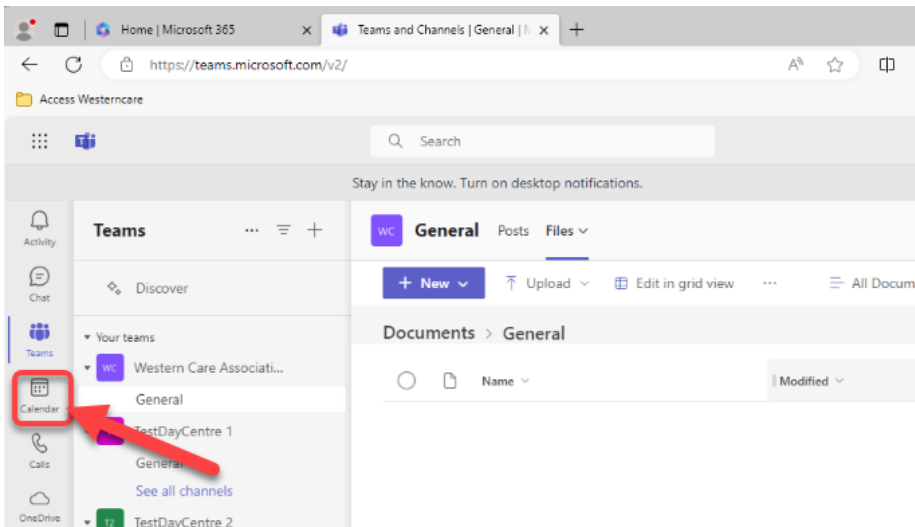


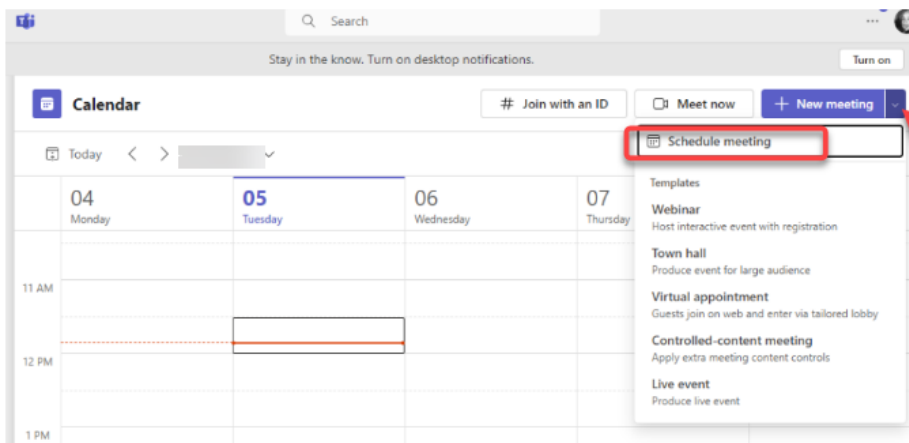
HOW TO CREATE A MEETING IN TEAMS

Below are the steps to take to schedule a meeting in Teams (a separate document shows to do this in Outlook):



