

Facilitating with Teams

Host, present, and engage with confidence

Training session

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What we'll cover

1

Setting up a Teams meeting

2

Log into your Teams account

3

Start a Teams meeting

4

Meeting window and controls

5

Share screen, slides, and video with sound

6

Breakout rooms

7

Polls and live feedback

8

Chat, reactions, and raised hands

How a Teams training gets set up

1

Account created

Your training coordinator will work with our tech team to give you a CTRL account with a Teams license.

2

Log in and confirm it works

We'll help you sign in and confirm your account works.

3

Meeting scheduled

Your training coordinator sets up the Teams meeting, adds you as an attendee, and sets your role to co-organizer.

4

Accept the invitation

Accept it from your CTRL account, and you're ready to go.



How to log into your Teams account

1

Open Teams

Launch the desktop app, or go to Teams in your web browser

2

Sign in

Use your CTRI email address and password. We create your account for you, so there's no need to make one.

3

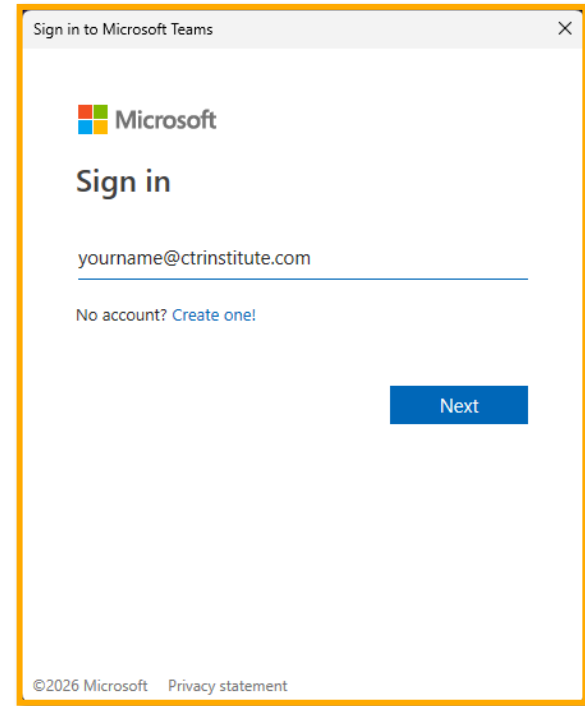
Verify your identity

Complete multi-factor authentication if prompted

4

Confirm you're in

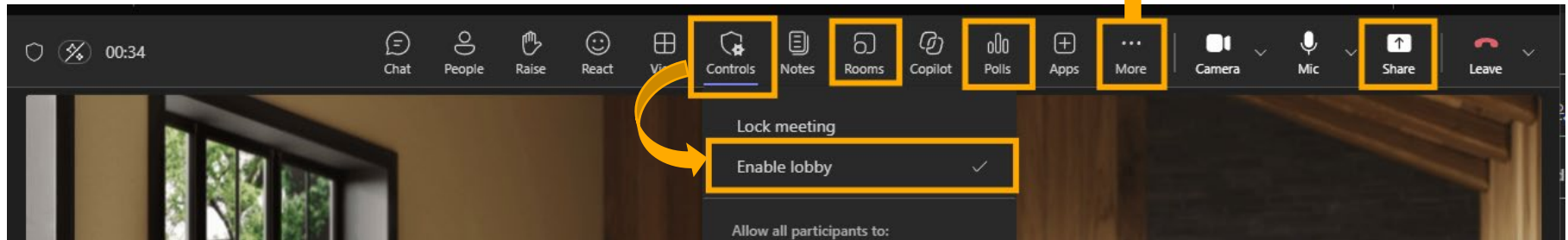
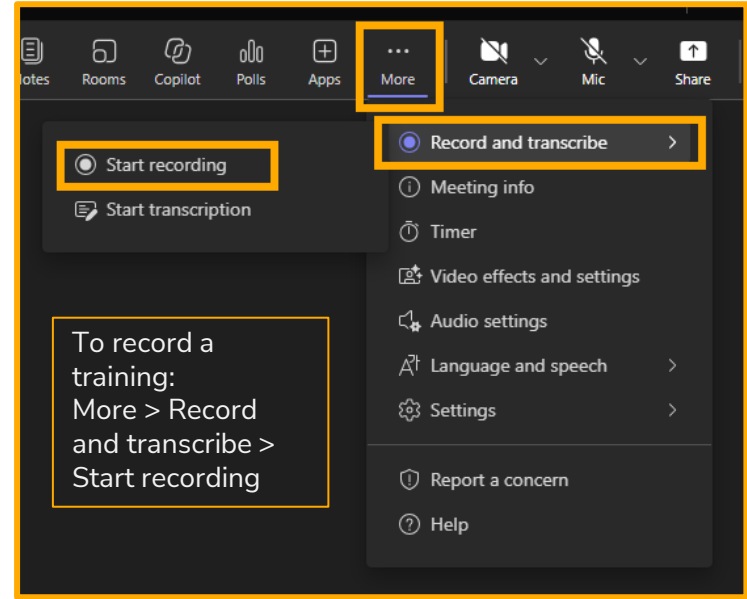
Check that your name or photo appears at the top right



