Audience: All employees using Microsoft Teams who interact with internal and external (temporary) employees.

Goal: Help employees use Microsoft Teams to quickly meet a mix of internal and external employees.

Author: Nick Leffler

On Screen/Instructions Scene 1: Intro Getting Started with M  A stressed person with an arrow pointing to MS Teams logo.	icrosoft Teams  Ever had an urgent fire drill and needed to hold a quick status meeting or something similar?  If so, you're in the right place. If not, then you may learn something new
Getting Started with M  1 A stressed person with an arrow pointing	icrosoft Teams  Ever had an urgent fire drill and needed to hold a quick status meeting or something similar?  If so, you're in the right place. If not, then you may learn something new
1 A stressed person with an arrow pointing	Ever had an urgent fire drill and needed to hold a quick status meeting or something similar?  If so, you're in the right place. If not, then you may learn something new
1 1	then you may learn something new
Happy person aha moment then thinking.	anyway.
Words: Quick Meeting, Internal Employees & External Guests, Microsoft Teams Basics	This course will show you how to send a quick meeting to a mix of people inside and outside your organization. You'll also do some other basic tasks in Teams to help you use it more effectively.
List objectives:	On the screen is some of what you'll do in this course to help you use Teams meetings.
<ol> <li>Create an unscheduled meeting in Microsoft Teams.</li> <li>Invite employees and guests to your meeting.</li> <li>Use meeting controls to record the meeting, enable your camera, and share your screen.</li> <li>Use social actions.</li> <li>End the meeting then access the transcript and recording.</li> </ol>	If you want to learn how to use this course, click the Help button in the top right corner, up here, before continuing.  You're going to help Vera, a project manager at Virelia, start a quick meeting. So, click next in the course when you're ready.
Callout pointing to the bottom right next button: Click Next in this course when you're ready to continue.  Course Next Button: progress to the	
next slide.  Course Back Button: no course back button  The Teams So	congrio



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2 Show the scenario visually with: Vera, Virelia logo, employees internal+external

**Course Next Button**: progress to the next scene.

**Course Back Button**: go to the previous slide.

Ready to help Vera?

She's working with a team of internal employees and external contractors. She's somewhat new to Microsoft Teams and needs to start a Teams meeting to meet with her team immediately. She'll need to blast the invite out via email with no scheduled meeting time.

Nothing like an impromptu meeting to throw the day off...

The external team members aren't part of her Microsoft Teams organization.

Luckily that doesn't matter! You're going to become a pro along with Vera and help her send the meeting out right now.

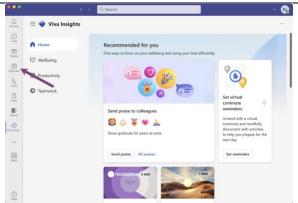
Ready? Click next, and you can help Vera through Teams while learning it yourself.

### Scene 2: Create an unscheduled meeting in Microsoft Teams

Topic 1: Make this an introduction slide with the title and show the percentage of the way through the course.

Microsoft Teams

3



**Callout pointing to Calendar tab**: Click this tab from anywhere in Teams.

You're going to be driving, so get ready to click around Microsoft Teams.

First up, open the Calendar tab in Microsoft Teams.



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**Hotspot:** Over the Calendar tab and

progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

### The Teams Calendar Tab

Coloradar

Callout pointing to the Meet now

**button**: Click this button to configure and start a quick meeting.

Hotspot: Over the Meet now button and

progress to the next slide.

Course Next Button: no course next

button.

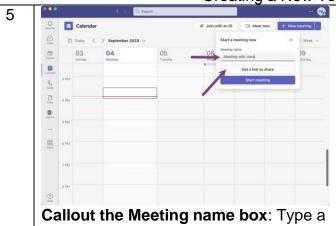
Course Back Button: go to the previous

slide.

The **Meet now** button lets you create an unscheduled meeting that Vera and her team can meet in right now. It'll create a link to share with her team via email.

Go ahead and click it.

Creating a New Teams Meeting



name here to name your meeting.

