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Training Guide

Schedule a Teams Meeting

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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 – Schedule a Meeting		
Version	**Date**	**Owner**	**Change**	**Purpose**
V0.1	09 June 2020	Paul Cook-Hannah	Creation of guide	Training Aid
V0.2	10 June 2020	Jo Menary	Minor format changes	Proofread
V1.1	02 July 2020	Rachel Bertenshaw	Name change	Quality
V1.2	08 September 2020	Melanie Ross	Minor format changes	Review
V2.1	01 December 2020	Darren Melling	Adding Calendar feature	Updates
V2.2	6 April 2021	Melanie Ross	Minor format changes	Proofread

Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	19 June 2020	Claire McGrady	IT Training Manager
V2.0	25 September 2020	Rachel Bertenshaw	Lead Trainer
V3.0	11 May 2021	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 service or practice specific information

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Microsoft Teams Meetings

Microsoft Teams meetings combine audio, web and video to be able to collaborate remotely with teams.

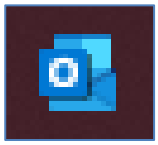
Microsoft Teams Meetings gives users the functionality to Share Screens, Record Meetings, use customisable layouts, Whiteboards and File Sharing.

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 Schedule Meetings in Microsoft Teams.

Schedule a Microsoft Teams Meeting via Outlook

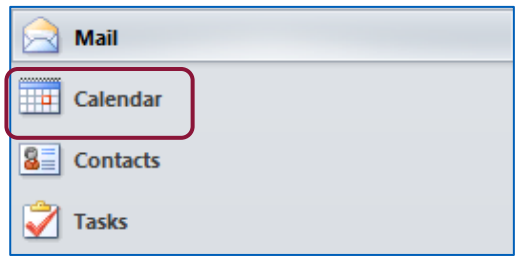
- Open Microsoft Outlook.



- Open the Calendar.

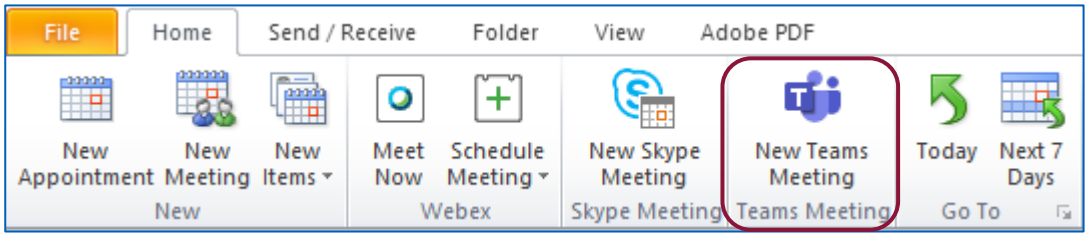
There are two areas within an Outlook calendar where a Teams meeting can be scheduled; from the Calendar or within an Appointment.

