

Training Guide

Host a Teams Meeting



To book training or to speak to a trainer, please get in touch via:

E training@imerseyside.nhs.uk

Disclaimer

Periodically changes to business processes or updates to systems or applications result in the update of training guides and materials. It is the responsibility of the delegate to check that they have the most up-to-date guides. All guides contain a Change Control table at the front which will detail when the document was updated. If you want to check if you have the correct version please email training@imerseyside.nhs.uk

Change Control

Document Type		Document Title		
Training Guide		Microsoft Teams during a Meeting		
Version	Date	Owner	Change	Purpose
V0.3	29 June 2020	Paul Cook-Hannah	Proof reading edits	Quality assurance
V1.1	02 July 2020	Rachel Bertenshaw	Name change	Quality assurance
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V4.1	10 December 2020	Darren Melling	Added Meeting Notes	Update
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Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	29 June 2020	Claire McGrady	IT Training Manager
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V4.0	20 November 2020	Rachel Bertenshaw	Lead Trainer
V5.0	11 December 2020	Rachel Bertenshaw	Lead Trainer

Hints and Tips

	This symbol suggests a tip or a good method of working for speed and efficiency
	This symbol suggests a caution or an action to be aware of
	This symbol indicates an Information Governance warning
	This symbol indicates hints and tips that support digital optimisation

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Microsoft Teams Meetings

Microsoft Teams meetings combine [audio](#), [web](#) and [video](#) to be able to collaborate remotely with others.

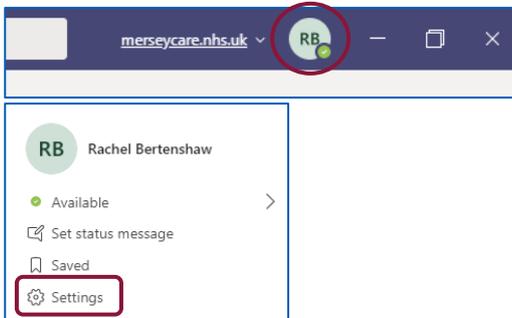
Microsoft Teams Meetings gives users the functionality to share screens, record meetings, use customisable layouts, use whiteboards and share files. Microsoft Teams also has the advantage to allow access to run training and host events.

This guide has been created to provide Hosts with the options available on how to host meetings in Microsoft Teams.

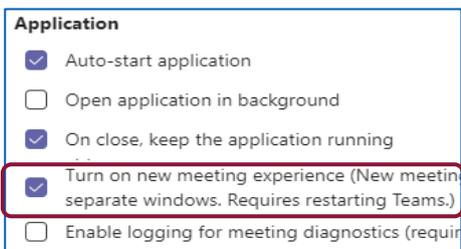


To have the best experience using Teams Meetings, it is essential that the appropriate [Profile](#) settings are configured. [Turn on new meeting experience](#) must be switched on so that the Teams meetings open in a new meeting window. This will also enable additional functionality such as [Focus](#), [Large Gallery](#) and [Together Mode](#).

- At the top right corner of the screen → click the [Profile Icon](#) → [Settings](#).

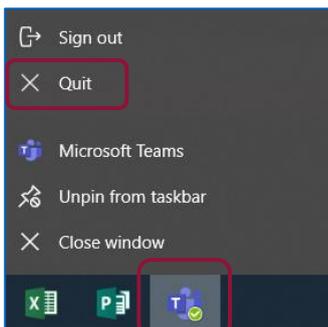


- Check the [Turn on new meeting experience](#) box.



Once the Application setting has been updated, Teams must be restarted for the changes to take effect.

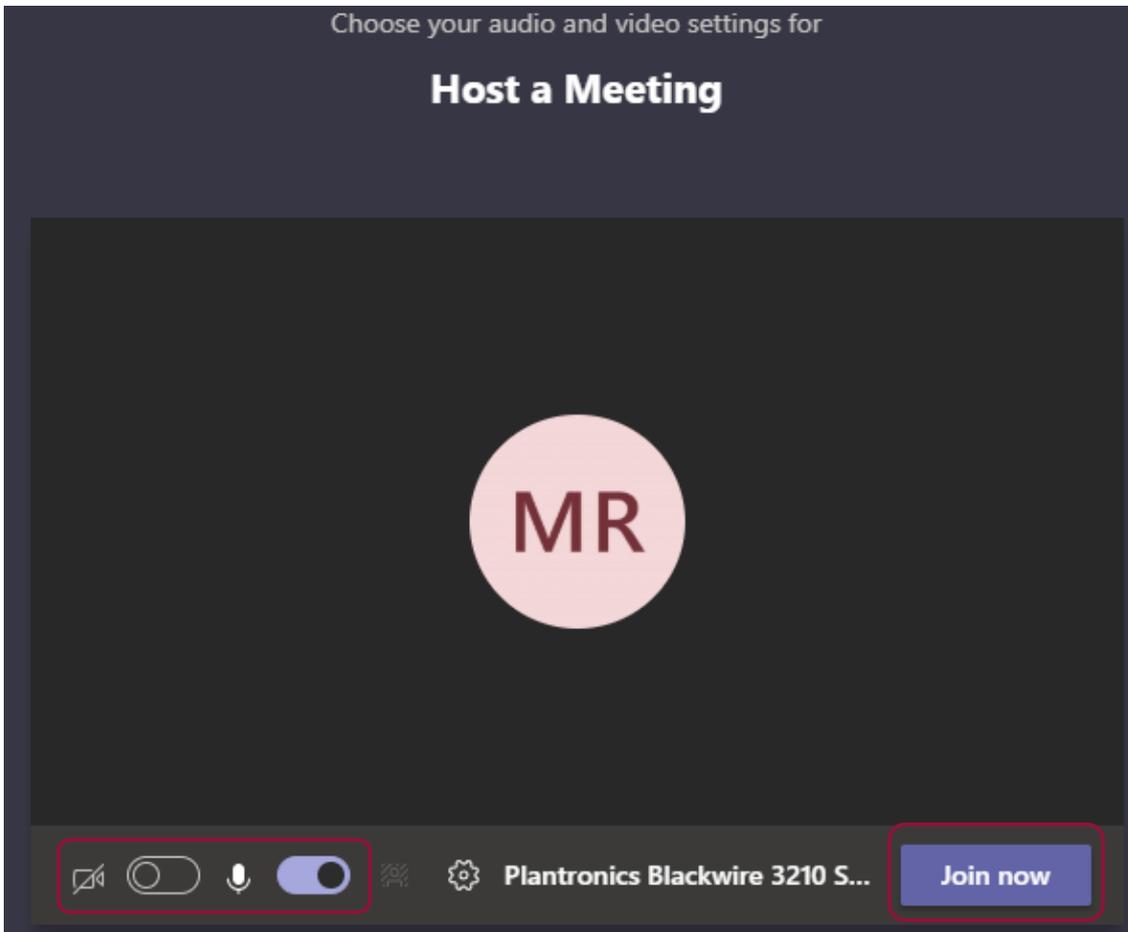
- To restart, right click the [Teams](#) icon in the taskbar → select [Quit](#) → click the [Teams](#) icon to [Reopen](#).