Now you can name the meeting and get a link Vera can share with her team. Give the meeting whatever name you'd like then click the "Get a link to share" button.



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### Callout the Get a link to share button:

Click this button when you've named your meeting.

**Text Box**: Allow user to type in the meeting name box. (save to a variable for later)

**Hotspot:** Over the "Get a link to share" button and progress to the next scene. **Course Next Button**: no course next

button.

Course Back Button: go to the previous

slide.

### Scene 3: Invite Employees and Guests To Your Meeting

Topic 2: Make this an introduction slide with the title and show the percentage of the way through the course.

Sharing a Teams Meeting Link

Calendar

Today

September 2923

Today

Share via email

An arrow should point to the copy/paste icon during narration.

Callout the Share via email button: Click this button to open Vera's default email client.

**Hotspot:** Over the Share via email button and progress to the next slide. **Course Next Button**: no course next

button.

Course Back Button: go to the previous

scene.

Teams did the hard work for us and created the meeting and a link too. This is the link which you can copy and paste anywhere such as a text message or Slack using this button.

Or, in our case, Vera needs to email the team, so click the "Share via email" button which opens her computer's default email program which is Outlook in Vera's case.

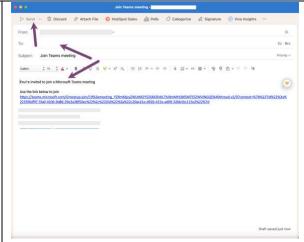
Sharing a Teams Meeting Via Email



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Author: Nick Leffler



Activity:

Provide an email on the left and blocks on the right to drop onto the email. Text blocks with employee's names: Joe, Holly, and Joanne.

Make the subject a text box that anything can be typed into. Don't tie it to any variable.

**Message block**: Hi, we need to meet right now so I can get the status on some tasks, and I have a few other questions. Please jump on this Team meeting right now if available.

https://teams.microsoft.com/l/meetup-join/19%3ameeting\_acrazylongthreadofl ettersandnumbersforthismeeting

Thank you! Vera

**Message block instructions**: Make the message block a drag and drop and when the block is dropped fill in the email.

You're going to build the email for Vera, so please drag some recipients over to the "To" box. < pause until first recipient is dragged over >

You can keep dragging recipients over or type in a subject and drag over the message block provided here. Teams will always include a link to the meeting in the email for you.

When you're done, click Send in Outlook.



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external employees. Author: Nick Leffler

Hotspot: Over the Send button and

progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

Starting the Teams Meeting

8 Calenda D

> Callout the Start meeting button: Click this button to configure the meeting and start it.

**Hotspot:** Over the Start meeting button and progress to the next slide.

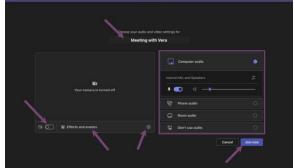
Course Next Button: no course next

button.

9

Course Back Button: go to the previous slide.

Setting Up the Meeting



Draw attention to the "Effects and avatars" button and gear icon. Make them clickable also.

There's lots of good stuff here but I'm going to leave it to you to explore a bit if you'd like. Select different elements and popups will appear to show you a bit about each one.

Now that you sent out the invite to all

To get Vera's meeting started, click

starts joining without you.

Start meeting.

those people, time to start the meeting before everyone gets excited and

I'll point out some important things, though.

You can rename your meeting here. Over here you can start your meeting with the camera turned on or adjust



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Clicking the Effects and avatars button will expand an overlay with the effects and avatars drawer with the following called out in text:

- Video effects tab
  - A box that doesn't call out anything: You can close this panel with the X or click the Avatars tab to learn about it.
  - Backgrounds: Choose a fake background for behind you. Blur is ideal for learning because it's proven less distracting.
  - Filters: Choose an overlay that sits above your camera on the screen.
- Avatars tab
  - A box that doesn't call out anything: You can close this panel with the X or click the Video effects tab to learn about it.
  - Avatars: Instead of video, use a cartoon avatar that you can customize.
  - Backgrounds: If you choose an avatar, you can also choose a background.

