Meeting with External Colleagues

Teams is available to all registered UoA staff and students. It is also possible to invite external colleagues to Teams meetings. They do not need to be a guest member of your Team.

This guide steps you through the different ways you can do this.

> ⚠️ Please remember that information or files you post on a Teams site may be available to other team members. Teams is for communication related to your job role and should not be used for personal chat not related to your work. Information you record on Teams could be disclosed in response to a freedom of information request or to someone you refer to in Teams chat. Consider the appropriateness of what you record; only record what is relevant and necessary; and do not share anything that impacts on the privacy of individuals. If you are unclear about how and where to appropriately record information, please contact the Information Governance Team at dpa@abdn.ac.uk

What's the best solution for you?

Working on a University managed device?

If you are, it is simplest to use the Calendar in Outlook Desktop App as you will have access to the Global Address List. Also, you may already have external colleagues in your Outlook Contacts.

- Guidance for Outlook Desktop App

Working on a personal device?
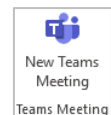
If you are, use Teams or Outlook Web App (OWA).

- Guidance for Teams
- Guidance for Outlook Web App (OWA)

What else is in this guide?

- Share a link to a meeting
- Meeting options (set participant permissions)
- Join a meeting

Using Outlook Desktop App

1. Go to Outlook's **Calendar**

2. Click **New Teams Meeting** in the Home tab Ribbon

   > 💡 If you don't see this button, it may be because the **Teams Meeting Add in** is not enabled. If you are unsure how to enable the Add-in, please contact the Service Desk.

3. A new **Untitled – Meeting** window opens.
   Notice the details and links at the foot of the meeting window. Do not delete these!

4. In the **New Meeting** window, add a **Title.**

5. **Add required (and optional) attendees** – the max number of participants is currently **1000**.

   - **External Guests:** Type in the email addresses of any external guests, separated by semi-colons. Or add them from your personal Outlook Contacts if appropriate.

   - **UoA staff colleagues and students:** If appropriate, add University of Aberdeen staff colleagues and students to the attendee fields in the usual way.

     > Remember that the Global Address List contains staff *and* student email addresses. Be sure you have selected the correct email address. Student email addresses can be identified by the PGR, PGT, and UG suffixes. Student names are also in capital letters.
     >
     > See our Toolkit guide on using the Global Address List.

6. Select the **Date**, **Start** and **End times** as required.

7. If required, add further details about the meeting in the main message area.

   - For the benefit of external guests, you may want to include a link to Microsoft's instructions on joining Teams meetings as a guest.

   - To attach an agenda or file, select **Insert > Attach File** from the meeting window ribbon.

8. Click **Send** to send a meeting invite by email to all attendees.

   - The meeting invite will include the **link** to join the meeting either from your computer (you can join via web or desktop app), mobile app or room device.

     Join on your computer, mobile app or room device
     Click here to join the meeting

Using Teams

1. In **MS Teams**, select the **Calendar**

2. Select **+ New Meeting** (top right)   **+ New meeting**

3. In the **New Meeting** window, add a **Title**

4. **Add required (and optional) attendees** – Note the max number of participants is currently **1000**.

   - **External Guests:** Type the email addresses of the any external guests separated by semi-colons

     > As you type, you may briefly see a prompt saying **No results found. Check spelling or try another name**. Ignore this and continue typing. Once you have typed the email address in full, click the **Invite** option that appears below the address field:
     >
     > | Project Forum | | |
     > | --- | --- | --- |
     > | ann.other@gmail.com | | + Optional |
     > | Invite ann.other@gmail.com | 18:30 30m All day | |
     >
     > This populates the email address in the address field:
     >
     > | Project Forum | |
     > | --- | --- |
     > | A ann.other@gmail.com ✕ | + Optional |

- **UoA staff colleagues and students:** If appropriate, add University of Aberdeen staff colleagues and students to the attendee fields in the usual way.