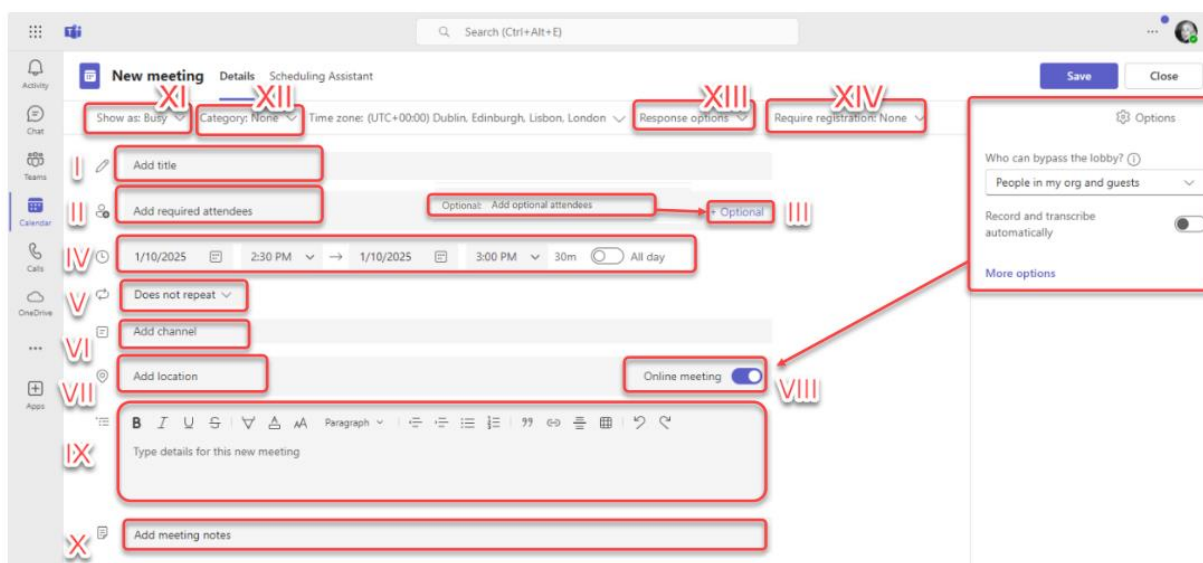
1

In Office 365 open Teams > click on Calendar



2

In Calendar click on "+New meeting button" or on the drop-down arrow and then on "Schedule meeting"



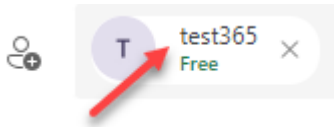
3

In the meeting you can set the following details:

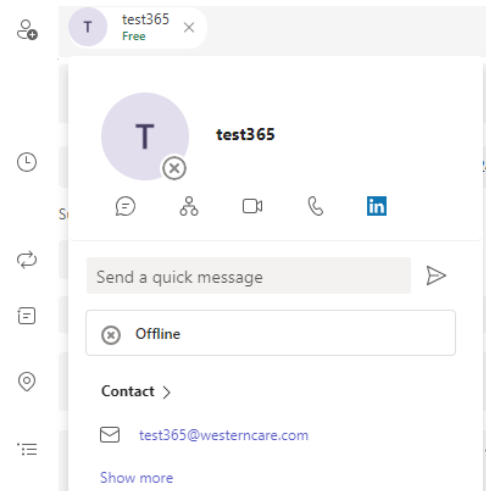
- I. Meeting name/title
- II. Attendees
- III. Optional attendees
- IV. Date/time/duration
- V. Repeat option
- VI. Channel
- VII. Location
- VIII. Online meeting + options
- IX. Details
- X. Agenda/notes/lookup
- XI. Availability
- XII. Category
- XIII. Response options
- XIV. Registration

I. MEETING NAME – this is a text field, provide a name for the meeting.

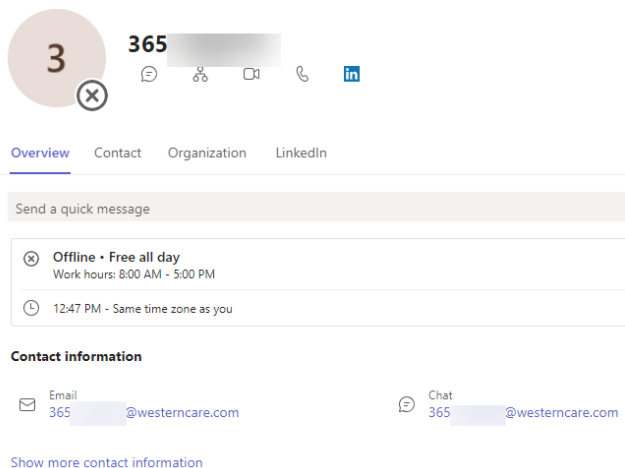
II. ATTENDEES - You can select invitees by typing their names (you can type either first name like *john* or start with last name like *doe* and the directory will display all people whose first name/last name and or email address contain the name you entered), then select the right person from the dropdown; alternatively you can type in their whole email address if you know it; for external invitees you have to provide their full email address). If you made a mistake in the name or are not sure you have selected the right person you – after you selected them click on their name/picture or hover over it