- Select Calendar

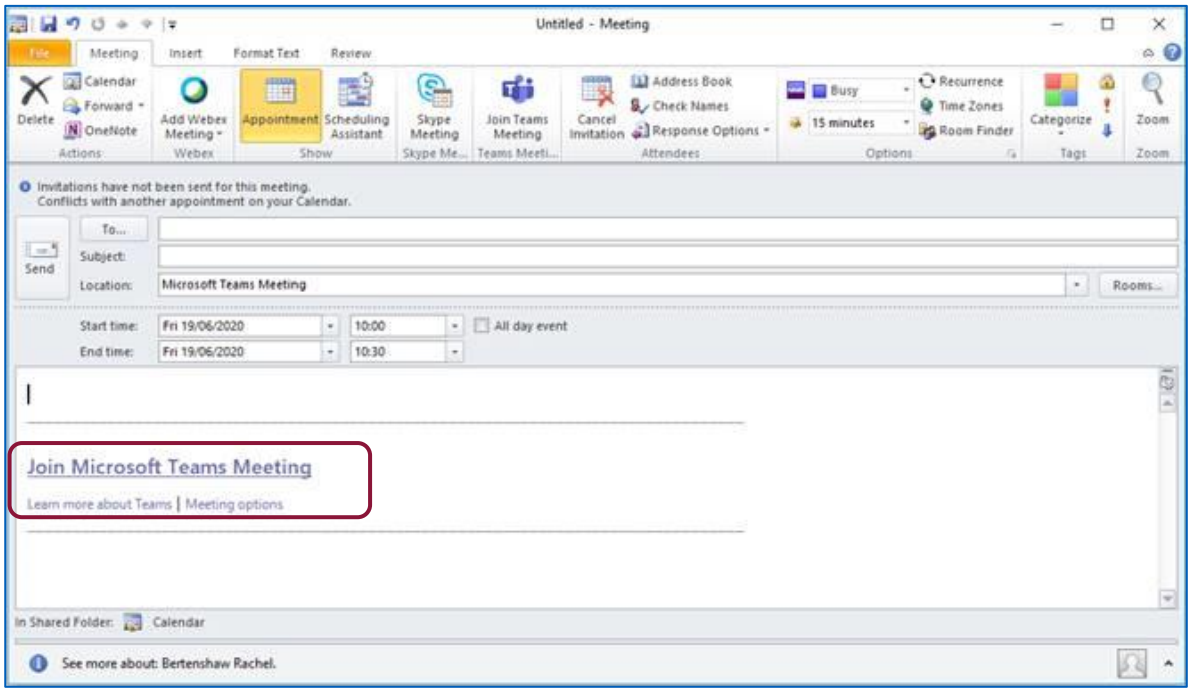


The image will vary depending on the version of Outlook being used.

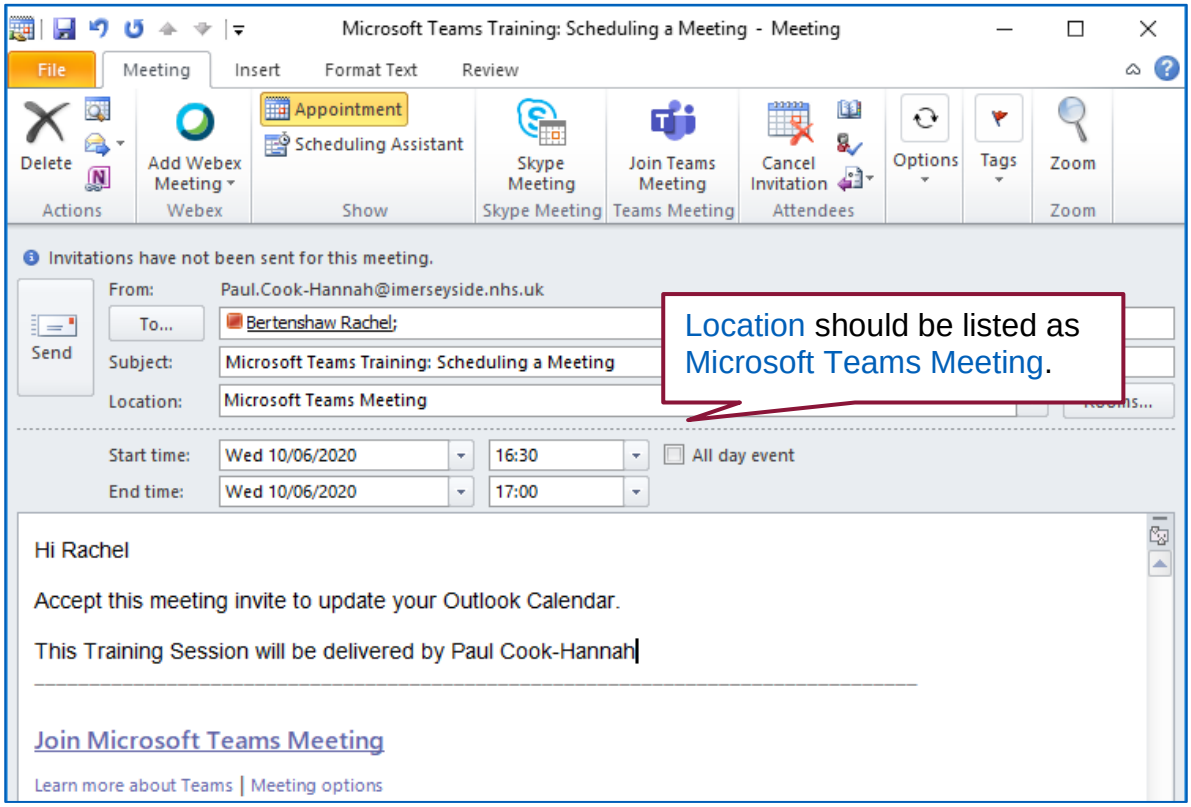
- Click on the New Teams Meeting icon on the ribbon.