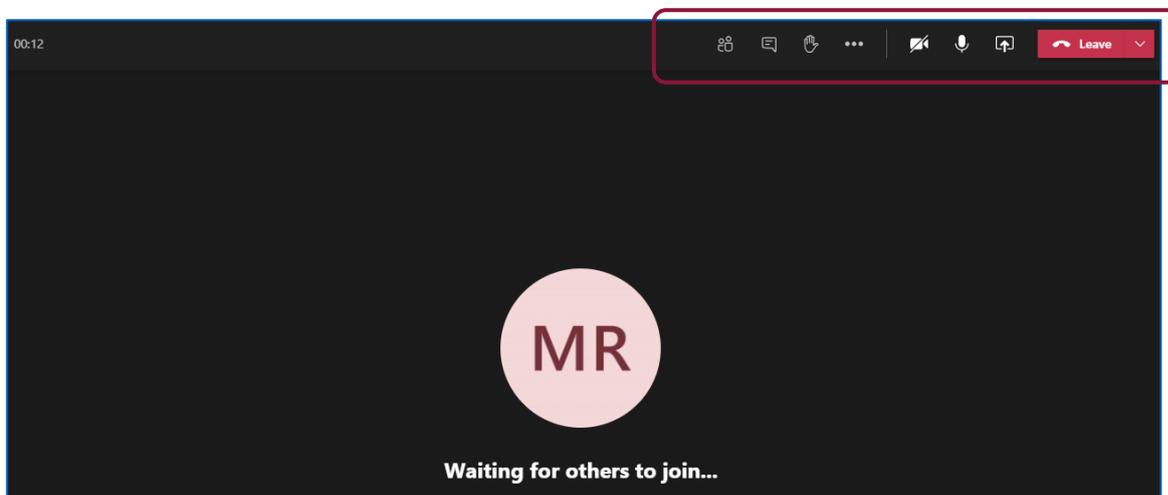
Meeting Preferences

Before a meeting is joined, options are given to join the meeting with or without the use of a Camera or Mic.

- Click to switch **On/Off** the **Mic/Camera** before a meeting is joined.
- Select **Join now** to begin the meeting

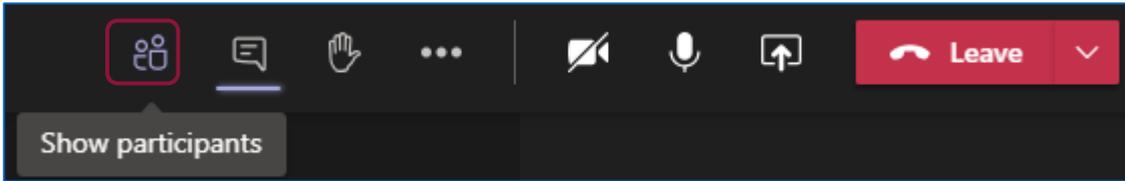


 Once a meeting has been joined, further **Meeting Options** are available from the **More actions** (3 dots) icon on the menu bar.

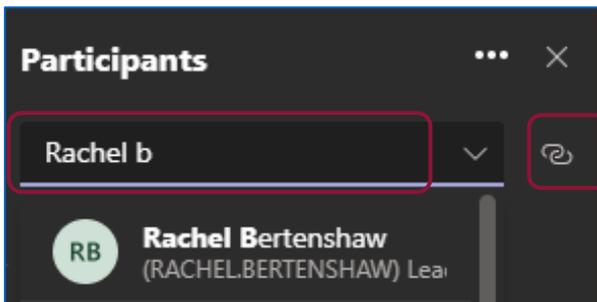


Participants

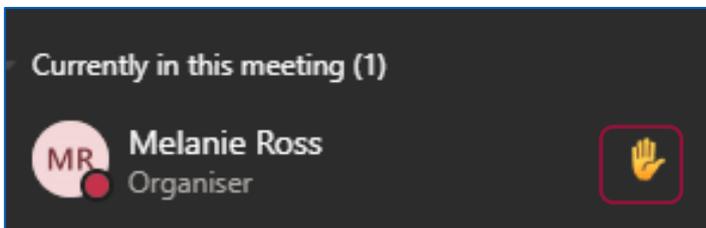
- Click [show participants](#) to view a full list of attendees.



- Select [Invite someone](#) to choose a current user of Microsoft Teams.
- Or select [Copy invite link](#) to copy a link to the meeting to a clipboard to send out a external invite.

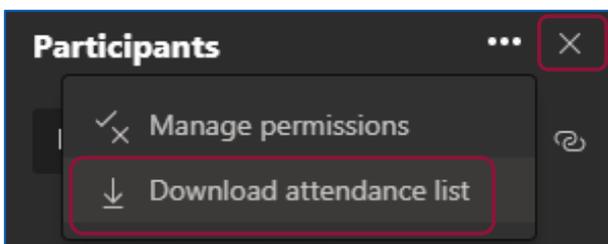


If an attendee raises their hand within a meeting, this can also be viewed in the show participants section.

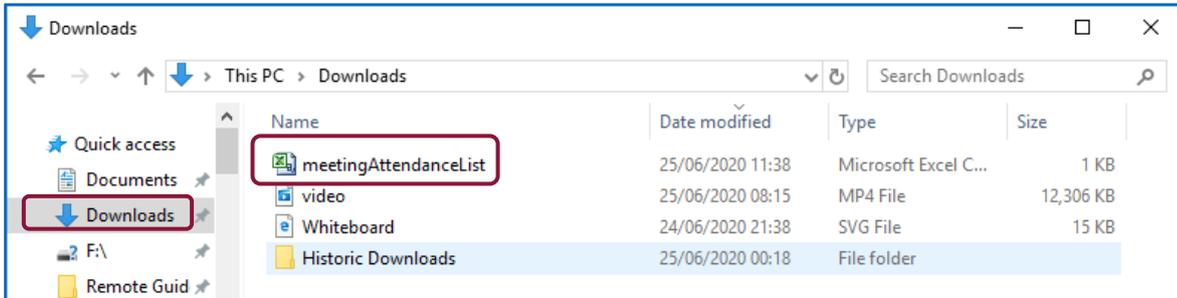
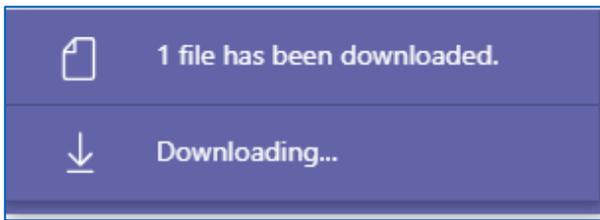


Attendance List

- Select the [More actions](#) icon.
- Select the [Download attendance list](#) to save a copy of who attended the meeting.



The report will download as a .CSV file and will save within the PC Downloads in File Explorer. A .CSV file can be opened in Excel and will contain the names, join times and leave times of all attendees.

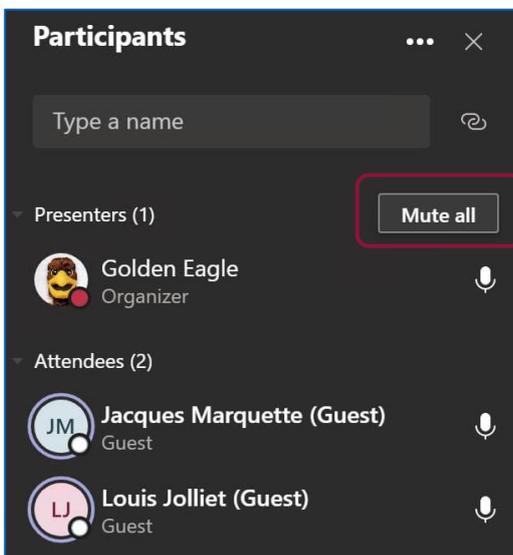


Only Meeting Organisers are able to download an attendance report.

Mute All

A useful feature as a meeting host is the option to **Mute all** participants rather than muting each individual:

From within the **Participants** list, select **Mute all**:



Spotlight

The **Spotlight** option allows the **focus** to be placed on a specific attendee within a meeting for all participants as long as they have their video activated.



