

User Guide

Touchcast for Microsoft Teams

Last Updated: July 2023

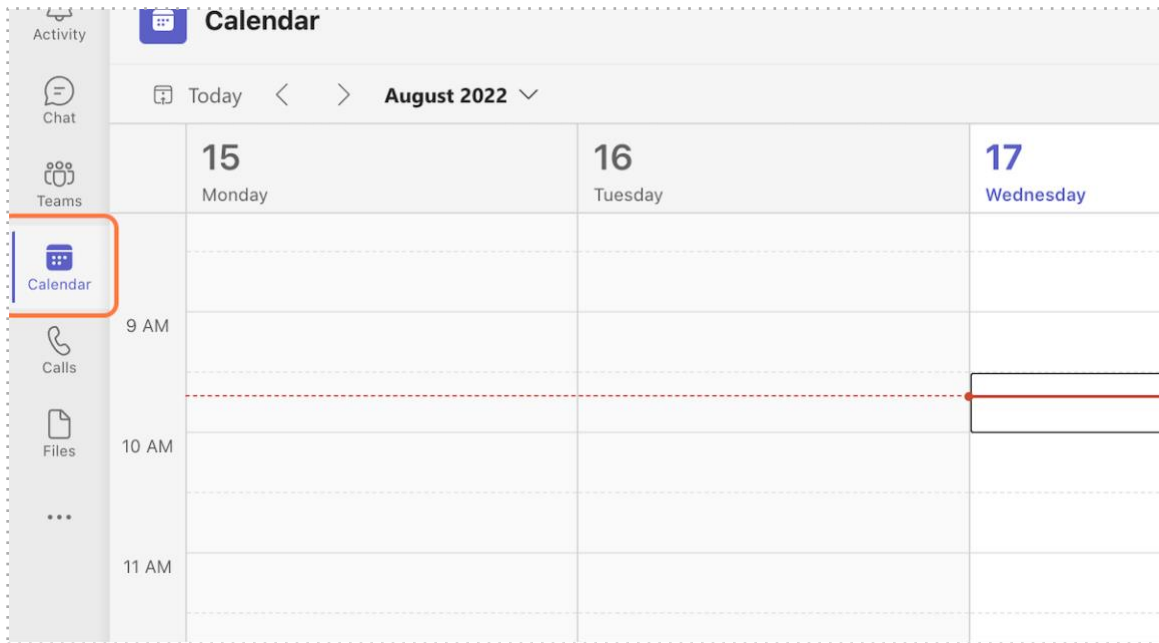
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Scheduling & Adding Touchcast to a Meeting

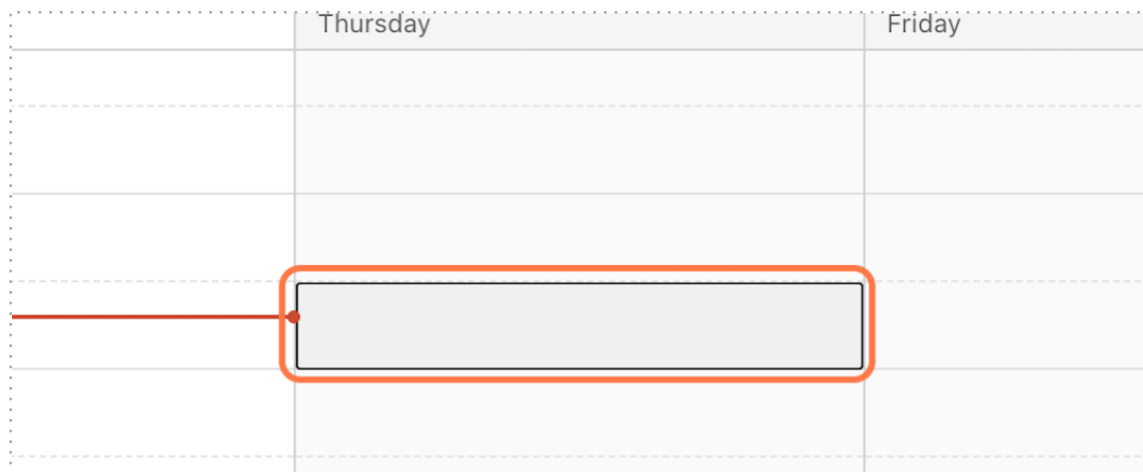
There are two ways you can add the Touchcast for Teams application to a meeting. The first way is for when you'd like to set up a meeting in advance without initiating the call.

1. Launch your **Teams desktop client**. Sign in if you haven't already.
2. Click on the **Calendar** tab from your left hand panel.

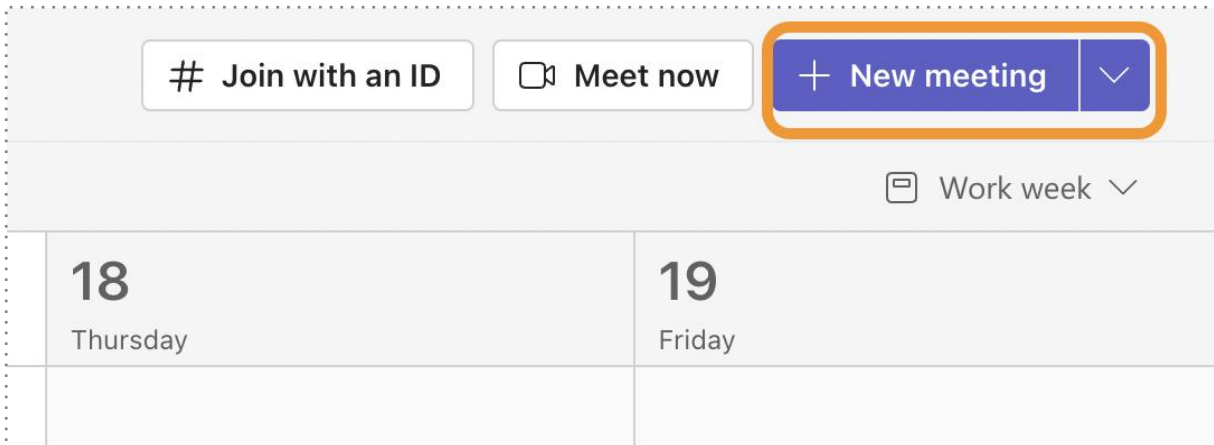


3. Click on the **time slot** directly in the Teams calendar (*Option 1*) **or** select "**+ New Meeting**" in the top right corner of the Teams window (*Option 2*).

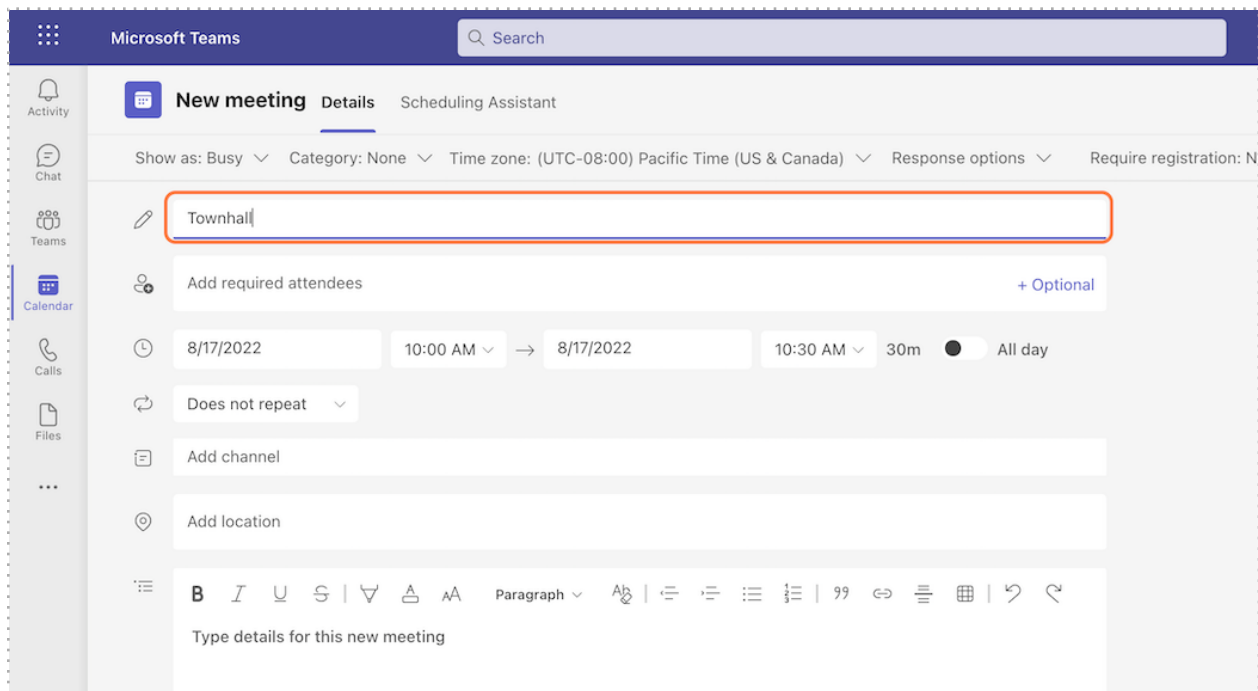
Option 1



Option 2

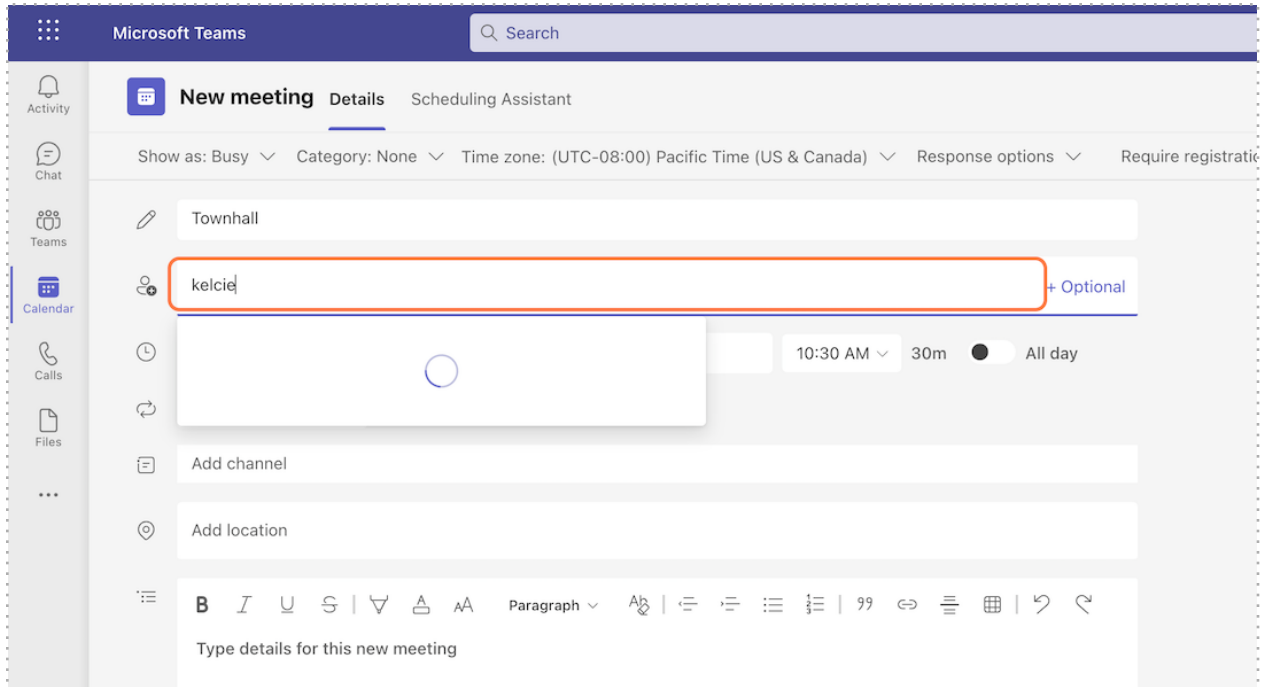


4. Enter a **title** for your meeting. The title added here will appear on all your calendar invites (i.e. for both speakers and attendees) by default. You can change this title per user role at a later time.