Video effects

Video effects

Avatars

Avatars

Backgrounds

More avatar settings

Clicking the gear icon under camera or the icon in computer audio settings opens the device settings as an overlay with text callouts: your effects and avatars by clicking this button.

The call is currently set to use the computer's audio which we're going to use, but you can also choose phone or room audio if you have those set up. I don't know why you'd want to choose no audio, but you can if you want!

Now for some audio settings. You can access those with this gear icon or this icon over here when you have computer audio selected.

I'll leave you to explore the effects and avatars option or audio and video settings. When you're ready, join the meeting, I'll leave how to do that marked on the screen.

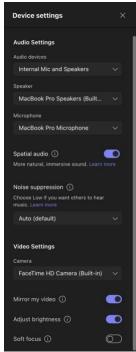


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- A box that doesn't call out anything: When you're done in this panel click the X.
- Audio settings: Adjust the device your computer uses for the speaker and microphone among other audio settings.
- Video Settings: Choose the camera you use for your meeting if there are multiple available and choose whether to mirror your camera or not.



**Callout the Join now button**: Click this button to join the meeting.

Hotspot: Over the Join now button and

progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

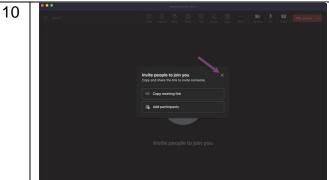
Close the Sharing Dialog



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**Callout the X button**: Click this button to close this message.

**Hotspot:** Over the X and progress to the next slide.

Course Next Button: no course next

button

Course Back Button: go to the previous

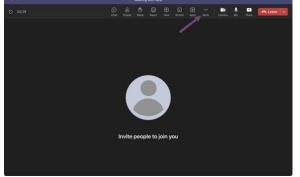
scene.

Now your meeting has begun, and you helped Vera share it with her team. Since you already invited all of Vera's colleagues you can close this dialog.

Scene 4: Use meeting controls to record, enable your camera, and share screen Topic 3: Make this an introduction slide with the title and show the percentage of the way through the course.

Recording a Teams Meeting

11



**Prompt**: Click the More button.

**Hotspot:** Over the More button and

progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

scene.

This call is important for Vera to document, which means she needs to start recording it before anyone shows up.

Follow the prompts on the screen to turn on recording for this meeting.

Recording a Teams Meeting

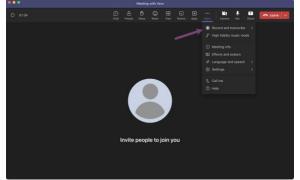


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Prompt: Click on Record and

transcribe.

**Hotspot:** Over the Record and transcribe option and progress to the

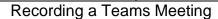
next slide on click.

Course Next Button: no course next

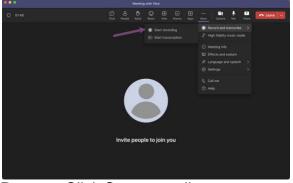
button.

Course Back Button: go to the previous

slide.







Prompt: Click Start recording.

**Hotspot:** Over the Start recording option

and progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

Turning Your Camera On

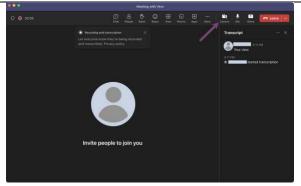


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Box timed with narration highlights the transcript drawer.

Arrow timed with narration points to the X on the transcript drawer.

Arrow timed with narration points to the More menu.

Show the Camera private preview when the down arrow next to the camera button is clicked and play the overlay audio track

Callout pointing to the Camera button area: Click the down arrow to see the private camera preview options or click the Camera button to turn on the camera.

Overlay:

When you start recording the call, transcription is also turned on and will show in real time what's being said in this panel.

You can see the call is being recorded here and attendees will also be alerted.

You can close the transcript panel with the X and to get it back, just head back into the menu where you started recording. That's also where you go to stop the recording.

