



University of Kentucky
College of Agriculture,
Food and Environment
Cooperative Extension Service

Microsoft Teams

Part 3: Collaboration and More

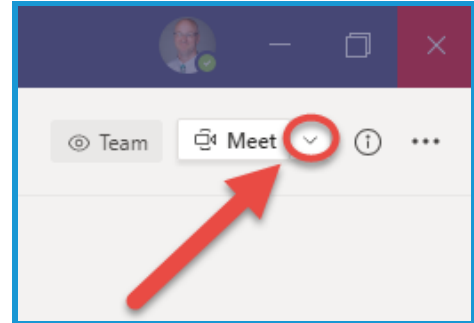
**Any questions or training request
chad.jennings@uky.edu**

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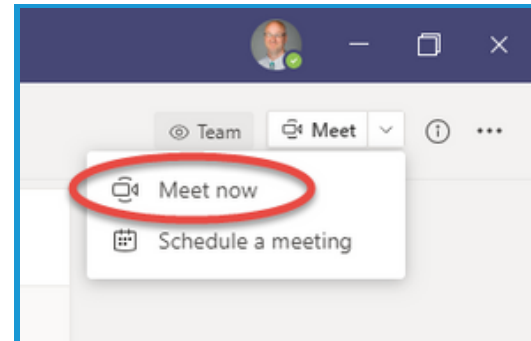
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Section 1A: Video Meeting (Getting Started)

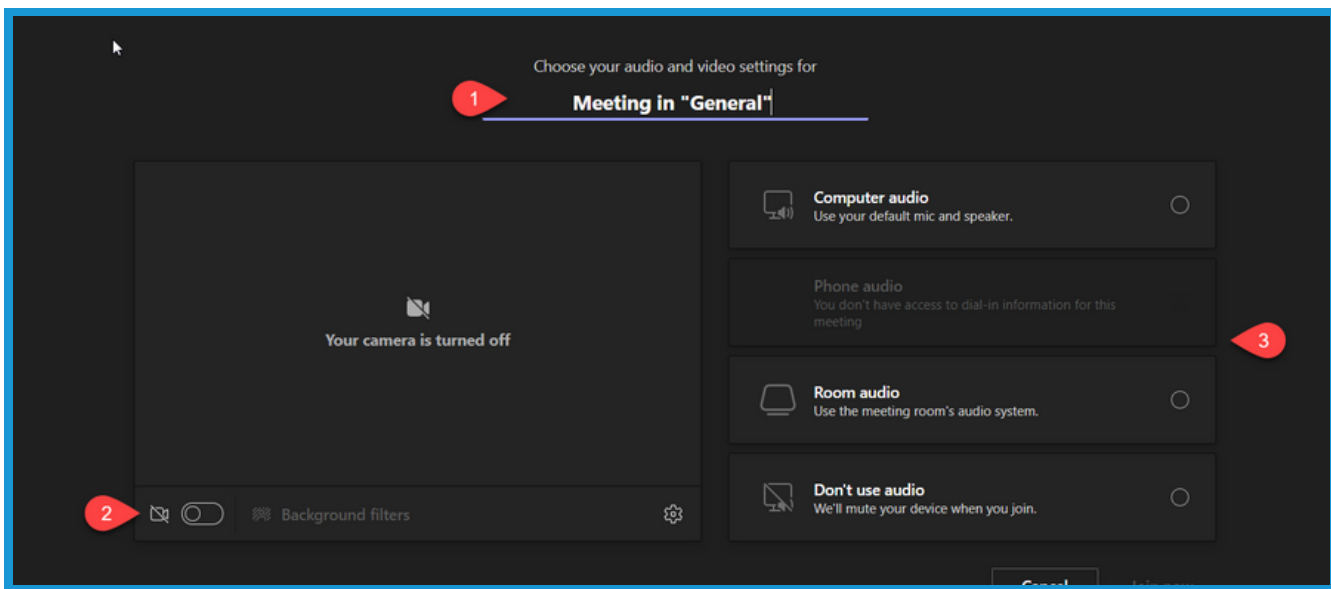
1. In the **upper right hand corner** of a **Teams' Channel**, click the **drop down menu** next to **Meet**.



2. Select **Meet now** to start a video call.

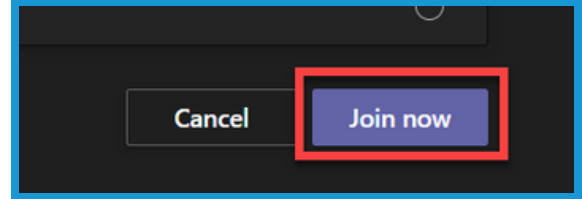


3. In the new window, give your **meeting a title (1)**. Also, decide if you want to start the meeting with your **camera on or off (2)**. Finally, choose your **audio source (3)**.

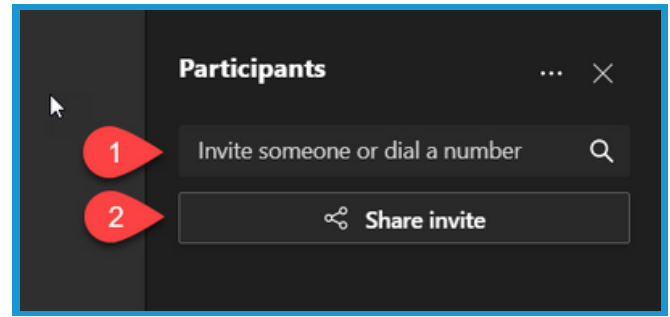


Section 1A: Video Meeting (Getting Started)

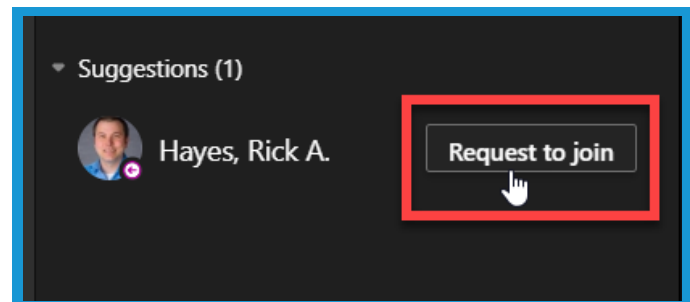
4. Click **Join now** in the **lower right corner** of the window after all settings have been established, and you are ready to start the meeting.



5. Add people to the meeting by **typing their names** into the **field on the right side** of the screen **(1)**. If they are **with UK** their names will **auto-populate**. You can also select **Share invite (2)** to copy the meeting link, or draft an email

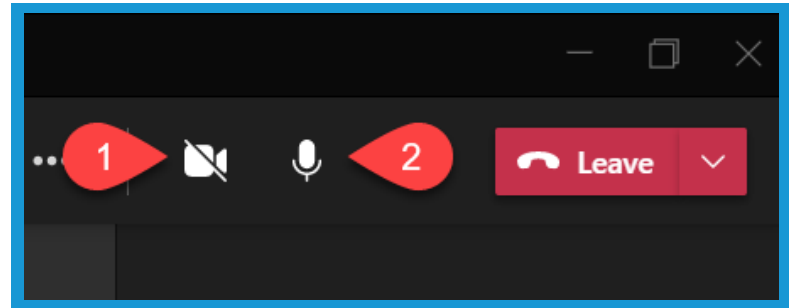


6. In a **Channel**, members of your **Team** will appear under **Suggestions**. Place your mouse over their name, and select **Request to join**.

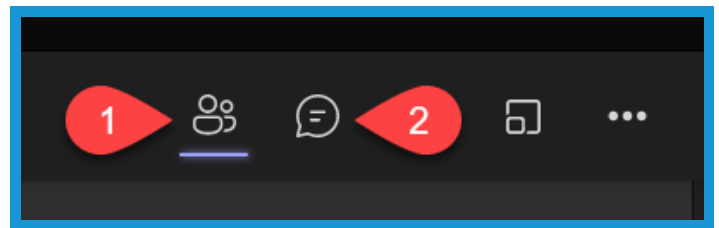


Section 1B: Video Meeting (The Controls)

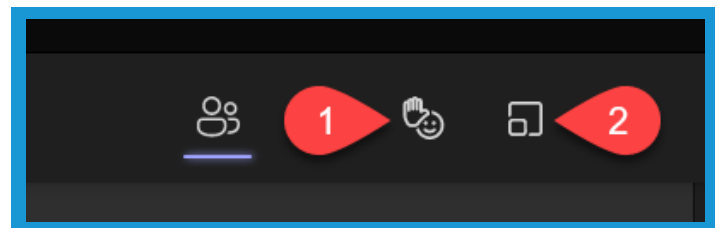
1. Click the **camera button** to turn the **camera on/off (1)**.
Click the **microphone (2)** to **mute your microphone**.



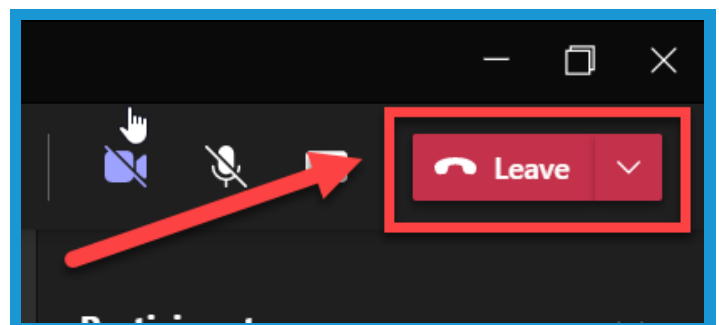
2. Select the **Hide Participants button (1)** to hide the participants window. Select the **Conversation button (2)** to activate the chat area.



3. Select the **Reaction button (1)** to raise your hand or post an emoji. Select the **Breakout Room button (2)** to create, enter, or send participants to a breakout room.

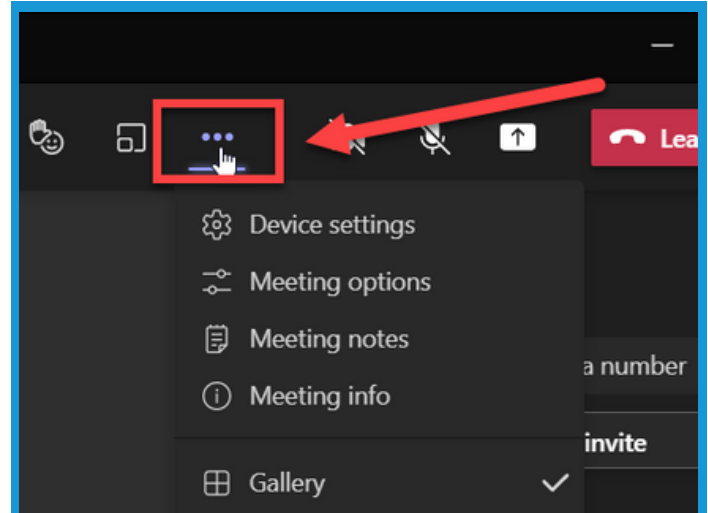


4. Select the **Leave button** to leave the meeting. If you are the host, click the **dropdown** to the **right** of the button to either leave the meeting or end the meeting for everyone.