An Appointment will open with the joining link in the body of the email.

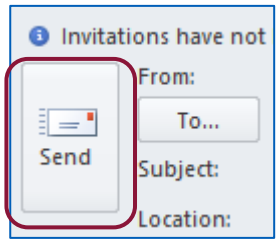


- Add Recipients, Subject and Location.
- Add Meeting Start/End Date and Time.
- Add Text to the Body of the invitation if required.



Once checked, the invitation is ready to send to the recipients.

- Click Send.

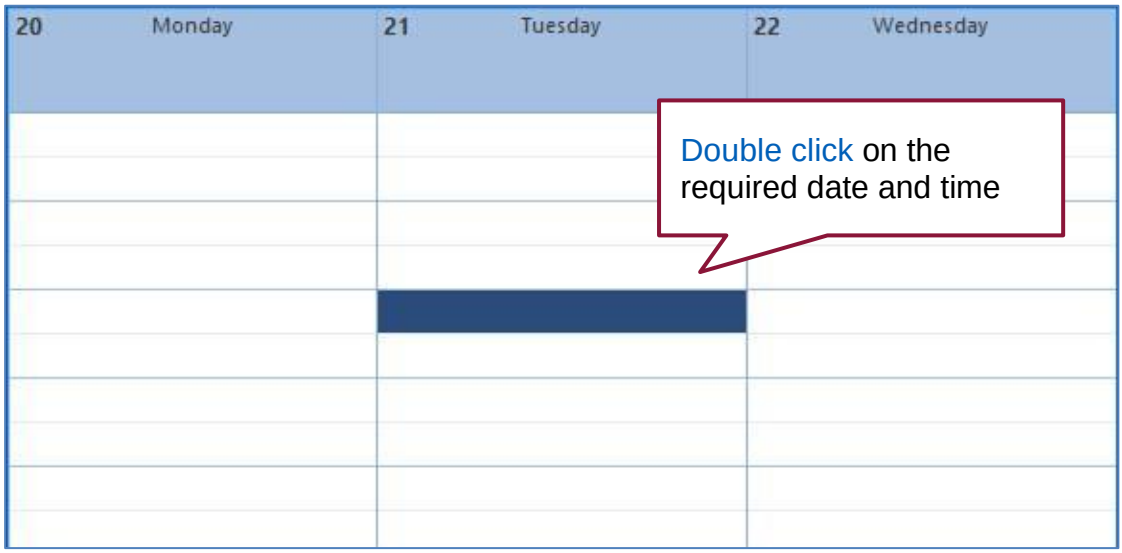


The invitation will be sent to the recipient's Outlook Calendar, and the Sender's Outlook Calendar, along with an email invitation.

