

Creating a Teams Meeting

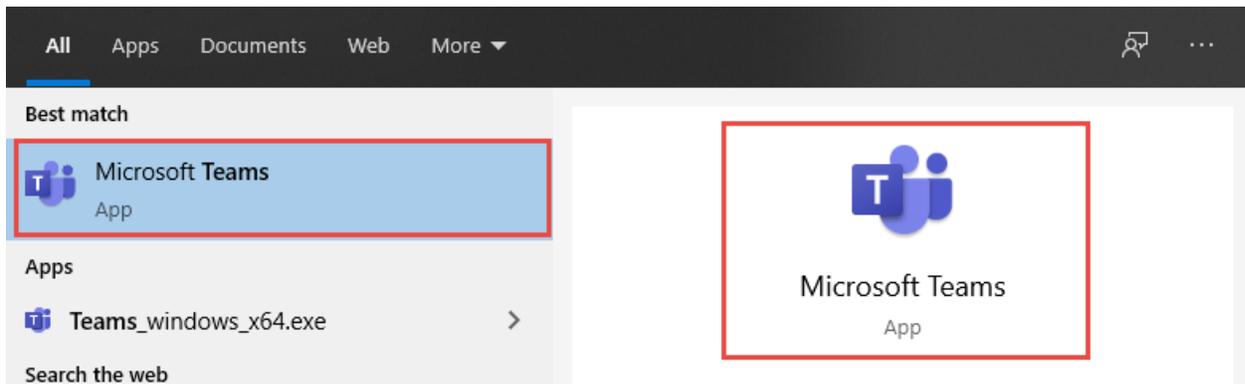
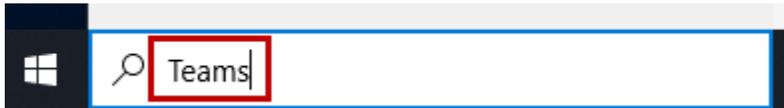
You can create a Teams meeting either through Outlook or directly through Teams. This section will review how to do in both and provide some additional tips regarding meeting options.

Teams

Step 1: Open the Teams App on your computer. This can be done either by clicking the Teams icon on your desktop.



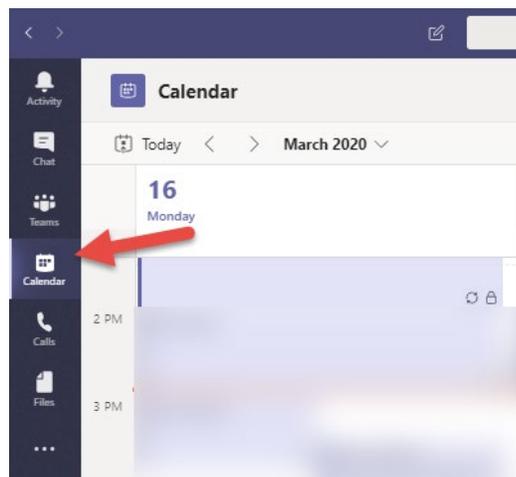
Searching for Teams in the windows search box and then clicking on the Microsoft Teams App title.



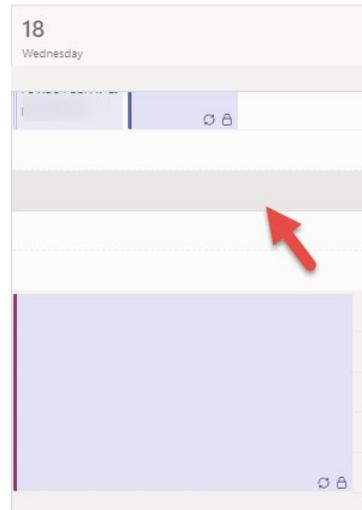
Or selecting the Teams icon on your navigation bar (if you have previously pinned it).



Step 2: Once Teams is open, click on the Calendar icon to open your calendar.



Step 3: Click on a blank area in the calendar (time) for which you'd like to add a meeting. (One click only is required).