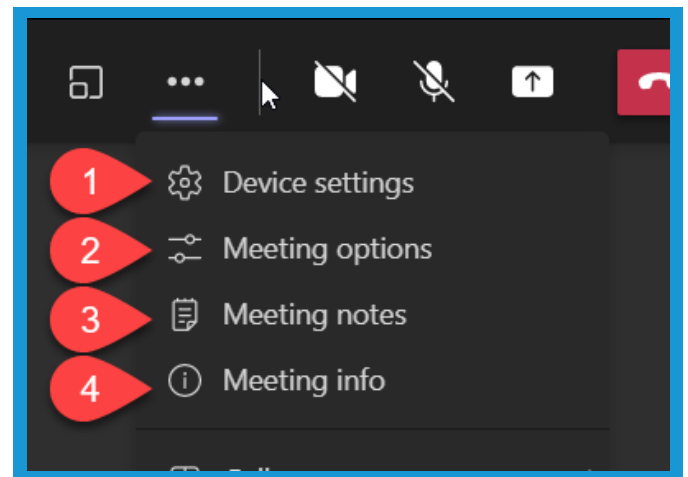


Section 1B: Video Meeting (The Controls)

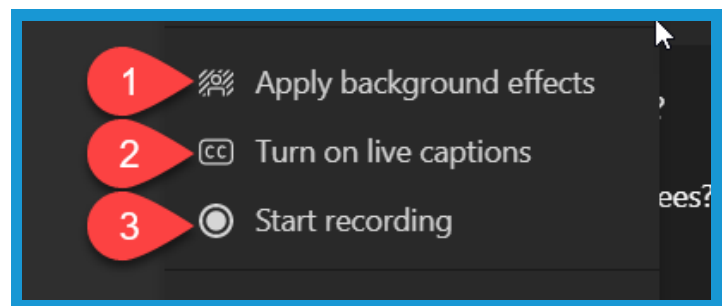
5. Click the **More Actions** button to display **additional meeting options**.



6. **Device Settings (1)** to adjust your camera or microphone. **Meeting options (2)** to disable the waiting room or participants mics and cameras. **Meeting Notes (3)** to take to type out notes from the meeting. **Meeting info (4)** will give you access to the meeting link and phone number for the meeting.

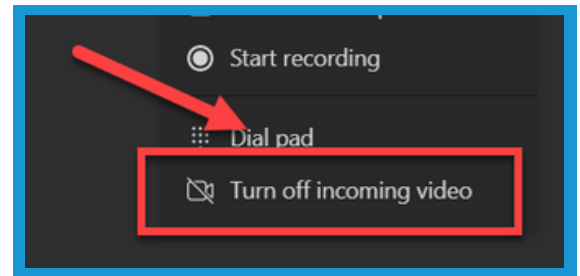


7. **Apply background effects (1)** will allow you to hide your surroundings using a Teams provided background, or you can upload your own. **Turn on live captions (2)** to activate captioning. **Start recording (3)** can be selected to produce a video of the meeting taking place.



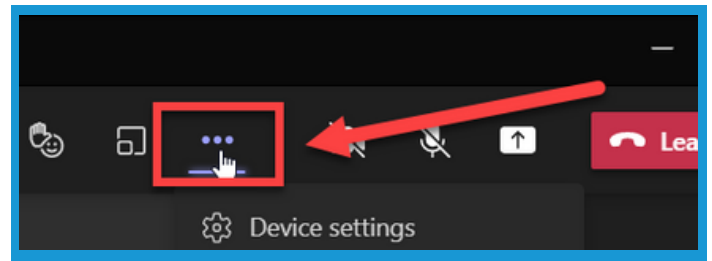
Section 1B: Video Meeting (The Controls)

8. By default, **Turn off incoming video** is turned on to save bandwidth on your meeting. This is very helpful if you have a slow internet connection. You can click this button to turn on everyone's camera as they enter the meeting.

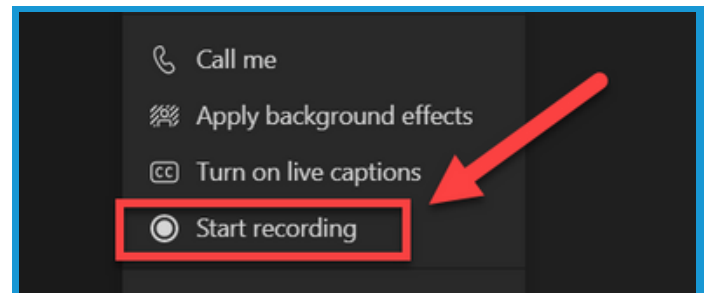


Section 1C: Video Meeting (Recording)

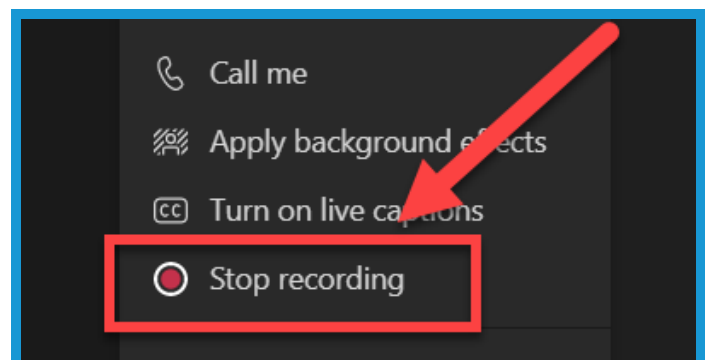
1. Click the **More Actions** button at the top of the screen.



2. Select **Start recording** to begin recording.

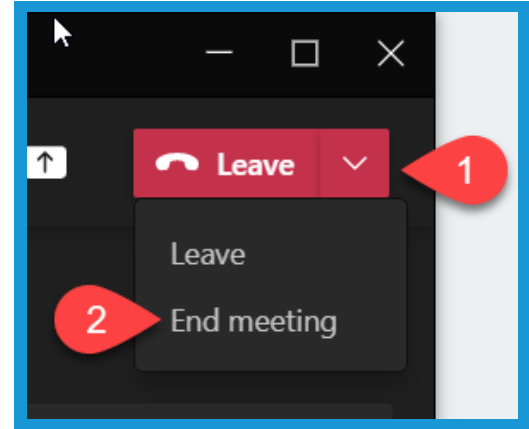


3. When the meeting has concluded, **repeat step 1**, and then select **Stop recording**.

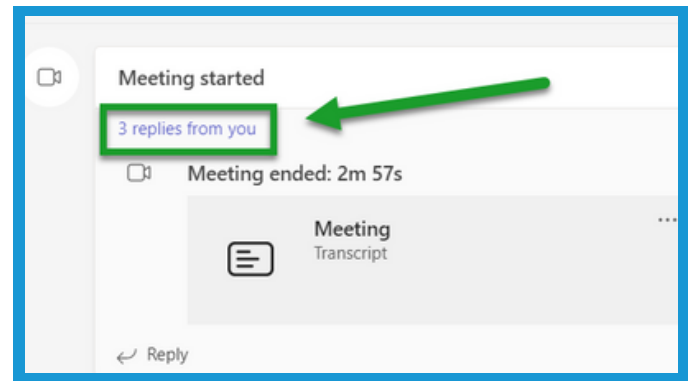


Section 1C: Video Meeting (Recording)

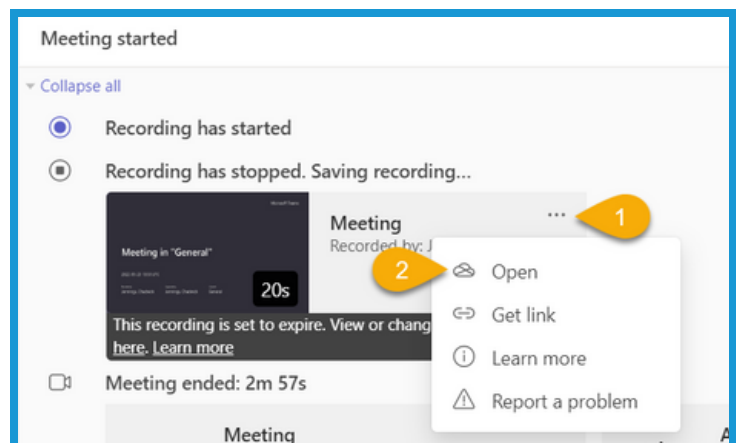
4. Select the dropdown menu to the right of the **Leave** button (1), and then select **End meeting** (2).



5. The **video** will appear at the **bottom** of the channel's chat area in a new conversation thread. **If you do not see the video click the replies button.**



6. Click the **three dots** (1) to the right of the video. Then select **Open** (2). Follow the steps to login to your University of Kentucky account.



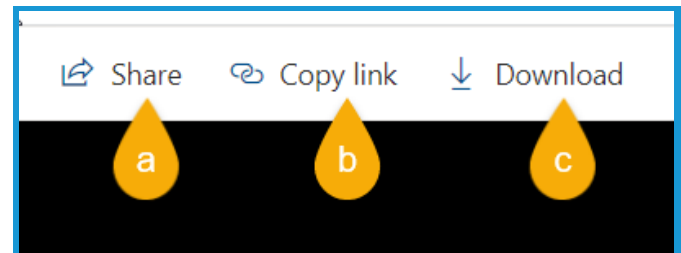
Section 1C: Video Meeting (Recording)

7. In the upper left corner you have three options on how to share the video.

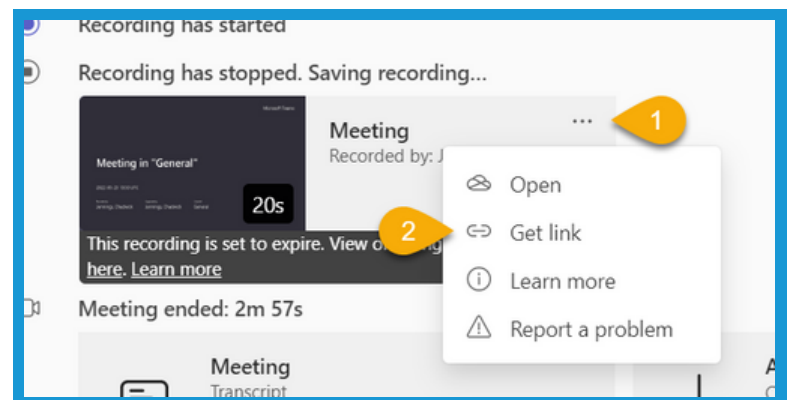
a. Select **Share** to send an email containing the link info. You can keep track of who is watching, and to adjust permissions.

b. **Copy link** will allow you to post a link to a communication of your choosing.

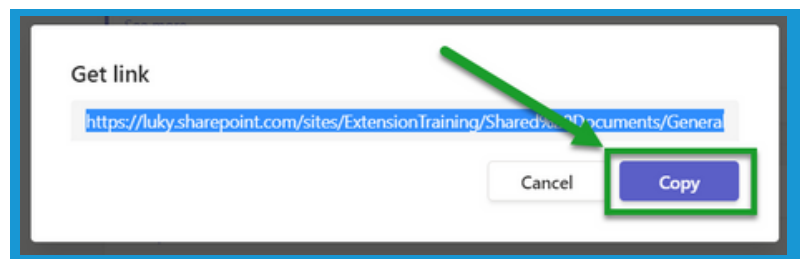
c. **Download** will produce an Mpeg4 file that you can share or post to another location



8. Back in the chat area, select the **three dots** to the right of the video **(1)**. Select **Get link (2)** to obtain a URL that can be shared with other University of Kentucky employees.