Schedule a Meeting from within an Appointment

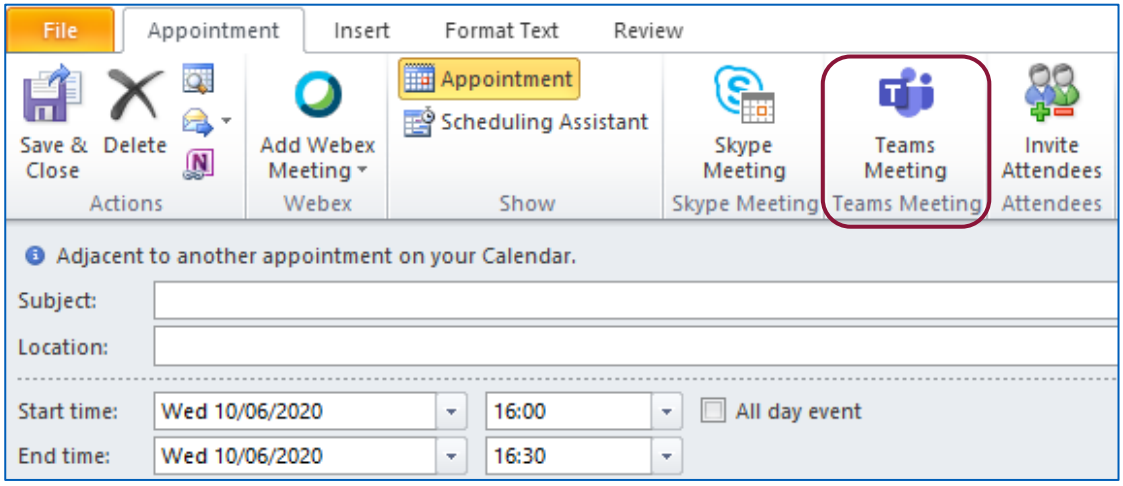
A Microsoft Teams Meeting can also be scheduled from within an Appointment.

- Navigate to the required date and time in the calendar:



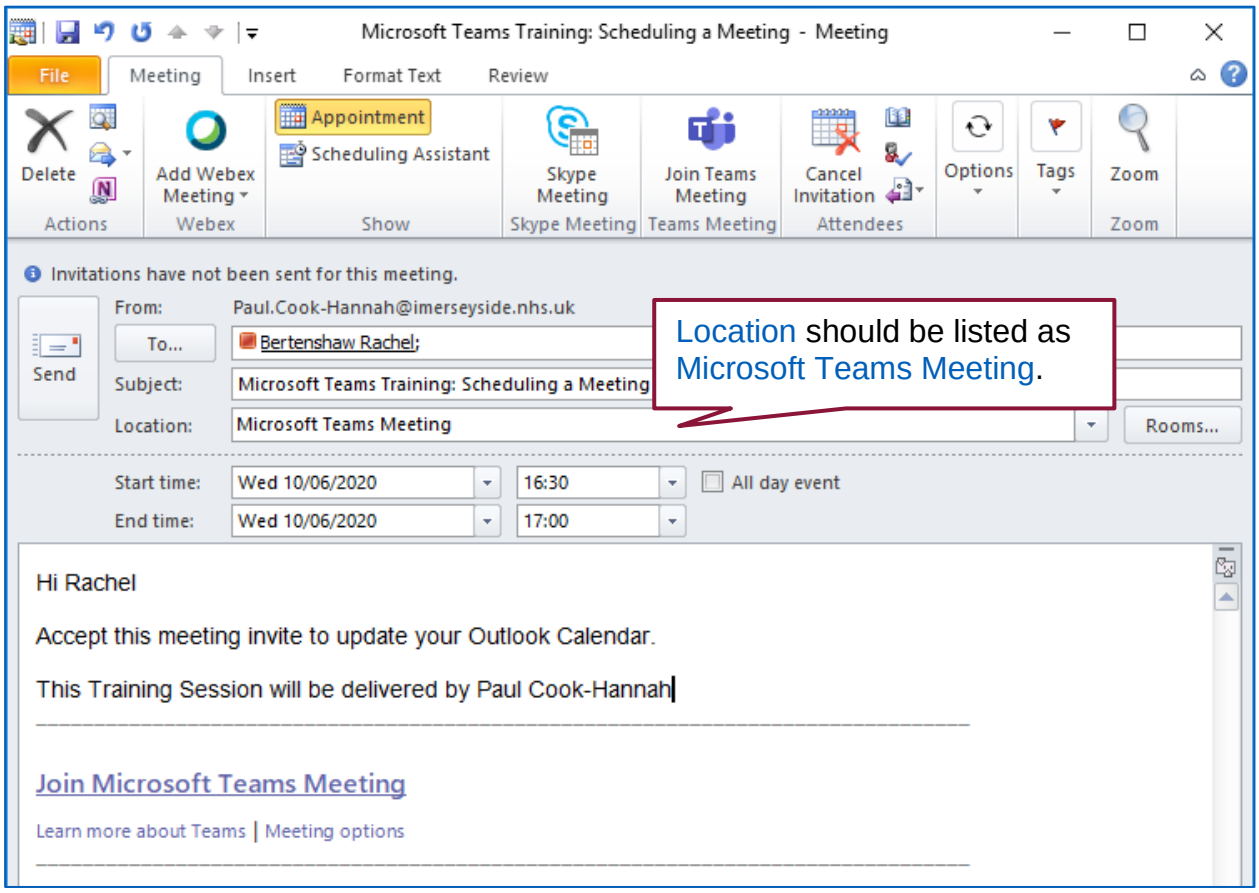
An Appointment will open with the date and time of the meeting prepopulated.