Step 4: The New Meeting window will open. Enter the following information:

Meeting Title,

Start and End Date (if different),

Start and End Time,

Details for the meeting and

Location if the meeting is to be virtual **and** in-person. You can select a location by using the drop-down menu (currently only PB locations are listed in Teams) or leave the locations blank if the meeting will not have an in-person component.

A screenshot of the 'New meeting' dialog box in Microsoft Teams. The dialog box contains the following fields and options:

- Title:** A text input field containing 'Teams Training'.
- Location:** A dropdown menu.
- Start/End Date/Time:** Fields for 'Start' (Mar 18, 2020, 2:00 PM) and 'End' (Mar 18, 2020, 2:30 PM). A 'Repeat' checkbox is also present.
- Details:** A rich text editor containing the text 'Training for Teams.'.
- Channel:** A dropdown menu labeled 'Select a channel to meet in' with 'None (optional)' selected.
- Invite people:** A button labeled 'Invite someone'.
- Organizer:** A field showing 'JB Baker-Johnson, Judy' and 'Judy.Baker-Johnson@portlandoregon...'.

At the bottom of the dialog box are 'Close' and 'Schedule' buttons. Red boxes highlight the Title field and the Start/End Date/Time fields. A red arrow points to the 'Invite someone' button.

Step 5: You can invite people to your meeting in the New Meetings window or select the Scheduling Assistant link.

New meeting ▾

Title *
Teams Training

Select a channel to meet in
None (optional) ▾

Location
▾

Invite people
Invite someone

Organizer
JB Baker-Johnson, Judy
Judy.BakerJohnson@portlandoregon...

Start
Mar 18, 2020 2:00 PM

End
Mar 18, 2020 2:30 PM

Repeat

[Scheduling assistant](#)

Step 6: When using the Scheduling assistant, enter the name of the first person you want to invite to your meeting into the Invite People box. (You can simply start typing the name; the system will display other city employees in a list below for you to select from.)

Start
Mar 17, 2020 8:30 AM

End
Mar 17, 2020 9:00 AM

Invite people
Harris

Tue 3/17
4 am 5 am 6 am 7 am 8 am 9 am 10 am 11 am 12 pm

Harrison, Monique
(MONIQUE.HARRISON) Human Res...

Step 7: Once your invitees have been added, you will be able to view their availability and adjust your meeting data and time as needed.

Start
Mar 17, 2020 8:30 AM

End
Mar 17, 2020 9:00 AM

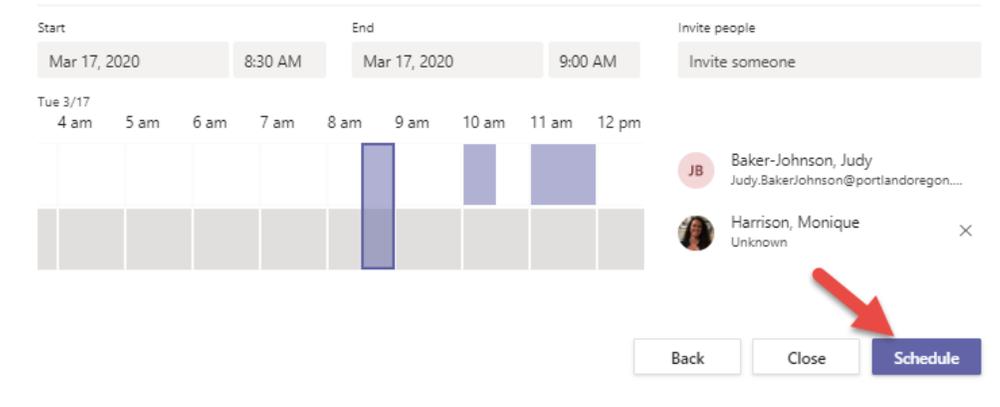
Invite people
Invite someone

Tue 3/17
4 am 5 am 6 am 7 am 8 am 9 am 10 am 11 am 12 pm

JB Baker-Johnson, Judy
Judy.BakerJohnson@portlandoregon...

Harrison, Monique
Unknown

Step 8 After all your adjustments have been made, you can click on Schedule.