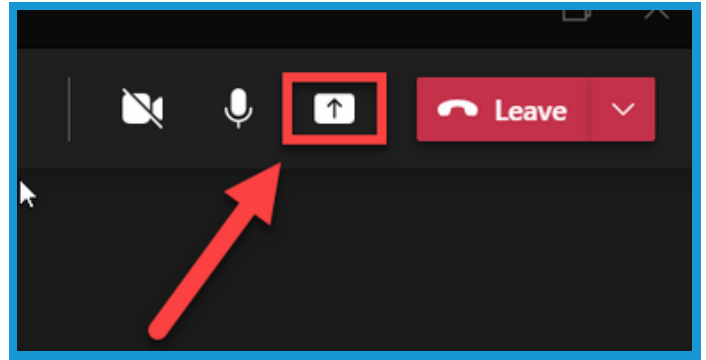


9. Select **Copy** in the lower right corner, and paste the link into the communication of your choosing. Please note that the user who clicks on the link will have to login to their UK Microsoft account.

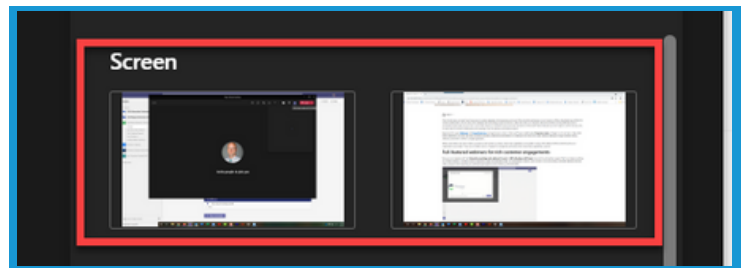


Section 1D: Video Meeting (Sharing your Screen)

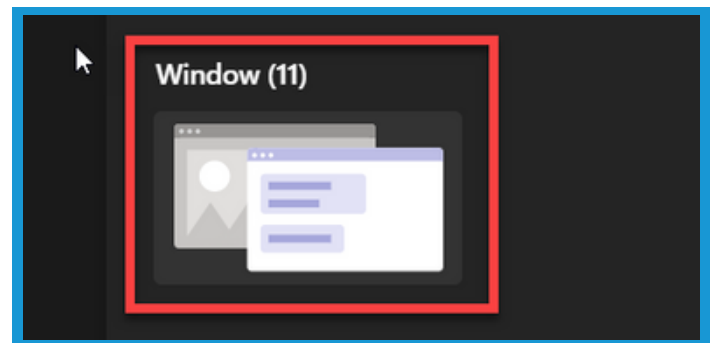
1. Click the **Share** button on the control panel.



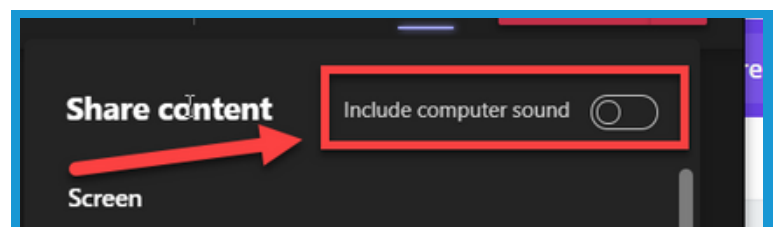
2. Select **Screen**, select which screen you would like to share. These options mean the participants will be able to view everything on your monitor.



3. Select **Windows** to get a list of all the open windows on your screen. If one of these is selected, the participants will only be able to see that specific window and not the other activity on your computer.

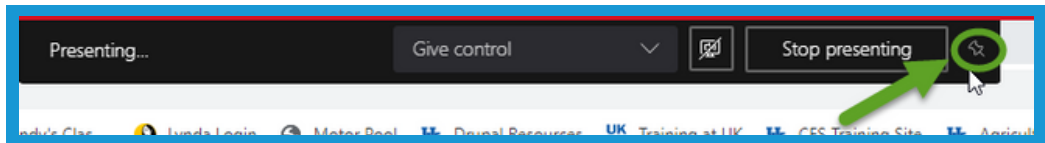


4. Select **Include computer sound** at the top of the dropdown menu if you are going to play audio while sharing your screen. If this is not turned on, the **participants will not be able to hear** what you are playing.

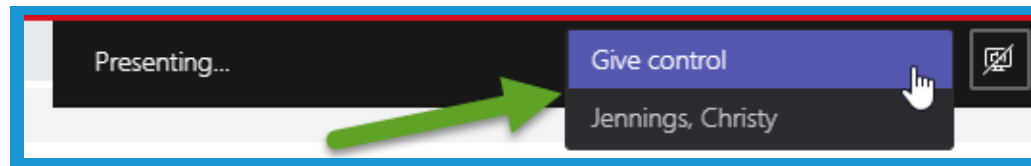


Section 1D: Video Meeting (Sharing your Screen)

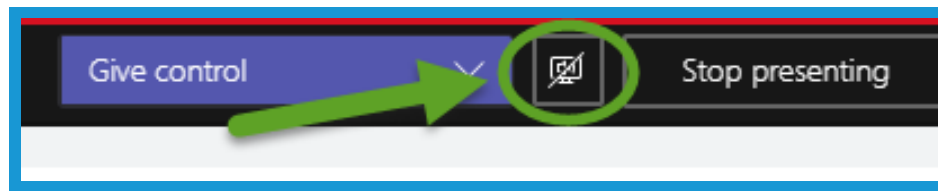
5. Place your **mouse** in the **upper middle** of the **screen**, and click on the **thumbtack** to **lock** the **control panel** to the **top** of the **screen**.



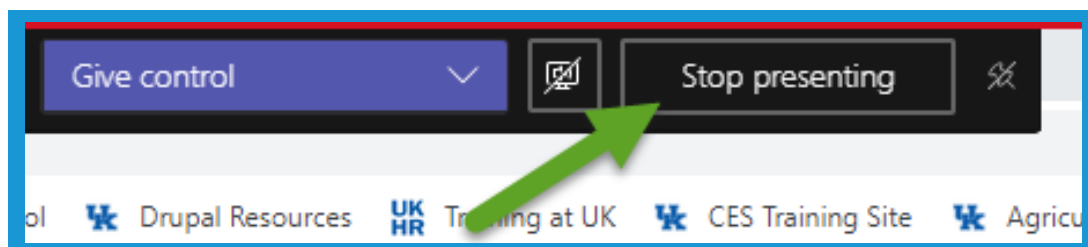
6. Click the **Give Control** drop down menu, and click on a **meeting participant** to **give them control** of your screen.



7. Click the **Share audio** button to **mute** or **unmute** your computer's audio.

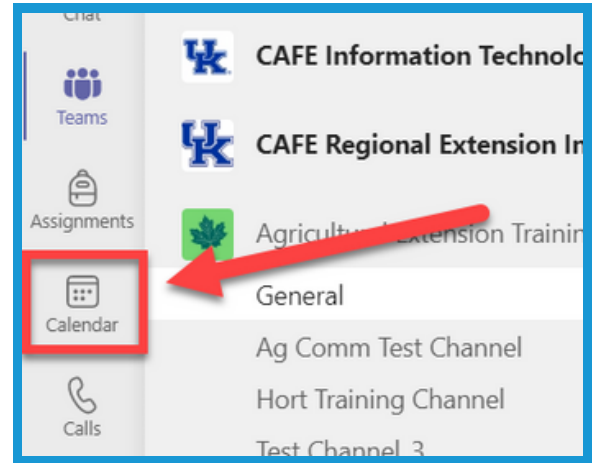


8. Click **Stop Presenting** to **stop sharing** your **screen** or **application**.

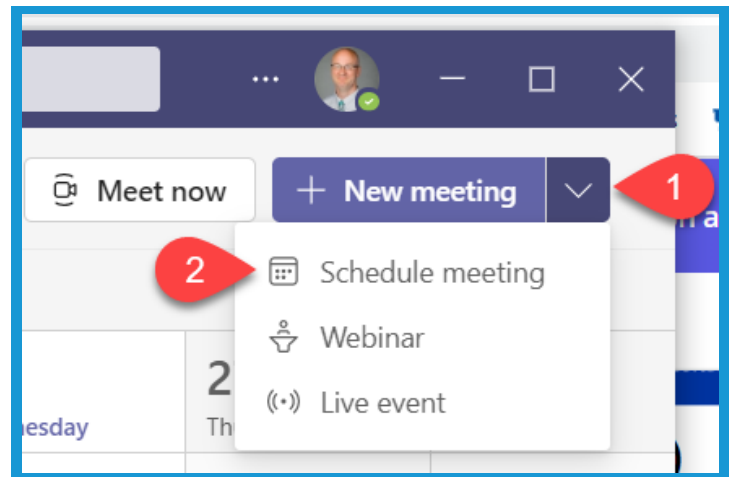


Section 2A: Scheduling Meetings (Basic)

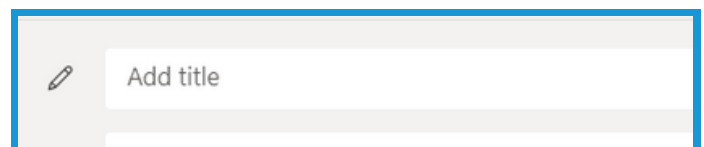
1. Click the **Calendar** button in the navigation pane on the left side of the screen.



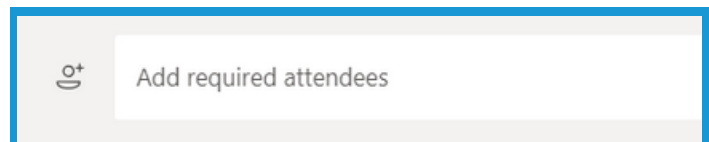
2. Select the dropdown in the upper right of **New meeting (1)** in the upper right corner. Select **Schedule meeting (2)**.



3. In the Title field, give your meeting a name.

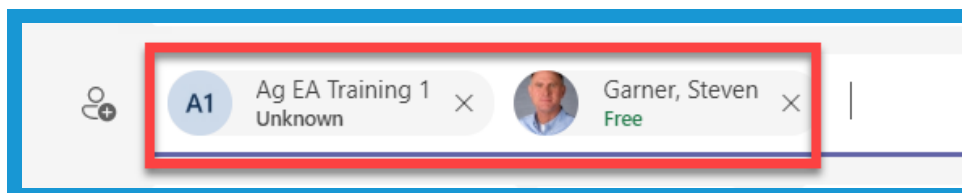


4. In the **attendees field**, type in the name of the people you are wanting to invite. If they are within UK, they will **auto-populate**. **You can also add a group from Outlook as well.**

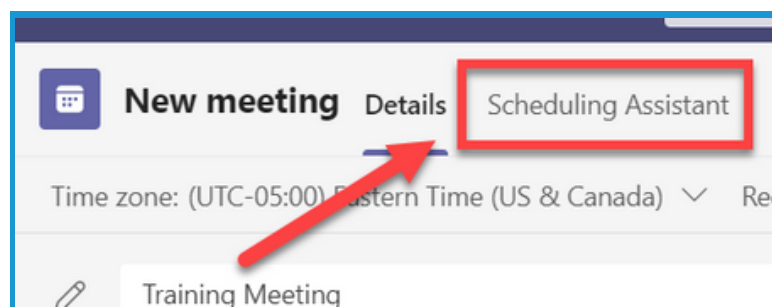


Section 2A: Scheduling Meetings (Basic)

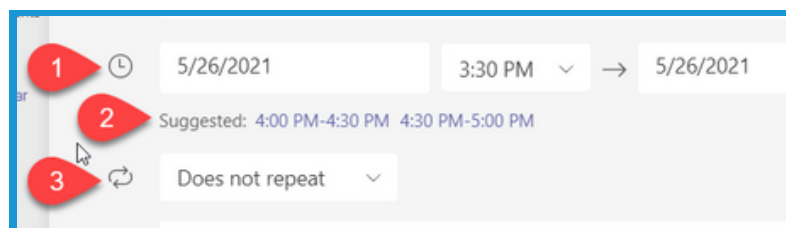
5. As you enter attendees, you can see their availability listed below their names.