You didn't turn on Vera's camera when you started the call, but she'd like to be seen at least for now. Before turning it on, I have a quick tip for you.

When the camera is off, before turning it on, you'll see a preview of your camera if you click the down arrow next to the camera button. You can try that on this screen.

Can you turn on the camera for Vera when you're ready?

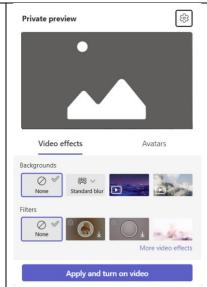
Overlay Audio Track if Camera preview is opened: This preview shows what your camera will look like when you turn it on. It's not on yet, so no one can see Vera's messy hair. You can also adjust the video effects, such as your background and filters, and turn on an avatar instead of your camera.



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Callout on Camera preview overlay pointing to the drop-down arrow: Click the drop-down again to continue.

**Hotspot**: Over the arrow next to the Camera button opens the above overlay. **Hotspot**: Over the camera button, click

progress to the next slide.

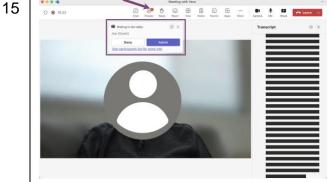
Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

Admitting Guests to a Teams Meeting



Arrow timed to narration pointing to guest waiting in lobby popup.

Awesome, there's Vera!

It looks like guests are trying to join. You can tell because this menu pops up, and a red number appears over the People button.

Instead of using the admit button on the popup, click on the People button for me please. There are a few things that are helpful to know in there.



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Arrow timed to narration pointing to red number over People button.

### Callout pointing to the People button:

Click the People button.

Hotspot: Over the People button and

progress to the next slide.

Course Next Button: no course next

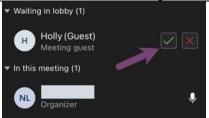
button.

Course Back Button: go to the previous

slide.

### Admitting Guests to a Teams Meeting

16



Callout pointing to Holly & Joe's admit/deny options: Admit Holly and then Joe.

Hotspot: Over both admit buttons and

progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

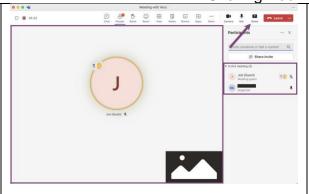
You can see Holly and Joe waiting in the lobby over here.

Depending on your meeting settings, internal employees will likely join automatically whereas external guests must be admitted.

Can you be a pal and admit them both by clicking on the admit buttons?

#### Sharing Your Screen

17



Thanks for bein' a pal and admitting them both.

Now you can see everyone in the meeting in the Participants panel and you'll see them in the main panel too.

You can also hover over a participant then click the menu button or rightclick on them to perform different actions such as mute them, pin them



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Callout box around the participants panel and main panel as being spoken in narration.

Callout pointing to the Share button: Click the Share button.

**Hotspot:** Over the Share button and progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

for you, spotlight them for everyone, and even remove them from the meeting.

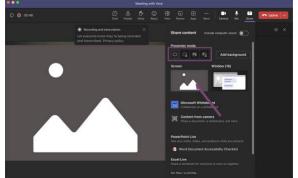
We'll be nice and leave everyone where they're at, though.

It's time for you to help Vera share her screen so the team can review the tasks that need to be accomplished.

To do that, click on the share button.

### Sharing Your Screen

18



Callout box around the presenter modes as spoken in narration.

Arrow pointing to Window timed to narration.

Callout with highlight on presenter modes: Click any of these presenter modes to explore what they look like.

Callout pointing to the Screen option: Choose this to share Vera's full Screen.

Hotspots: Each of three Presenter mode buttons (Standout, Side-by-side, and Reporter) shows a layer with a preview of what each one looks like in a layer...

Now you can choose all types of presenter modes with these buttons. Vera just needs to focus on the spreadsheet, so you won't use any of those here.

But, if you want to see what each one looks like, just click on each one for examples.

