

# MS Teams: Quick guide to Meetings

This quick guide steps you through setting up and joining meetings in MS Teams. Teams is available via a desktop app (PCs and Mac) and an online app (recommended browsers are Chrome or Edge). You can start a Teams meeting straightaway (Meet now) or schedule it using Teams or your Outlook calendar.



Please remember that information or files you post on a Teams site may be available to other team members. Teams is for communication related to your job role and should not be used for personal chat not related to your work. Information you record on Teams could be disclosed in response to a freedom of information request or to someone you refer to in Teams chat. Consider the appropriateness of what you record; only record what is relevant and necessary; and do not share anything that impacts on the privacy of individuals. If you are unclear about how and where to appropriately record information, please contact the Information Governance Team at [dpa@abdn.ac.uk](mailto:dpa@abdn.ac.uk).

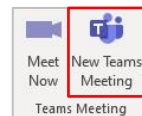
## Set up a Teams Meeting

**Note:** The maximum number of participants varies, depending on whether the meeting includes breakout rooms:

- Meeting *without* breakout rooms: **1000** participants
- Meeting *with* breakout rooms: **300** participants

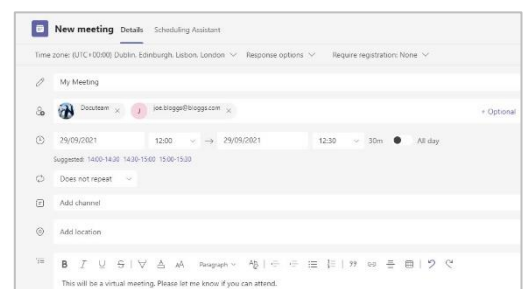
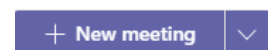
## Schedule the meeting using Outlook Desktop App

1. Go to your **Calendar** and click and drag over the timeslot for your meeting.
2. Click the **New Teams Meeting** button on the Ribbon.
3. Add a **Title** and enter an invitee's name (for University staff colleagues, PGTs, or UGs), or email address (for external contacts) in the **Required** field of the Meeting window.
  - PGTs and UGs can be distinguished from staff by the **(PGT)** or **(UG)** suffix, and the fact that their name appears in caps, e.g., BLOGGS, JO (PGT), or BLOGGS, JO (UG).
4. The link to join the meeting appears in the main message area.
5. Type any additional text in the message area.
6. Click **Send**.



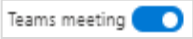
## Schedule a meeting using Teams

1. Click **Calendar** – left of screen.
2. Click **New meeting** at the top right of the window.
3. Enter the details for your meeting
  - **Title**
  - **Attendees** – search by name for University staff colleagues or students or type an email address to invite others (eg external to the University).  
Remember PGTs and UGs can be distinguished from staff by the **(PGT)** or **(UG)** suffix, and the fact that their name appears in caps, eg BLOGGS, JO (PGT) or BLOGGS, JO (UG)
  - **Date and time**



- **Additional info** (recurrence, channel<sup>1</sup>, location).
  - **Any additional text** you want to include.
4. Set additional options via the buttons at the top of the window:
    - **Response Options** - switch on/off options to request responses and allow forwarding
    - **Require registration** - switch on/off options to require registration for people in the organisation or for everyone.
  5. Click **Send**.

## Schedule the meeting using Outlook Web App (OWA)

1. Go to your **Calendar** and click and drag on the timeslot for your meeting or click the **New event** button at the top left of the window.
2. Add a **title** for your meeting and type invitees' names (for University staff colleagues, PGTs, or UGs), or email address (for external contacts).
  - Remember PGTs and UGs can be distinguished from staff by the **(PGT)** or **(UG)** suffix, and the fact that their name appears in caps, e.g. BLOGGS, JO (PGT) or BLOGGS, JO (UG)
3. Check the **Teams meeting** slider switch is in the **On** position. If not, click the switch. 
4. Type any additional text in the message area, and click **Send**.