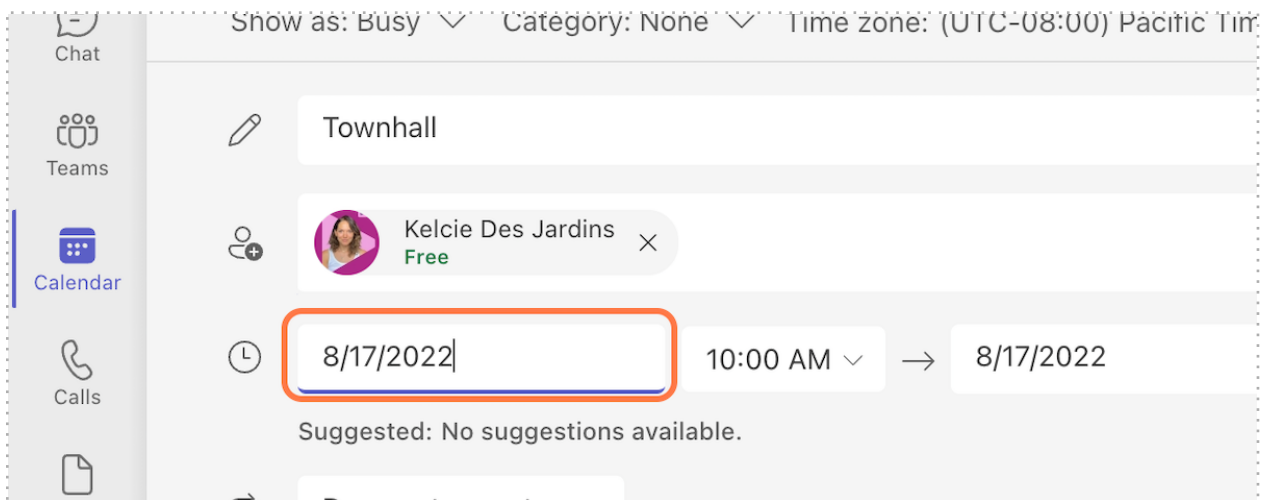


5. Add yourself as a **required attendee** of the meeting (*this step is **required** to add the Touchcast for Teams app later*).

👏 Touchcast recommends adding yourself (or a member of your internal team) to the meeting. Anyone added to the meeting at this stage will be assigned to **both** the speaker and attendee meetings.



6. Enter or select the **date, start, and end time** for the meeting. This can be edited later.



7. Click "**Send**" to save the meeting.

! At minimum, you will need to include the title, a start/end time, and at least 1 participant to proceed with adding the Touchcast app.

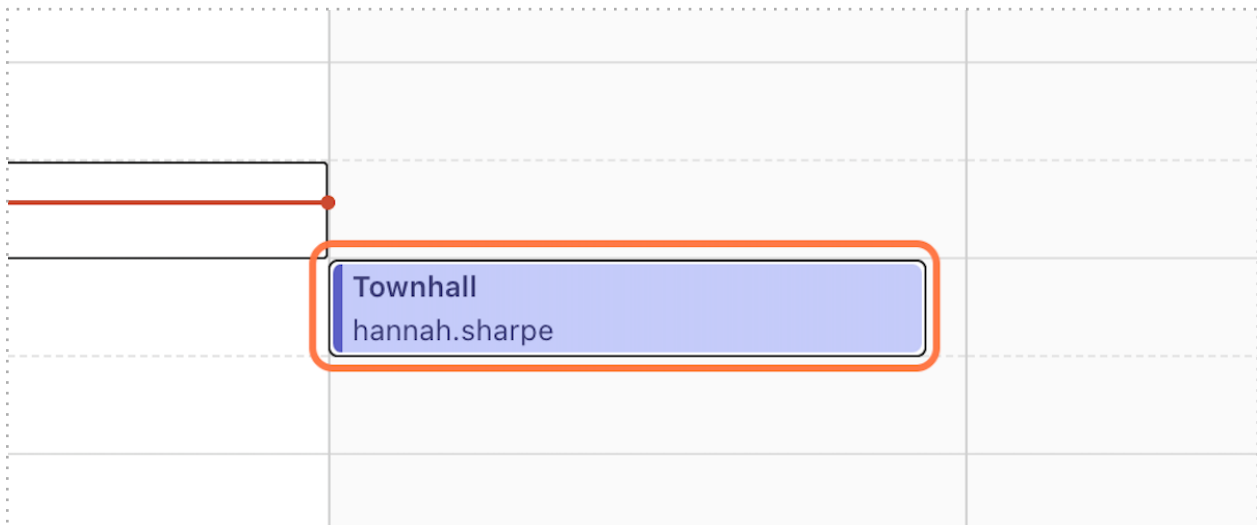
Send Close

response options ▾ Require registration: None ▾

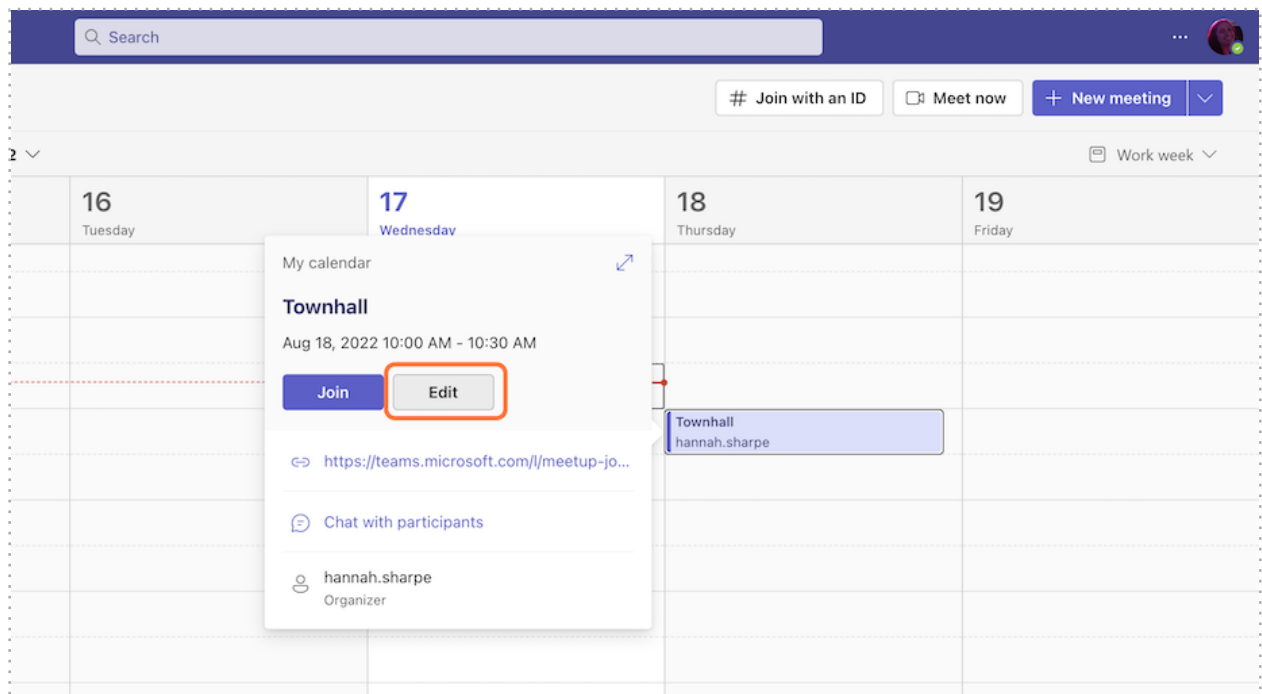
+ Optional

0m All day

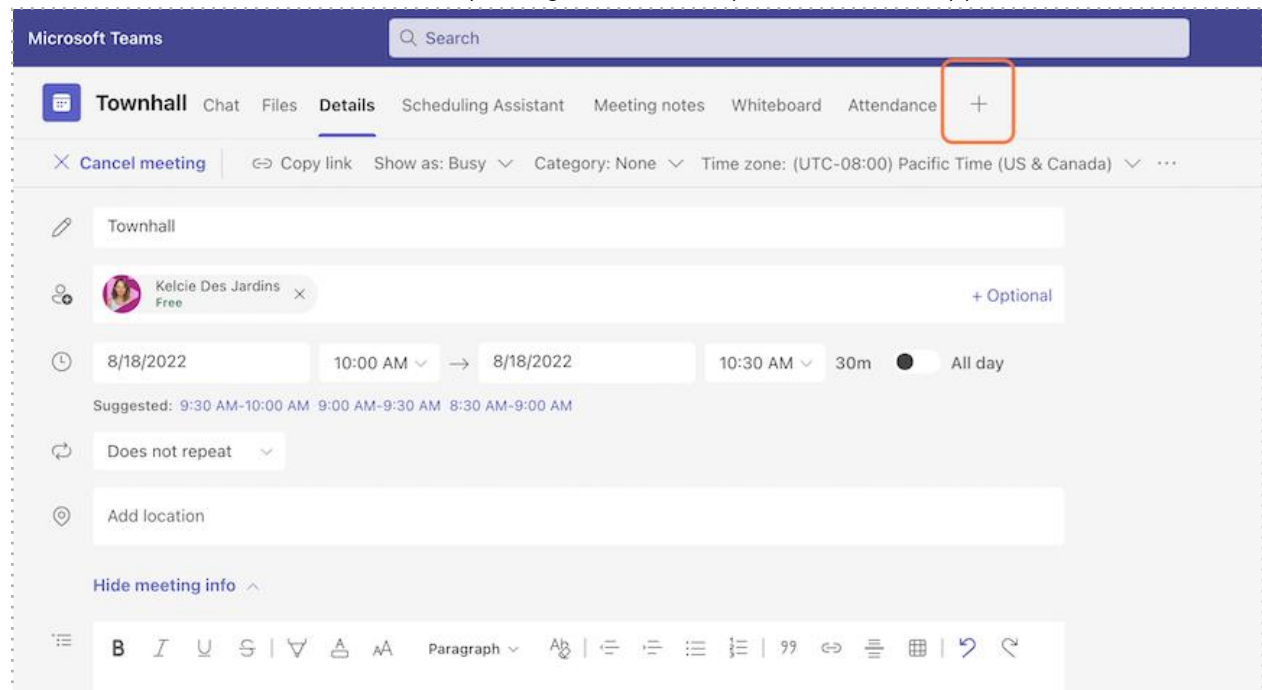
8. Click on the **created meeting** in your Teams calendar.



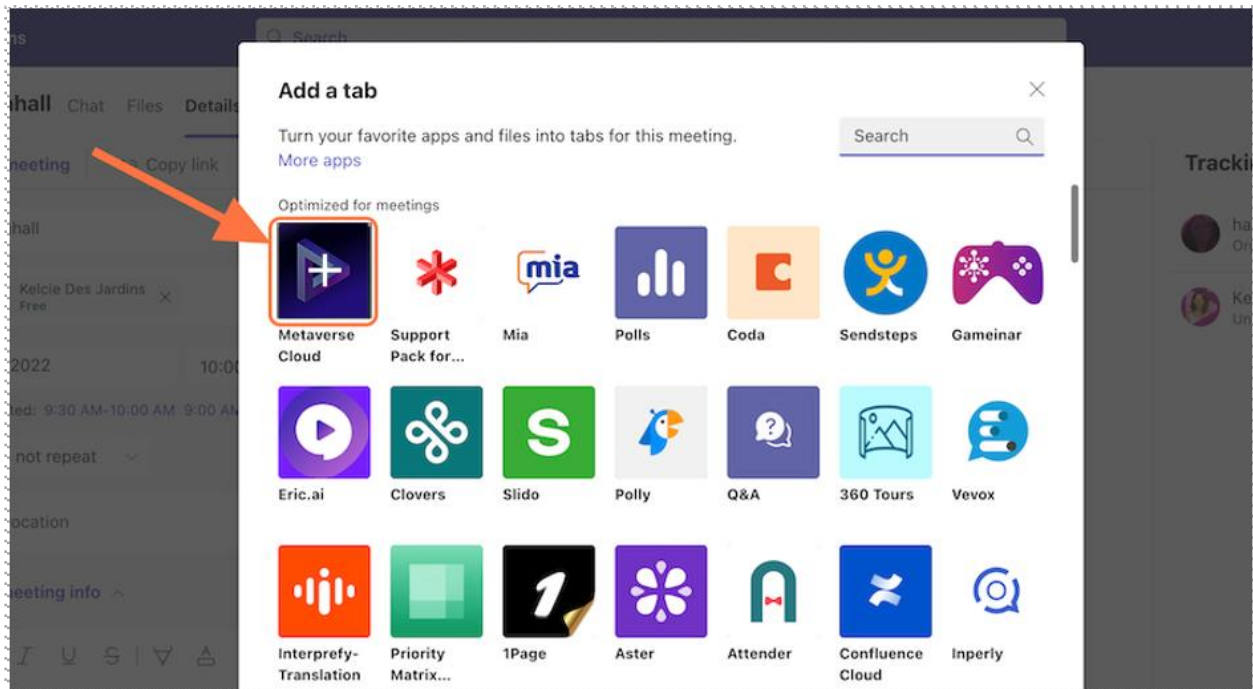
9. Select "**Edit**" from the popup.