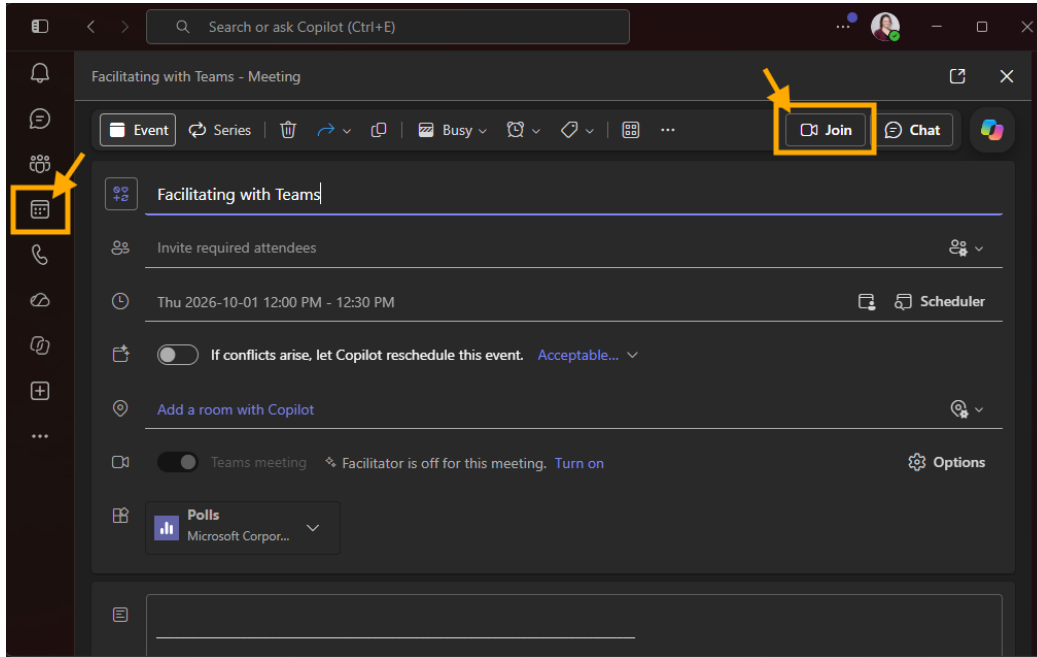
What you can do as a co-organizer

Nearly all the same controls as the person who scheduled the meeting:

- Start the meeting
- Allow attendees to enter
- Turn off the Lobby (aka the Waiting Room)
- Create and launch polls
- Run breakout rooms
- Start and stop recording