A good way to create focus and minimize distractions is to choose a specific window to share rather than sharing your entire screen, which distracts people with messages, alerts, and everything else.

Since Vera just needs a quick status update on each task, share her whole screen. We're okay with the distractions for such a short meeting.



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Hotspot: Over the Screen option and

progress to the next slide.

Course Next Button: no course next

button.

**Course Back Button**: go to the previous

slide.

Stop Sharing Your Screen

19



### Callout pointing to the top toolbar:

Hover over this bar to access tools and stop sharing.

Callout pointing to the Stop sharing button: Click the Stop sharing button.

**Hotspot**: Top small toolbar unhides the full toolbar.

**Hotspot:** Over the Stop sharing button

and progress to the next slide. **Course Next Button**: no course next

button.

Course Back Button: go to the previous

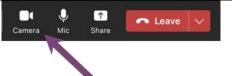
slide.

Now Vera can go over each task with the team and get the status and any needed updates. Vera could even give control to others in the toolbar at the top of the screen. We're not going that crazy so you can end Vera's presentation since she's done getting all the updates. She's really fast and of course, this is just an example.

To stop sharing, hover over the sharing menu at the top of your screen and click stop sharing.

### Turning Off Your Camera

20



Callout pointing to the Camera button: Click the Camera button to turn video off.

**Hotspot:** Over the Camera button and progress to the next scene.

Vera's kind of sick of being on display like she's in a fishbowl so you can turn off her video now.



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Course Next Button: no course next

button.

Course Back Button: go to the previous

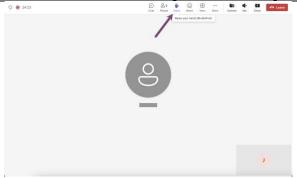
slide.

### Scene 5: Use social actions with meeting controls

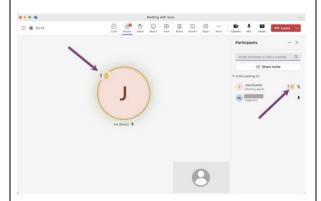
Topic 4: Make this an introduction slide with the title and show the percentage of the way through the course.

Raising and Lowering Hands for Questions

21



Call out the raise hand button in sync with the narration.



Show main screen with arrow pointing to the raised hand next to Holly's name and over avatar in time with parration.

Callout pointing to Holly's name: Right click on Holly and then lower her hand.

**Hotspot**: On right click unhides menu.

Meeting participants can raise their hand to let Vera know they have something to say or a question. Unfortunately, there's no way to \*really\* raise your hand like when you were in 3<sup>rd</sup> grade and really had to pee.

It looks like Holly has a question, and she raised her hand. You can see when someone raises their hand anywhere in Teams because a red number over the People button shows up. We already have the People panel open so you can see there's a hand raised next to Holly as well as in the main panel.

That means you can give her the floor to ask her question. She can lower her hand by clicking the Raise button again or you can do it by right clicking on her name and lowering her hand.

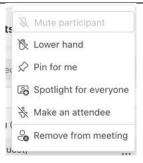
Just be gentle if you lower her hand for her.



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**Hotspot**: over the lower hand option

lowers Holly's hand.

Course Next Button: no course next

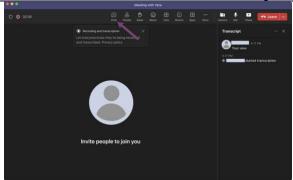
button.

Course Back Button: go to the previous

scene.

### Chatting in Teams

22



Callout pointing to the Chat button:
Click the Chat button.

**Hotspot:** Over the Chat button and

progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

Now it's time for a bit of social action in the meeting so you can get the hang of these helpful features in Microsoft Teams.

Vera really cares about your mastery of Teams.

The first thing she wants you to know is how to chat. To get to chat, click on the chat button.

Chatting in Teams

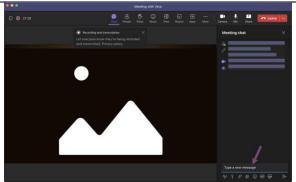


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Author: Nick Leffler

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Callout pointing to the Chat box: Type in a message and click the send button or press enter/return on your keyboard.