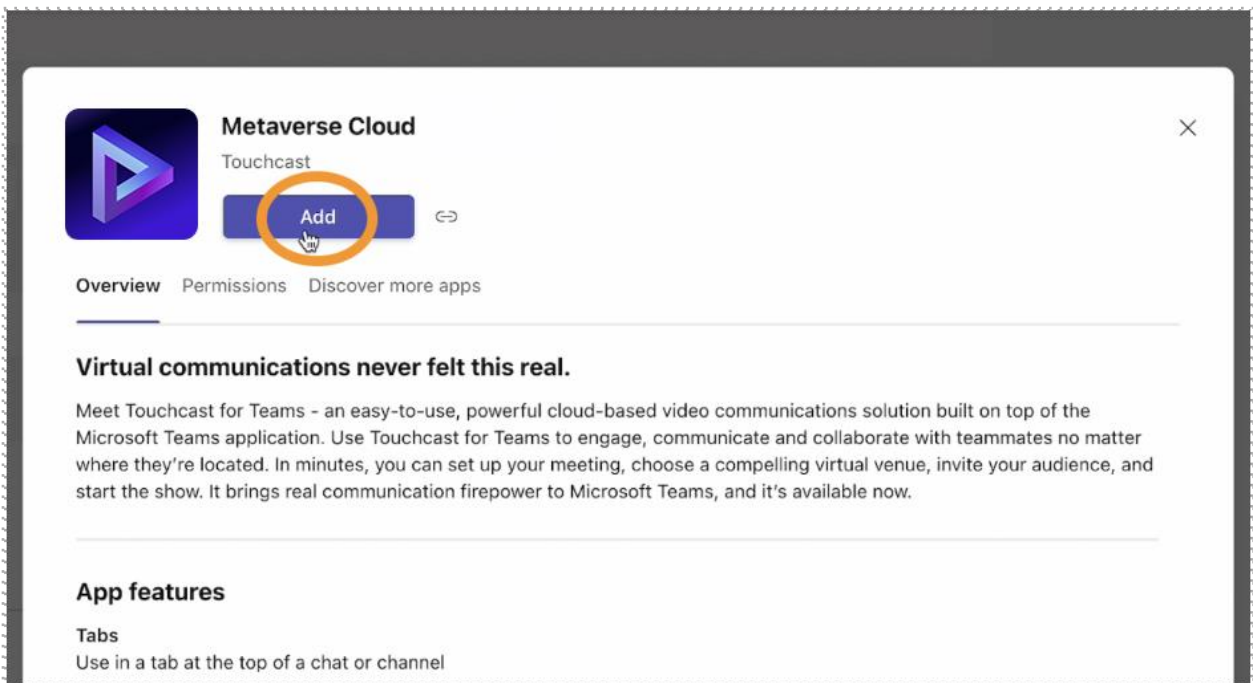
10. Click on the "+" icon in the top navigation bar to open the Teams App Store.



11. Type in "Touchcast" to search for the extension, and select the **Touchcast for Teams app**.



12. For first time installation, select **Add** from the popup.



13. Enter your information in the **registration fields**.

👉 You will be asked to register for the Touchcast app only once.



Register

First Name

hannah.sharpe

Last Name

Last Name

Email

hannah.sharpe@touchcast.com

Country


United States

Back

Save

14. Scroll to the bottom of the registration form and select **Register**.

1h

 Metaverse Cloud About ×

Email

Country


▼

Password

Confirm Password

meeting ↔ Copy link Show

in hall

 Kelcie Des Jardins Free ×


10/2022 10:00 AM

cheduled: 9:30 AM-10:00 AM 9:00 AM-9:30 AM


is not repeat ▼


location

meeting info ^



icrosoft Teams meeting



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Virtual events never felt this real.

Go beyond video conferencing and deliver stunning presentations that rival any physical event.

Tracking

-  hannah.sh Organizer
-  Kelcie Des Unknown

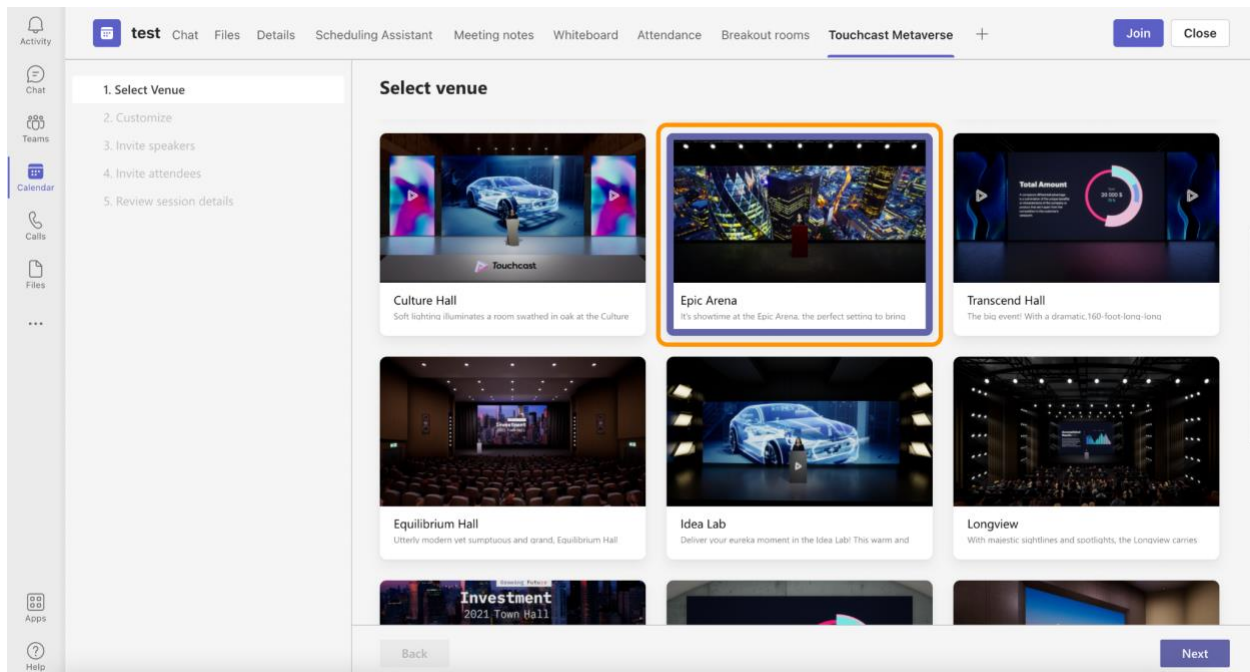
15. Click **Save** to confirm the addition of the Touchcast for Teams app to your meeting.

Setting Up Touchcast for Teams

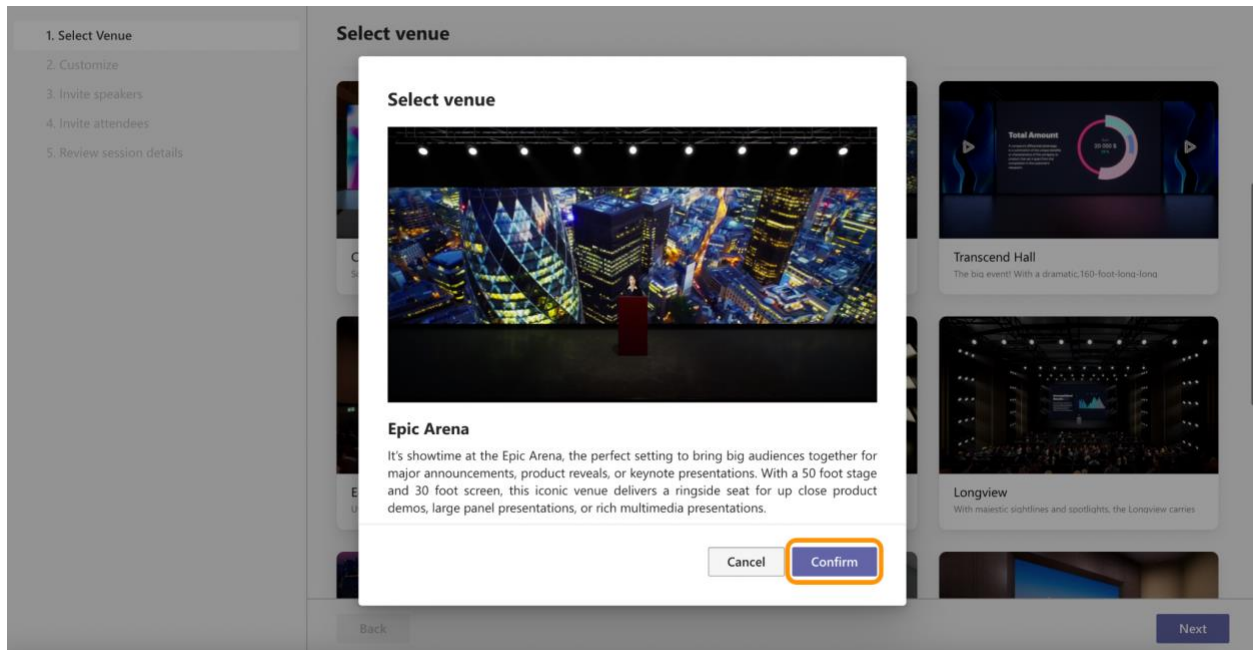
Once you've successfully registered and added the application to your meeting, you will be prompted to follow 5 additional steps before your meeting is configured and confirmed.

Step 1: Select Venue

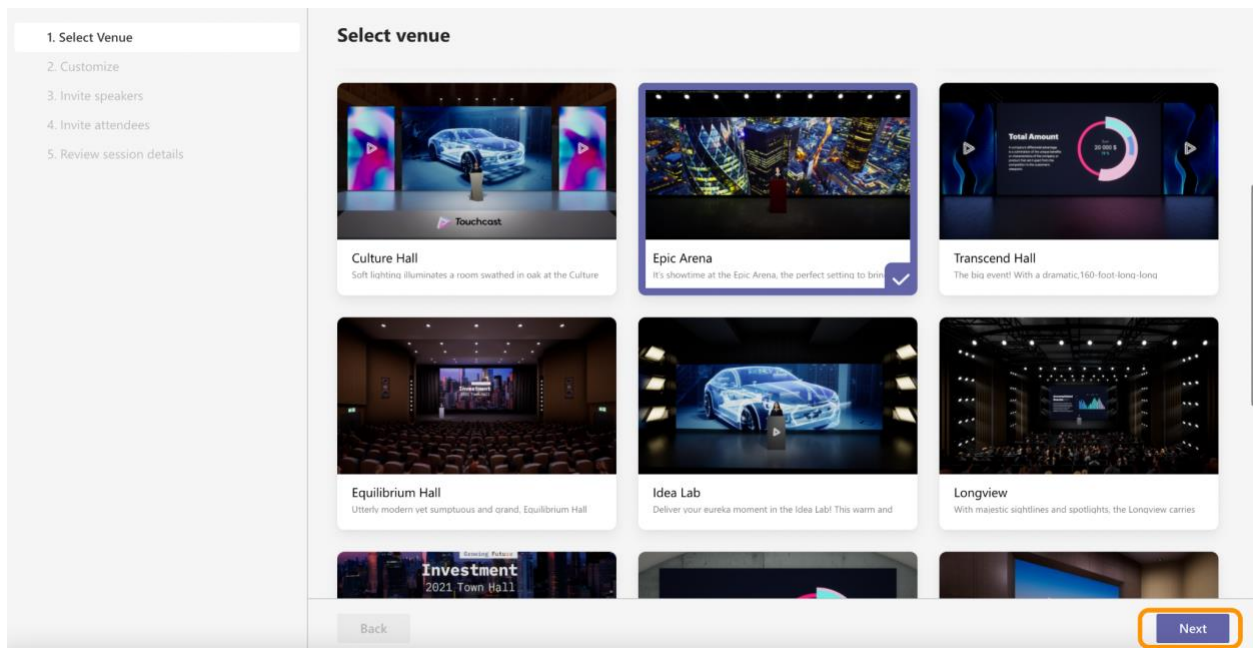
1. From the **Select Venue** tab, scroll through the Touchcast Iconic Venues and click to select the one that fits your desired look and feel.