## Schedule Interviews

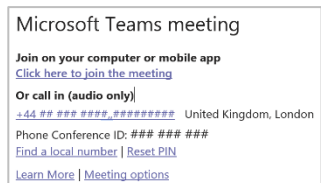
You can **Arrange an Interview** with an external candidate by setting up a Teams Meeting using any of the methods described above.

Send the invitation to the person's email address. They will receive an email including a link to a web browser version of the Teams meeting.



**Note:** Every online meeting includes Meeting Notes by default. You might find this useful for your meeting agenda and minutes.

**Note:** If your account is enabled for Microsoft Audio Conferencing<sup>2</sup>, a dial-in phone number and conference ID will appear under the 'Click here to join the meeting' link when you schedule a meeting. This allows participants to call in by phone (incurring usual telephony costs).



## Differentiate between Presenters and Attendees

When you schedule a Teams meeting, **you** are the **Organiser**. The organiser has specific permissions e.g., to end the meeting for all and to download an attendance report. By default, *all* other participants are **Presenters** and can share content during the meeting, admit people from the lobby, and start or stop recordings. This is not always ideal, so it's a good idea to limit the number of privileged users, particularly when many participants are joining a meeting. For more detailed instructions, see our [Roles and Permissions in Teams Meetings guide](#).

<sup>1</sup> Do not use channels if your meeting includes attendees who are not part of your team e.g. an external contact or student, as functionality will be limited for them. See our guide [MS Teams: Meetings in channels](#) for more details.

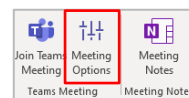
<sup>2</sup> To request that your account be enabled for Microsoft Audio Conferencing, contact the IT Service Desk

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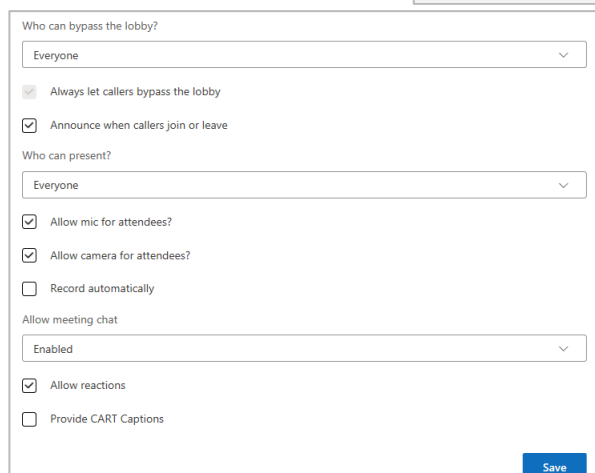
## Assign permissions using Outlook Desktop App

Set up the meeting as described above.

- Under the **Meeting** tab on the ribbon, click **Meeting Options**. The Meeting Options window opens.

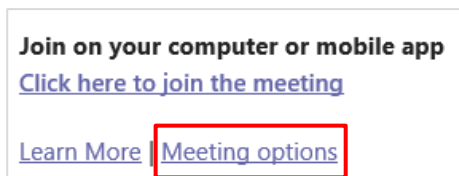


- Choose who can **bypass the lobby**:
  - Everyone; People in my organization, trusted organizations and guests;
  - People in my organization and guests;
  - People in my organization;
  - People I invite (Turn Off Allow Forwarding in the meeting invite) or Only me.



- If your meeting has a call-in option, you can choose if callers can bypass the lobby and if they are announced when joining or leaving.
- Choose who can **present**:
  - Everyone; People in my organization and guests; Specific people; or Only me.
  - If you select **Specific People**, you can then choose which of your participants can present.
- Choose whether to **Allow mic and/or camera for attendees** or not. (This does not apply to presenters)
- Choose whether to set **Allow meeting chat** to: Enabled; Disabled or In-meeting only
- Choose whether to **Allow reactions** or not.
- Choose whether to **Provide CART Captions** or not. (For more information, see the [Microsoft support page on using CART captions in a Teams meeting.](#))
- Click **Save** to save your Meeting Options.