### Callout pointing to the send button:

This is the send button.

**Text Box**: The chat box should be a text box tied to a variable that will be shown in the next slide. Return/enter saves variable and progresses to the next slide.

**Hotspot:** Over the Send button sets variable and progress to the next slide. **Course Next Button**: no course next

outton

**Course Back Button**: go to the previous slide.

With the chat panel open you can see everything being said in the meeting. Hopefully it's not something bad.

You're going to type something really nice; I know it. Do that right now and either click the send button or press return or enter on your keyboard.

End The Meeting and Access Transcript and Recording

Topic 5: Make this an introduction slide in the middle of the scene with the title and show the percentage of the way through the course

**Ending a Teams Meeting** 



Woohoo! There's your chat for all attendees to see. You can also interact with other's messages by hovering over any message. Try it before continuing.

It's kind of late and everyone is anxious to go home for the day. Time to end the meeting.



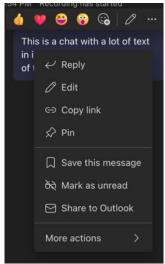
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Callout pointing to a message: Hover over this message to see what options you have.

**Hotspot**: Over a chat bubble when hovered over shows the reaction popup.



Callout pointing to the arrow next to the Leave button: Click this to end the meeting.

**Hotspot:** Over the drop-down on the Leave button and progress to the next slide.

Course Next Button: no course next

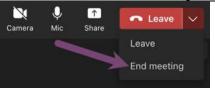
button.

**Course Back Button**: go to the previous slide.

To do that, click the drop-down arrow on the Leave button.

**Ending a Teams Meeting** 

25



Callout pointing to the End meeting option: Click End meeting.

Only do this when you're ready to boot everyone from the meeting because it will end it for all and stop the recording. If you want to leave the meeting open for others, you can simply click **Leave** without ending the meeting.



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**Hotspot:** Over the End meeting option

and progress to the next slide.

Course Next Button: no course next

button.

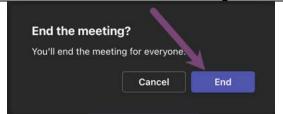
Course Back Button: go to the previous

slide.

It's time to say goodnight so click **End meeting**.

**Ending a Teams Meeting** 

26



Callout pointing to the End button:

Click the End button.

**Hotspot:** Over the End button and

progress to the next slide.

Course Next Button: no course next

button.

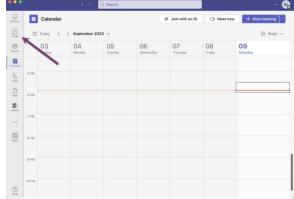
Course Back Button: go to the previous

slide.

Yes, this is a really big decision, so you have to verify it. Yes, Vera is done with these people so get 'em outta here. Click **End**.

Viewing Meeting Recording

27



Callout pointing to the Chat tab: Click the Chat tab.

Hotspot: Over the Chat tab and

progress to the next slide.

Course Next Button: no course next

button.

Now you're right back to the Calendar tab of Teams but you need to be in the Chat tab to see your meeting information including the transcript and recording. So, click **Chat!** 



Audience: All employees using Microsoft Teams who interact with internal and external (temporary) employees.

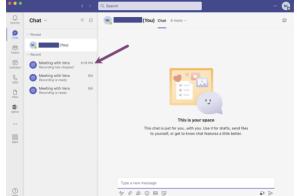
Goal: Help employees use Microsoft Teams to quickly meet a mix of internal and external employees.

Author: Nick Leffler

**Course Back Button**: go to the previous slide.

Viewing Meeting Recording

28



Arrow pointing to the "Recording has stopped" text on the screen.

Point to the Filter button in time with narration.

Change screenshot to recording is ready in time with the narration.

Callout pointing to the meeting: Click this meeting.