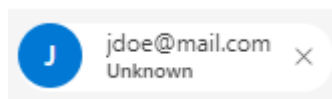
and it will auto-expand their profile



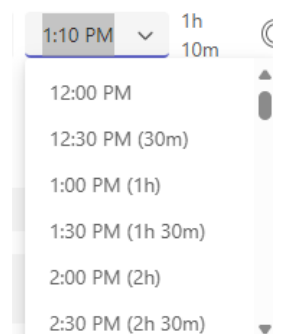
to show additional details that may help you determine if this is the right person. Alternatively click on the name/picture and a pop-up of the profile will open



III. OPTIONAL ATTENDEES - you can also add Optional attendees by clicking on “+Optional” link which adds “Optional” field below the “Add required attendees”. You don’t need to type commas or any other separators between the names, just start typing them and select them from the drop-down list. If you are inviting people from outside the organisation by their email, to include more than 1 after typing the email address you can type a colon ; and it will turn the picture blue, showing Teams status below the email address as “Unknown” such as in the picture below:



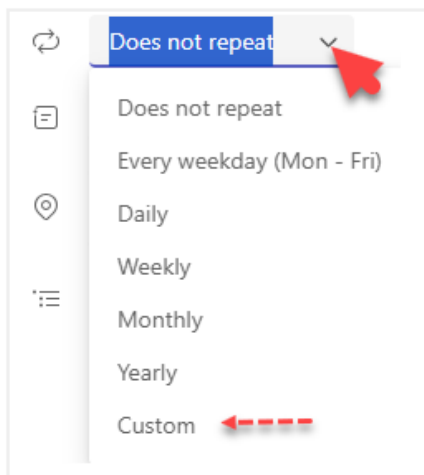
IV. DATE/TIME/DURATION - Select date and time of the meeting, you can select the duration in pre-set increments of 30 minutes/1 hour or you can insert the cursor into the time field and type in the required duration, such as shown below:



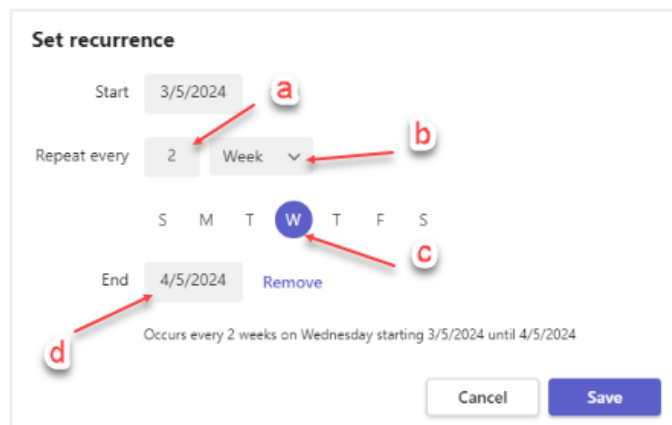
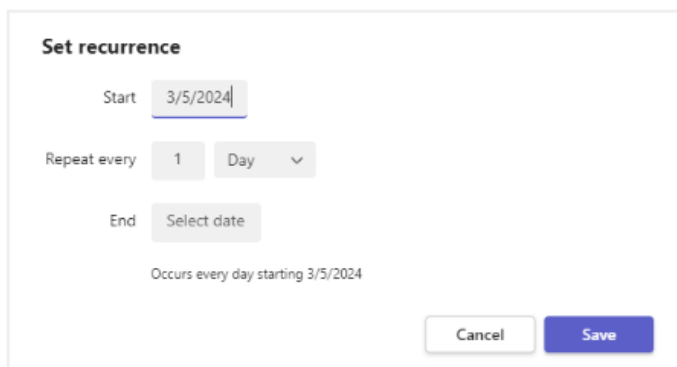
Alternatively, you can toggle the field “All day” to make it an all-day event/meeting/invite.