- Click Teams Meeting on the ribbon.



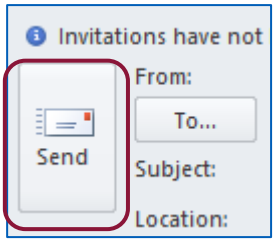
The joining link will be added to the body of the email.

- Add Recipients, Subject and Location.
- Add Text to the Body of the invitation if required.



Once checked, the invitation is ready to send to the recipient.

- Click Send.



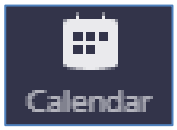
The invitation will be sent to the recipient's Outlook Calendar, and the Sender's Outlook Calendar, along with an email invitation.

Schedule a Meeting using the Teams Calendar App

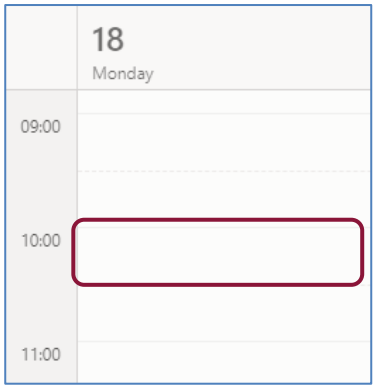
Meetings can be arranged from within Teams using the Calendar App.

The App will only be available if the email account has been migrated to Exchange Online.