Only meeting presenters can place the **Spotlight** on a participant.

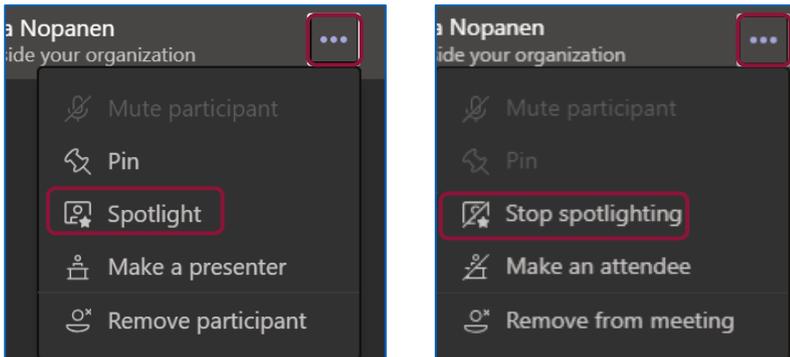
To **Spotlight** someone else's video:

- Right click the participant's video and select **Spotlight**.

Or from the **Participants** list:

- Find the participant to be **Spotlighted**.
- Right click their name or select the three dots next to their name.
- Select **Spotlight**.

To remove the **Spotlight**, select the three dots and select **Stop Spotighting**



Camera & Audio



This example shows the camera is off and the mic is on

Camera and Audio settings are easily changed within a meeting.

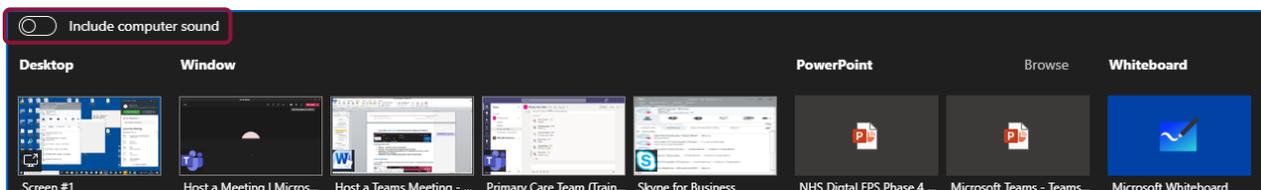
- Click on the **Camera and Mic icons** to switch the Camera on/off and Mute/Unmute the mic.

Screen Sharing



The share option allows meeting participants to share different types of applications or windows during a meeting.

- Tick **include computer sound** to allow sharing of audio straight from the device.

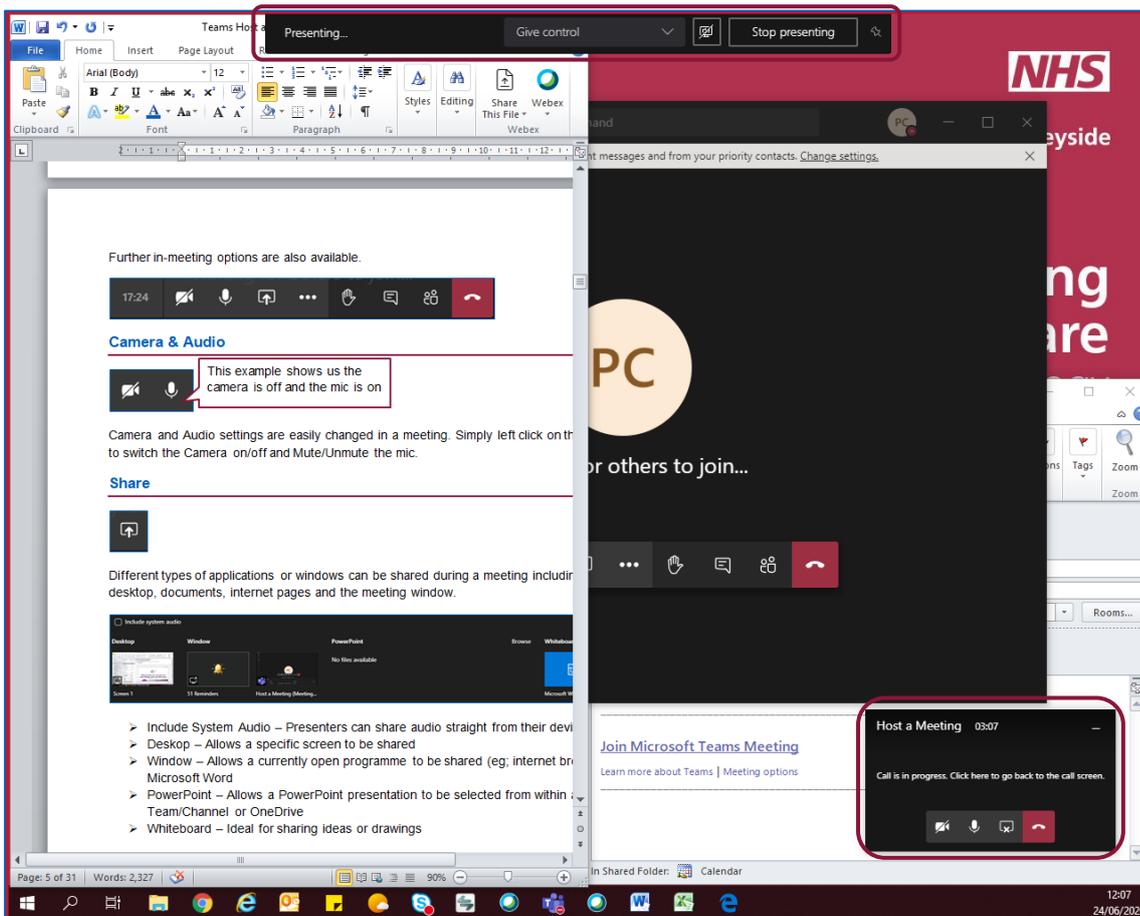


Sharing options include:

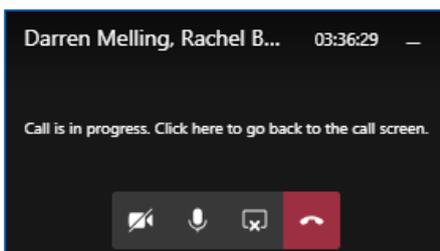
- Desktop – A specific screen can be shared.
- Window – Any currently open programme can be shared.
- PowerPoint – PowerPoint presentations can be selected from within a current Team/Channel or OneDrive.
- Whiteboard – Allows meeting participants to draw and share ideas.

Presenting Desktop

A red rectangle will border the window to show which screen is currently shared to meeting participants.



The meeting window shows in the bottom right hand corner and can be moved around the screen.



- To recall the meeting screen, follow the onscreen instructions and [click on the window](#) to reopen it.

Sharing options are located at the top of the screen will disappear if not in use.