2. Once clicked, a popup will appear. Click **Confirm** to proceed.

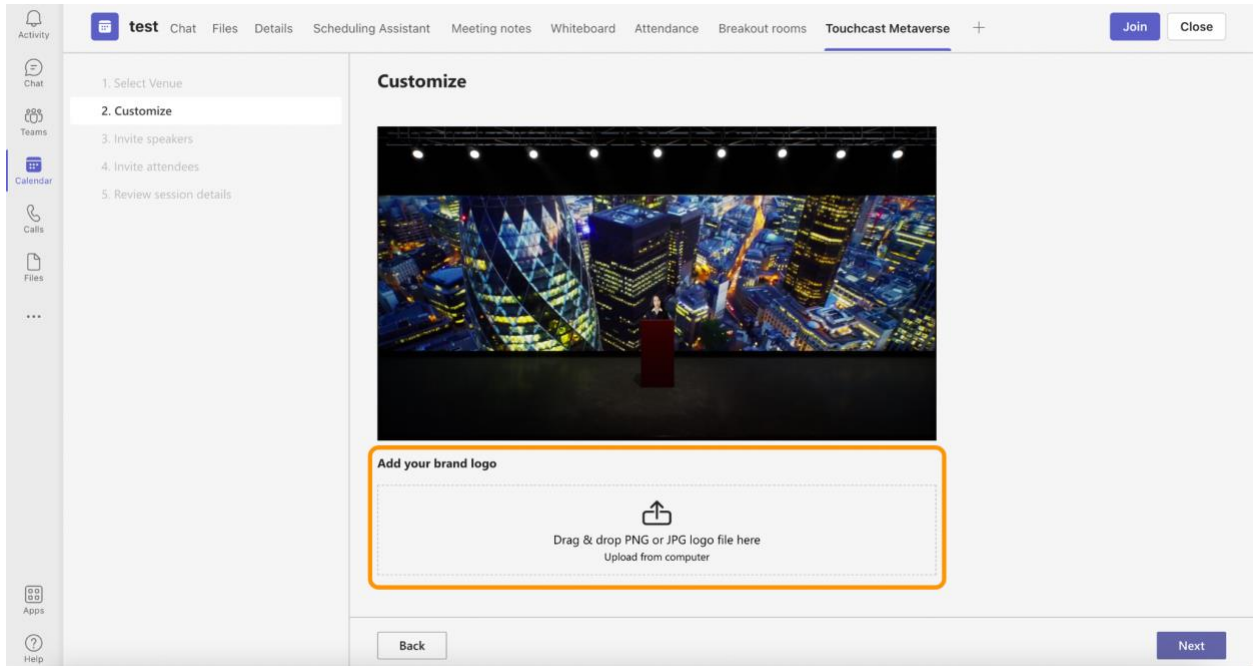


3. Click **Next**.

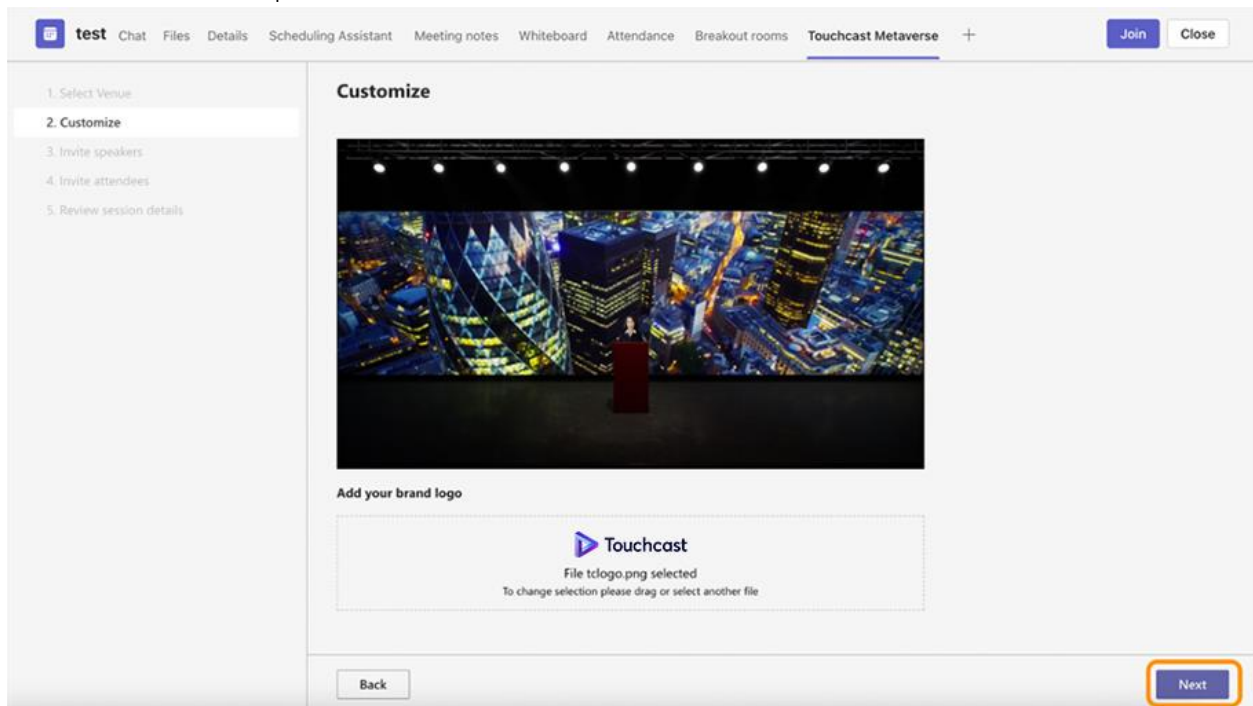


Step 2: Customize

1. (Optional) Drag and drop or click into the **Add your brand logo** section to select a logo from your local files. Skip this step if you do not want to add a custom logo to the venue.

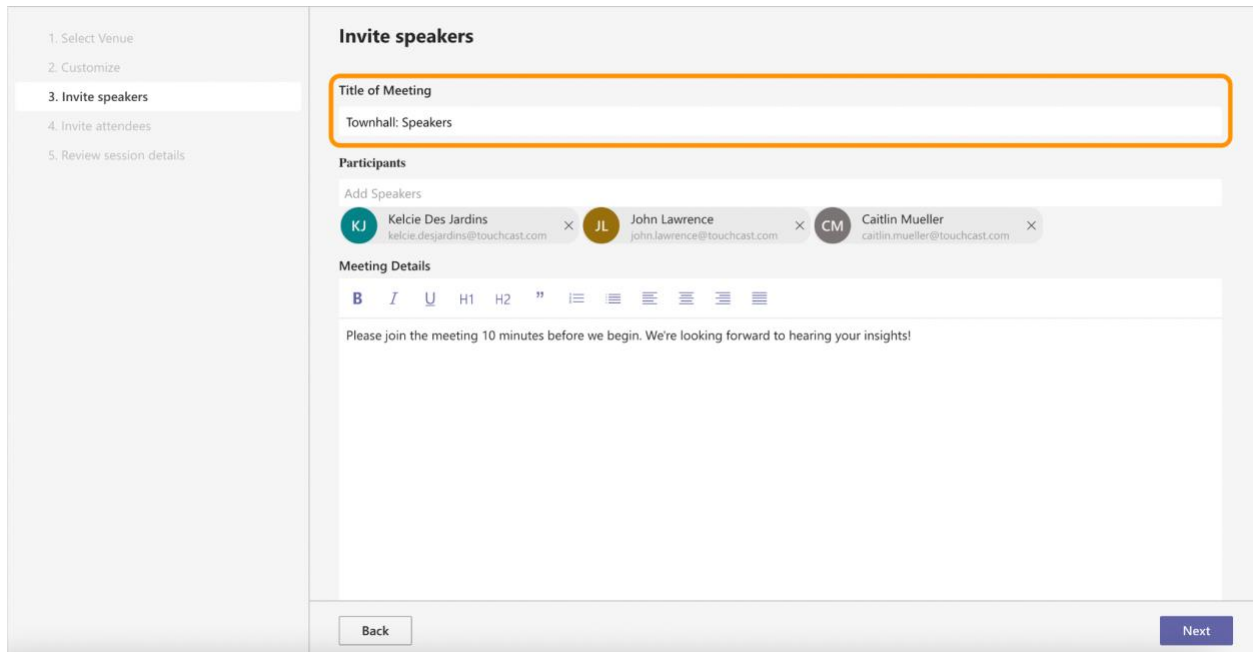


2. Click **Next** to proceed.



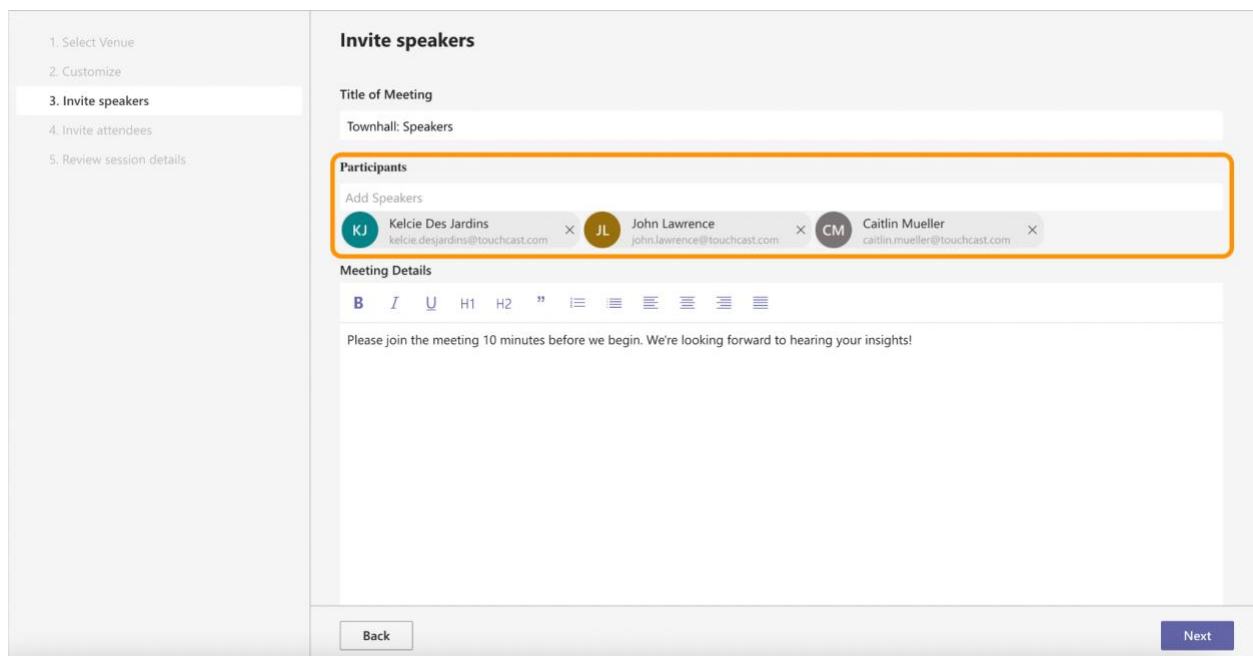
Step 3: Invite Speakers

1. If desired, edit the **Title** of the speaker meeting room.



The screenshot shows the 'Invite speakers' interface. On the left is a sidebar with a navigation menu containing five items: '1. Select Venue', '2. Customize', '3. Invite speakers' (which is highlighted), '4. Invite attendees', and '5. Review session details'. The main content area is titled 'Invite speakers' and contains three sections: 'Title of Meeting' with a text input field containing 'Townhall: Speakers' (this field is highlighted with an orange border), 'Participants' with an 'Add Speakers' input field and three added participants: Kelcie Des Jardins (KJ), John Lawrence (JL), and Caitlin Mueller (CM), each with a close button; and 'Meeting Details' with a rich text editor toolbar and a message: 'Please join the meeting 10 minutes before we begin. We're looking forward to hearing your insights!'. At the bottom are 'Back' and 'Next' buttons.

2. Add the speaker **Participants** by individually typing the name (if they belong to your Teams tenant) or entering the email address of your speakers.



