Adding UU Video-conference Rooms to large Teams Meeting

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Introduction

Teams Meetings usually involve small groups of people with perhaps 10 or 12 participants at most. However, the maximum number of participants possible at present (Summer 2021) is 300, and therefore Teams Meetings can be used for larger proceedings.

(Note - for even larger meetings, Teams Live Events have a maximum of 10,000 participants, but they will not be covered in this document. See the end of this document for links to Microsoft's Help Pages about Teams Live Events.)

Teams has several options to help you control large meetings. Examples are:

- You can set everyone to enter a Lobby when they first arrive. The Organizer can then let people into the main meeting only at the start / appropriate time.
- You can set most participants to be Attendees who cannot share their audio and video. In a large meeting this will cut down on the ambient noise and other interruptions.
- You can set specific participants to be Presenters who can share audio, video, and content.
- You can create Breakout Rooms, then at a certain point split the participants into different groups and send them to the Rooms for discussions. A Leader / Scribe for each room can then report back to the main meeting. (Note that Breakout Rooms can only be set up after the meeting has started.)
- You can download an Attendance list after the meeting has finished.

Note that the only person with complete control over all these options is the Organizer who sets up the meeting in the first place. Therefore, you want the person who is going to do most of the technical administration - allowing people in from the lobby, making people Attendees and Presenters, creating Breakout Rooms, and so on - to be the person who sets up the Meeting in Teams.

Note also that Microsoft regularly updates options for Teams Meetings. The following is current at June 2021. For the most up to date information, check the Microsoft links at the end of this document.

Creating the Meeting and Sending Invites

This section covers

- the three different roles in Teams Meetings; and
- setting up the Meeting either in your Teams Calendar or in your Outlook Calendar.

Roles

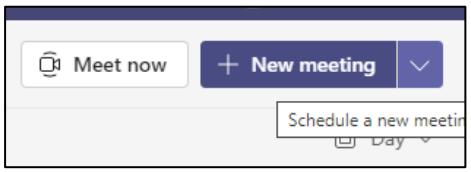
There are three Roles in Teams Meetings:

- Organizer – sets up the Meeting, sends out the Invites, and is the only person with complete control over all the options.
- Presenter - can share audio, video, and content, and has control over some options during the meeting.
- Attendee - cannot share audio, video, or content - except in Breakout Rooms, or if allowed to do so by the Organizer or Presenters.

The Organizer and Presenters can change participants' roles from Attendee to Presenter (or vice-versa) during the meeting itself.

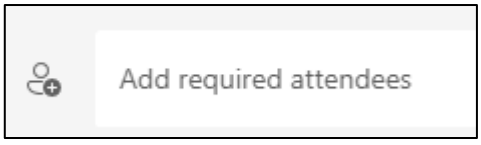
Creating the Meeting in Teams Calendar

- In your Teams Calendar, go to the top right and click on "New Meeting".

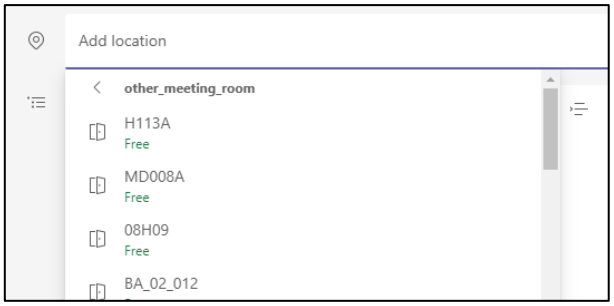


- Complete the meeting details such as Title, Date and Time.

- In the "Add Required Attendees" box enter the emails of the participants.



- In the "Add location" box, enter the details of the UU Video Conference rooms that will be involved in the Conference. These rooms and their availability should pop-up as you type:



- Then click "Send" at the top right to send the Invite out.