> Remember that the Global Address List contains staff *and* student email addresses. Be sure you have selected the correct email address. Student email addresses can be identified by the PGR, PGT, and UG suffixes.
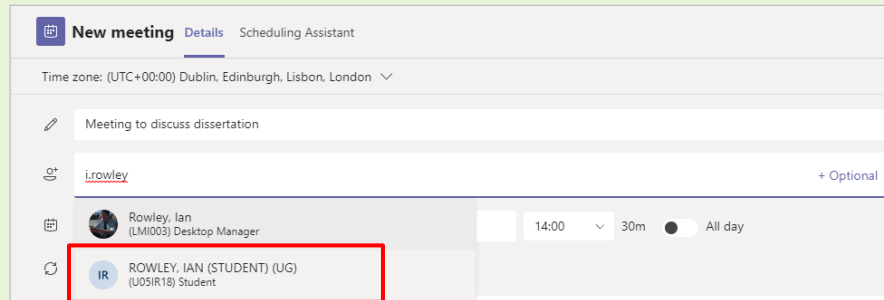
> See our Toolkit guide on using the Global Address List.

5. Select the **date and time** as required

6. Add details if required.

   - For the benefit of external guests, you may want to link to Microsoft's instructions on joining Teams meetings as a guest.

7. Click **Send** to create a meeting and send a meeting invite by email.

8. The meeting invite will include a **link** to join the meeting via the Teams app or on the web.

Using Outlook Web App (OWA)

1. Launch OWA – https://outlook.com/abdn.ac.uk

2. Go to the **Calendar** and click **New event** (top left)

3. In the new Meeting window, add a **Title** and select the **date**, **start** and **end** time as required.

4. Halfway down the meeting window, click to toggle *on* the **Teams meeting** button to include online joining instructions.
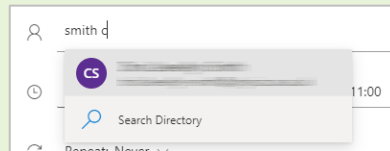

5. Click in the **Invite attendees** field – Note the max number of participants is currently **1000**.

   - **External Guests:** Type the email addresses of the any external guests separated by semi-colons.

   - **UoA staff colleagues and students:** If appropriate, add University of Aberdeen staff colleagues and students to the attendee fields in the usual way.
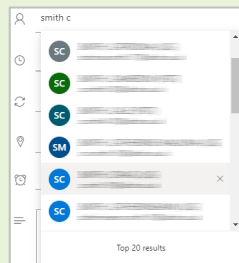
> Remember that the University address list contains staff *and* student email addresses. Be sure you have selected the correct email address. Student email addresses can be identified by the PGR, PGT, and UG suffixes. Here's our quick tip for finding students in OWA:
>
> i. **Students**: To find a student's email address, type in their **last name** followed by **a space**, then the **first initial of their first name**, for example: **smith c.**
>
> ii. This will bring up the option to **Search Directory** – click **Search Directory**
>
>
>
> iii. Select the appropriate student from the list of results.
>
>
>
> See our Toolkit guide on using the Global Address List for more.

6. If required, add further details about the meeting in the **Add a description...** field and attach a document.

   - For the benefit of external guests, you may want to link to Microsoft's instructions on joining Teams meetings as a guest.

7. Click **Send** (top left)

Share a link to a meeting

This can be useful when you want to contact a large group (max 1000) and already have a mailing list you can use, for example contacting students via a class email list.

1. Create a Teams meeting using Outlook, Teams, or OWA – as described above

2. You will need to add **at least one attendee address** to create the meeting and generate a link

   - For example, you could use a staff colleague's University email address
     Note: This person does not have to attend the meeting, but they *will* receive the invitation, so always check with them first.

3. Complete the other meeting details as required and click **Send**.

4. Open the meeting you have just created, right-click on the **Click here to join the meeting** link and choose to **copy the link** from the pop-up menu.

5. Then paste the link as required, for example into a mailing list message.

Note: If your account is enabled for Microsoft Audio Conferencing[1] a dial-in phone number and conference ID will appear under the Join Teams Meeting link when you schedule a meeting. This allows participants to call in by phone (incurring usual telephony costs).

Meeting options

When you schedule a Teams meeting, you (as Organiser) can assign permissions for participants. For further guidance, see **Appendix** on page 5.