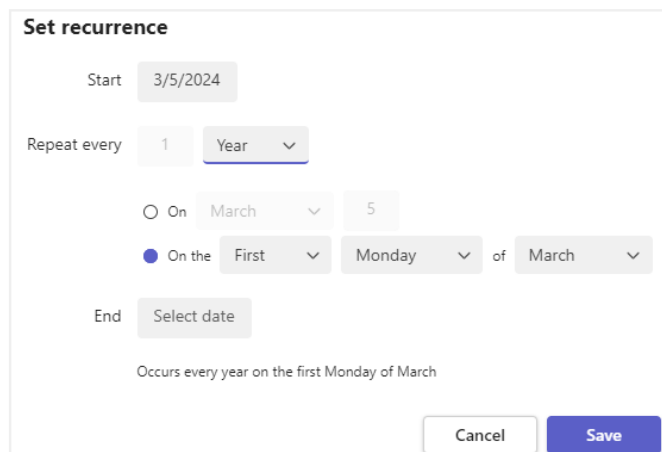
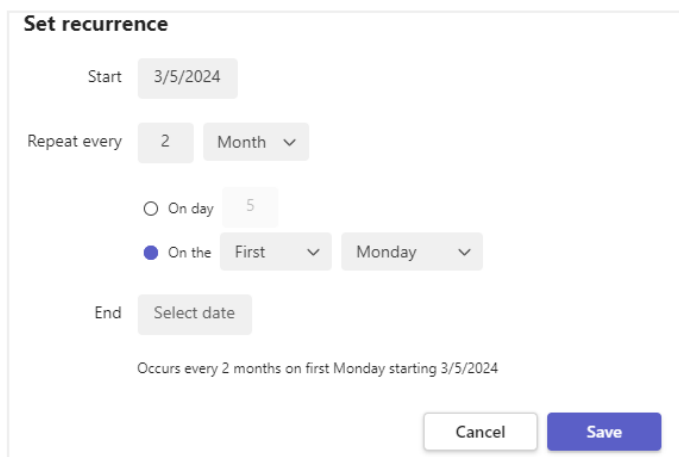
V. REPEAT OPTION - For repeat option, if you would like to set a repeating invite, click on the dropdown arrow next to “Does not repeat” and select the option from the dropdown menu, if you need to set it to end on a particular date or repeat with a certain frequency (such as every 2nd week or every 4 months) then click on “Custom”



In the “Set recurrence” dialogue you can select the start date, frequency, end date and interval (day/week/month/year):

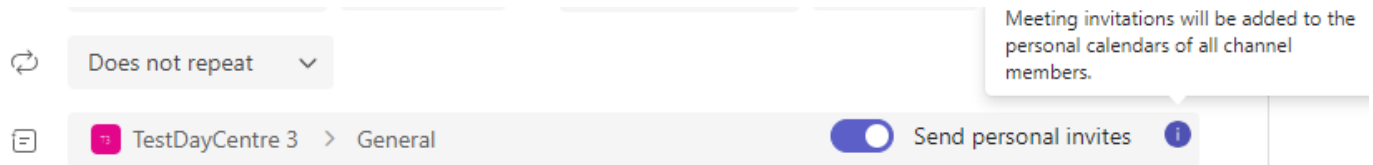


- a) Frequency
- b) Interval (day/week/month/year)
- c) For weekly recurrence you can select the day of the week the meeting, for monthly – you can select the day (5th of every month) or the number of the day and day of the week (First Monday of every month), for yearly – month and date of the day (5 March every year) or the number of the day + day of the week + month (every First Monday of March yearly)



- d) Choose the end date for the repeating meeting.