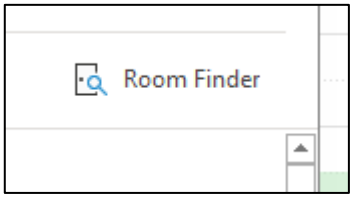
Alternative - Creating the Meeting in Outlook Calendar

- In your Outlook Calendar, click on the "New Teams Meeting" button in the top bar:

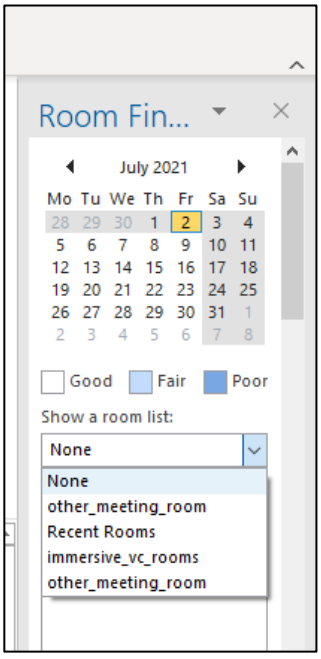
- Complete the meeting details such as Title, Date and Time.

- In the "Required" box enter the emails of the participants.

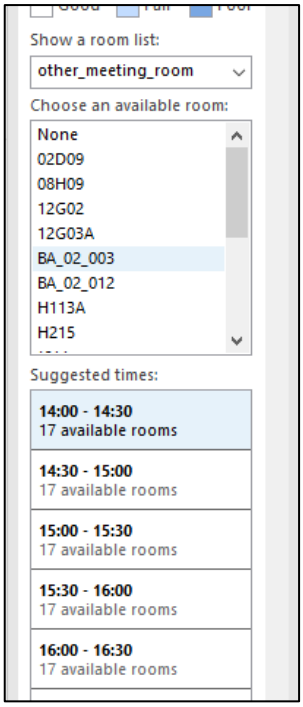
- Now you can choose any UU video-conference rooms to be added to the meeting if necessary. Click on the “Room Finder” button on the right:



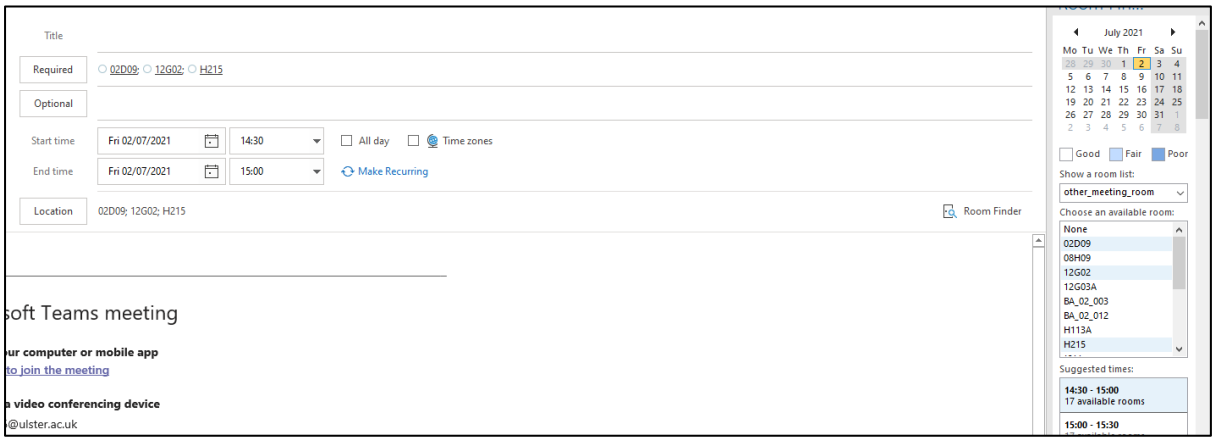
- This will bring up the Room Finder pane. In here, click on the “Show a room list” field, to bring up a list of types of rooms:



- In this list, click on, for example, “other_meeting_room” to see a list of rooms with suggested times below:



- Now click on a room name to add it to your meeting. If you are adding more than one room, hold down the “CTRL” key as you click each of the rooms to highlight them in blue:



- You will see those rooms now added to the “Required” and “Location” fields of your invite.