This screenshot is identical to the one above, but the 'Participants' section is highlighted with an orange border. This section shows the 'Add Speakers' input field and the three added participants: Kelcie Des Jardins (KJ), John Lawrence (JL), and Caitlin Mueller (CM), each with a close button. The rest of the interface, including the sidebar, title field, and meeting details, remains the same.

 **If you are adding participants to the Speaker meeting who *will not* be actively**

participating in the session, remind them to keep their cameras off and microphones muted.

3. Enter **Meeting Details**. Information provided in this field will only be visible to those added as Participants to the speaker meeting.

The screenshot shows the 'Invite speakers' configuration screen. On the left, a sidebar lists steps: 1. Select Venue, 2. Customize, 3. Invite speakers (highlighted), 4. Invite attendees, and 5. Review session details. The main area is titled 'Invite speakers' and contains a 'Title of Meeting' field with the text 'Townhall: Speakers'. Below this is a 'Participants' section with an 'Add Speakers' input field and three added participants: Kelcie Des Jardins (KJ), John Lawrence (JL), and Caitlin Mueller (CM). A 'Meeting Details' text area is highlighted with an orange border, containing a rich text editor toolbar and the message: 'Please join the meeting 10 minutes before we begin. We're looking forward to hearing your insights!'. At the bottom, there are 'Back' and 'Next' buttons.

4. Select **Next** to proceed.

Step 4: Invite Attendees

1. If desired, edit the **Title** of the attendee meeting room.

The screenshot shows the 'Invite attendees' configuration screen. The top navigation bar includes 'test', 'Chat', 'Files', 'Details', 'Scheduling Assistant', 'Meeting notes', 'Whiteboard', 'Attendance', 'Breakout rooms', 'Touchcast Metaverse', '+', 'Join', and 'Close'. The left sidebar lists steps: 1. Select Venue, 2. Customize, 3. Invite speakers, 4. Invite attendees (highlighted), and 5. Review session details. The main area is titled 'Invite attendees' and features a 'Title of Meeting' field with the text 'Townhall: Attendees', which is highlighted with an orange border. Below this is a 'Participants' section with an 'Add Attendees' input field and six added participants: Carmen Windsor (CW), alex.campos (A), Elissa Dreilich (ED), Sarah Brown (SB), Julia Verplank (JV), and Rachel Green (RG). A 'Meeting Details' text area contains a rich text editor toolbar and the message: 'Join us for our quarterly Touchcast Town Hall! We are looking forward to reporting on our teams' success and discussing company goals.'. At the bottom, there are 'Back' and 'Next' buttons.

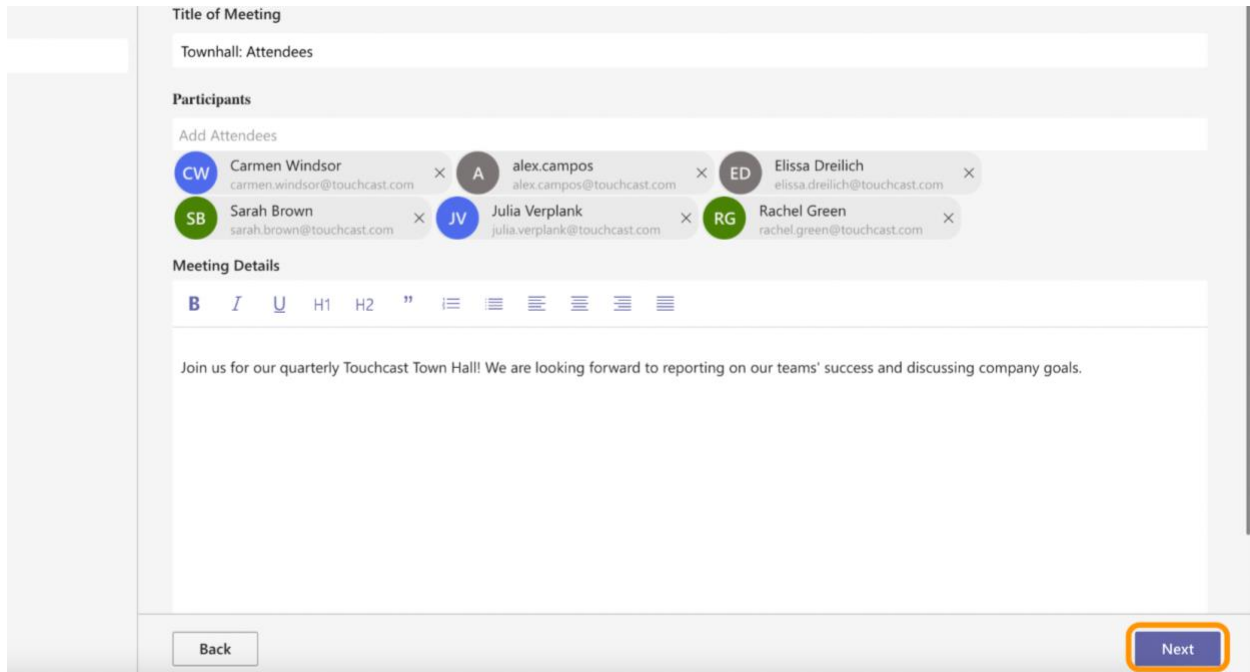
2. Add the attendee **Participants** by individually typing their name, or entering their emails.

👉 To delete a speaker or participant, simply select the “X” next to their name and email.

3. Enter **Meeting Details** as desired. Information provided in this field will only be visible to those added as Participants to the speaker meeting.

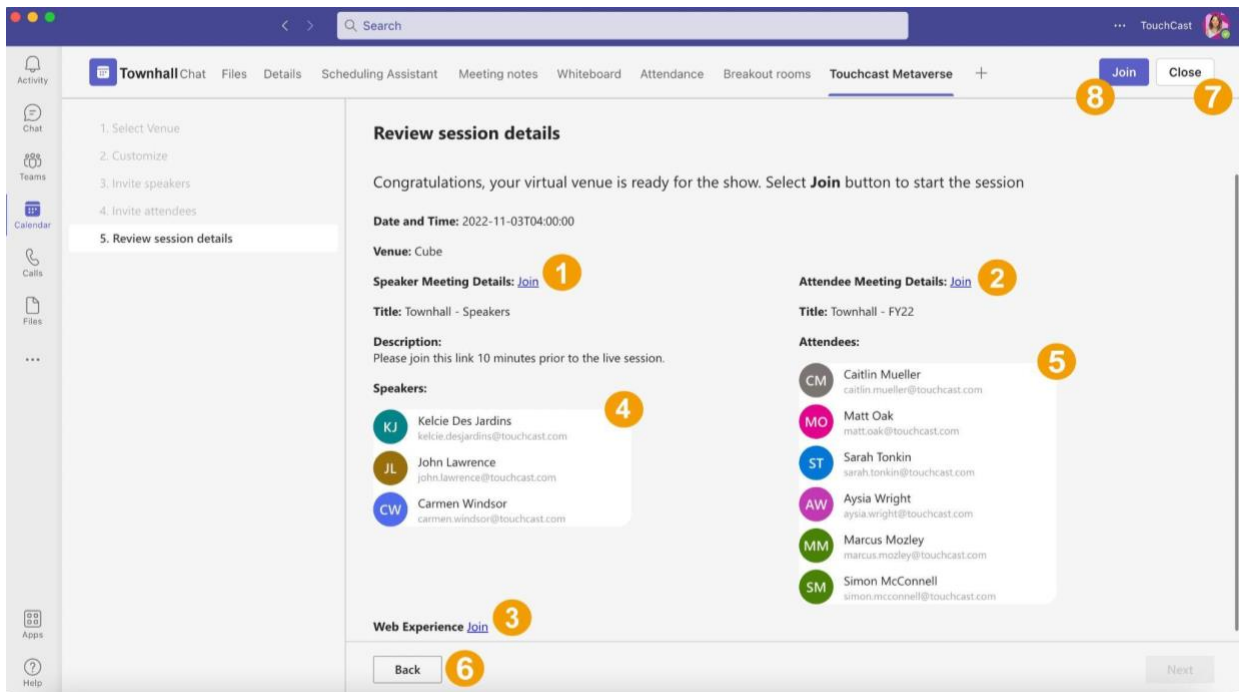
👉 Reminder! The meeting can always be edited at a later point in time.

4. Select **Next** to proceed.



Step 5: Review Session Details

Upon adding the app and customizing the Touchcast for Teams plug-in, there will be two separate meeting rooms created: one for the speakers, and one for the attendees. Be sure to carefully review the details you added at each prior step.



1. Click **Join** to begin the speaker meeting, or right-click to copy the link and paste it wherever needed.
2. Click **Join** to begin the attendee meeting, or right-click to copy the link and paste it wherever needed.
3. Copy the **Web Link** if attendees will be joining through a browser link (outside of Teams entirely). While you can find this link later, it's easiest to pull at this stage.

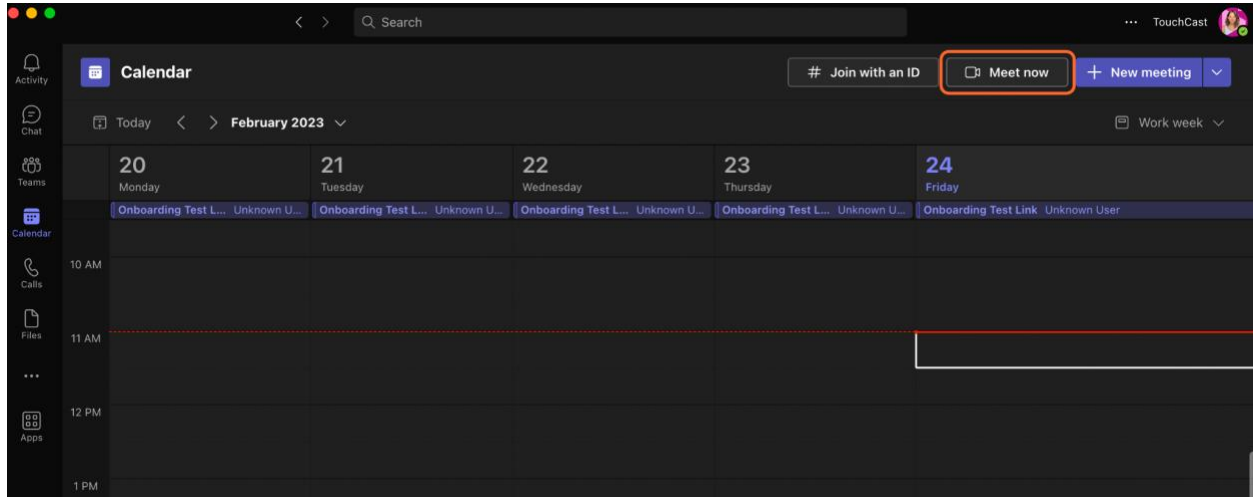
👉 You can also find the speaker and attendee meeting links by exiting the review page and clicking on each meeting within your Teams Calendar.

4. Review the list of **Speakers**.
5. Review the list of **Attendees**.
6. If any details need to be edited, you can select **Back** to go back to the previous step(s).
7. Click **Close** to exit the setup experience and navigate back to your Teams calendar.
8. Click **Join** if you would like to start the meeting immediately.