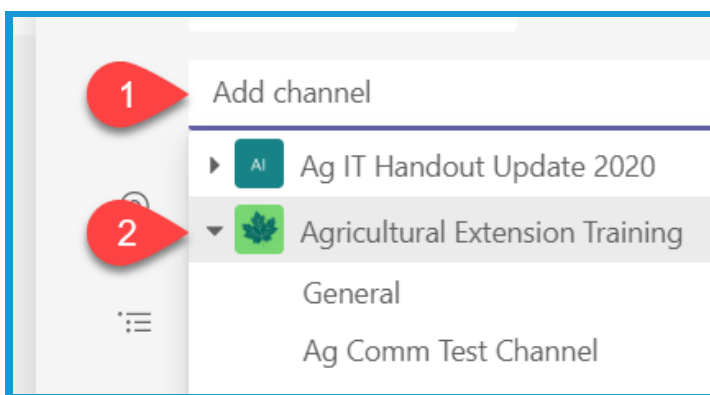
6. To take an expanded look at availability, select the **Scheduling Assistant** at the top of the screen.



7. Select the **date and time (1)** for the meeting. Below the date field you will see **suggested times (2)** that you can select. You can also choose whether or not the meeting will be **reoccurring (3)**.

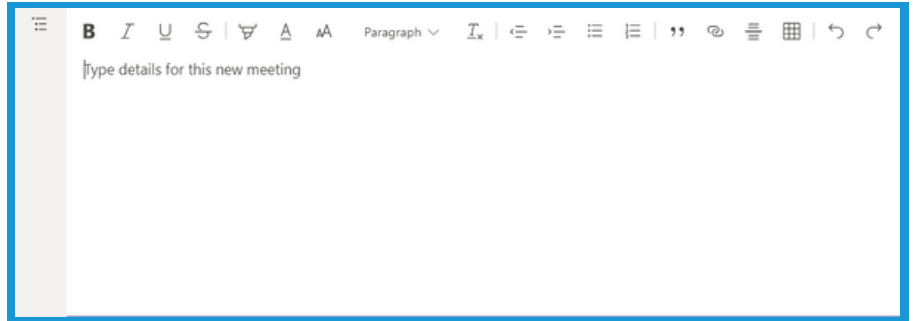


8. To select a specific channel, click in the **Add channel field (1)**. Select the **arrow to the left of the Team name (2)**, and select a channel. **If this step is not completed files shared, recordings, and meeting notes will be posted in the host's private chat section.**

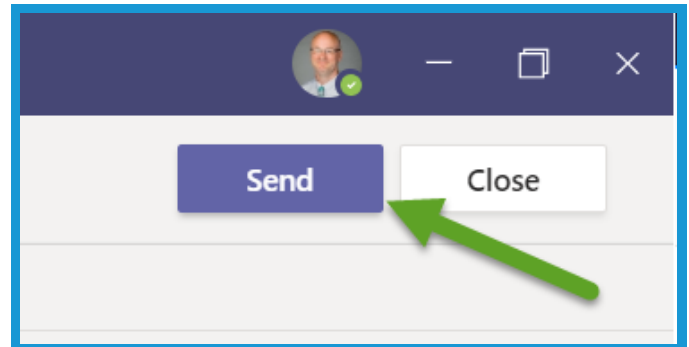


Section 2A: Scheduling Meetings (Basic)

9. In the **body section**, you can type out specific details for the meeting. You can also **format** the body by using the tools at the **top of the field**.

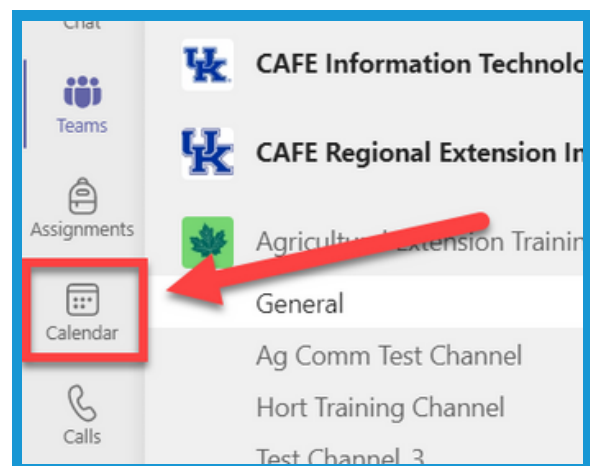


10. Click **Send**, in the **upper right** to **send out** the invite. **Meeting information** will also appear in the **attendee's Outlook email and calendar**.



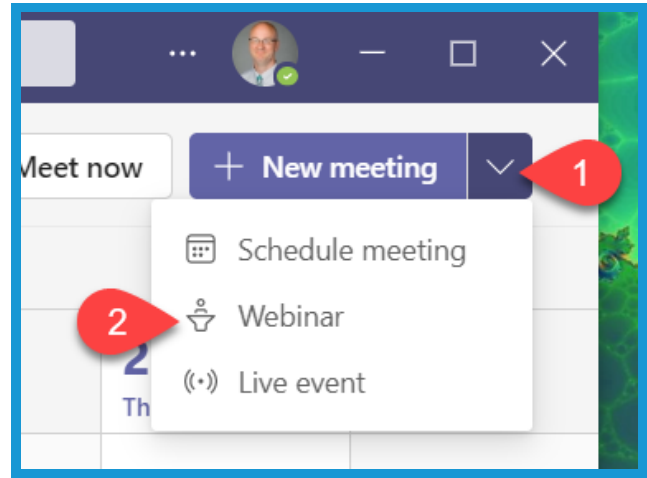
Section 2B: Scheduling Meetings (Webinar)

1. Click the **Calendar** button in the navigation pane on the left side of the screen.

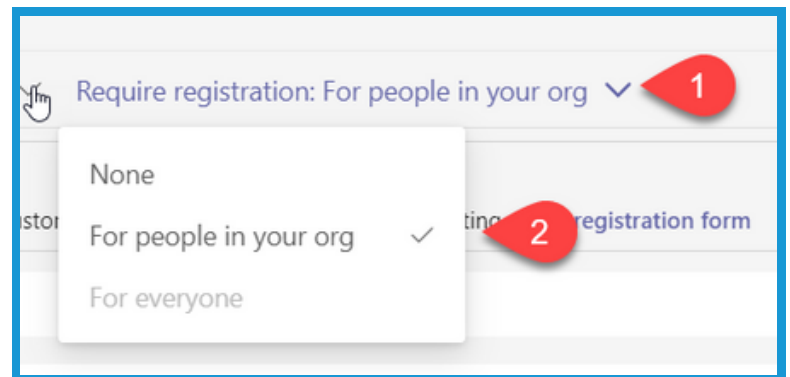


Section 2B: Scheduling Meetings (Webinar)

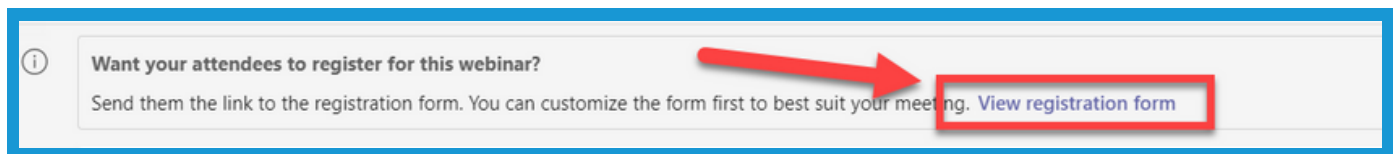
2. Select the dropdown in the upper right of **New meeting** (1) in the upper right corner. Select **Webinar** (2).



3. Click the **Require registration** dropdown (1) in the upper left to **turn off registration** (2).

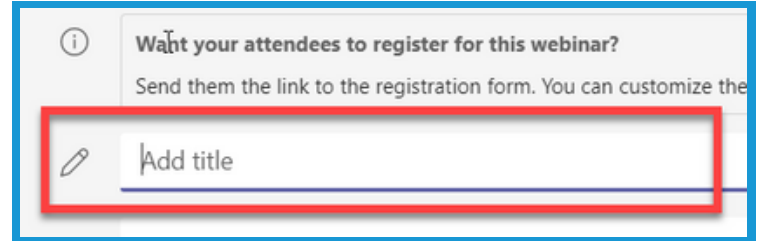


4. Click the **View registration form** button at the top of the screen to modify the form or obtain the registration link.

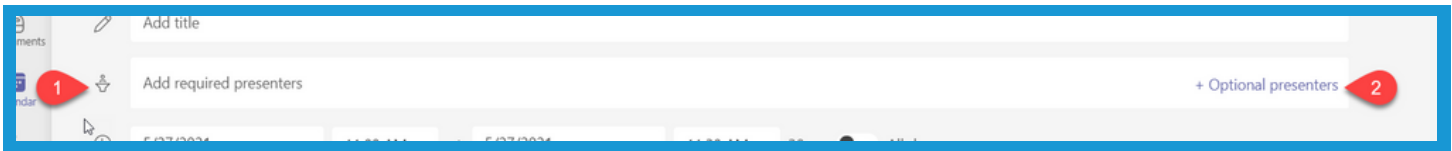


Section 2B: Scheduling Meetings (Webinar)

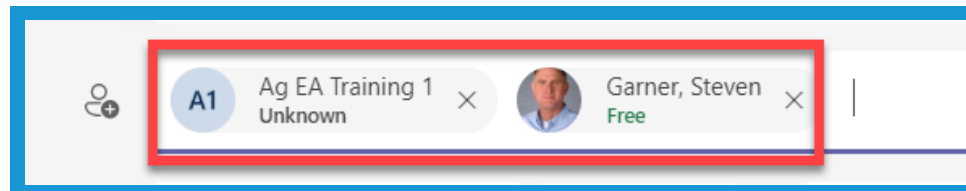
5. Click in the **Add title** field to give your Webinar a name.



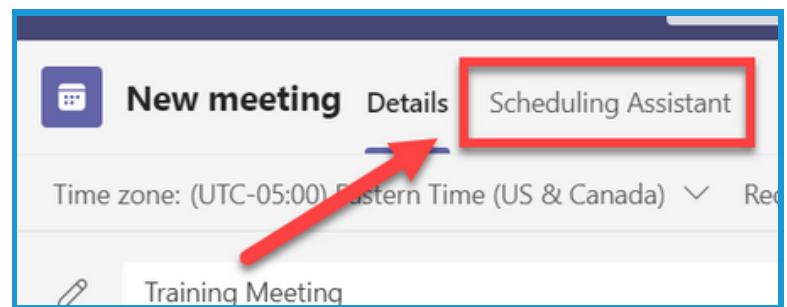
6. Click in the **Add required presenters (1)** to type in the presenters' names. If they are within UK, they will **auto-populate**. **You can also add a group from Outlook as well**. Click **Optional presenter (2)** to add secondary presenters.