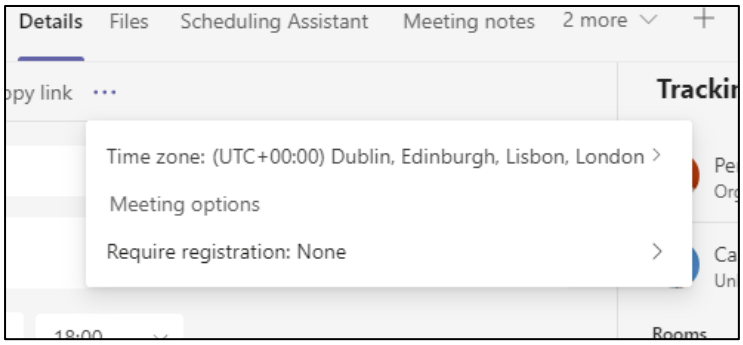
- Then click "Send" at the top left to send the Invite out.

Setting Options before the Meeting

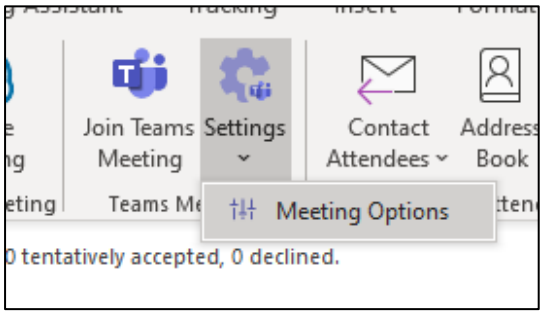
Once the Invite has been sent out, you can set up several options for the Meeting.

To access these options:

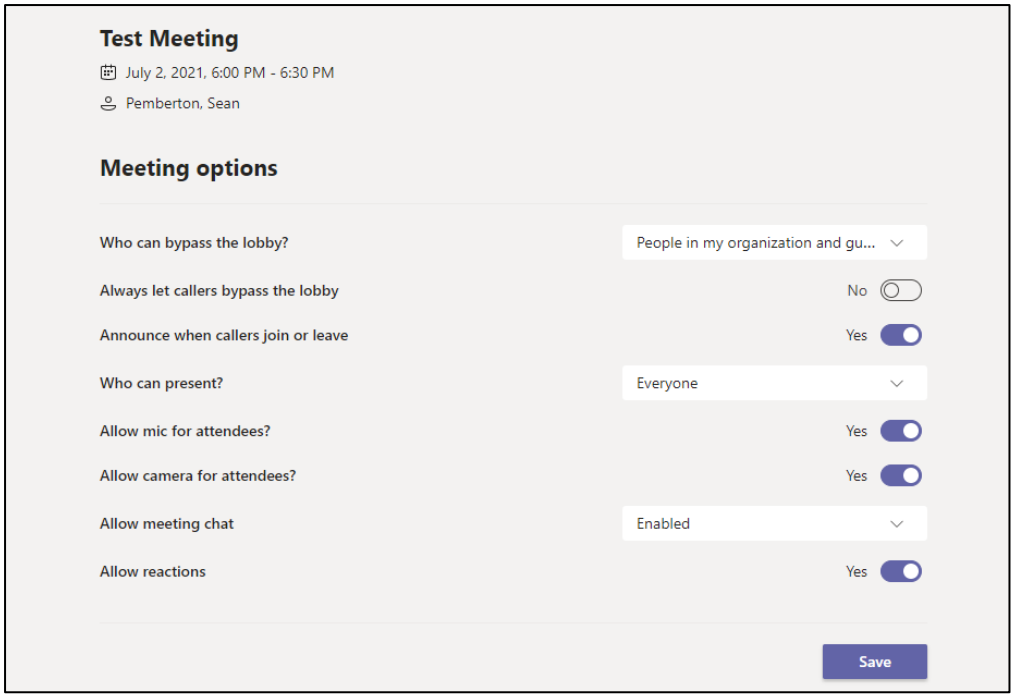
- In Teams, with the Meeting Invite open, choose "Meeting Options in the top bar (you may need to click the three dots in the top bar to see the option in a drop-down list):



- In Outlook click the "Settings" then "Meeting Options" button in the top bar:



- In both Teams and Outlook you should then see a page with Options such as this:



If you are having a large meeting, these are probably the best choices:

Bypass lobby: Only me

Always let callers bypass the lobby: No

These choices mean that the Organizer will be the first and only person into the meeting to begin with. He or she can then allow in other people when necessary - so the Presenters can be allowed in at some time before the start of the meeting, and then the Attendees can be brought in later when the meeting is about to begin.