Step 9: Your meeting will display on your calendar. As it gets closer the Join button will display. You can join the meeting using this button if that is your preference. For more information on how to join meetings, go to

Note: When you create a Teams meeting, a link, phone number and conference ID should be added automatically. If you don't see a phone number or conference ID you do not have the "Audio" license to run a meeting with audio. Contact BTS to obtain a license.

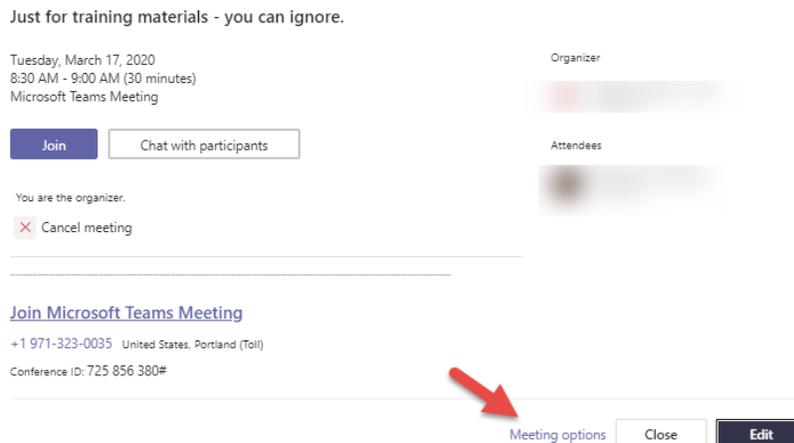
[Join Microsoft Teams Meeting](#)

+1 971-323-0035 United States, Portland (Toll)

Conference ID: 725 856 380#

Options

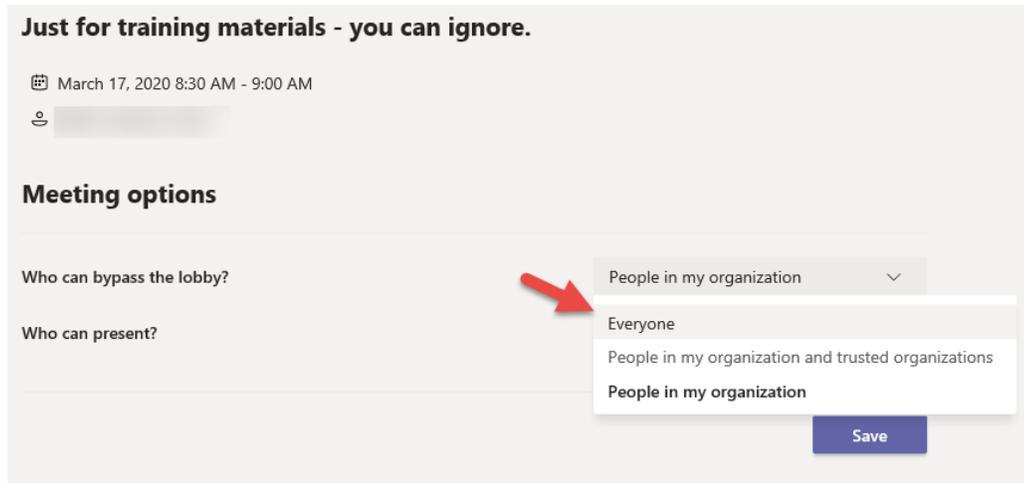
There are two main options you can set for your Teams meeting. To view your options, click the Meeting options link in your meeting invite.



Office365.portlandoregon.gov page will open. Click on your email address to log in.

The options page will open. You can then set two options:

Who can bypass the Lobby – The Lobby is a virtual waiting area for invitees to wait until they are admitted into the meeting. You set your meeting to allow everyone to bypass the lobby by setting this to Everyone.