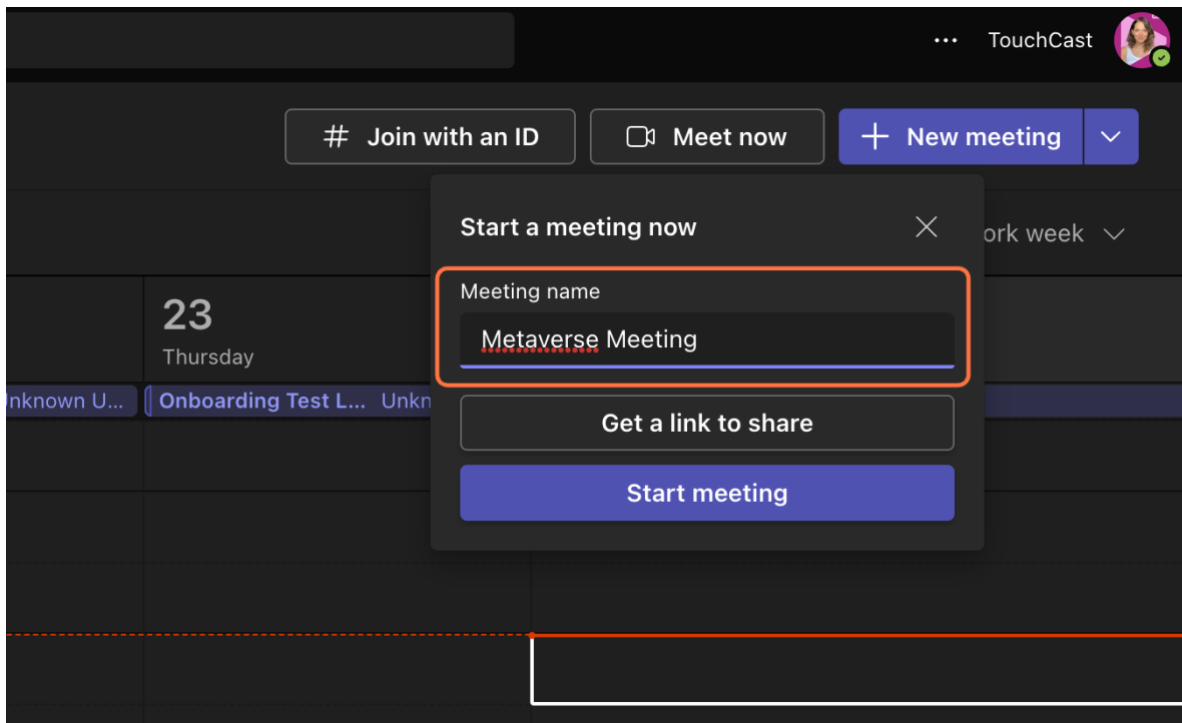
Adding the Touchcast for Teams App Mid-Meeting

There is a second way to use the Touchcast for Teams application by adding the plug-in to a Teams meeting that has already started.

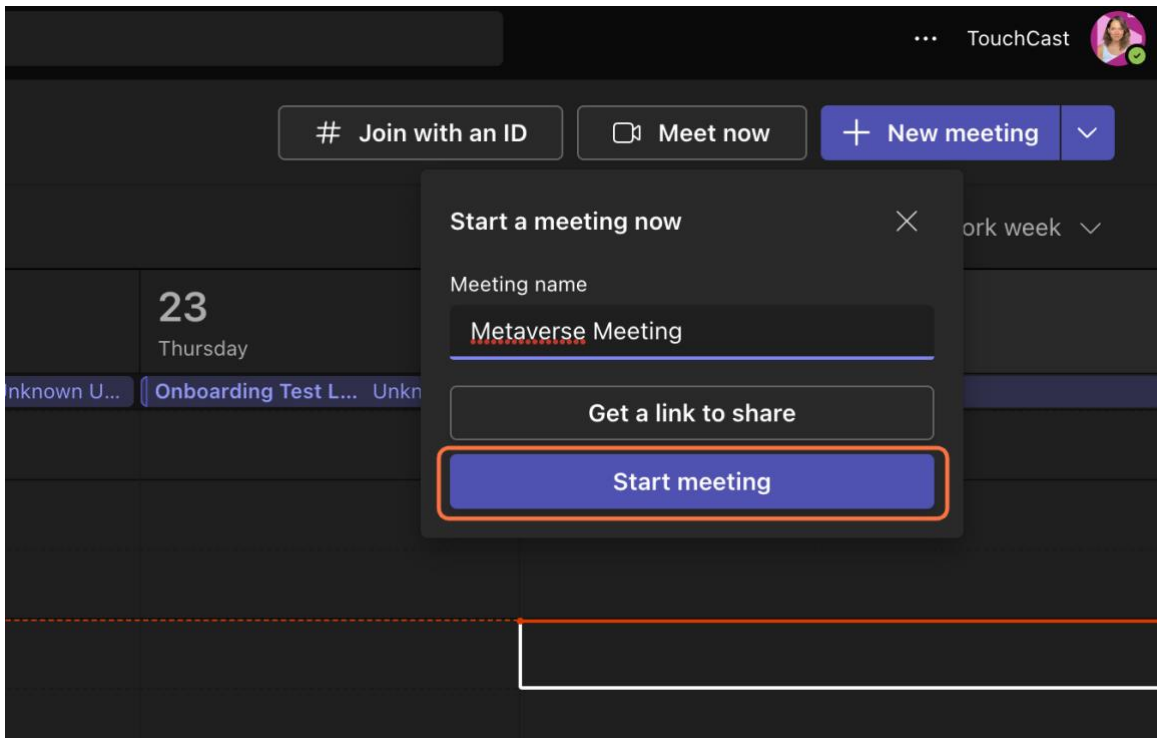
1. Launch your **Teams desktop client**, and sign in if you haven't already.
2. Click on the **Meet now** button in the upper right of your Teams client.



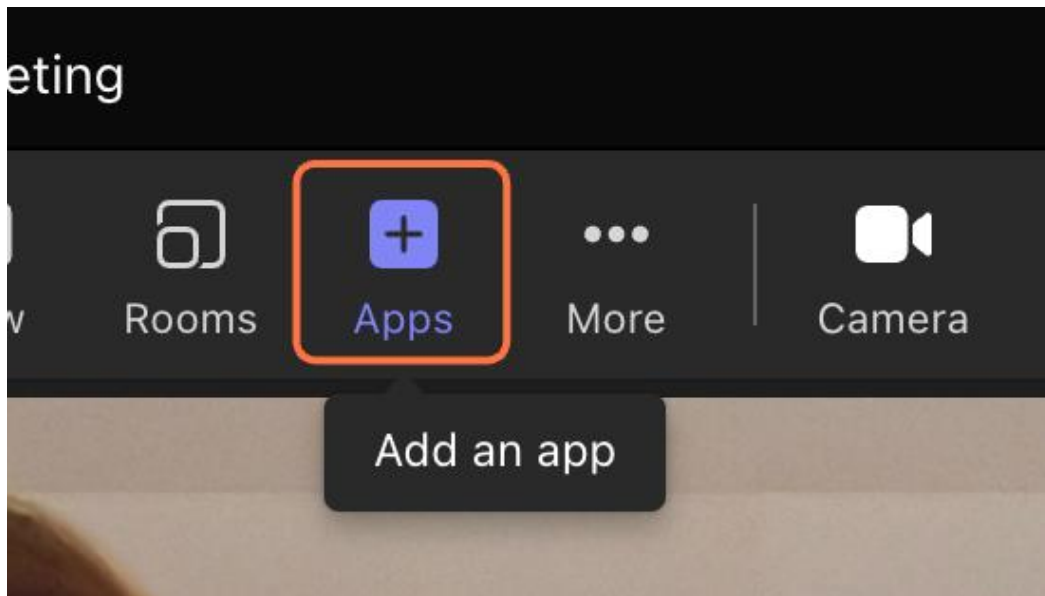
3. A pop-up will appear. Enter the title for your meeting in the **Meeting name** field.



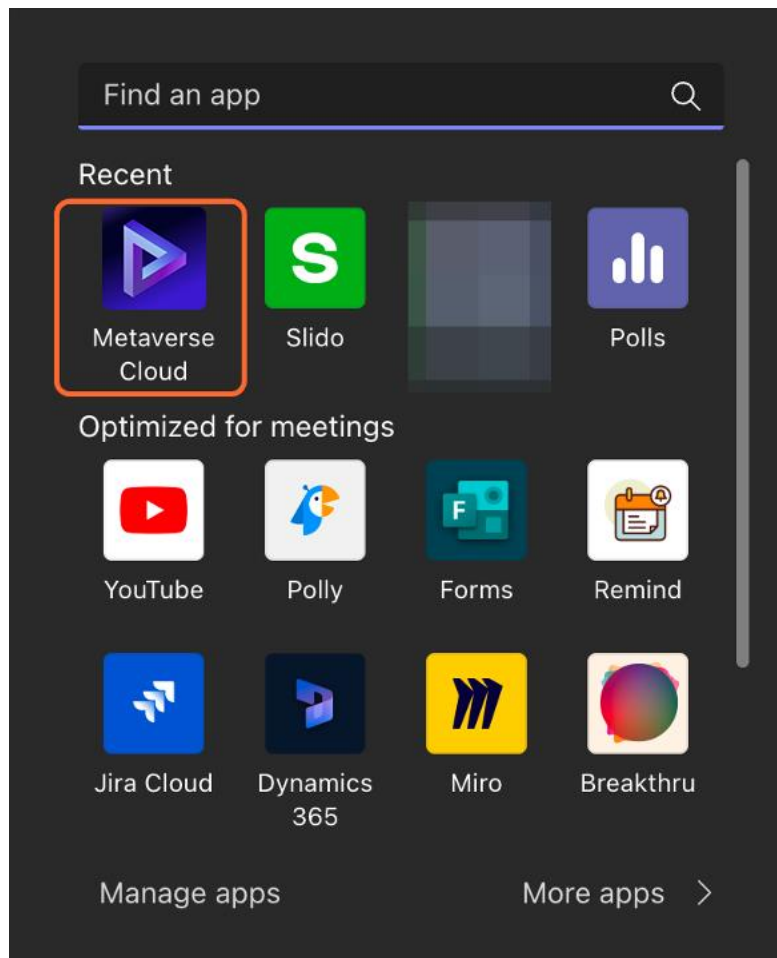
4. Click **Start meeting**.



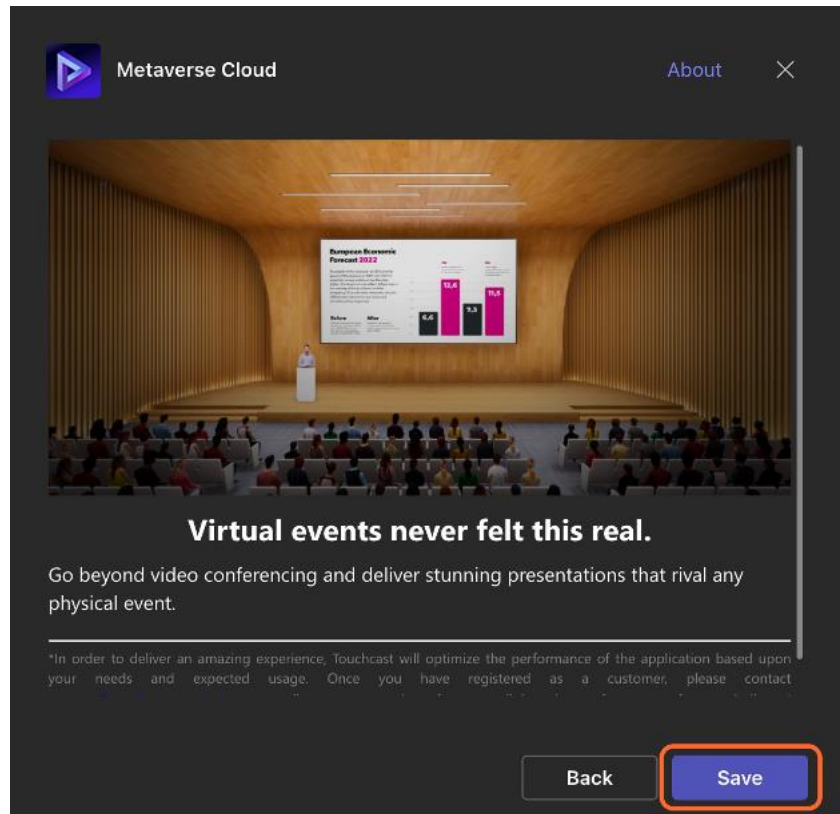
5. As with any Teams meeting, you'll be asked to confirm your camera and microphone settings are correct.
6. After launching the meeting click the **Apps** button from your top navigation bar.



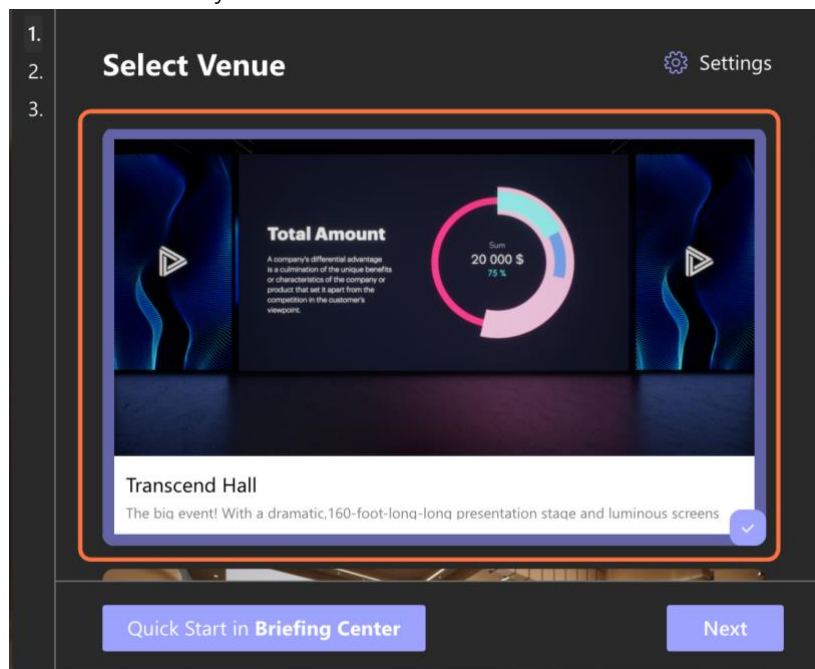
7. Search for the **Touchcast** plug-in from the pop-up window.