Announce when callers join or leave: No

If you have a large meeting, constant notifications when people join and leave will be distracting. Therefore, set this to "No" to turn off those notifications.

Who can present: Specific people

Set this box to "Specific people". That will then reveal a second option "Select presenters for this meeting". Begin typing the name of one of your Presenters in this box and their name will pop up so that you can select it. Do this with the other people you want to act as Presenters.

Everyone not in this "Specific people" list will be Attendees. You now select options for those Attendees.

Allow mic for attendees – No

Allow camera for attendees – No

By setting mic and camera off for Attendees, you stop the possibility of random noise or interruptions disturbing the Meeting.

Note that during the meeting itself you will be able to change the mic and camera settings for both Attendees and Presenters. You will also be able to change participants from Attendee to Presenter and vice versa.

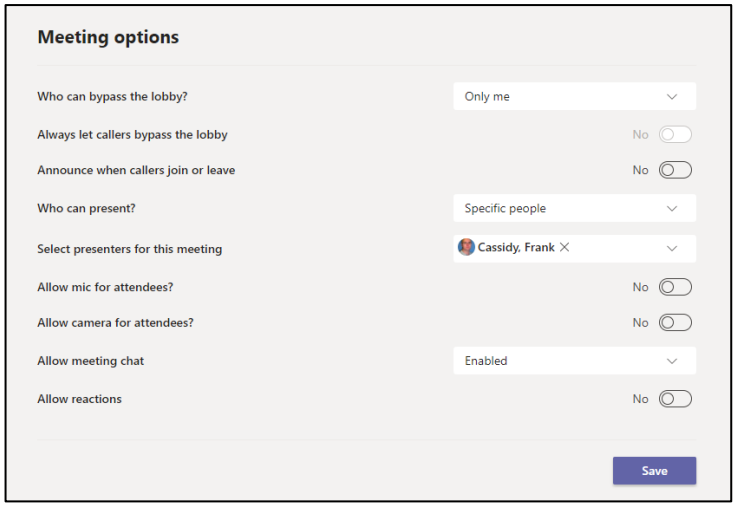
Allow meeting chat – Enabled

This means that Attendees and Presenters will be able to use chat during the meeting to send questions and comments. Notifications of new chat messages will pop up on only the Organizer's screen, so Presenters talking or sharing content will not be disturbed by them.

Allow reactions – No

Again, this is turned off to minimize possible disruptions.

- The options screen will then look something like this:



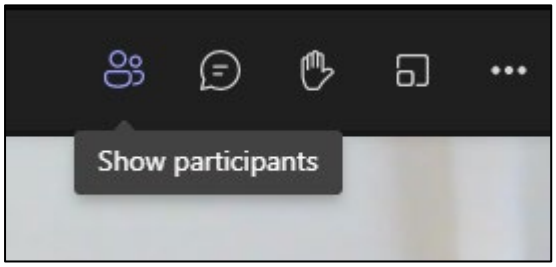
- Click the "Save" button, and once the button changes to "Done" you can close the page.

Starting the Meeting

The Organizer has control over the start of the meeting. He / she decides when to allow the Presenters in from the Lobby, and along with the Presenters decides when to allow the Attendees in.

We advise that the Organizer joins the Meeting c.15-20 minutes before the official start time. When Presenters begin to appear in the Lobby, he or she can then allow them into the meeting, and they can run tests for audio, video, and content sharing.

You can see who is in the Meeting, who is in the Lobby, and who else has been invited by clicking on the "Show participants" icon in the top bar of Teams - the icon at the far left:



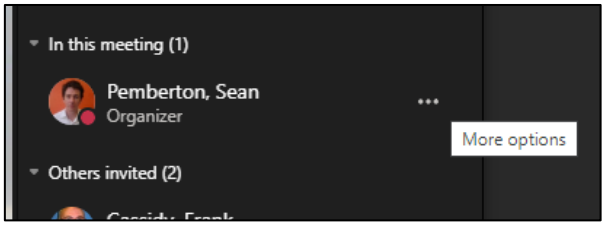
Note that Presenters as well as the Organizer can allow people in from the Lobby.