7. As you enter presenters, you can see their availability listed below their names.

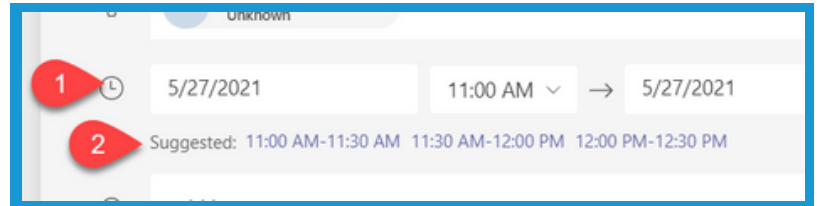


8. To take an expanded look at availability, select the **Scheduling Assistant** at the top of the screen.

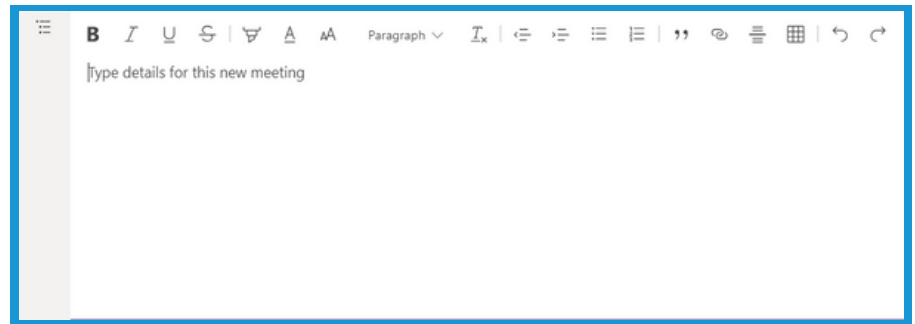


Section 2B: Scheduling Meetings (Webinar)

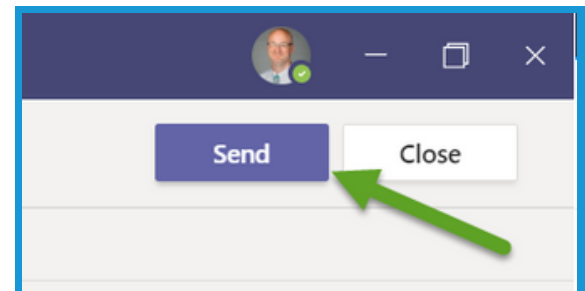
9. Select the **date and time (1)** for the meeting. Below the date field you will see **suggested times (2)** that you can select.



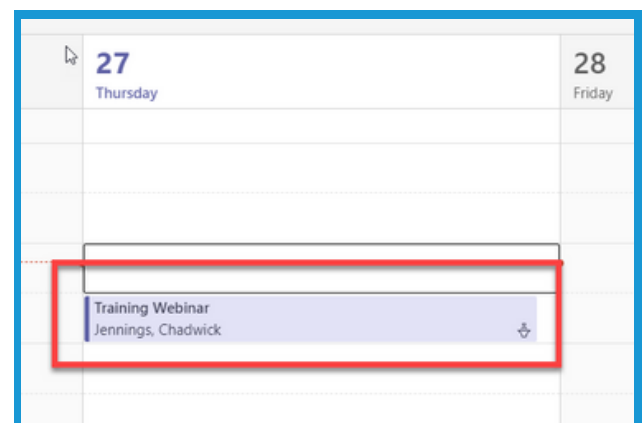
10. In the **body section**, you can type out specific details for the webinar. You can also **format** the body by using the tools at the **top of the field**.



11. Click **Send**, in the **upper right** to **send out** the invite. Meeting information will also appear in the presenter's Outlook email and calendar. After hitting **Send**, you will be **redirected to your Teams calendar**.

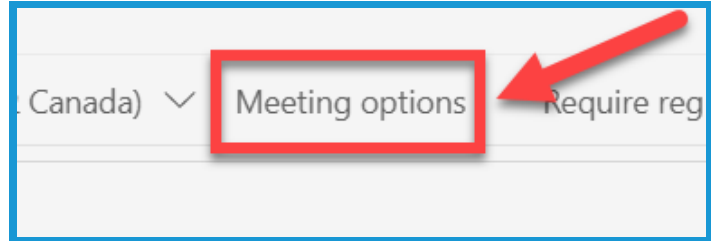


12. Locate the webinar in the Teams' calendar, and **double click the posting**.

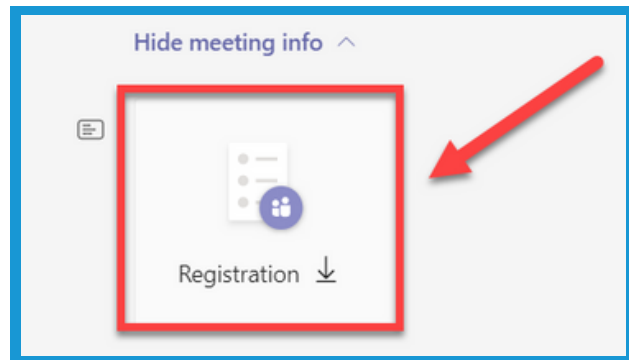


Section 2B: Scheduling Meetings (Webinar)

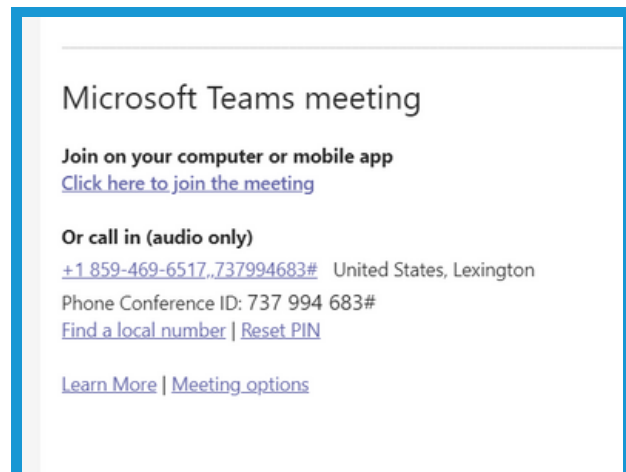
13. Select the **Meeting options** button at the top of the screen to determine how presenters and attendees can interact in the Webinar. Login using your linkblue credentials



14. Select the **Registration** button to download a report of registrants.

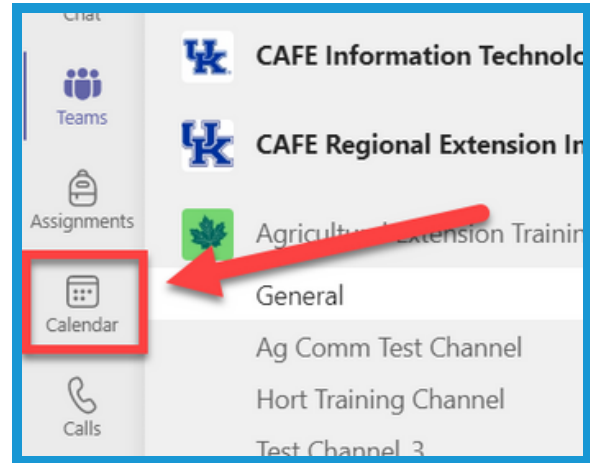


15. In the **body of the calendar invite** you will find the information to join the webinar.

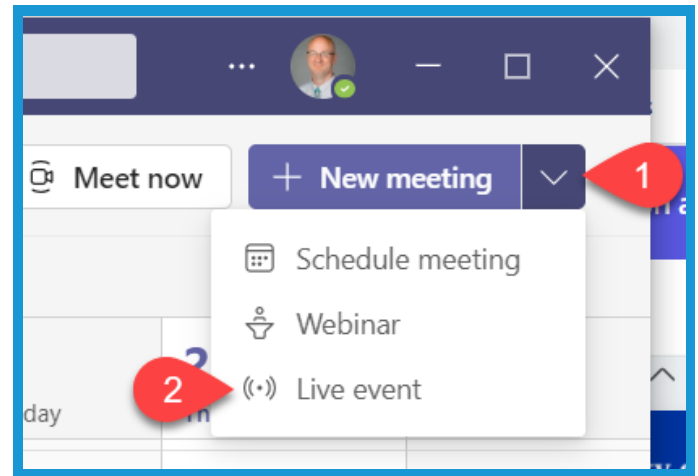


Section 2C: Scheduling Meetings (Live Event)

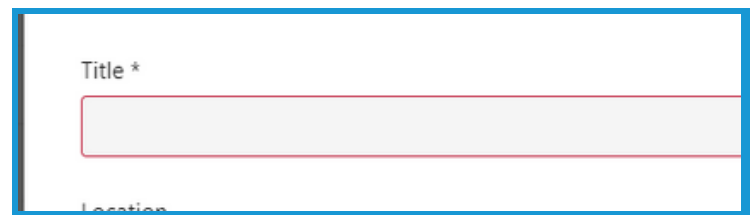
1. Click the **Calendar** button in the navigation pane on the left side of the screen.



2. Select the dropdown in the upper right of **New meeting** (1) in the upper right corner. Select **Live Event** (2).

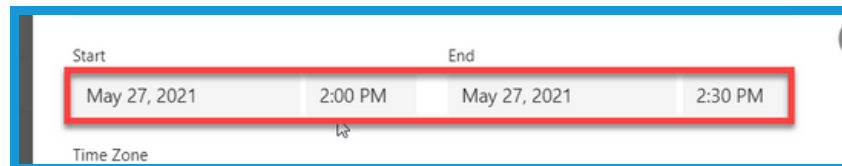


3. Give the live event a name in the **Title** field of the new window

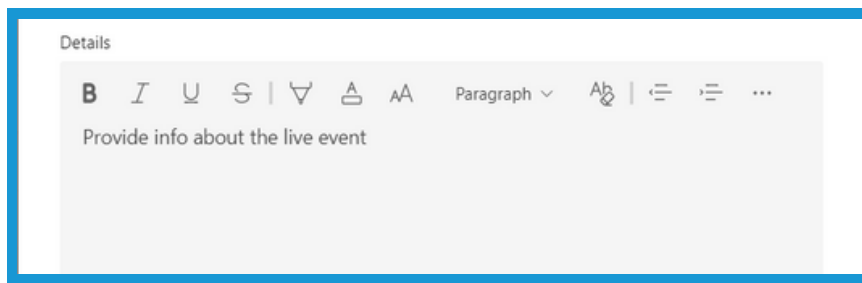


Section 2C: Scheduling Meetings (Live Event)

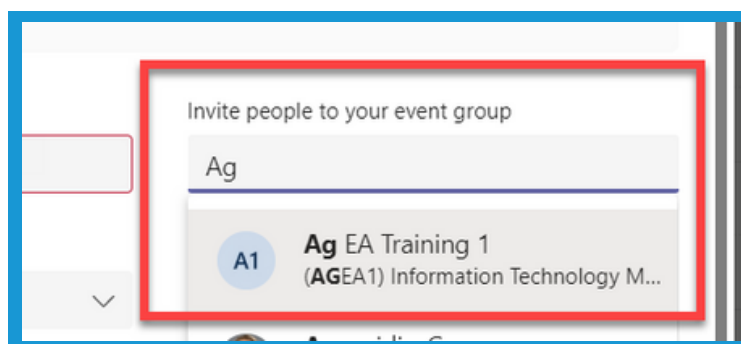
4. Set the **Start and End time** in the fields provided.