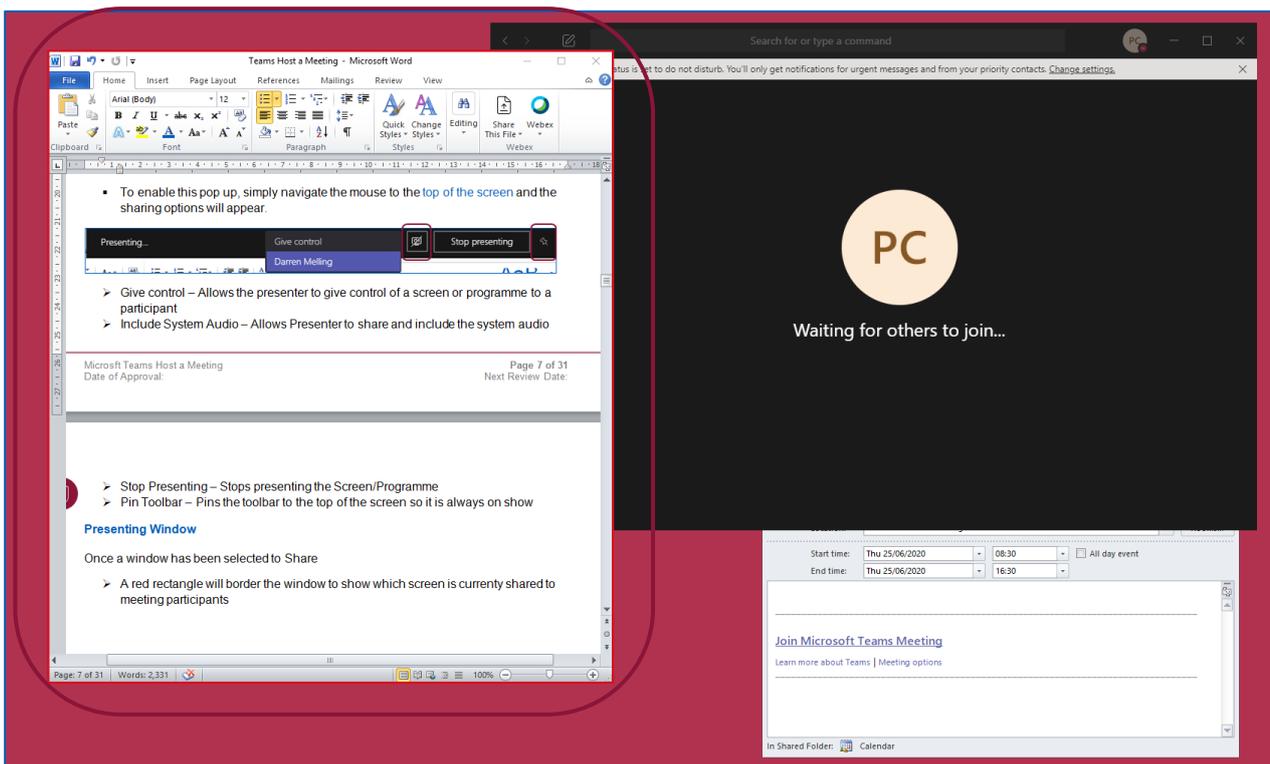
- To enable this pop up, simply navigate the mouse to the [top of the screen](#) and the sharing options will appear.



- [Give control](#) – Allows the presenter to give control of a screen or programme to a participant.
- [Include System Audio](#) – Allows Presenter to share and include the system audio.
- [Stop Presenting](#) – Stops presenting the Screen/Programme.
- [Pin Toolbar](#) – Pins the toolbar to the top of the screen so it is always on show.

Presenting Window

A red rectangle will border the window to show which window/programme is currently shared to meeting participants.

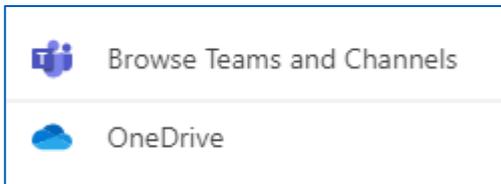


 Sharing a programme rather than a screen will enable the presenter to navigate around their screen whilst only presenting that selected programme.

 If using dual screens, the sharing options are located at the top of the screen and are only available on Screen One.

PowerPoint

The PowerPoint option in Screen Sharing only allows PowerPoint files to be shared if they are currently saved within Teams, Channels or OneDrive.



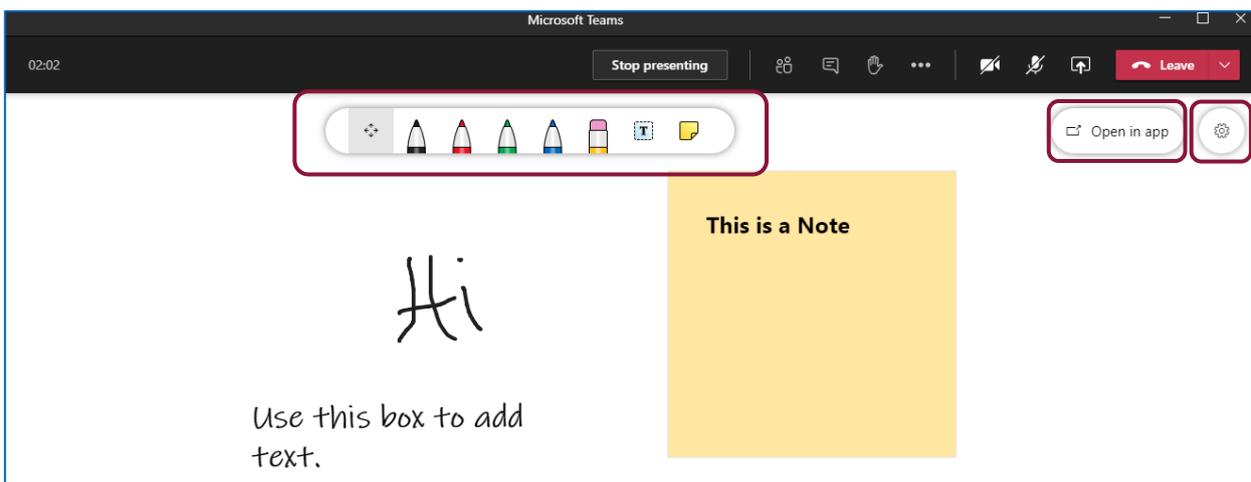
Sharing PowerPoint presentations will still be available through sharing a screen or programme. The presentation does not have to be delivered using the PowerPoint sharing option.

Whiteboard



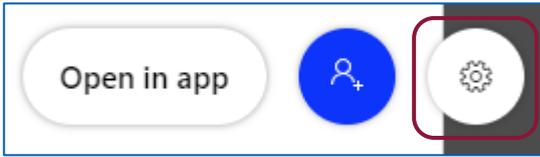
The [Whiteboard](#) option allows meeting participants to draw and share ideas. As soon as the [Whiteboard](#) canvas has been started, meeting attendees will be able to write on it using the coloured pens.

- Select from the choice of [Pen icons](#) from the options on the right of the screen. Left click and use the mouse cursor to [ink](#) the screen.

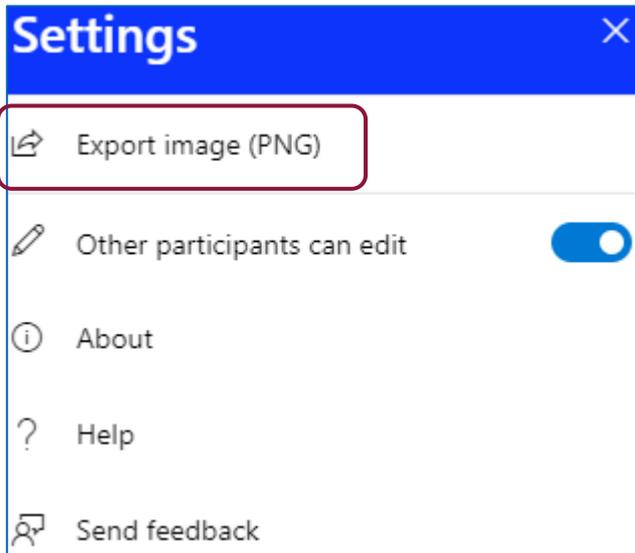


This supports users that have joined the meeting outside of the Teams App.