Managing the Meeting

Once the Meeting has started you can change several options:

For individual participants

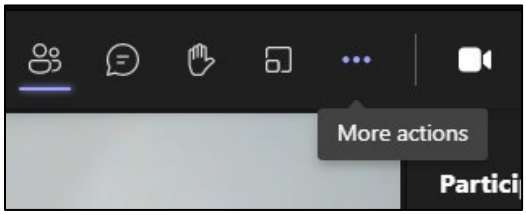
Hover over the three dots to the right of the person's name and then choose "More options":



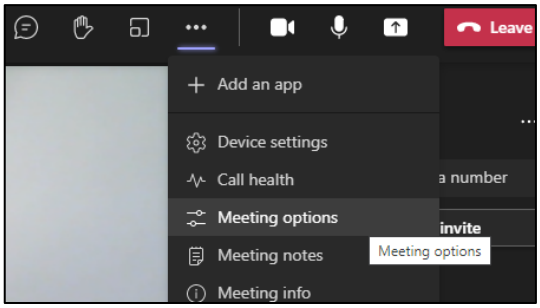
From here you will be able to mute their mike, make them a Presenter, make them an Attendee, and so on.

For the whole meeting

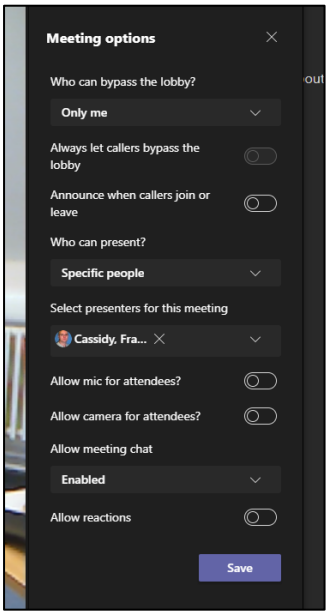
Click the three dots to the right of the icons in the top bar:



From the drop-down menu that appears, choose "Meeting options":



This opens a set of options like the ones set before the meeting:



If you have a lot of participants, you could now change "Who can bypass the Lobby?" from "Only me" to "Everyone". This means you would no longer have to keep your eye on the Lobby to allow people in.

See below for more detail on details on options such as Breakout Rooms, Chat, Recording, and Attendance Details.

Breakout Rooms

In large groups it is difficult to control the discussion so that everyone can contribute. In a Teams Meeting you can split people into smaller groups in "Breakout Rooms". People can then discuss amongst themselves, and a Room Leader / Scribe can report back to the main meeting.

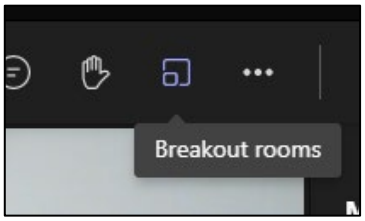
At present (June 2021) the maximum number of Breakout Rooms in Teams is 50.

At present Breakout Rooms can only be created **after** the meeting has started.