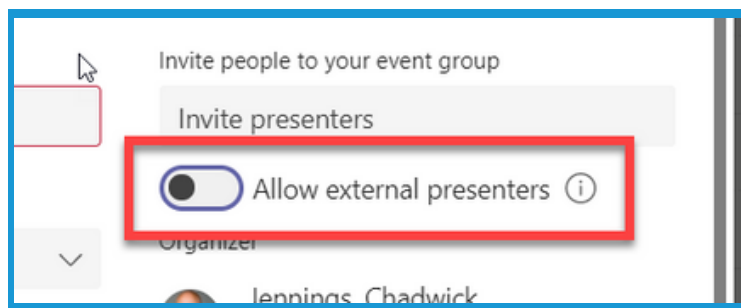
5. Provide any additional information about the event in the **Details** section.



6. In the **Presenter Field**, write the names of presenters. The names will auto-populate if they are within the organization.

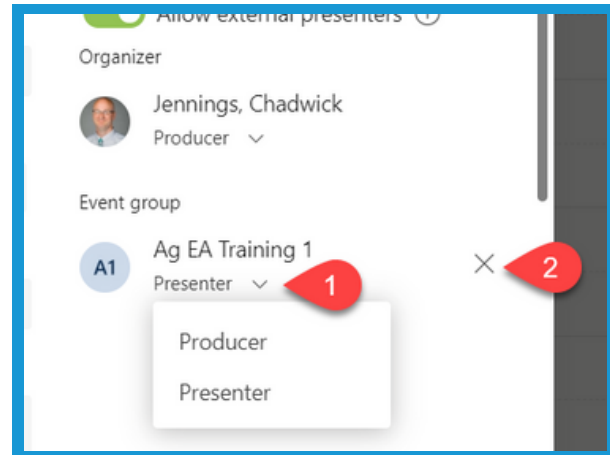


7. Turn on the **Allow external presenters** button to let people outside of UK to be presenters, and then you can add their emails to the Presenter field. **Please note that you will still have to accept them from the waiting room at the time of the event.**

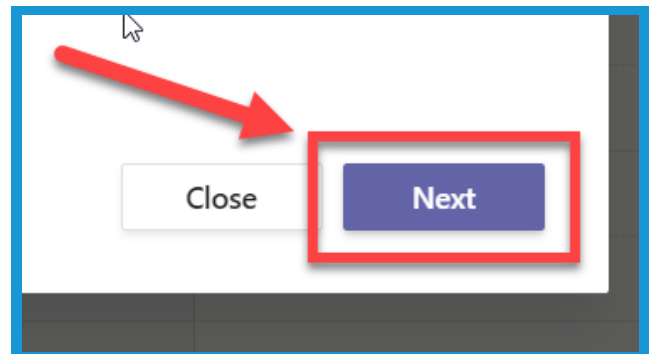


Section 2C: Scheduling Meetings (Live Event)

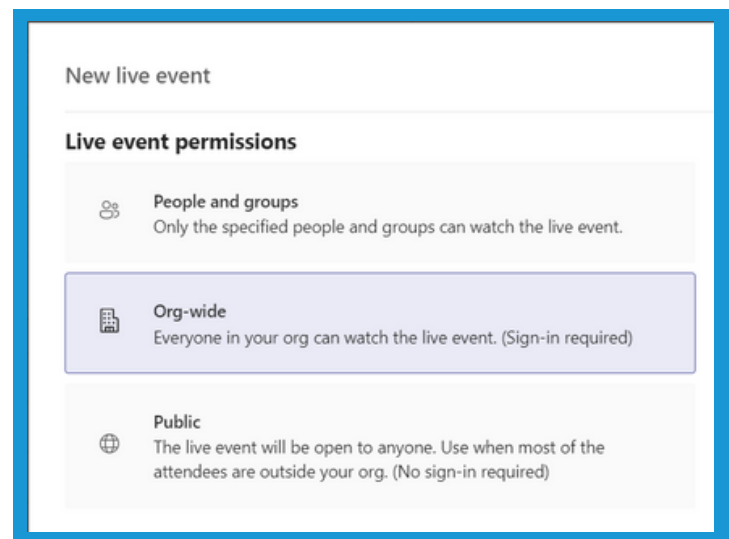
8. Select the **dropdown** under **someone's name (1)** to change their role for the event. If a presenter needs to be removed click the **"X"** to the right of their name **(2)**.



9. Select **Next** in the lower right.

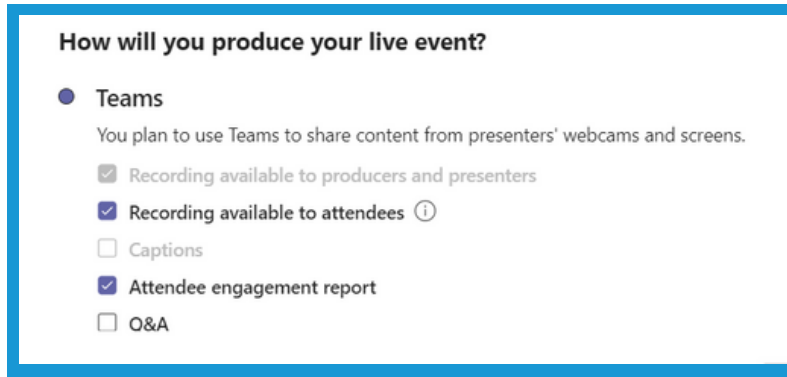


10. Under **Live Event permissions** determine if you want to make this session private, available to only those within UK, or that anyone can join (both internal or external).

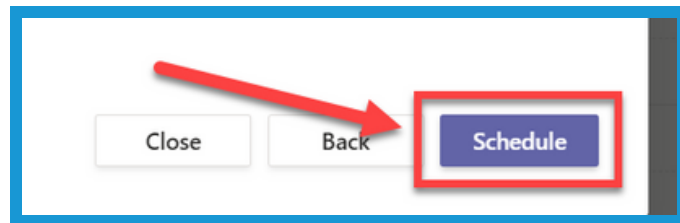


Section 2C: Scheduling Meetings (Live Event)

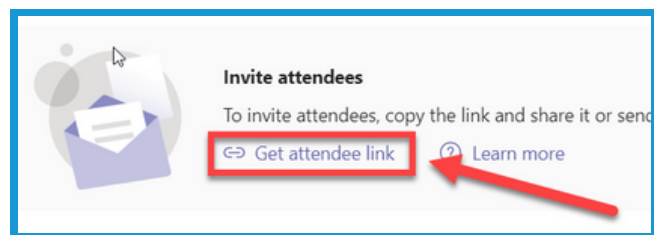
11. At the bottom of the new window determine if you want to provide a recording, produce an engagement report, or enable a Q&A portion for the event



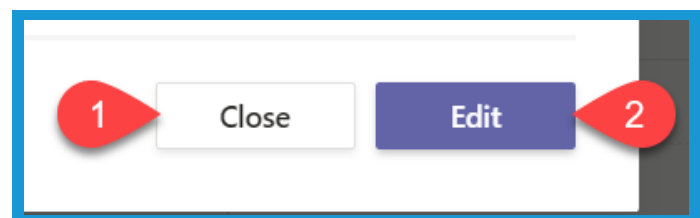
12. Select **Schedule** in the lower right.



13. Select the **Get attendee link** button in the new window to get the event information to send to participants.

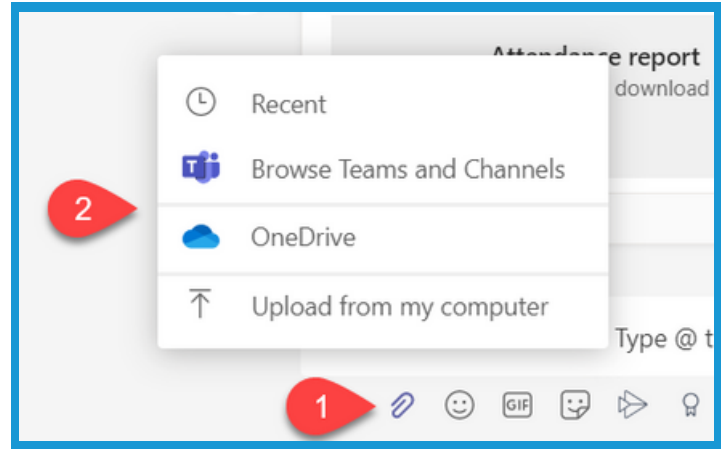


14. Select **Close (1)** in the lower right to return to the calendar. Select **Edit (2)** to make changes to the event.

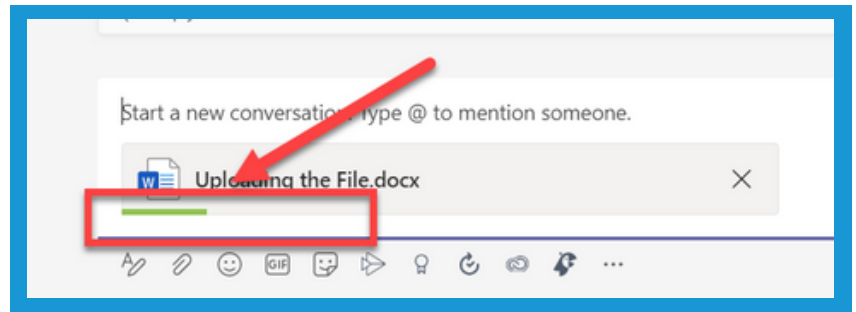


Section 3: Document Collaboration

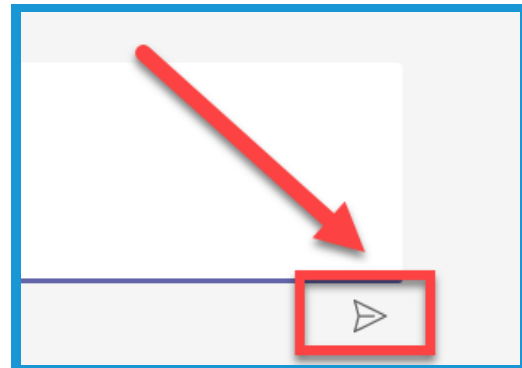
1. Select the **paperclip button (1)** below the conversation field. Then choose the **location of the file (2)** you are wanting to upload



2. Locate the **green bar** below the document before sending the document to the private chat or channel. Do not send until this green bar is gone. Your document may become corrupted if the green bar is still visible.