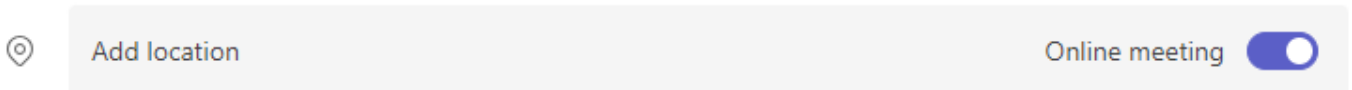
VI. CHANNEL - Select a channel in teams and under the channel's name select 'General' if you wish to post the link to the meeting in the channel. If you want to include everyone in that channel you must also toggle the option to "Send personal invites". Meeting invitations will be added to the personal calendars of all channel members.



This feature is very useful when you have a team where all members are the invitees and meetings' record keeping is essential, as you can use the channel to do the following:

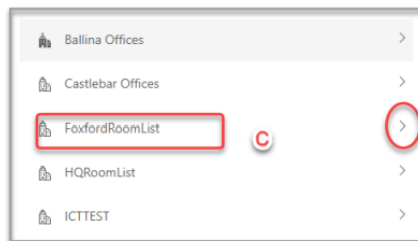
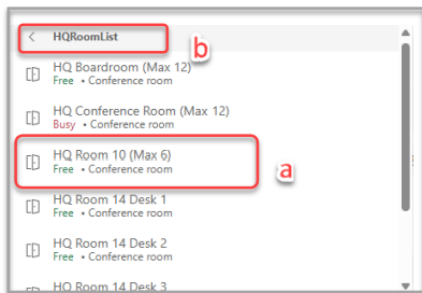
- * chat to everyone in the team/channel
- * access/store records of meetings, attendance, copies of mediums used (such as whiteboard), if you chose the option to record the meeting its recording will automatically be stored in the channel under Files > Recordings
- * start meeting from channel (no need to try to find the invitation, you can use the link in the channel)

VII. LOCATION – choose a meeting room, type in the name or leave it blank



Note: if you added a channel in step #VI then the "Online meeting" toggle will not be visible, it becomes an automatic MS Teams meeting.

If you had previously used any meeting rooms, this field (once you click into it) will display recently used rooms, from which you can pick one that you'd like to use:



- a) pick a room you want
- b) if it's not on the list or you need to switch to another location, click on the link/arrow above
- c) select the location and click on the arrow to show the full list of rooms

For guidance on room booking in Outlook you can refer to [How to book a room in Outlook](#) on the training website.

VIII. ONLINE MEETING – "Online meeting" toggle is set to ON by default, and you also get additional options that can be set for an online meeting, such as Security, Audio & Video, Engagement, Roles and Recording & transcript:

Meeting options



Some options may be locked. [Learn more](#)

Security

- Audio & video
- Engagement
- Roles
- Recording & transcript

Security

- Who can bypass the lobby? (i) People in my org and guests ▼
- People dialing in can bypass the lobby ☐
- Attendees with a registration link can bypass the lobby (i) ☐
- Who can admit from the lobby Organizers, co-organizers, and presenters ▼
- Enable Green room (i) ☐

Audio & video

- Allow mic for attendees (i) ☑
- Allow camera for attendees (i) ☑

Save

Explanation of these options can be found here - <https://support.microsoft.com/en-us/office/meeting-options-in-microsoft-teams-53261366-dbd5-45f9-aae9-a70e6354f88e>