**Hotspot:** Over the meeting and progress to the next slide.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide.

This is where you can see all your past meetings including chats, transcripts, and recording if you chose to record the meeting, which we did. Keep in mind that if you were recording the call it takes some time for the recording to show up. You'll see "Recording has stopped" right here if it's still processing your recording.

When it's done you'll see "Recording is ready".

This button is great for filtering down to only meetings so you don't see everything else too.

Nice! It's now ready.

Go ahead and open it.

Viewing Meeting Recording

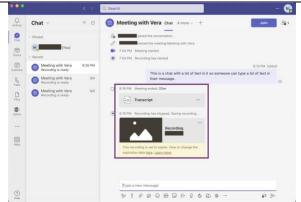


Audience: All employees using Microsoft Teams who interact with internal and external (temporary) employees.

Goal: Help employees use Microsoft Teams to quickly meet a mix of internal and external employees.

Author: Nick Leffler

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Show a callout around all the information from the meeting and arrow that points to downloadable transcript timed to the narration.

Show an arrow pointing to the Join button.

Show an arrow to the participant icon.

Callout pointing to Next in the course: Click Next in this course when you're ready to continue.

**Course Next Button**: progress to the next slide.

**Course Back Button**: go to the previous slide.

There's everything that happened in the meeting including the downloadable transcript and video that you can watch or download from Microsoft Stream. That's where Teams stores meeting recordings. Just be aware, it doesn't store it forever so be sure you download it before it expires. You can also change or remove the expiration date completely if you're allowed to.

You can even keep the meeting going if you'd like by joining it again and sending out invites again. Or you can simply type a message here that will go to any internal employee who was added to the meeting. External employees are left out of the fun. These tabs give you access to some other cool Teams features too.

You did it! You helped Vera do a lot and, in the process, you probably picked up a few new skills too, I hope. Click next in the course to continue.

### Microsoft Teams Course Review

30 Show YouTube icon that links to search for Microsoft Teams search.

Review the following course topics (links to each module in a lightbox:

- 1. Create an unscheduled meeting in Microsoft Teams.
- Invite employees and guests to your meeting.
- 3. Use meeting controls to record the meeting, enable your camera, and share your screen.

I think you learned enough to start your own Teams meeting and get around Teams. Don't you?

If not, there are lots of advanced courses and videos for Microsoft Teams, just search YouTube!

If you want to revisit any part of this course you can do that here, just click on a section.



Audience: All employees using Microsoft Teams who interact with internal and external (temporary) employees.

Goal: Help employees use Microsoft Teams to quickly meet a mix of internal and external employees.

Author: Nick Leffler

- 4. Use social actions.
- 5. End the meeting then access the transcript and recording.

Include a button that says "Visit techstructional's Website" and links to techstructional's website.

Course Next Button: no course next

button.

Course Back Button: go to the previous

slide

If you want a course like this for your company but custom for your company's software, check us out, we're always available to build custom and effective corporate technical training.

#### Help Scene: Lightbox for the help slide

#### Help

Overlay over the screen pointing to different parts of the options around the course screen. Each callout also has the icon of what the option looks like on the screen.

<Show what a prompt/callout looks like with instructions to click/do something> with this text in it: This is an instruction letting you know what to do next.

Callout pointing to callout example: This is what a prompt looks like.

Callout pointing to the menu in the course: View & navigate the course menu and read the narration.

Callout pointing the play/pause button in the course: Play/Pause Narration Callout pointing to the mute/volume

button: Mute/Change Volume

Callout pointing to the cc button: Turn

on/off close captions

Callout pointing to the previous/next buttons: Previous/Next Buttons
Callout pointing to the X button to close the help overlay: Close Help and return to the course.

There's lots of options available to control this course including those shown here.

You'll also see prompts on the screen that look like this. They'll tell you what to do next and where to click in case you space out for a second. We're all guilty of that, right?

When you're done here, click the X button in the top right of this course to close this Help overlay.



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Goal: Help employees use Microsoft Teams to quickly meet a mix of internal and

external employees. Author: Nick Leffler