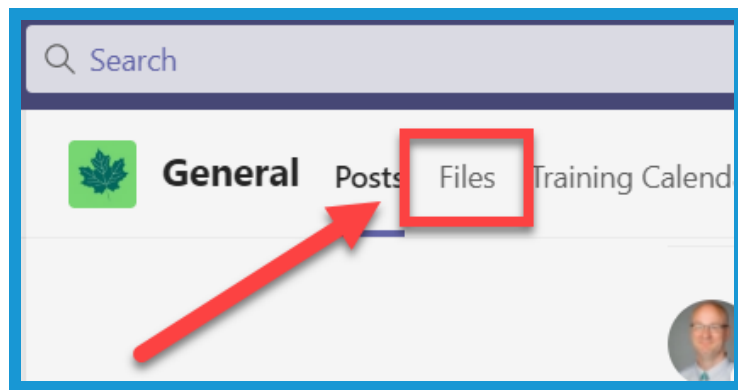


3. Select the **Send button** in the lower right of the conversation field.

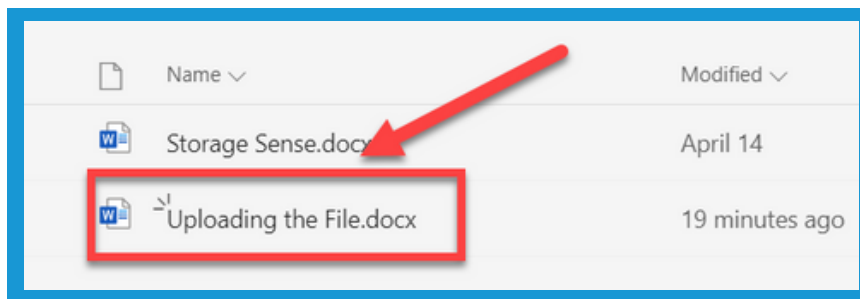


Section 3: Document Collaboration

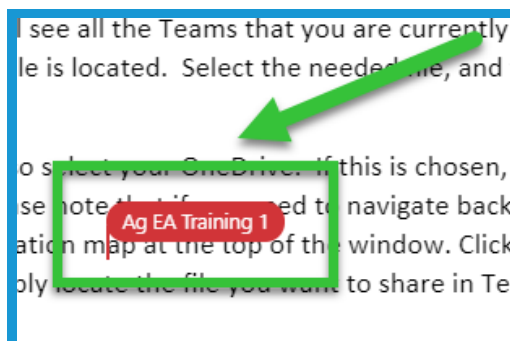
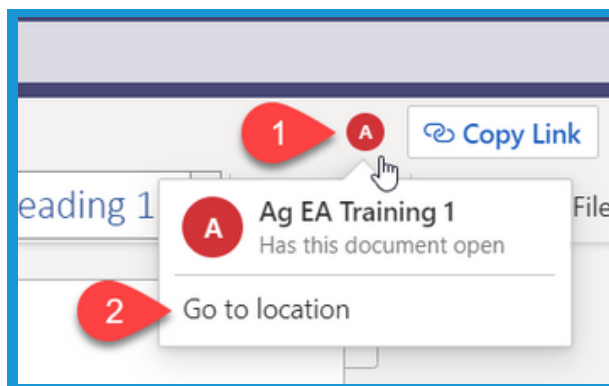
4. Select the **Files** tab at the top of the private chat or channel.



5. Click on the **file** you are wanting to open.

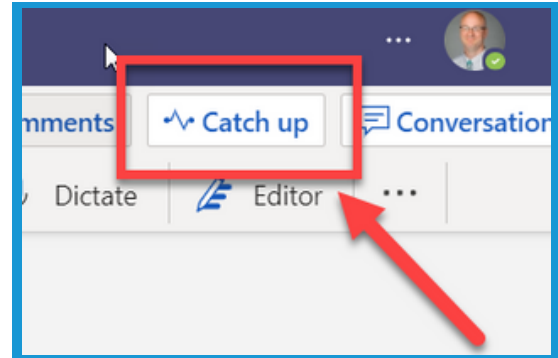


6. Click the **collaborator's profile button (1)** in the upper right corner. Select **Go to location (2)** to produce a flag in the document to check where that person is reviewing the document.

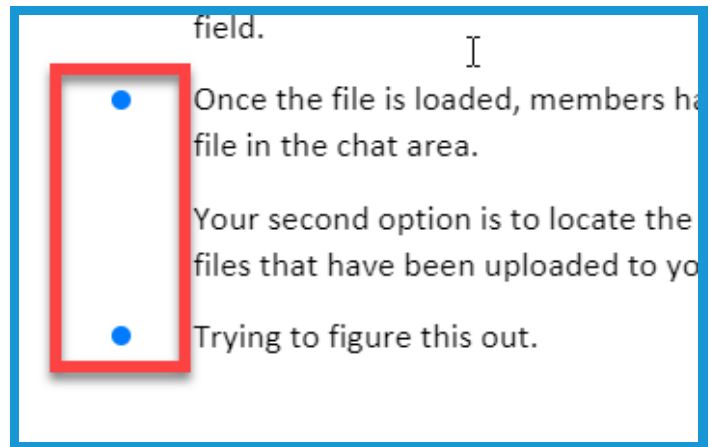


Section 3: Document Collaboration

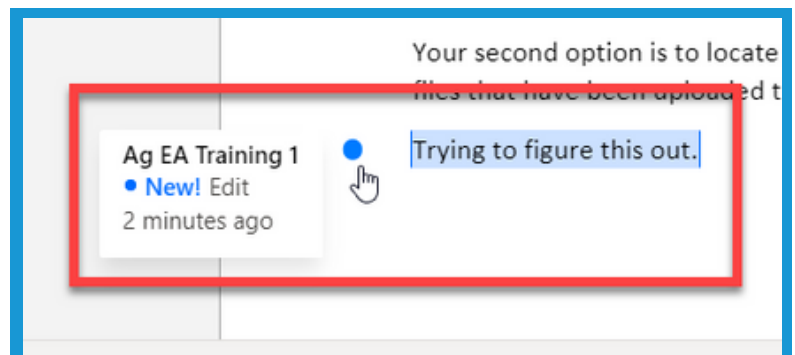
7. Select **Catch up** in the upper right corner.



8. **Blue dots** will appear in the document.

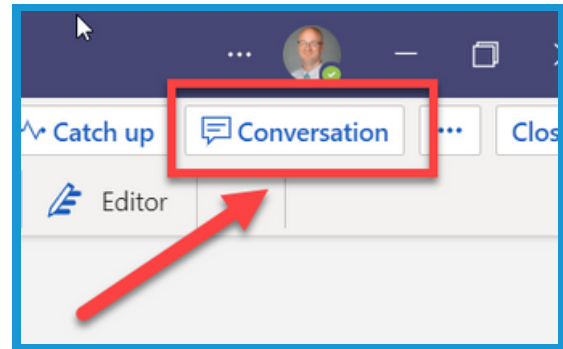


9. Click the **Blue dots** to highlight the changes that were made, who made the change, and when the edit was made.

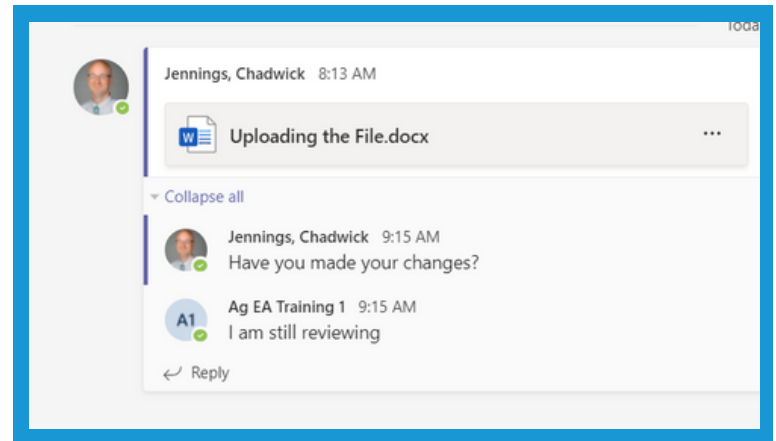
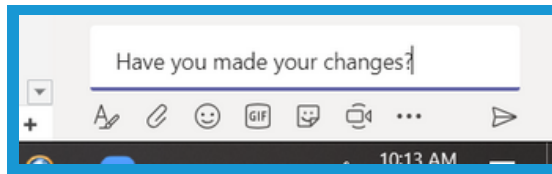


Section 3: Document Collaboration

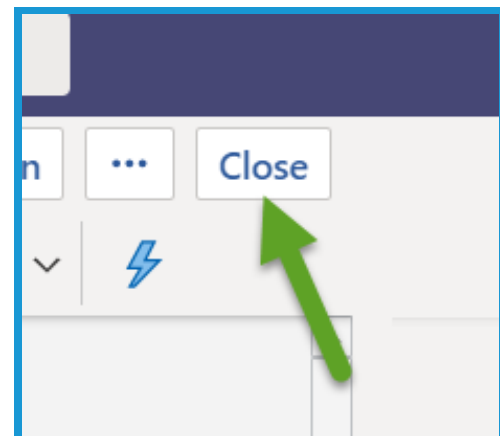
10. Click **Conversation** in the upper right to open the chat window on the right side of the screen.



11. Any **conversation** you type in this window will **appear** in the **main conversation** window on the **private chat** or **channel page**.

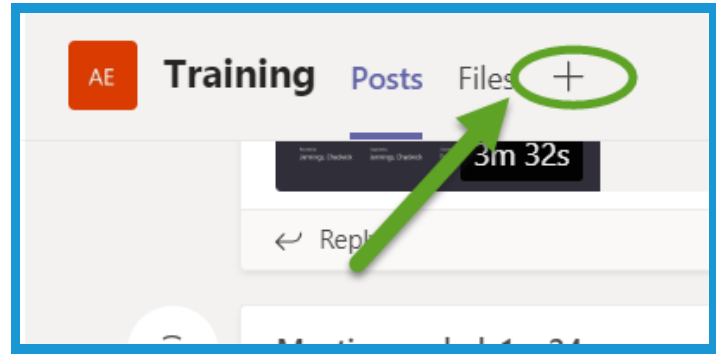


12. Click **Close** to **leave** the **collaboration page**. Please note that any **changes** made to the document are **automatically saved** to the file on the **private chat** or **Team channel**.

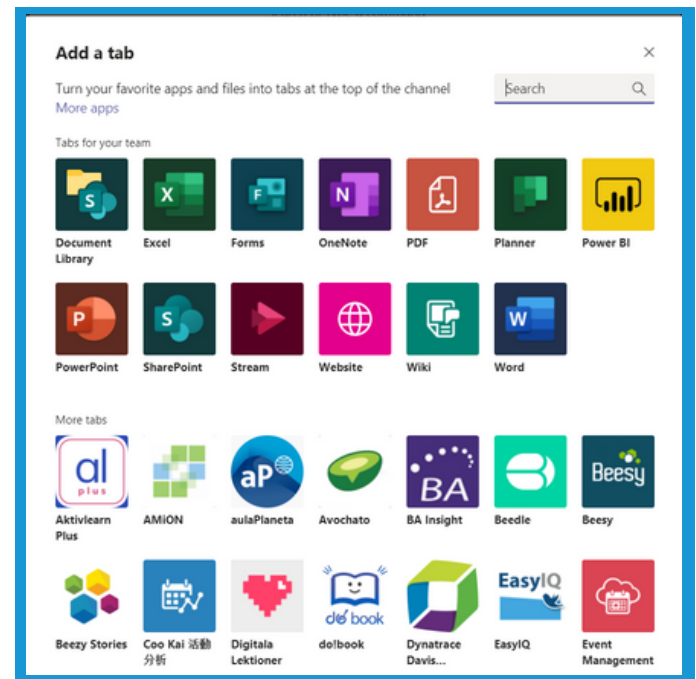


Section 4: Adding a New Tab to a Channel - Powerpoint Presentation

1. Click on the **plus button** at the **top of the screen**.

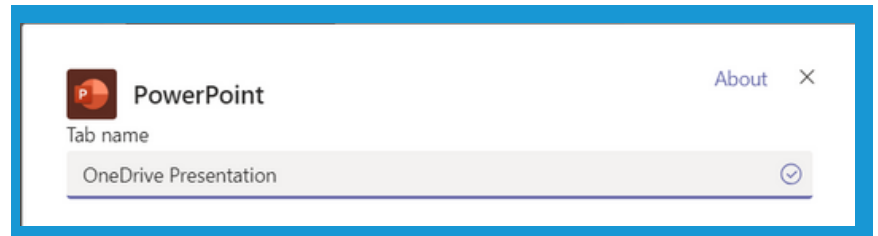


2. Click on the **Microsoft application** or **App** you want to **load to your Channel page**. For this example we are going to use a **PowerPoint presentation**. **Please note that any files you are adding as tab have to be already loaded in your Team app**. To **load a file**, please see **Section 8H (page 27)** .