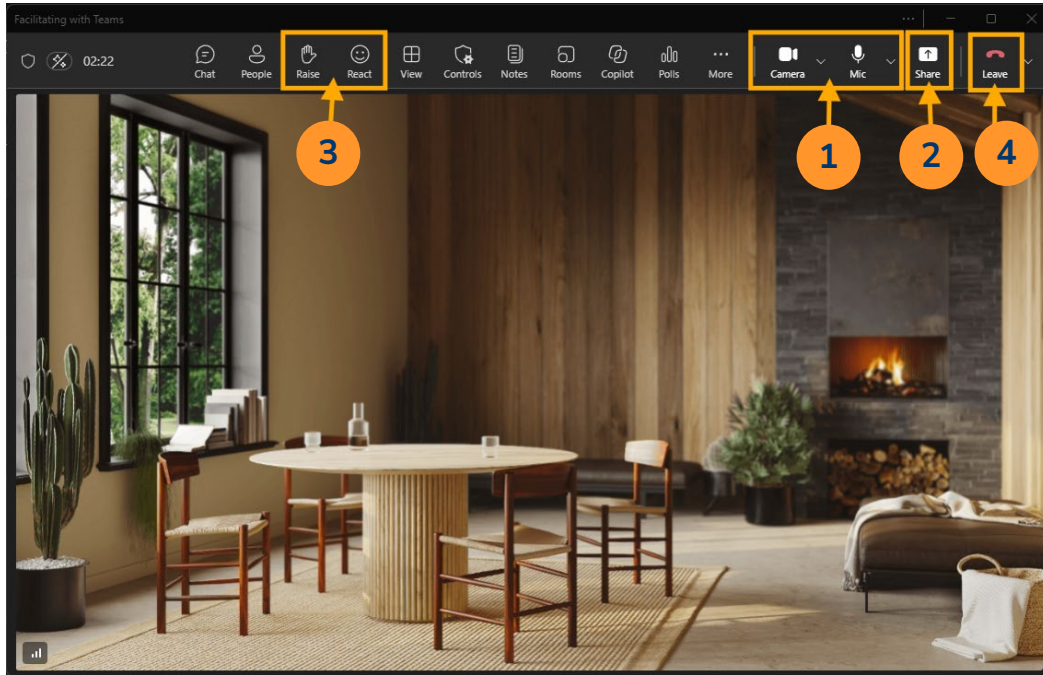


How to start a Teams meeting



- 1 Go to Calendar**
Open Teams and select the calendar in the left-hand app bar
- 2 Start the meeting**
Open the scheduled meeting and select "Join"
- 3 Check your audio and video**
Pick your camera and microphone on the preview screen
- 4 Join the meeting**
Select Join now

Meeting window and controls



1

Mic and camera

Turn your audio and video on or off

2

Share

Present your screen, window, or file

3

React

Raise your hand or send a reaction

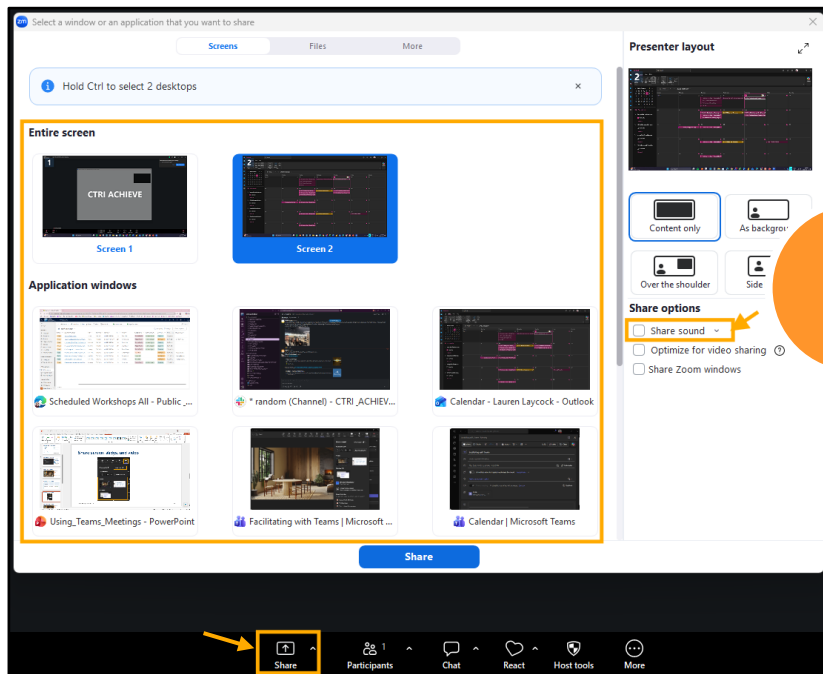
4

Leave

Click the arrow to select Leave or End meeting

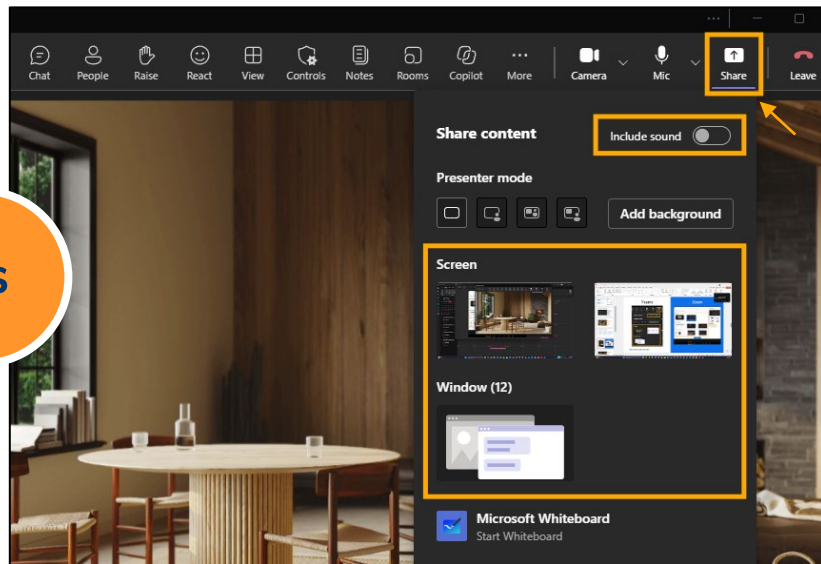
Zoom vs. Teams: Share screen, slides, and video