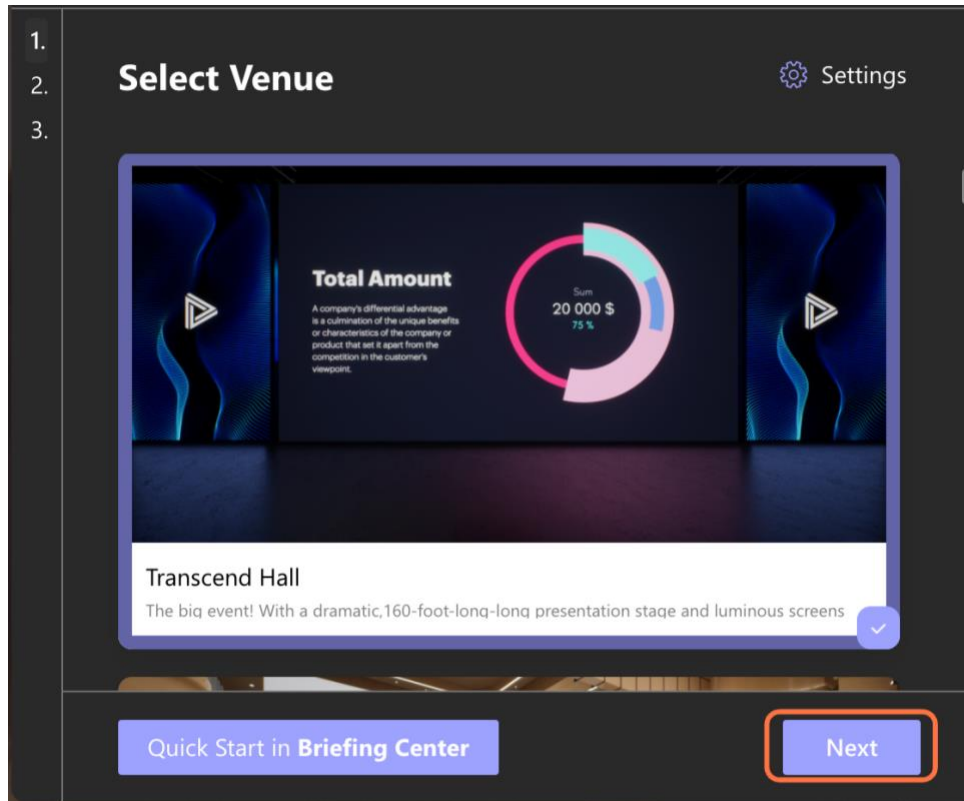
8. If this is your first time using the Touchcast for Teams plug-in you'll be prompted to register. For returning users, you'll simply need to click the **Save** button to begin configuring the plug-in for your meeting.



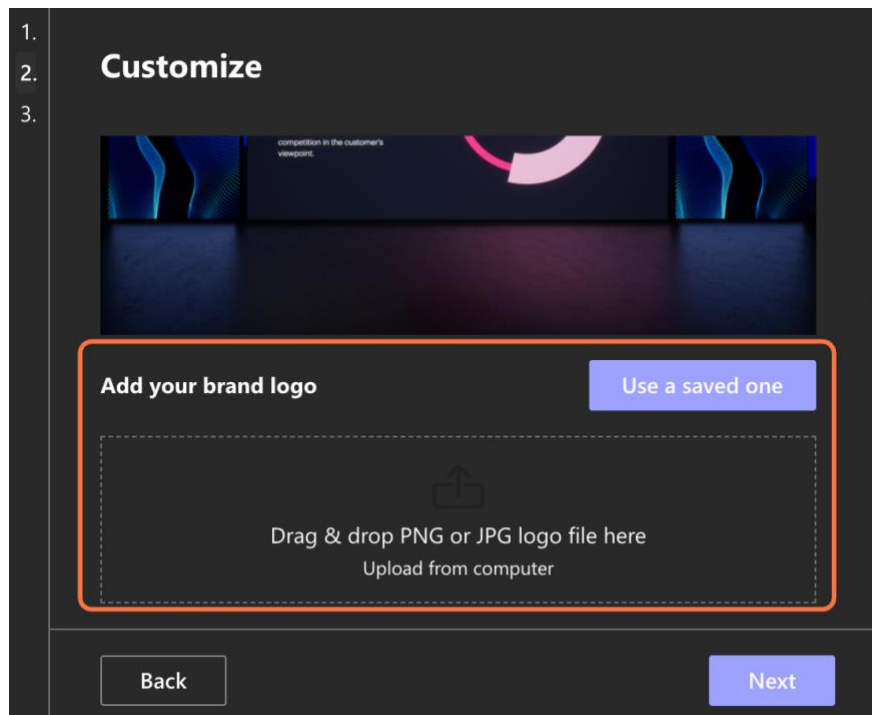
- From the **Select Venue** tab, scroll through the Touchcast Iconic Venues and click to select the environment that fits your desired look and feel.



- Once your selection is highlighted, click **Next** to proceed.

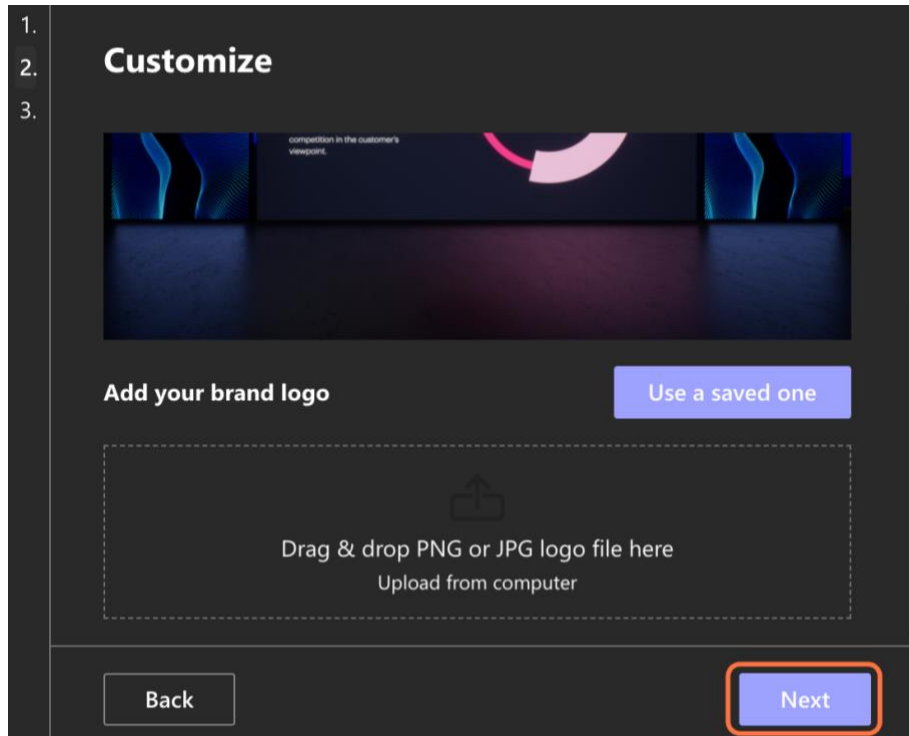


11. You can further customize your venue by adding a brand logo. Skip this step if you do not want to add a custom logo to the venue.

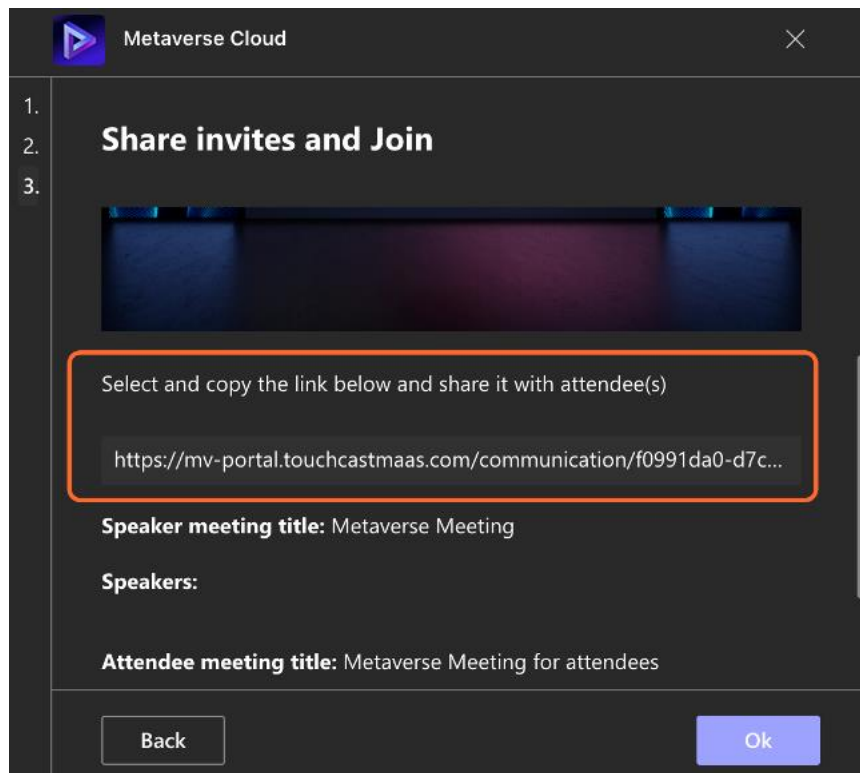


12. Click

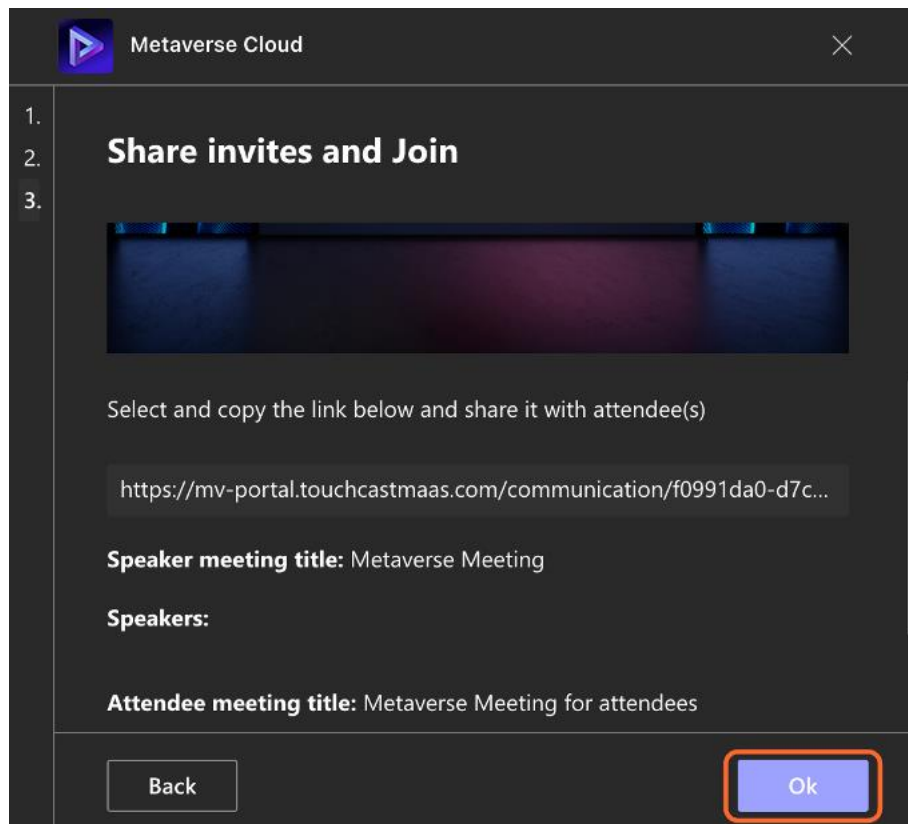
Next to proceed.