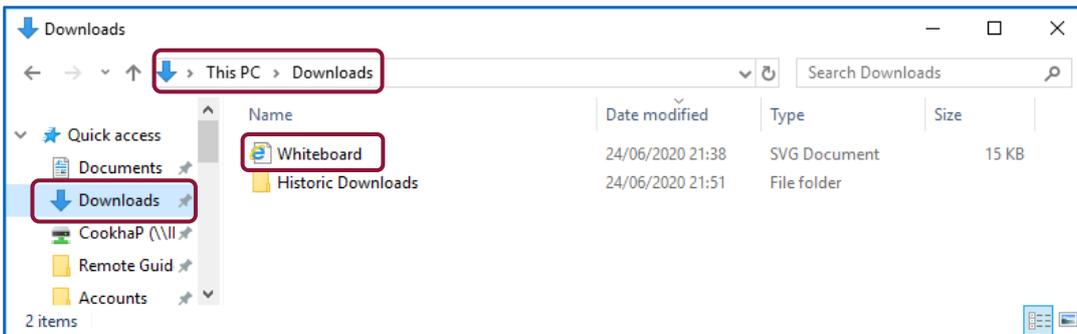
- Select the [Cog Icon](#) to open up [Settings](#).



- Click [Export the image \(PNG\)](#) and save it to Downloads.



- Select [Export image \(SVG\)](#), the whiteboard will download to the PC Downloads Folder.



Whiteboards can only be opened outside of Teams using [Chrome or Edge](#).

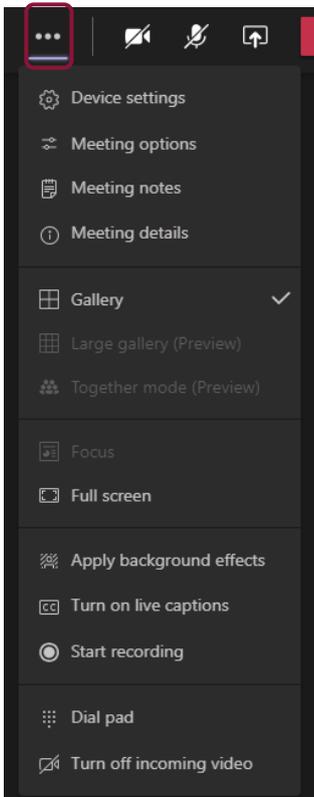
- Stop sharing the Whiteboard with attendees by selecting [Stop presenting](#) from the Whiteboard screen and return to the meeting screen.



The [Whiteboard](#) for each individual meeting will be saved in the [Chat section](#) for the meeting in question under the [Whiteboard Tab](#).

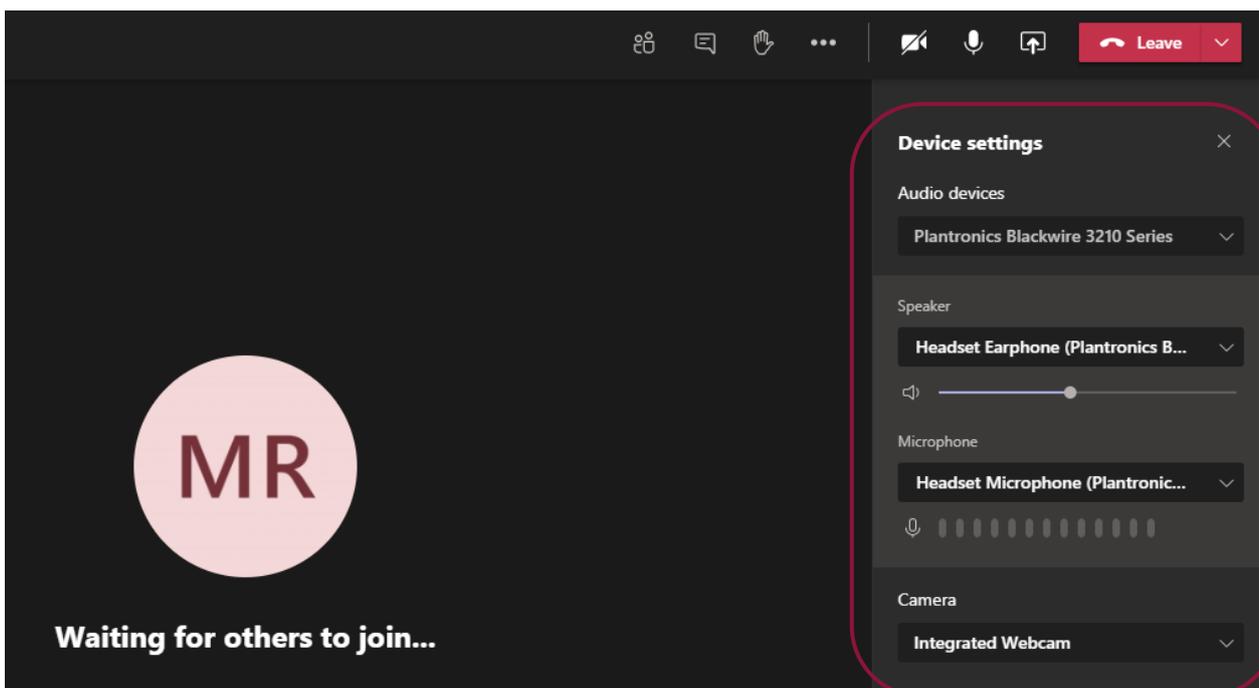
More Actions

The [More actions](#) icon opens up further in-meeting options.



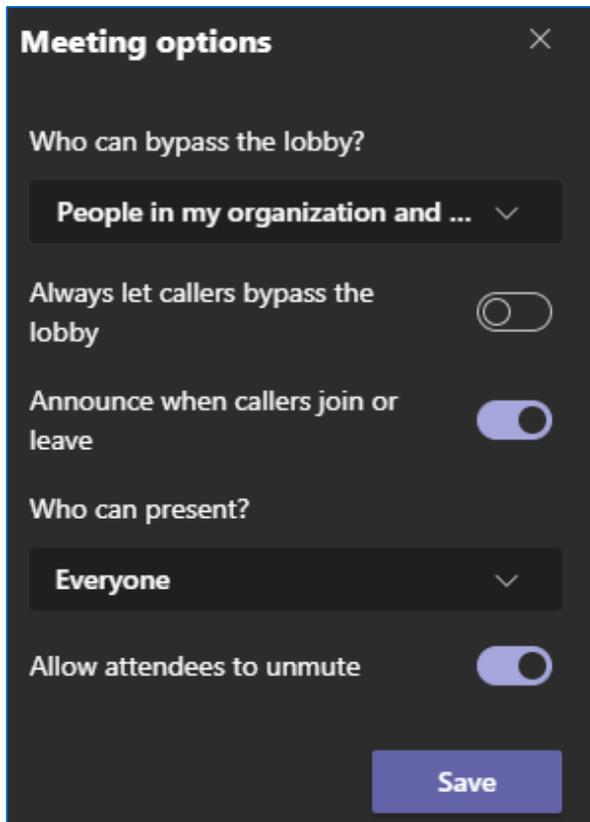
Device Settings

- Select [Device Settings](#) to show device preferences for Audio Devices and Web Camera.



Meeting Options

This option opens the Meeting Permissions whilst in the meeting.