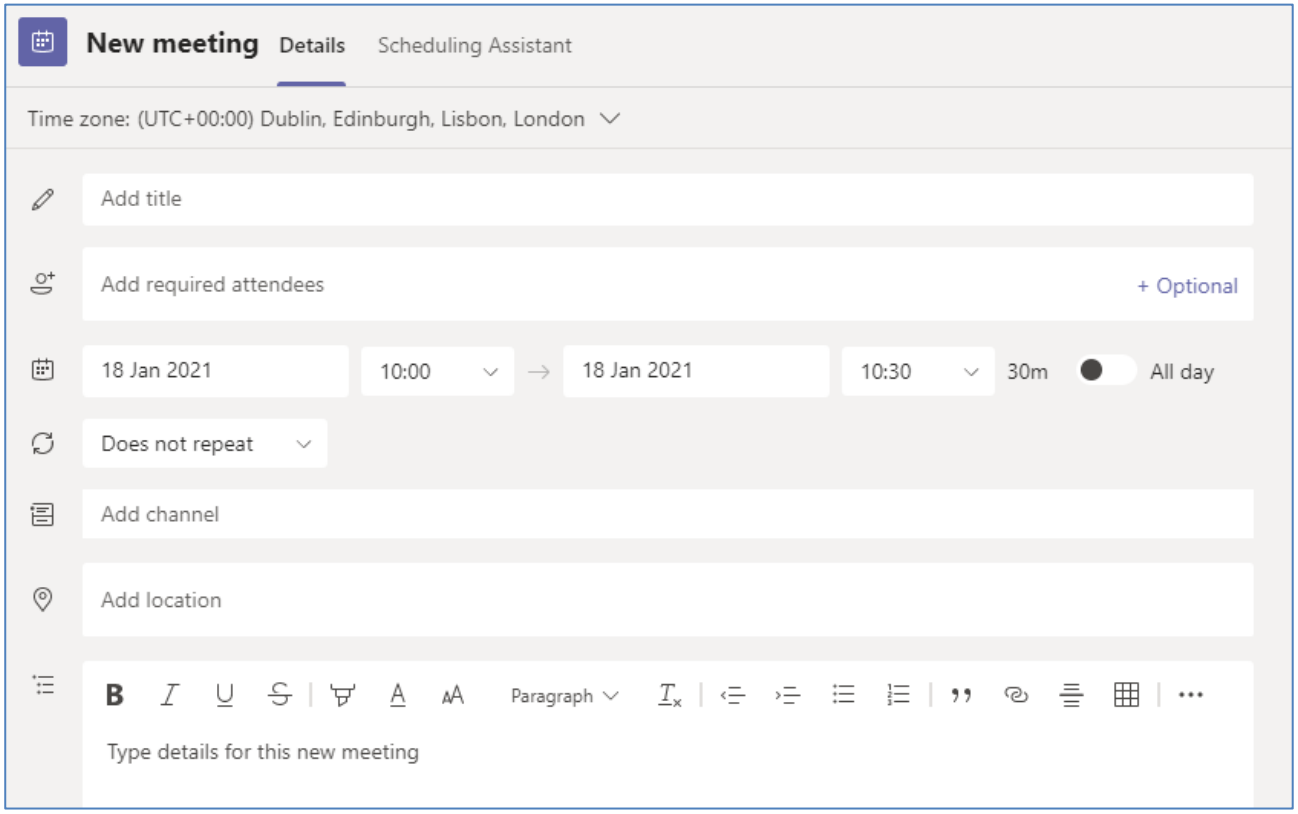
- Select the Calendar app from the Navigation Pane