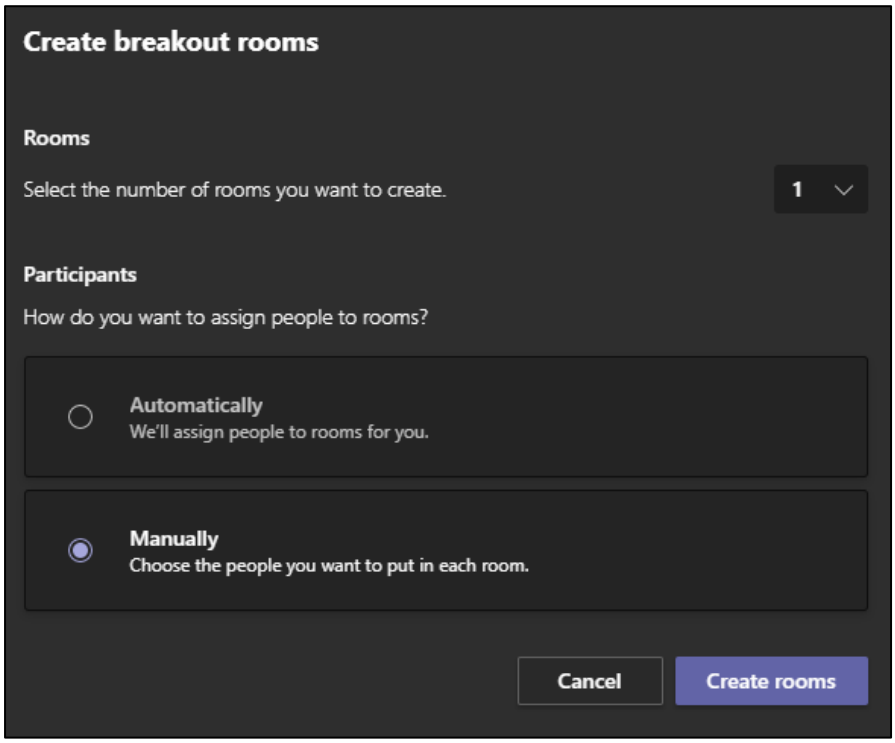
Note the default setting is that people will immediately enter the rooms when you click the “Start Rooms” button.

Creating Breakout Rooms

When the Meeting has started, click the Breakout Rooms icon in the top bar:



You can now choose how many Breakout Rooms you want to create, and if participants will be assigned automatically or manually to each room:

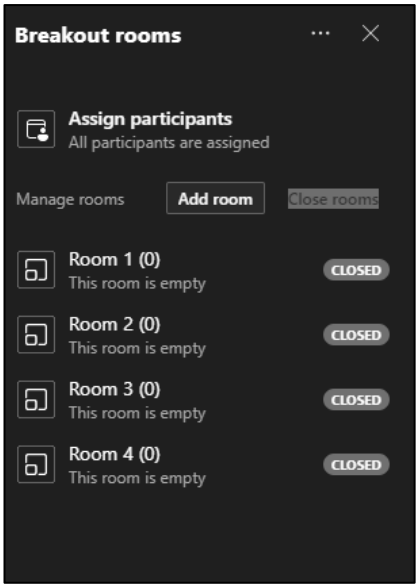


If you choose “Automatically”, Teams will randomly assign people to the rooms.

If you choose “Manually”, you will pick who goes into which room.

Once you have chosen your options, click “Create rooms”.

Teams will then tell you it is creating the rooms, and you will see a list of them on the right:



Assigning people to rooms

If you originally chose “Automatically”, your participants will already have been automatically assigned to the rooms.

If you originally chose “Manually”, you now must assign each participant to a room.

To do this:

- Click the “Assign Participants” button at the top:

- A list of the Participants appears. Tick the check-box for all those you want to put in the first room

- Then click “Assign” and choose the room they will go into.

- Repeat the process to assign people to the other rooms.

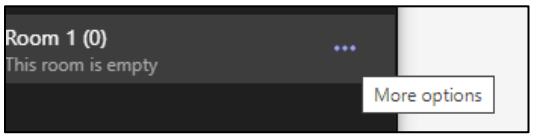
Starting the Breakout Rooms

When the time comes to begin the Breakout sessions, click the “Start Rooms” button at the top of the Breakout Rooms pane. This opens all the rooms, and Teams will immediately push people into their rooms.

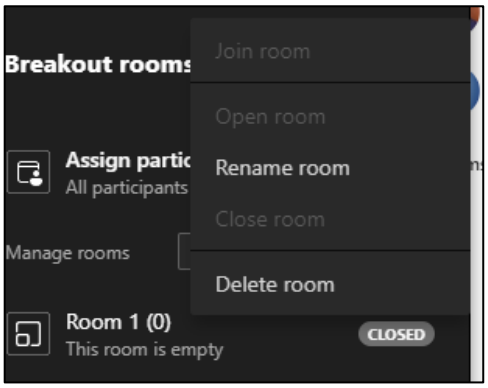
To open one room at a time:

- Hover your mouse pointer over the “Closed” message for the room:

- It will turn into three dots:

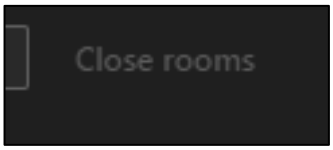


- Click on the dots to see the further options:
- From the list choose "Open Room"
- Note that you can also Delete, Close, Join, and Rename the room from here.