Zoom



VS

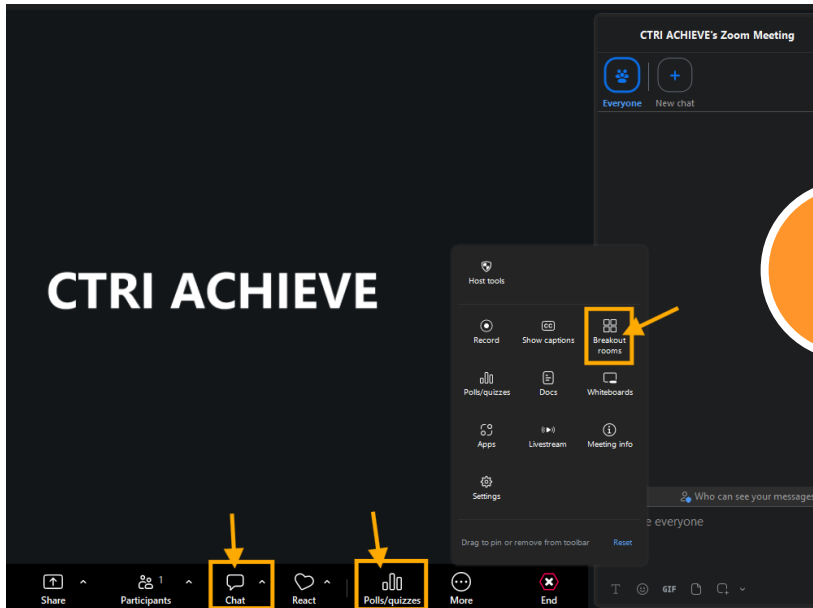
Teams



Share button, select a screen or window, turn on sound.

Zoom vs. Teams: Chat, polls, and breakout room

Zoom



VS

Teams



Breakout rooms: what attendees need

Who can't be moved into rooms

- Free Teams accounts
- Unsupported devices (like CVI)
- Anyone not fully in the meeting
- Older versions of Teams

Before the session, attendees should

- Update Teams
- Sign in with a work or school account
- Join before rooms open

Backup: Use **Ask to join**, or keep anyone who isn't moved in the main meeting.

Create breakout rooms

×

Choose the number of rooms you want to create.

2

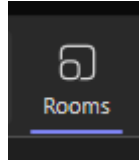
Assign participants

☒ Automatically assign 0 people to each room

☐ Manually assign people to rooms

☐ Let people choose their rooms

Create rooms



Set up and manage breakout rooms

1

Create the rooms

Choose how many rooms you need

2

Assign participants

Assign automatically or manually

3

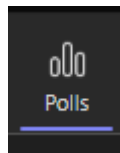
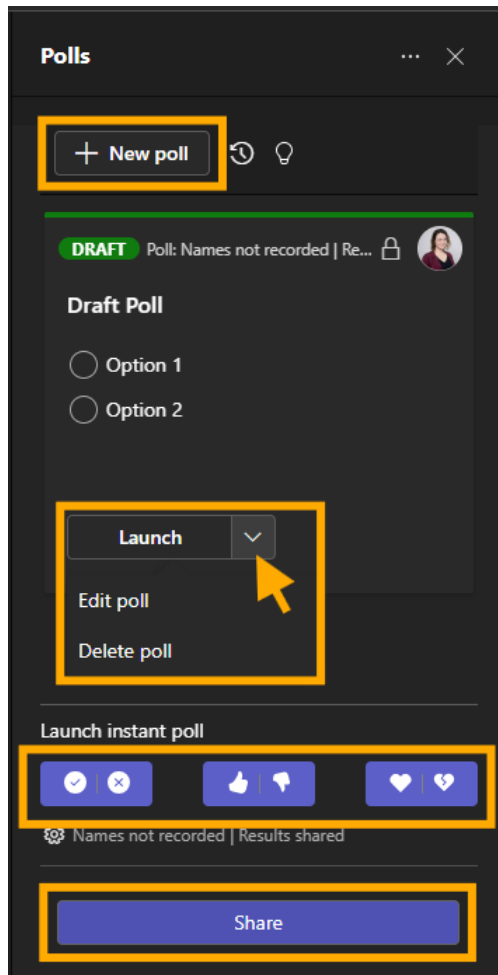
Open the rooms

Start the rooms and send participants in

4

Monitor and bring everyone back

Visit rooms, send announcements, then close the rooms



Run polls and gather live feedback

1

Create a new poll

Select from multiple choice, quiz, word cloud, rating, or ranking

2

Edit & Launch

Select the arrow to Edit before launching

3

Launch instant poll

Use prebuilt polls quickly

4

Share the results

Show the group and use them to guide discussion

Questions?