Join a meeting

1. **You** can join the meeting from your Teams Calendar, or from Outlook or OWA.

    - In **Teams**, go to the **Calendar**, click on the meeting and then **Join** in the pop-up window.

    - In **Outlook**, go to the **Calendar** and open the meeting, then click the **Join Teams Meeting** button on the ribbon, or the **Click here to join the meeting** link in the invite window.

    - In **OWA**, go to the **Calendar** click on the meeting and then **Join** in the pop-up window or open the meeting and use the **Click here to join the meeting** link in the invite window.

2. **External guests** will receive an email invite with a **Click here to join the meeting** link.

    Once guests click on the link, they can join the meeting in one of three ways:

    - Launching the Teams app if their organisation is already using Teams.

    - Downloading and using the Teams app – this can be on a computer or mobile device.

    - Joining on the web by continuing in the browser.
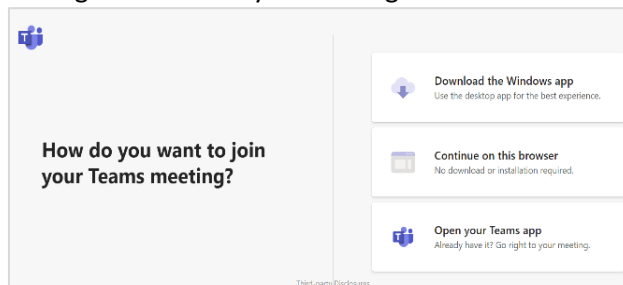
3. During the meeting, participants can:

    - Use audio/video if available to them

    - Click the **Chat** icon to open the **Meeting chat** pane and chat with other participants.
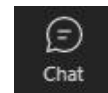
During the meeting

See our Quick guide to Meetings for more details on the controls and roles within a meeting, and in particular the options that the organiser or a presenter can use.

Help and Support

See Guides and Links in our MS Teams resource on Toolkit or contact the IT Service Desk: myit.abdn.ac.uk

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[1] To request that your account be enabled for Microsoft Audio Conferencing, contact the IT Service Desk

Appendix: Meeting options

When you schedule a Teams meeting, **you** are the **Organiser**. By default, *all* other participants are **Presenters** and can share content during the meeting, admit people from the lobby, and start or stop recordings.

This is not always ideal, so it's a good idea to limit the number of privileged users, particularly when many participants are joining a meeting.

Assigning permissions when scheduling a meeting

Using Outlook Desktop App

Set up the meeting as described above – but **before** sending the invitation, **Ctrl + click** the **Meeting options** link at the foot of the meeting window.

Learn More | Meeting options

This launches the **Meeting options** window in your web browser.

- Choose who can bypass the lobby: **Everyone**; **People in my organization, trusted organizations and guests; People in my organization and guests; People in my organization; People I invite (Turn Off Allow Forwarding in the meeting invite)** or **Only me and co-organizers**.

- If your meeting has a call-in option, you can choose if callers can bypass the lobby and if they are announced when joining or leaving.

- Choose who can present: **Everyone; People in my organization and guests; Specific people;** or **Only me and co-organizers.**

  If you select **Specific People**, you can then choose which of your participants can present.

- Choose whether to:
  o **Allow mic for attendees** or not. (This does not apply to presenters)
  o **Allow camera for attendees** or not. (This does not apply to presenters)
  o **Record automatically** when the meeting starts or not.
  o **Allow meeting chat** or not. Set it to Enabled; Disabled or In-meeting only.
  o **Allow reactions** or not.
  o **Enable Q&A** or not.
  o **Provide CART Captions** or not.
- Click **Save** to save your Meeting Options.

Using Teams or Outlook Web App (OWA)

Currently, in Teams and OWA, the **Meeting options** link does not appear until *after* you have saved or sent your meeting invitation. It is likely this feature will be added in the future. Meantime:

- Set up the meeting as described above and click **Save** to send it.
- Return to your meeting and open it for editing. You will now see the link for **Meeting options**.
- Follow the steps as above, then save or update the meeting.