Closing the Breakout Rooms

Once the Breakout sessions are over, click the "Close Rooms" button, to shut the rooms down and send everyone back to the main session:



Other Breakout Room Options

There are several other options for Breakout Rooms, including:

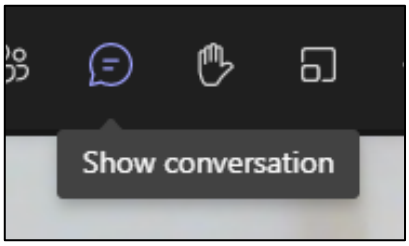
- Making announcements to the rooms
- Setting time limits for the rooms
- Turning off automatic entry to the rooms

For these options and more detail on Breakout Rooms, see the Microsoft Support Page “Use Breakout Rooms in Teams Meetings” here:

https://support.microsoft.com/en-us/office/use-breakout-rooms-in-teams-meetings-7de1f48a-da07-466c-a5ab-4ebace28e461

Chat

View the Chat by clicking on the conversation bubble icon on the top bar:



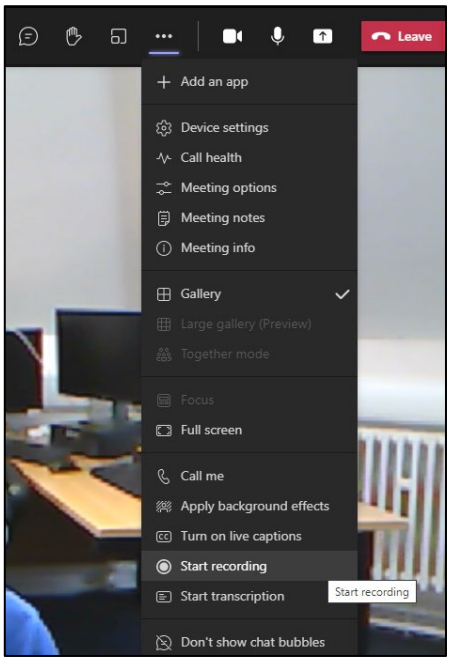
You can then see the chat (and other details of the meeting).

If you have disabled the mikes and cameras for the Attendees, this is where they will be able to ask their questions and interact.

You could nominate one person to watch the chat, record the questions, and then pass them on to the appropriate people.

Recording

- To start recording, click the three dots on the top bar, and then choose "Start recording":



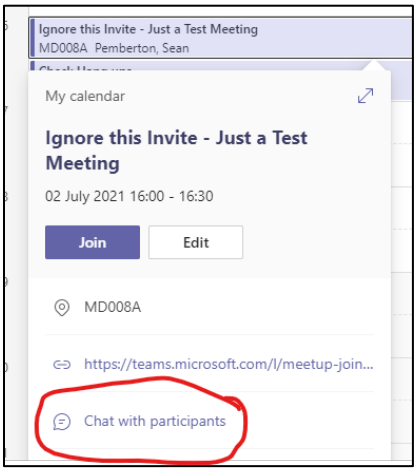
- Stop the recording from the same place.

The recording will not be available until at least after the planned end time of the meeting. So, if your meeting ends 45 minutes early, you won't be able to access the Recording until at least 45 minutes from then.

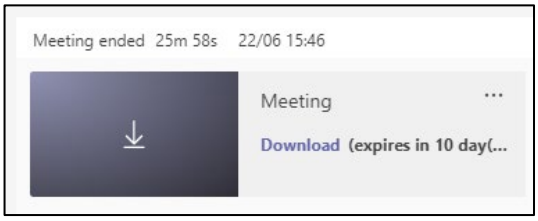
From our experience it also often takes some time before the Recording is available. You may have to wait several days, especially if the meeting has been a long one.

To access the Recording once the meeting is over:

- Click the event in your Teams calendar and choose "Chat with participants" near the bottom:



- At the end of the chat there will be a screen like this for the Recording. Click on the "Download" link to download it to your machine.