**Note:** before sending the invitation, you can **Ctrl + click** the **Meeting Options** link at the foot of the meeting window to launch the **Meeting Options** window in your web browser.



## Assign permissions when scheduling a Teams meeting using Teams or Outlook Web App (OWA)

Currently, in Teams and OWA, the **Meeting Options** link does not appear until *after* you have saved or sent your meeting invitation:

- Set up the meeting as described above and **save or send** it.
- Return to your meeting and open it for editing. You will now see the link for **Meeting Options** at the top of the window. The Meeting Options window opens in your browser.
- Follow the steps as above, then save or update the meeting.

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## Use Meet now (instant meetings)

1. Click **Calendar** in **Teams** – left of screen.
2. Click the **Meet now** button at the top right of the window. A pop-up appears where you can enter **Name** for your meeting, **Get a link to share** and **Start meeting**.
3. Click **Start meeting**
4. Check your equipment settings via the buttons in the meeting window:
  - Camera – on/off
  - Microphone – on/off
  - Background filters<sup>3</sup> – choose no background, blur, existing background image or add new
  - Settings Cog – opens Device settings where you can check/change the Audio and Video devices you are using and Noise suppression settings.
5. Click **Join now** to start the meeting.
6. You are prompted to **Invite people to join you**. To do this, click on **Copy meeting link** and share it. Alternatively, you can close this prompt, type a name in the Participants panel, hover over the correct person's name and click **Request to join**.
7. To change settings, click 3 dots (...) in the Toolbar and choose **Meeting Options**.

## Joining a Teams meeting

1. Go to the calendar appointment (in Teams, Outlook or OWA).
2. To join the meeting:
  - In **Teams**: Click on the meeting and then **Join** in the pop-up window.
  - In **Outlook** or **OWA**: Click the **Click here to join the meeting** link in the calendar appointment. From Outlook, if you already have the Teams app, the meeting will open in it automatically. Otherwise, a browser window will open showing a message asking if you want to open the Teams app or continue on the browser. There is also a link to download the Teams app if you don't have it. Click the appropriate option to launch the desktop app or the web app.
3. A preview window opens. Set the options for your audio and video equipment. To check individual device settings, or noise suppression settings, click the cog button under the camera preview area.  
**Note:** you can test your equipment in Teams by going to **Settings<sup>4</sup> - Devices** and clicking **Make a test call** – this will check the equipment and report any issues.
4. When you are ready to join the meeting, click **Join now**.
5. When you are ready to leave the meeting, click **Leave**.



## The Meeting toolbar (you may not see all options)

The Toolbar you see, and the order of icons will depend on whether you are using a browser or an app. In the desktop Teams app, you can now view a meeting in a separate window from the Teams interface.

**People** show/hide participants; **Chat** show/hide conversation; **Raise hand and reactions**; **Breakout Rooms** (organiser only); **More Actions** e.g. record, change background, turn on live captions; **Camera** off/on; **Mic** mute/unmute; **Share Content** desktop/window/presentation; **Leave** leave meeting.



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<sup>3</sup> Only available when the camera is switched on.

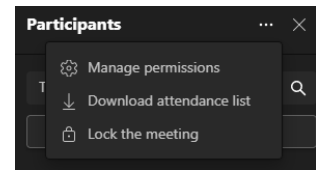
<sup>4</sup> You can access Settings by clicking on the 3 dots (...) in the top right of the Teams window.

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## Controls as the organiser

### In Participants panel

To access the three controls detailed below (Download attendance list, Manage Permissions and Lock the Meeting), click **People** icon in meeting toolbar and then 3 dots (...) in the Participants Panel.



### Download attendance list

You, as **organiser**, can download an **attendee list** *during* the meeting at any point.

- Click **Download attendance list** to **save** the report to your **Downloads**.

This is a .CSV file containing the **name**, **join time** and **leave time** of all meeting attendees.