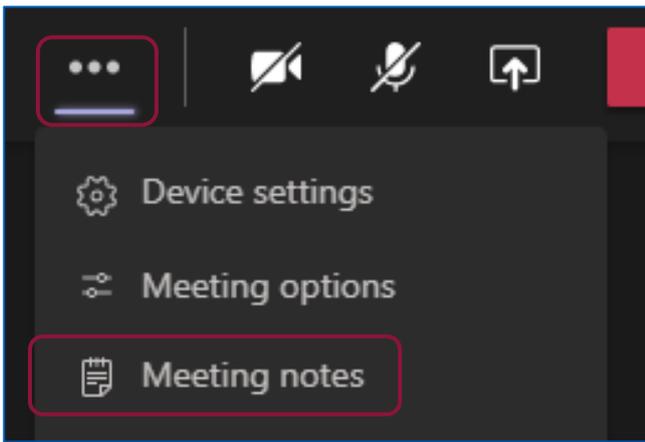
- Who can bypass the lobby? - Allows the [host](#) the option to admit attendees to the meeting from the lobby
 - Always let callers bypass the lobby
 - Announce when callers join or leave
 - Who can present – Present allows [hosts and attendees](#) to share a screen or a specific programme
-
- [Slide](#) to activate settings
 - Select [Save](#) to keep these settings

Meeting Notes

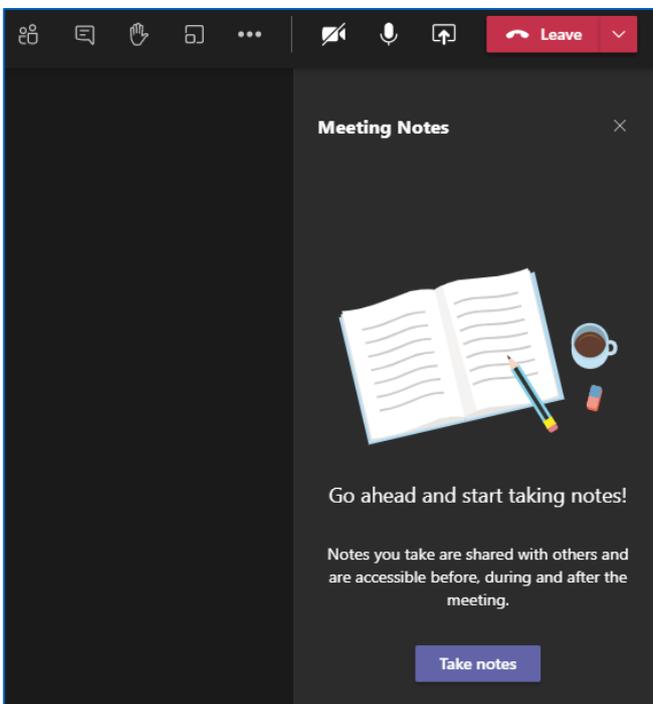
[Meeting Notes](#) can be captured and shared during and after a Teams Meeting.

To take [notes](#) during the meeting:

- Select the [More Actions](#).
- Select the [Meeting Notes](#).

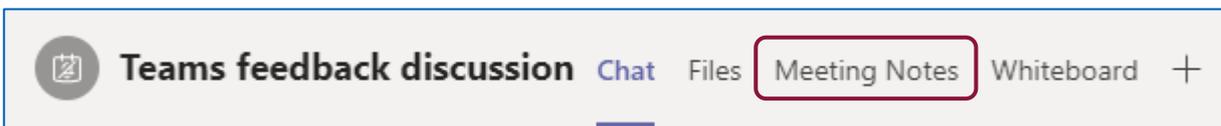


- Click [Take Notes](#) and the [Meeting Chat](#) window will automatically open.

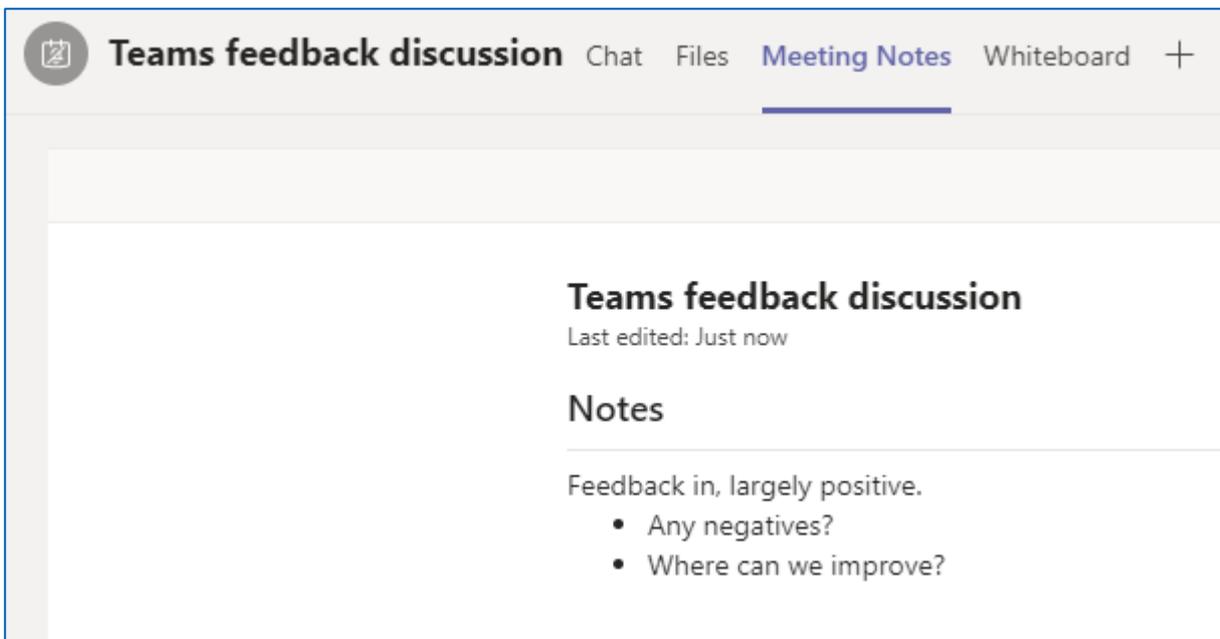


When the Meeting chat window opens

- Select the [Meeting Notes](#) Tab.

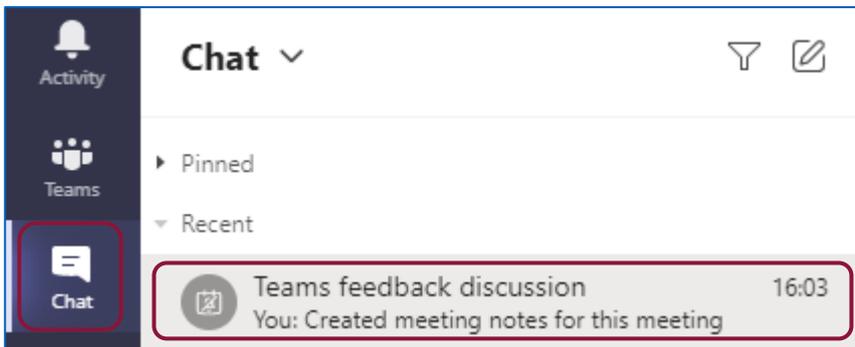


- Begin making [Notes](#).

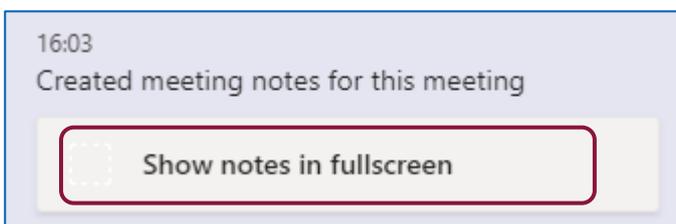


After the meeting:

- Select [Chat](#).
- Select the [Meeting Chat](#).



- Select [Show notes in full screen](#).



The meeting notes will open in a [Wiki](#) tab.