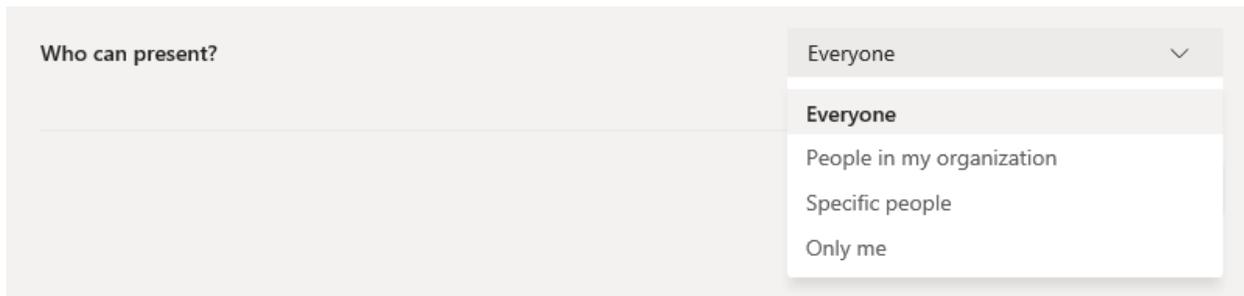


If you set it to People in my organization and trusted organizations or People in my organization, you will have to Admit attendees to the meeting once you are prompted to do so (an Admit window will pop up).

In addition, if you select Everyone, attendees recognized by the system (Outlook/City employees) will not be announced when entering the meeting.

Note: If attendees are using a cell phone not recognized by the city (non-city phone), the system will still announce their entry and exit from a meeting.

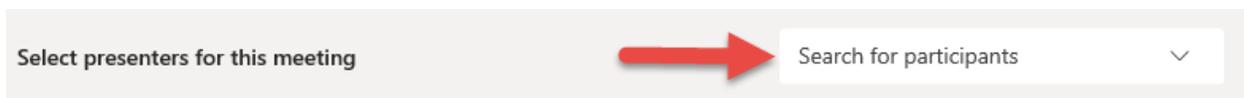
Who can present? – If you wish to limit or allow other attendees the opportunity to present (share their screen), you will need change this option.



Everyone – Allows any attendee to share their screen.

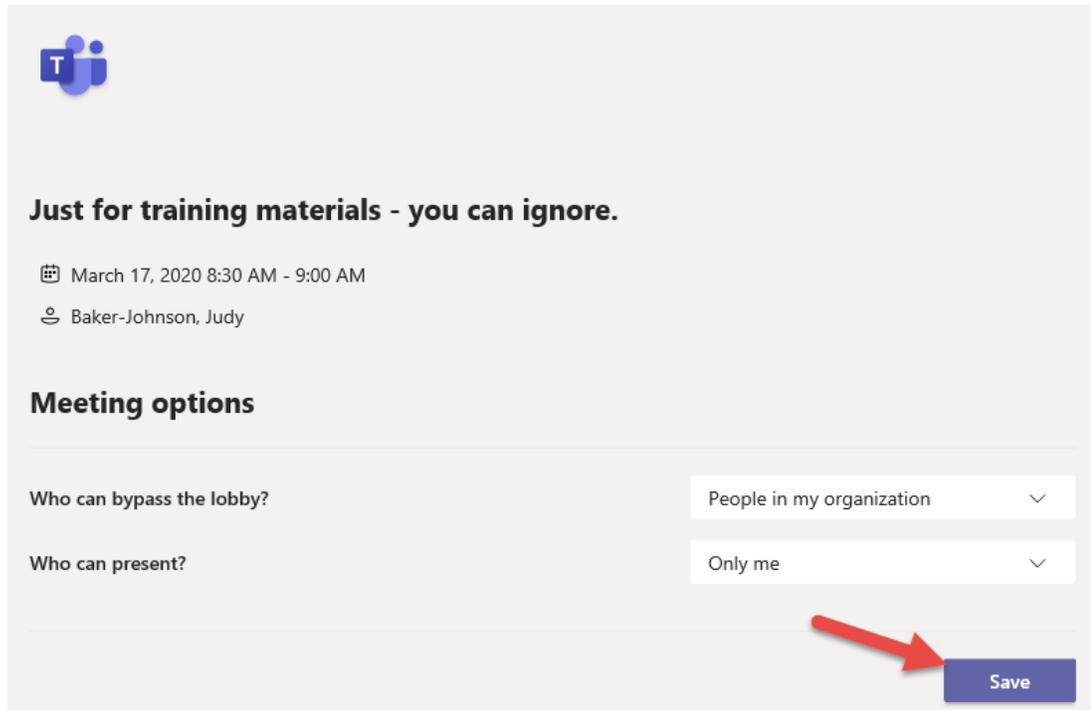
People in my organization – Check your organization list to determine who would be included here.