An **attendance report** is now **automatically generated**<sup>5</sup> *after* a meeting which **only the organiser** can see and download from the meeting chat.

### Manage Permissions

Click on **Manage Permissions** at any time to be taken to the **Meeting options**.

Alternatively, click **3 dots (...)** **More actions** in the Toolbar and choose **Meeting options**.

### Lock the meeting

Click **Lock the meeting** to prevent people joining. A lock icon appears at the top left of the window. Invitees can still access the meeting chat and any recording. To unlock, click 3 dots (...) in the Participants Panel and choose **Unlock the meeting**.

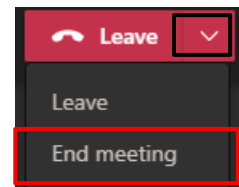
### Breakout Rooms

As an **organiser** you can create Breakout Rooms. See our [guide on using Breakout Rooms](#) in Toolkit.

### Ending the Meeting

As **organiser** you can end the meeting for everyone at one time.

1. In the meeting control toolbar, go to the arrow next to **Leave**<sup>6</sup>.
2. Choose **End Meeting**
3. You will be warned that this will end the meeting for everyone.
4. Click **End**



## Controls as a presenter (or organiser)

### In the Participants panel

#### Control over mics

The meeting organiser sets permissions at the start of a meeting for attendees to either control their own microphones *or* join the meeting muted and be unable to unmute.

During a meeting, a presenter can control who is muted and who can unmute.

Click **People** icon on the meeting toolbar

- Click **Mute all** to mute all participants' microphones *without disabling them*.
- Click 3 dots (...) next to a person's name to choose **Mute participant**

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<sup>5</sup> The attendance list won't appear automatically until the meeting has ended completely. If anyone remains in the meeting, the report will not appear. Remove participants and end the meeting to generate the report.

<sup>6</sup> On some toolbars the End Meeting option can be found by clicking on More actions (...)

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If attendees cannot unmute, anyone who wishes to speak can use [Raise Hand](#) and a presenter can

- Click 3 dots (...) next to the person's name and choose **Allow mic**

Once they have spoken a presenter can

- Click 3 dots (...) next to the person's name and choose **Disable mic**

### Control over cameras

The meeting organiser sets permissions at the start of a meeting for attendees to either control their own cameras *or* join the meeting with cameras disabled.

During a meeting, a presenter can control cameras for all attendees or for individuals, either disabling or allowing, in a similar way to controlling microphones and can respond to [Raise Hand](#), if appropriate.

Click **People** icon on the meeting toolbar

- Click 3 dots (...) at top of panel and click **Allow camera for attendees** or **Disable camera for attendees**.
- Click 3 dots (...) next to a person's name to choose **Allow camera** or **Disable camera**

**Note:** You may see different terminology for microphone and camera control on a Mobile rather than on Desktop, but the functionality is the same.

For more about microphone and camera control see [Manage attendee audio and video permissions in Teams meetings](#).



If you have allowed all participants to be presenters, you *don't* have control over their mics or cameras.

However, you can change the *role* of a participant or apply a change to *Who can present?* in the Meeting options, *during the meeting*.

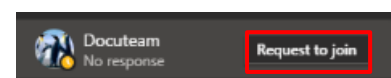
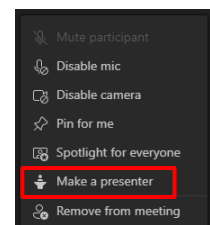
### Assign permissions during a meeting

During a meeting, a presenter or organiser can **change the role** of a participant.

They can click on the 3 dots next to a person's name and Make an attendee a presenter or Make a presenter an attendee.

### Request to Join

A presenter or organiser can hover over the name of an invited person who has not yet joined the meeting and click the option **Request to Join** or Ask to Join.



## Further information and help

See [Guides and Links](#) in our **MS Teams** resource on Toolkit, or contact the Service Desk: [myit.abdn.ac.uk](mailto:myit.abdn.ac.uk)