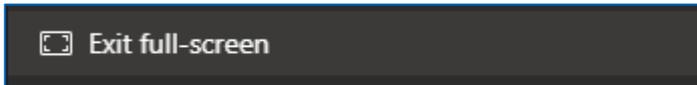
Enter Full-Screen

[Enter Full Screen](#) is not available when the option [Turn on new meeting experience](#) is ticked within settings.

Enter Full Screen allows hosts and participants to have a full screen displaying the meeting currently in progress.

To exit **Full Screen** mode.

- Select **More actions** → **Exit full-screen**.



Gallery

- Click to show up to 9 participants at once.

Large Gallery

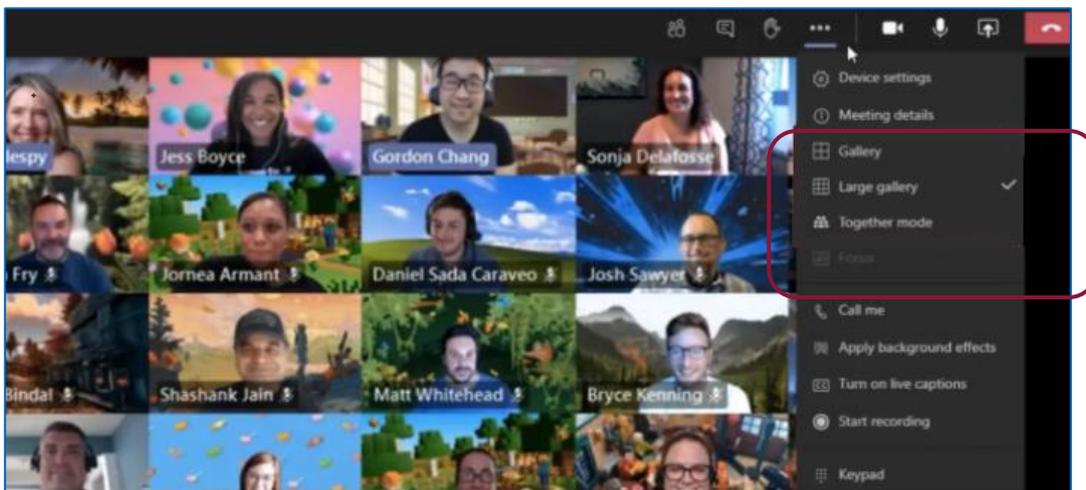
- Click to show up to 49 participants at once.

Together Mode

- Click to show all of the participants of a meeting in a shared background like a lecture hall.

Focus

- Click to temporarily remove the video feed when content is being shared. This enables the screen to focus on the content.



Show Background Effects

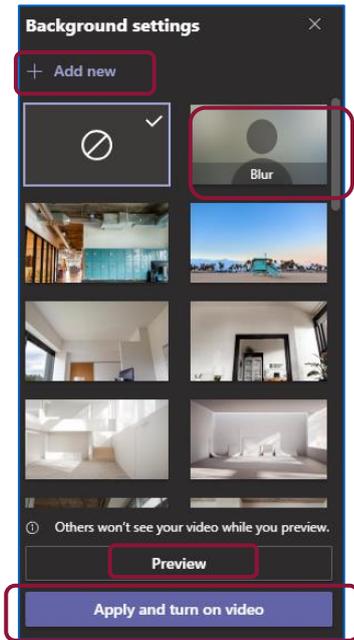
Enables a Host or Participant to change background images or blur out images in the background whilst sharing camera view.



- Click **Apply background effects**.
- **Select your preferred background** from the list.
- Alternatively click **Add new** to load a background.
- **Preview or apply (and turn on video)** to view the background.



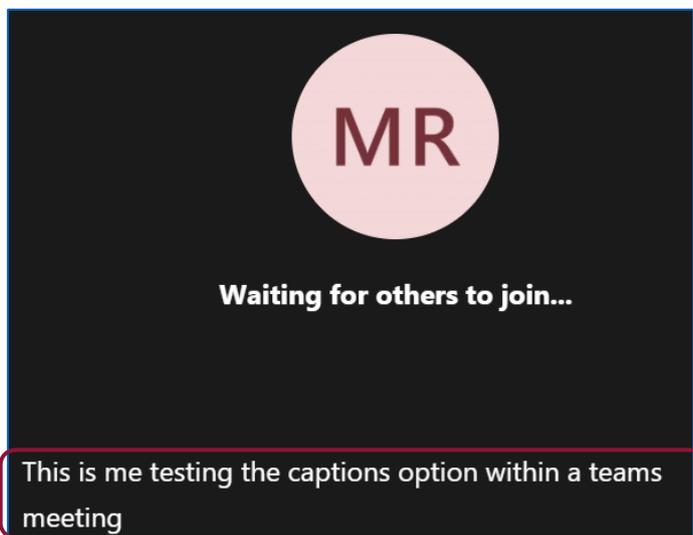
Other participants will not see the preview until the background is applied.



Turn on Live Captions

Live captions enables Teams to detect what is said in a meeting and present a real-time caption.

- Once live captions have been **switched on**, words will appear across the bottom of the screen when **speaking** into the mic for all participants.



This is best used by the host when all other attendees have muted mics.

Start recording

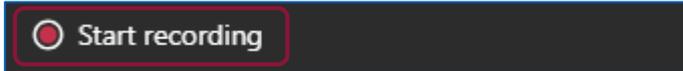
Teams Meetings can be recorded during a meeting.



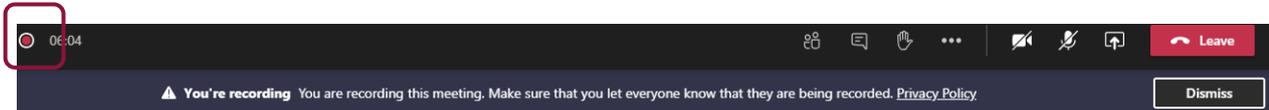
Always inform attendees when a recording is about to start and state the reason for recording the meeting.

Don't keep the recordings for longer than needed, make sure the local data retention policy is followed.

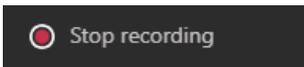
- Click [Start recording](#), the session will start recording straight away.



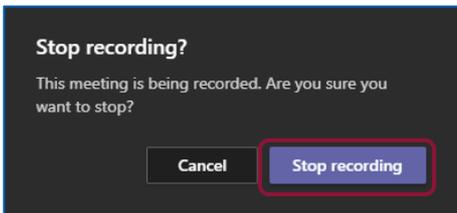
A warning message will appear across the top of the screen as well as recording icon on the Meeting options tab.



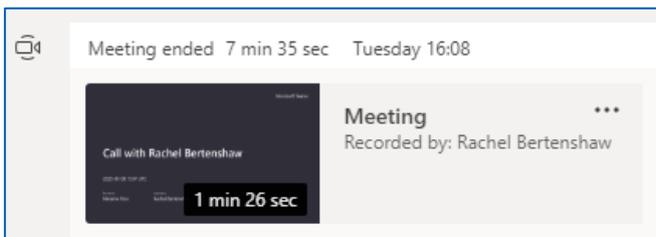
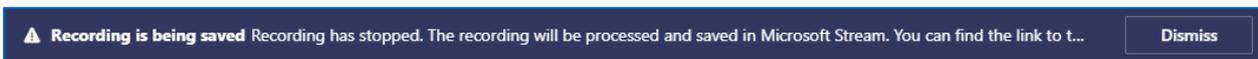
- To stop a recording, select [More actions](#) and select [Stop recording](#).



- Select [Stop recording](#) to confirm.



The recording is now saved and will be available from the Meeting Chat within the Meeting and within the Teams Chat section. This is confirmed by a warning across the top of the screen.