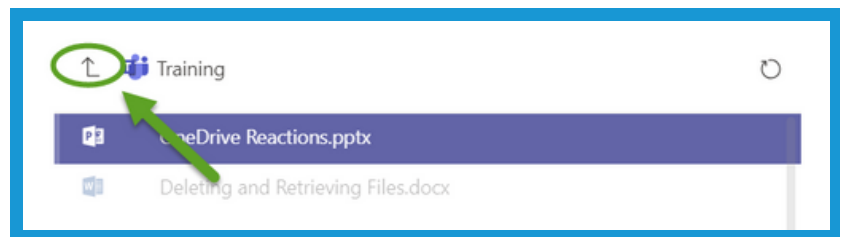


Section 4: Adding a New Tab to a Channel - Powerpoint Presentation

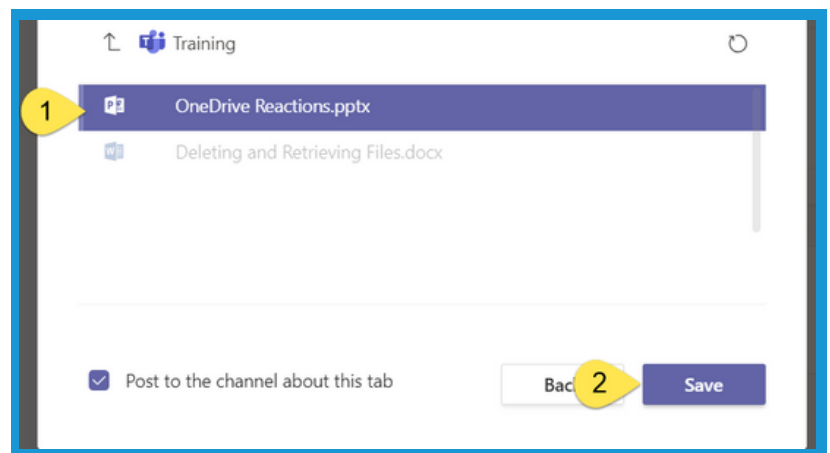
3. In the **new window**, give your **new tab** a name.



4. Files that **are** in the **channel** will **automatically appear**. To **load** a file from **another location** on your **Team account**, click the **back arrow**.

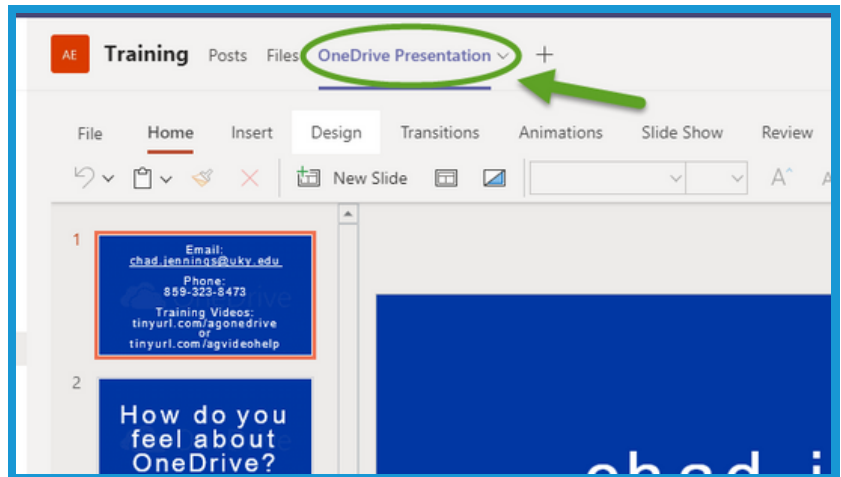


5. Click on the **file** you want to **load** and then click **Save**.



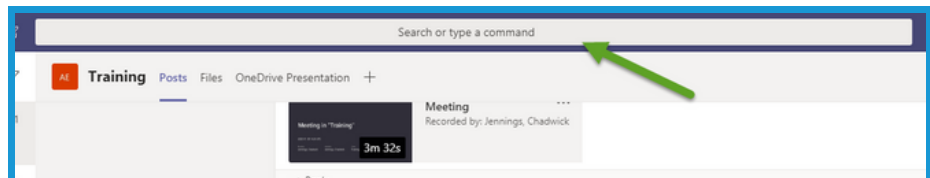
Section 4: Adding a New Tab to a Channel - Powerpoint Presentation

6. Your **new tab** will appear at the top of the screen. In the case of the **PowerPoint**, all of the typical **PowerPoint controls** and **formatting tools** will appear in the new tab.

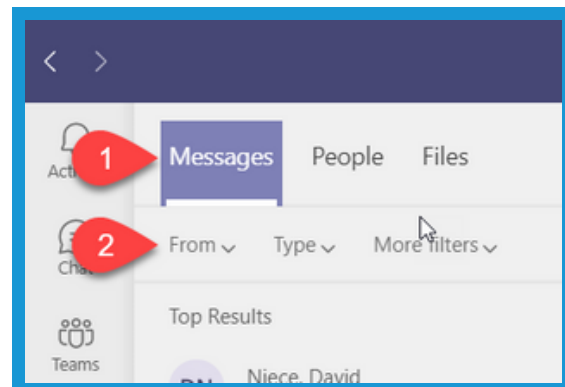


Section 5: Search Engine

1. Use the **search engine** at the **top** of the **screen** to locate **people** in the **organization** to **chat** with, or to locate a set of **keywords** in a **conversation** or **post**.

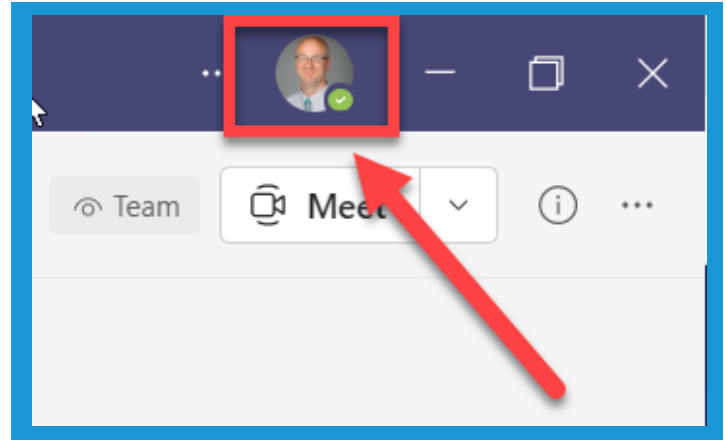


2. **Search results** will appear on the **left side** of the **screen**. Your results will be broken into **three categories (1)**, and **additional filters (2)** will appear above the results.

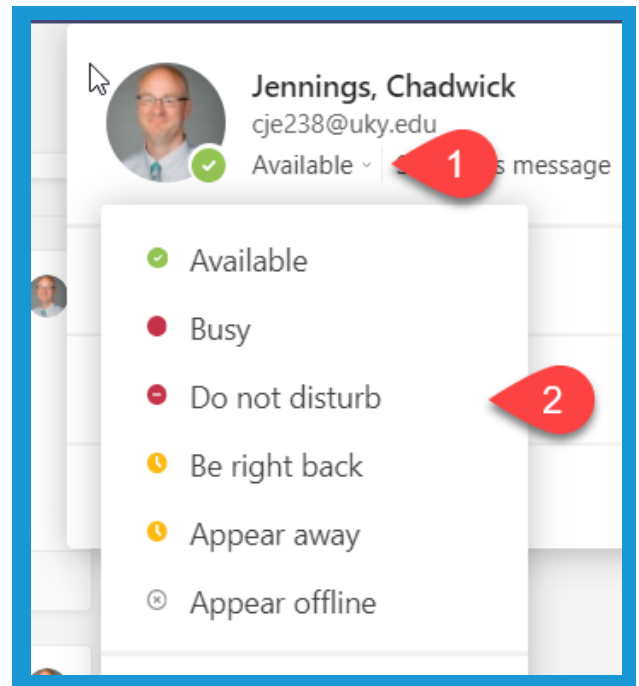


Section 6: Updating Your Status

1. Click on your **user profile button** at the top right of the screen. If you do not have a picture, you will see your initials.

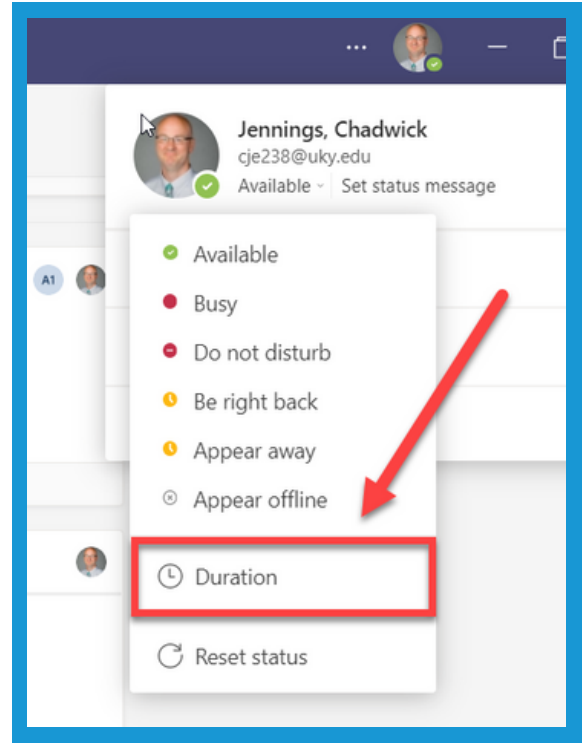


2. Click on the **arrow** to the **right (1)** of your **current status**. Select the **updated status (2)**.

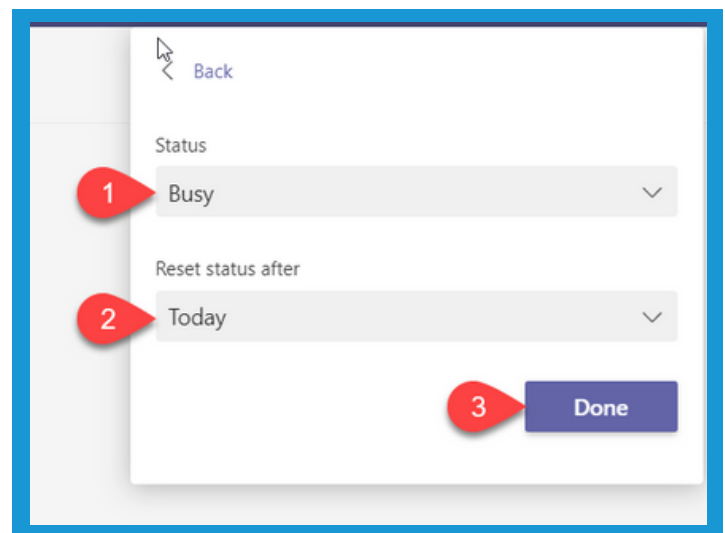


Section 6: Updating Your Status

3. Select **Duration** in the Status menu.



4. In the new window, determine the **status (1)**. When you want the **status to reset (2)**. Then select **Done (3)**.





University of Kentucky
College of Agriculture,
Food and Environment
Cooperative Extension Service

Microsoft Teams

Part 3: Collaboration and More

**Any questions or training request
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