- Select the desired start time in the Calendar



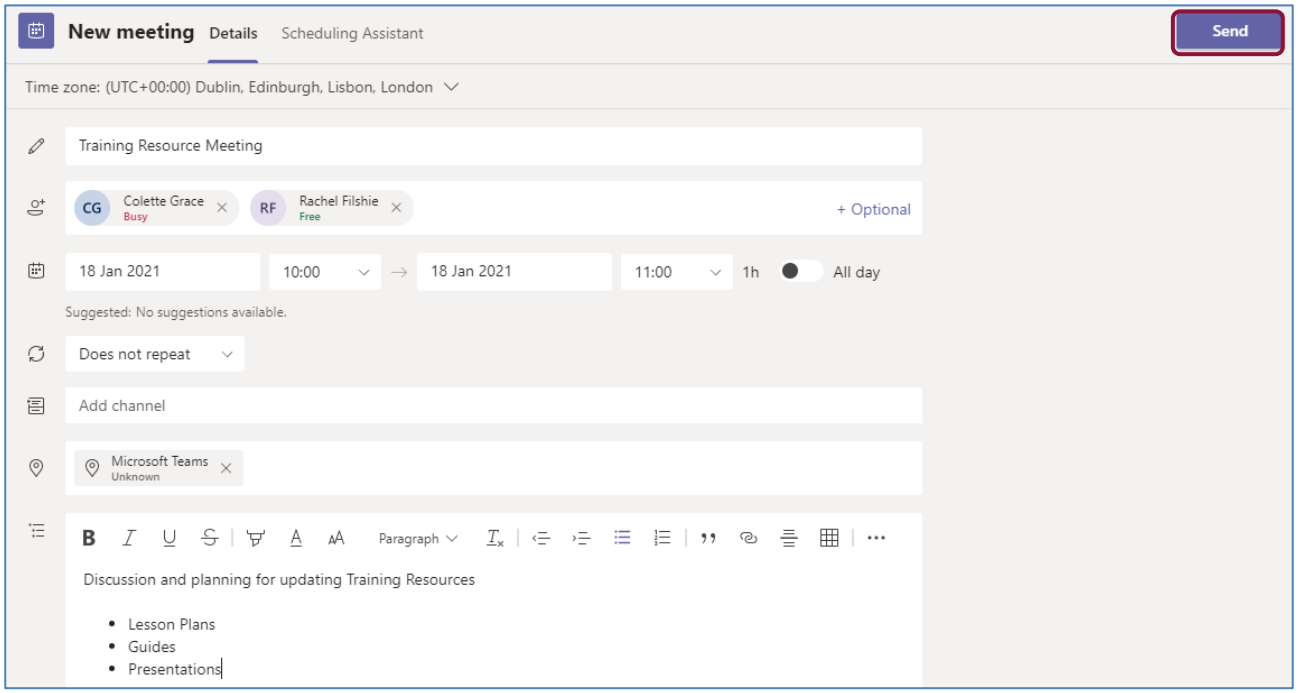
The New Meeting window will open:



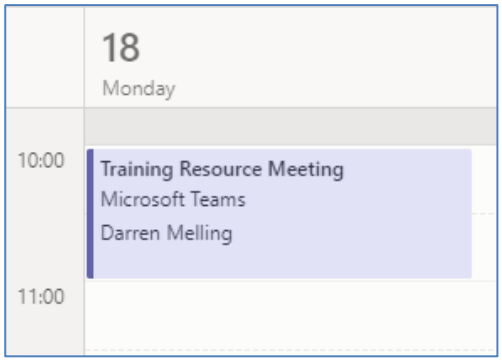
- Add title – Enter the Subject of your Meeting.
- Add required attendees – Invite delegates you require to your Meeting.
- + Optional – Add Optional delegates to your Meeting.
- Date and Time – adjust the start and end dates of your Meeting or make the Meeting All day.
- Repeat – state whether the Meeting will recur.
- Add channel – Include a Channel in the Meeting invite.
- Add location – Specify where the Meeting will take place.
- Type Details – Add a description of the Meeting, points to be covered etc.

Complete all relevant fields.

- Select Send.



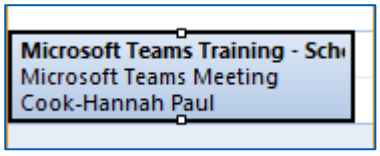
The Meeting now appears in the Calendar and will sync with the Outlook Calendar:



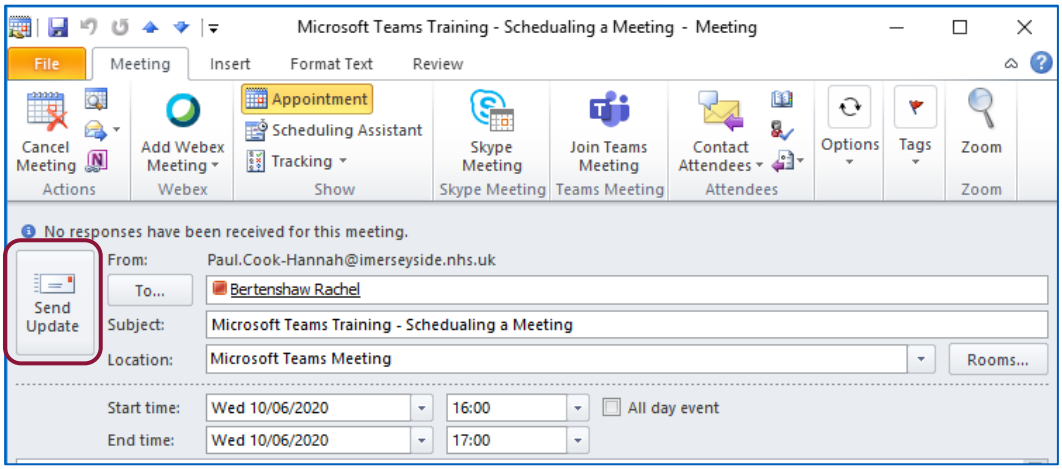
Edit a Microsoft Teams Meeting

If the Host needs to update the date or time, this can be done from the Outlook calendar.

- Open Outlook Calendar.
- Double click the invitation to open.



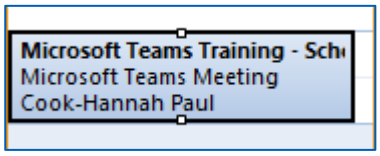
- Make the necessary changes, click Send Update.



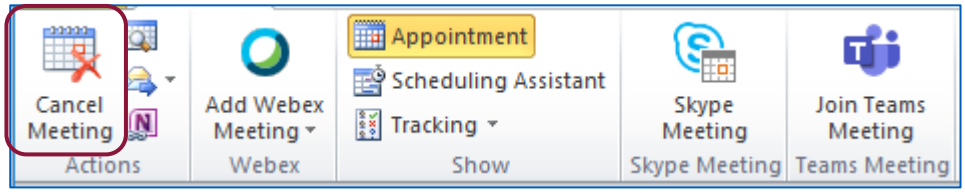
An email will be sent to the recipient and the sender's Outlook Calendar will also show the updated details.

Cancel a Microsoft Teams Meeting

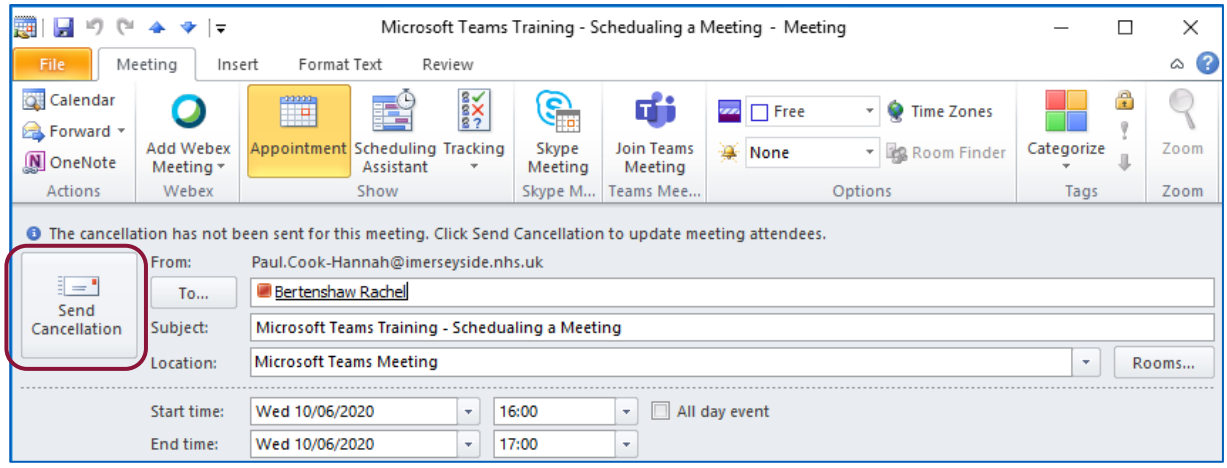
- Open Outlook Calendar and Double click the invatation to open.



- Click Cancel Meeting.



- Click Send Cancellation.



A cancellation email will be sent to the recipient's and the sender's Outlook calendar will also show the cancellation.

Contact Details

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