Specific People – You add multiple presenters by selecting this option and adding their names to the Select presenters for this meeting drop down.



Only me – Only allows the meeting organizer to present at the meeting.

Once your options have been selected. Click on Save.



The image shows a screenshot of the Microsoft Teams meeting options interface. At the top left is the Teams logo. Below it, the text reads "Just for training materials - you can ignore." followed by the meeting details: "March 17, 2020 8:30 AM - 9:00 AM" and "Baker-Johnson, Judy". The section is titled "Meeting options" and contains two dropdown menus. The first dropdown is labeled "Who can bypass the lobby?" and is set to "People in my organization". The second dropdown is labeled "Who can present?" and is set to "Only me". A red arrow points to a blue "Save" button at the bottom right of the options section.

Just for training materials - you can ignore.

📅 March 17, 2020 8:30 AM - 9:00 AM
👤 Baker-Johnson, Judy

Meeting options

Who can bypass the lobby? People in my organization ▾

Who can present? Only me ▾

Save

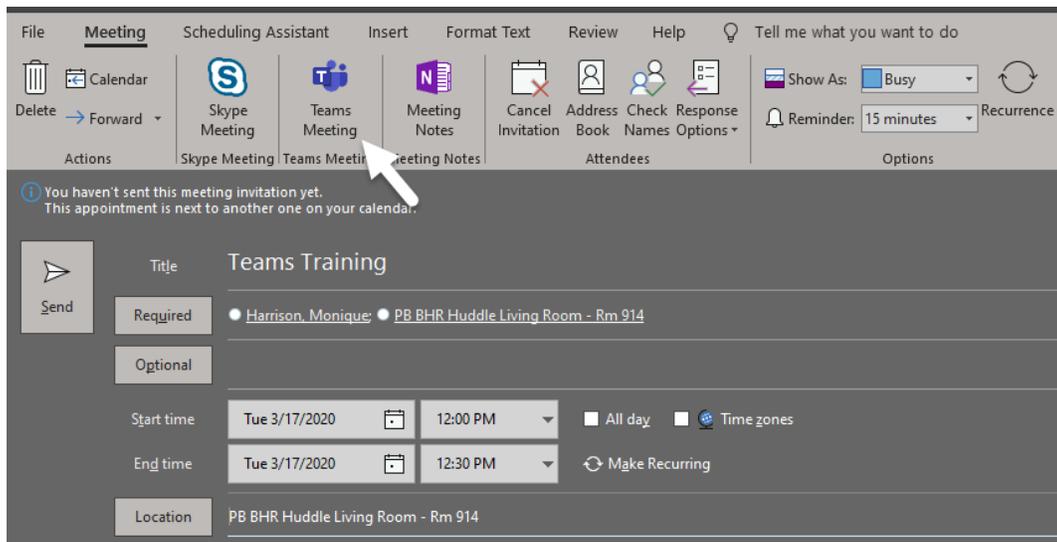
Outlook

This section will review how to set a Teams meeting via Outlook. This section is just how to add Teams, it doesn't review how to create an invite via Outlook.

Step 1: Create a meeting the way you normally would in Outlook. (Include a room if you are offering both in-person and a virtual option).

Note: You have more room options via Outlook than what is currently available in Teams.

Step 2: Click the Teams icon to add the virtual meeting options.



Step 3: The meeting link, phone number and conference ID will automatically display. To change the Meeting options, click on the Meeting options link and follow the instructions listed above in the [Teams/Options](#) section.