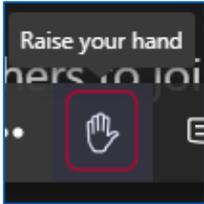
Turn off Incoming Video

Enables the meeting Host to disable all incoming videos from participants.

Raise your Hand

During a meeting, a virtual hand can be raised to let people know participants want to contribute or ask questions without interrupting the current speaker.

- Select [Raise hand](#) from the Meeting options.



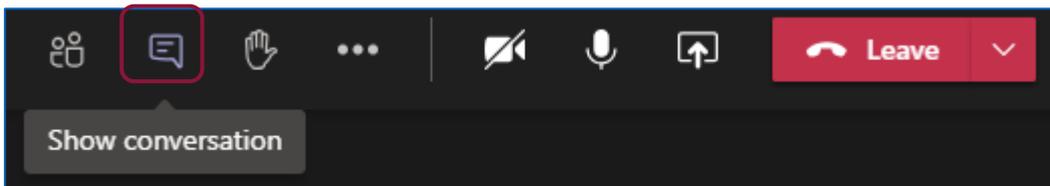
A hand raise is confirmed by a notification on the screen. The Hand Raise icon is also highlighted and now states Lower your hand.



As a Meeting Host, participants who have raised their hands can be seen in the Participants panel.

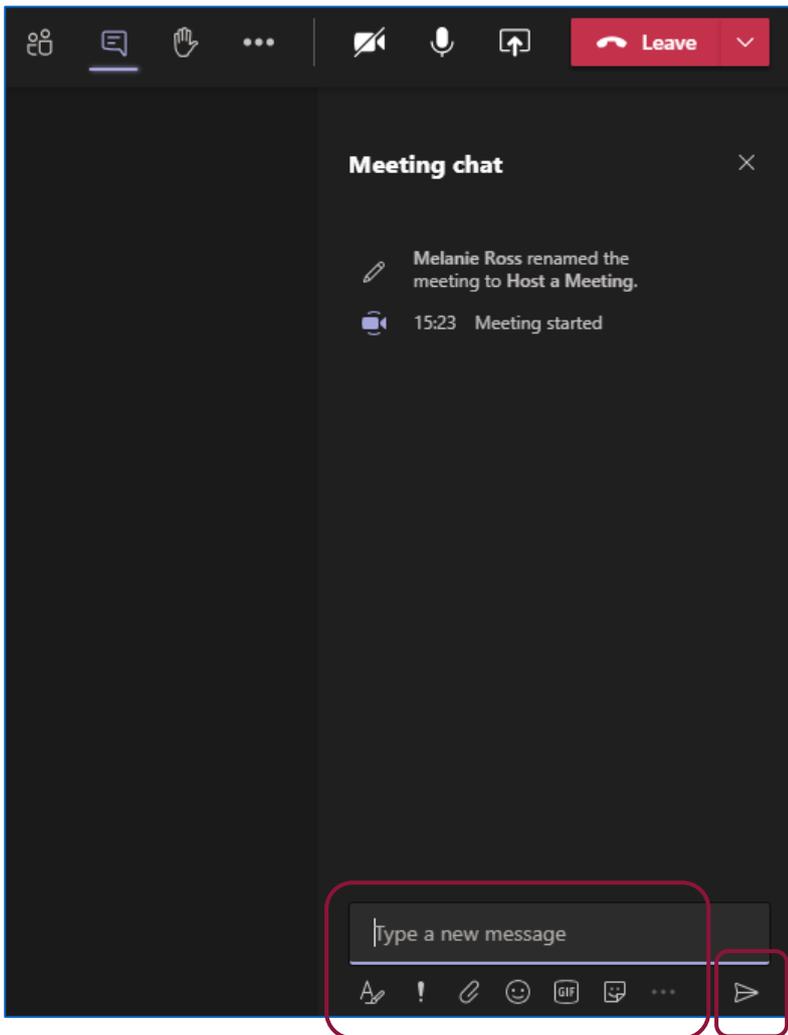
Show Conversation

The Show conversation option allows attendees to chat during the meeting. This can keep the attendees engaged by asking them to respond to questions asked.



- Select [Show conversation](#) to open the [Meeting chat](#).

The Meeting chat opens down the right-hand side of the meeting window and shows all messages and media sent during the meeting.



- To send a new message, type into the [Type a new message box](#) → click [Send](#) icon.

Further options are available within Meeting Chat:



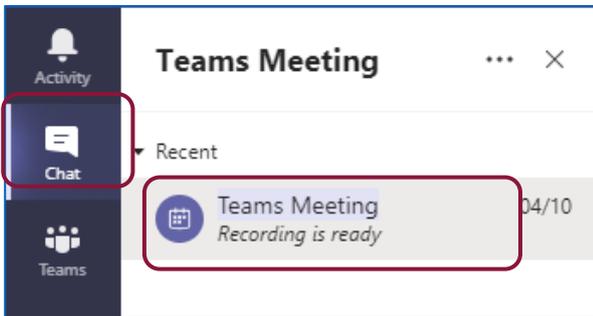
- Format – Format the text such as Bold, Italics and Highlight text.
- Set delivery options – Standard, Important, Urgent.
- Attach – (Currently unavailable as this uses OneDrive).
- Emoji – Search for and select commonly used Emoji's.
- Giphy – Search for and select commonly used Gifys.
- Sticker – Search for and select commonly used Stickers.



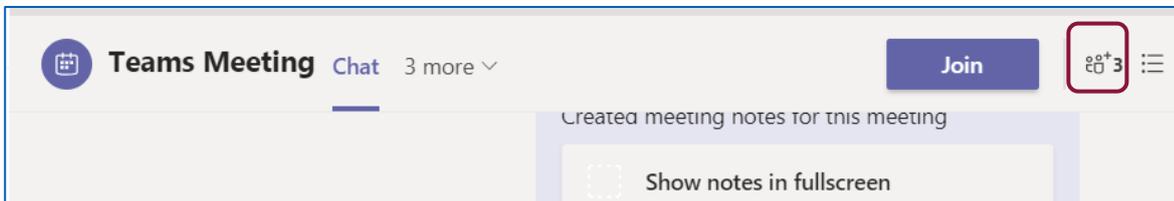
Conversations from the meeting are saved as [Meeting Chats](#) in the [Chat](#) section of Teams and can be accessed by everyone who has been invited to the meeting. [Hosts](#) can remove participants from the Meeting Chat if they did not attend.

Remove Non-Attendees or Participants from Meeting Chat

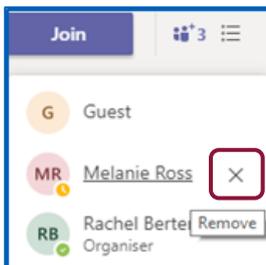
- Go to [Chat](#) then click the [Meeting Chat](#).



- Click the [View and Add Participants](#) icon.



- Click [X](#) next to the non-attendee or participant name to remove.

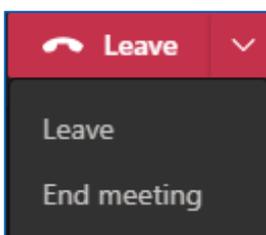


A [Participant](#) can also remove themselves in the same way.

 It is good practice to remove users that do not need to be part of a meeting chat to avoid future sharing of sensitive information.

Leave

- Select [Leave](#) to leave the meeting but allow participants to carry the meeting on in the hosts absence.
- Select [End meeting](#) to end the meeting.



Contact Details

IT Queries	Informatics Merseyside IT Service Desk	0151 296 7777
Training Queries	Informatics Merseyside Training Service	training@imerseyside.nhs.uk