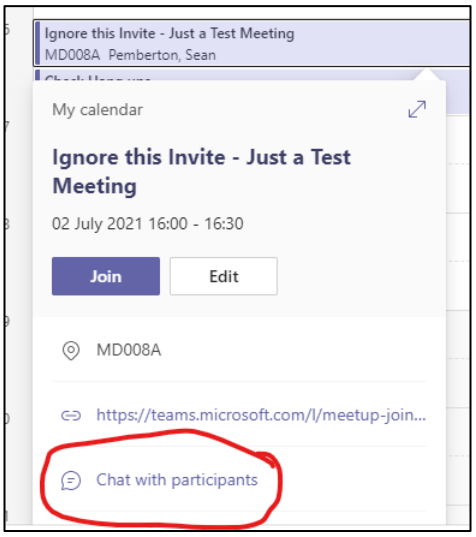


Attendance

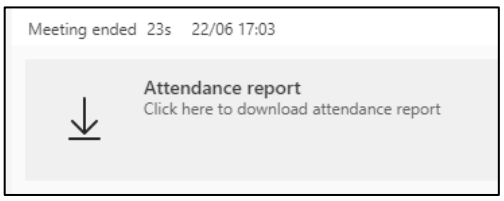
After the meeting is over you can also download an Attendance Report giving details of who attended, their email addresses, and so on.

Access this in the same way that you access the Recording:

- Click on the event in your Teams calendar and choose "Chat with participants":



- At the end of the chat there will be a message about the Attendance Report.



- Click on the message to download the Attendance Report to your machine's Download folder.

Other Options

Other possible options for large meetings in Teams are:

- The **webinar option** to set up **pre-registration forms** for Attendees to complete.

Note that this option is only being rolled out in UU. If it is not available in your Teams client, you may need to request via the Helpdesk that one of the UU Teams Admins makes it live for you.

- **Teams Live Events** - larger versions of Teams Meetings.

At present, Teams Meetings have a maximum of 300 participants. Teams Live Events have a maximum of 10,000. There are several important differences between the two. For example, you cannot create Breakout Room in Teams Live Events.

- **Whiteboards** in Teams Meetings

- Taking meeting **Notes** in Teams

- **Transcriptions** and **captions**

- **Call Health** stats

For more details on these, see the Microsoft Help pages mentioned below.

Note that Microsoft sometimes change settings, options, and specifications for Teams Meetings. The above was written in June 2021.

For the most up-to-date information, check the Microsoft help pages linked below.

Links

Poll attendees during a Teams meeting - https://support.microsoft.com/en-us/office/poll-attendees-during-a-teams-meeting-9923b7d4-ea97-4aa2-b8b8-b45fefe7d454

Express yourself in Teams meetings with live reactions - https://support.microsoft.com/en-us/office/express-yourself-in-teams-meetings-with-live-reactions-a8323a40-3d07-4129-934b-305370a36e21

Roles in a Teams meeting - https://support.microsoft.com/en-us/office/roles-in-a-teams-meeting-c16fa7d0-1666-4dde-8686-0a0bfe16e019

Best Practices for a large Teams meeting - https://support.microsoft.com/en-us/office/best-practices-for-a-large-teams-meeting-ce2cdb9a-0546-43a4-bb55-34ab98ab6b16

Get started with Teams webinars - https://support.microsoft.com/en-us/office/get-started-with-teams-webinars-42f3f874-22dc-4289-b53f-bbc1a69013e3

Set up a Microsoft Teams webinar - https://docs.microsoft.com/en-us/dynamics365/marketing/teams-webinar

Manage attendee audio and video permissions in Teams meetings -

https://support.microsoft.com/en-us/office/manage-attendee-audio-and-video-permissions-in-teams-meetings-f9db15e1-f46f-46da-95c6-34f9f39e671a

What are Microsoft Teams live events - https://docs.microsoft.com/en-us/microsoftteams/teams-live-events/what-are-teams-live-events

Get started with Microsoft Teams live events - https://support.microsoft.com/en-us/office/get-started-with-microsoft-teams-live-events-d077fec2-a058-483e-9ab5-1494afda578a