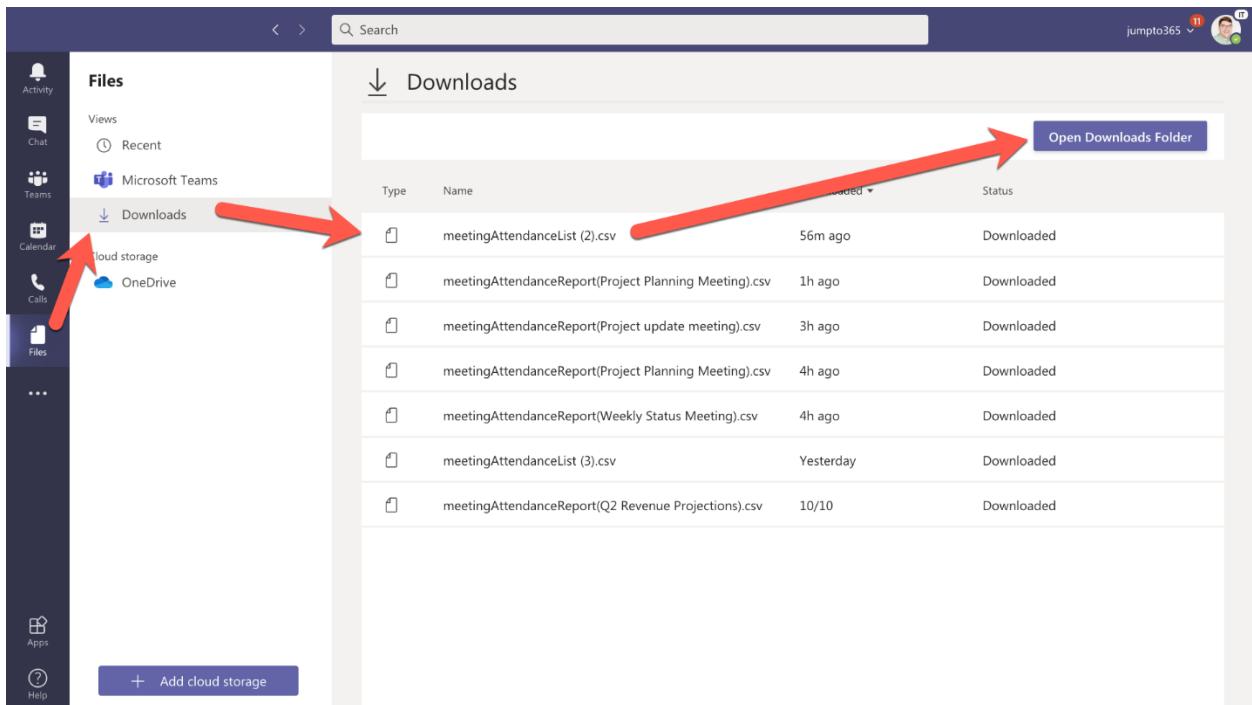
Quick tip: The report doesn't start compiling until the meeting is over. To get it as soon as possible, don't just *leave* the meeting, *end* the meeting for everyone so everyone leaves at the same time. Sometimes people forget to hang up and that can delay when your report actually gets created.