IX. DETAILS – provide any additional details about the meeting such as additional location details, agenda, notes, etc.

X. AGENDA/NOTES/FOLLOWUP – you can use this field to add a Loop instance with agenda, notes and or followup:

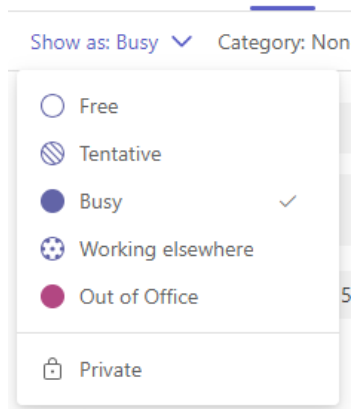
The screenshot shows a Microsoft Loop meeting notes card titled "Meeting Notes 1" with a "Just now" timestamp. The card is divided into three main sections: "Agenda", "Meeting notes", and "Follow-up tasks".

- Agenda:** Includes a sub-header "Topic, @name, time allotted" and a list of items.
- Meeting notes:** Includes a sub-header "Add meeting notes" and a list of notes.
- Follow-up tasks:** Includes a sub-header "Add task" and a list of tasks. A "Task apps" button is visible in the bottom right corner.

You can click on “Meeting Notes 1” on the top left corner to open Loop add-in in a separate tab in your browser where you can fill out additional details such as Agenda, Meeting notes and Follow-up tasks, or do it inside the meeting invitation.

Additional information can be found here - <https://support.microsoft.com/en-us/office/take-meeting-notes-in-microsoft-teams-3eadf032-0ef8-4d60-9e21-0691d317d103>

XI. AVAILABILITY

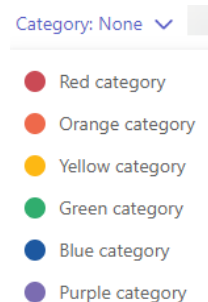


You can select if you want the calendar to display your availability for the meeting duration as one of the following but clicking on the drop-down arrow next to “Show as: Busy” –

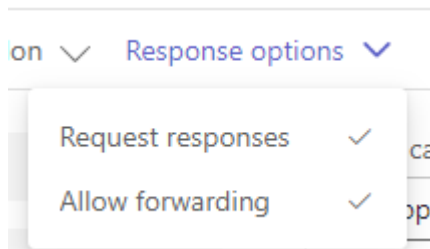
XII. CATEGORY

Category is just a fun colourful way to make your invitations stand out in calendar, it allows you to select a different colour for any invitation.

Note: not available for channel meetings



XIII. RESPONSE OPTIONS



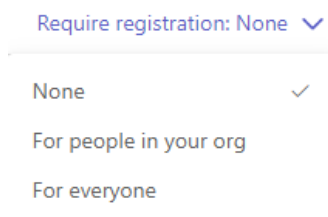
Under “Response options” you can select whether you want to be notified of whether invitees accepted or declined the invitation

(“Request responses”)

and or if you want to allow the invitation to be forwarded by invitees (“Allow forwarding”)

XIV. REGISTRATION

This options allows you to request that people register for the event/meeting. The options are:



New meeting Details **Scheduling Assistant** Send Close

Show as: Busy Category: None Time zone: (UTC+00:00) Dublin, Edinburgh, Lisbon, London Response options Require registration: None

1/15/2025 11:30 AM → 1/15/2025 12:00 PM 30m All day View my work hours

Suggested: No suggestions available.

January 14, 2025 Wednesday, January 15, 2025 TP

All attendees

Required attendees

365Test Available

Add required attendees

Optional attendees

Add optional attendees

Locations

Add location

4

Scheduling Assistant will help you see whether the invitees have conflicting meetings for the time you have chosen, and you can move it to the time that suits most by simply dragging the meeting bar across. Another handy feature is the option to "View my work hours"

To create a meeting/invitation in Outlook follow the guidance here [How to create a meeting in Outlook](#) on the training website.