13. You'll now be brought to the **Share invites and Join** screen. If your attendees are joining via the web link, be sure to copy that link and share with your preferred communication method.



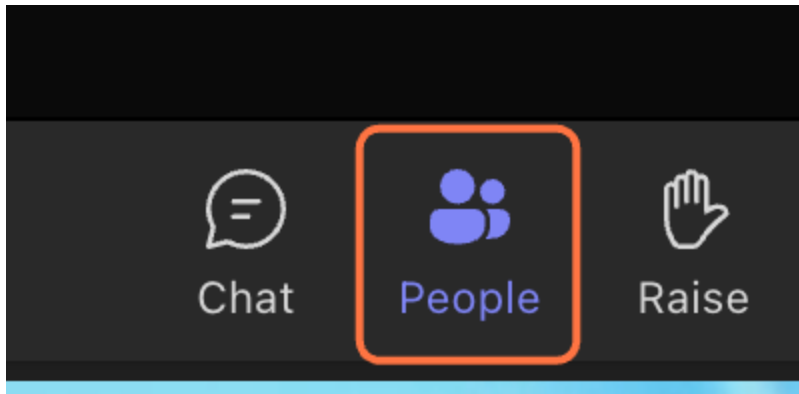
14. Click **Ok** to launch the plug-in.



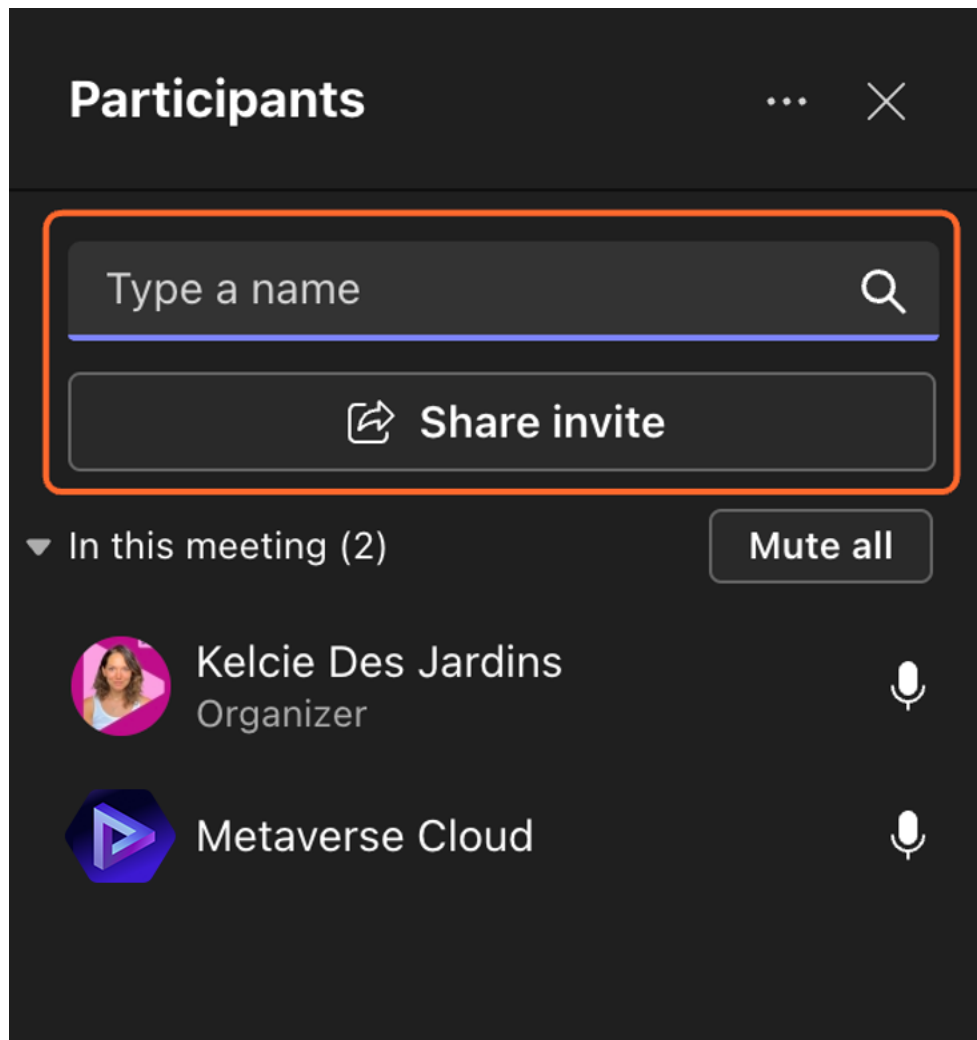
15. When the Metaverse plug-in has launched you'll be placed into the immerse 3D venue.



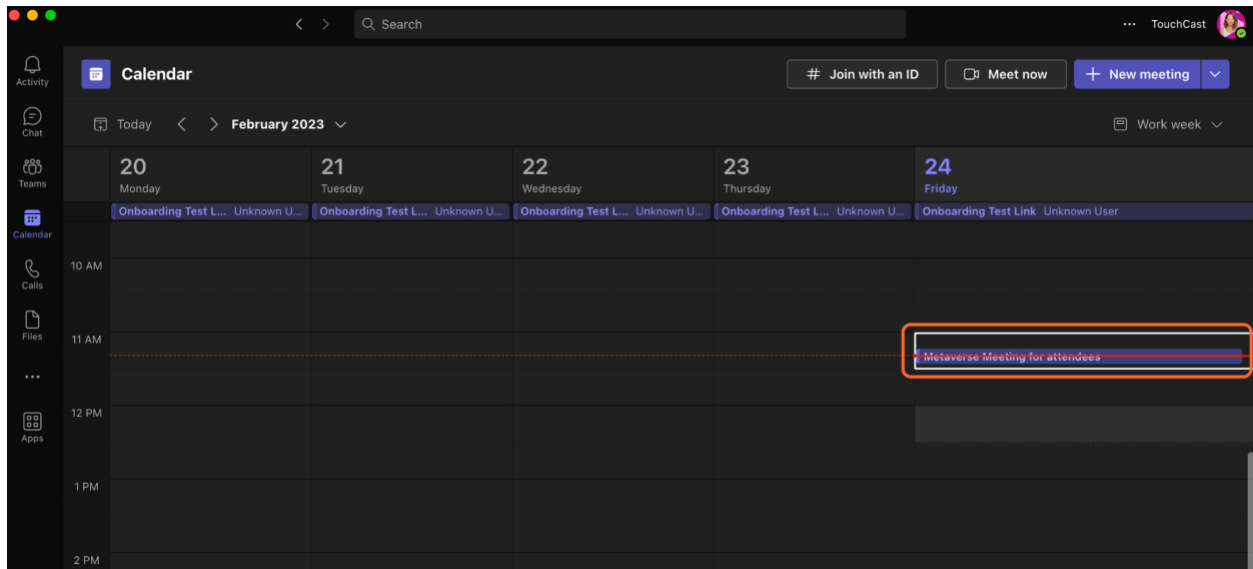
16. Click the **People** icon in the top navigation to invite additional speakers to the speaker call.



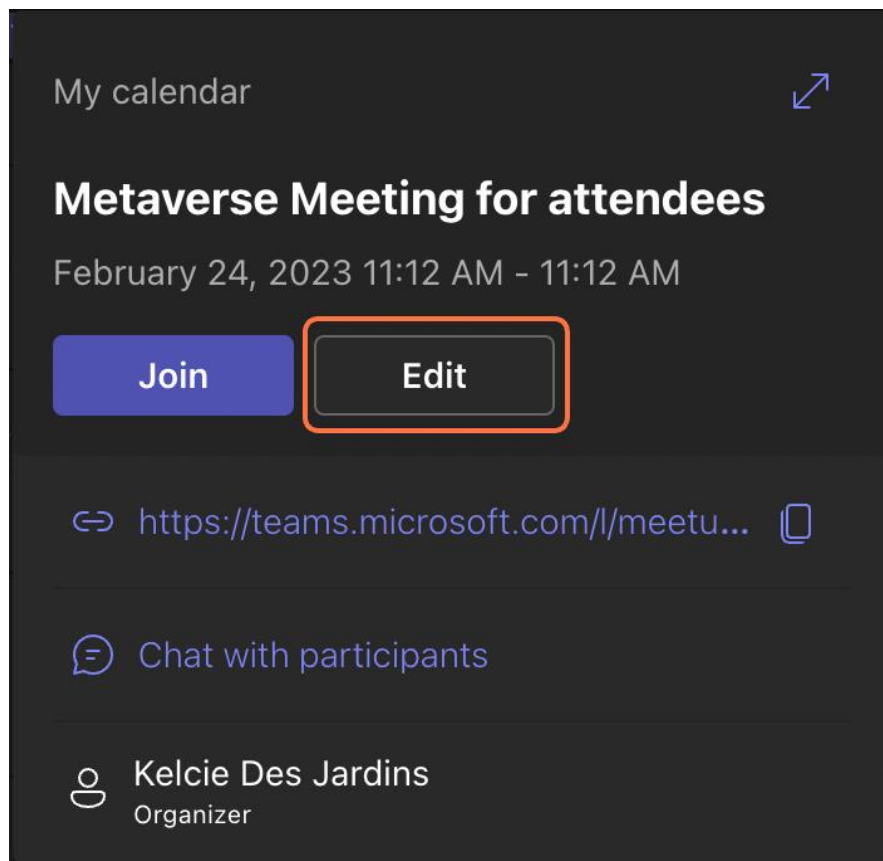
17. Your right side panel will now open with **Participant** details. Type the name of speakers you'd like to join this call, or click **Share invite**.



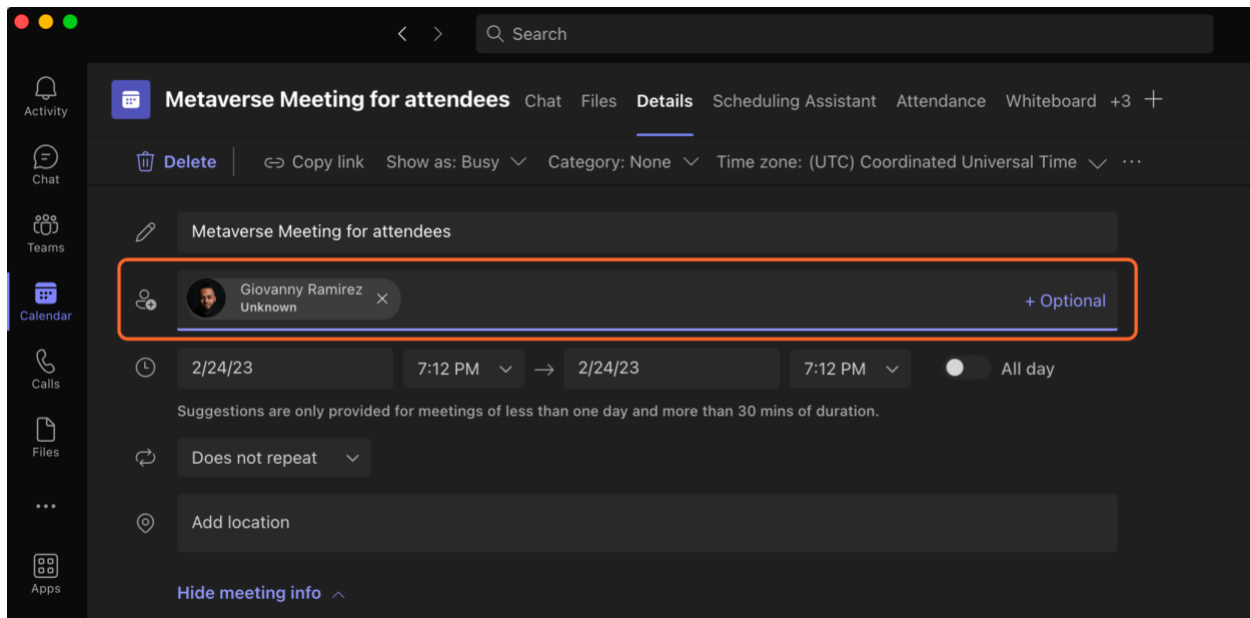
18. To add attendees to the Attendee call, return to your Teams calendar. You should now see the Attendee meeting cell.



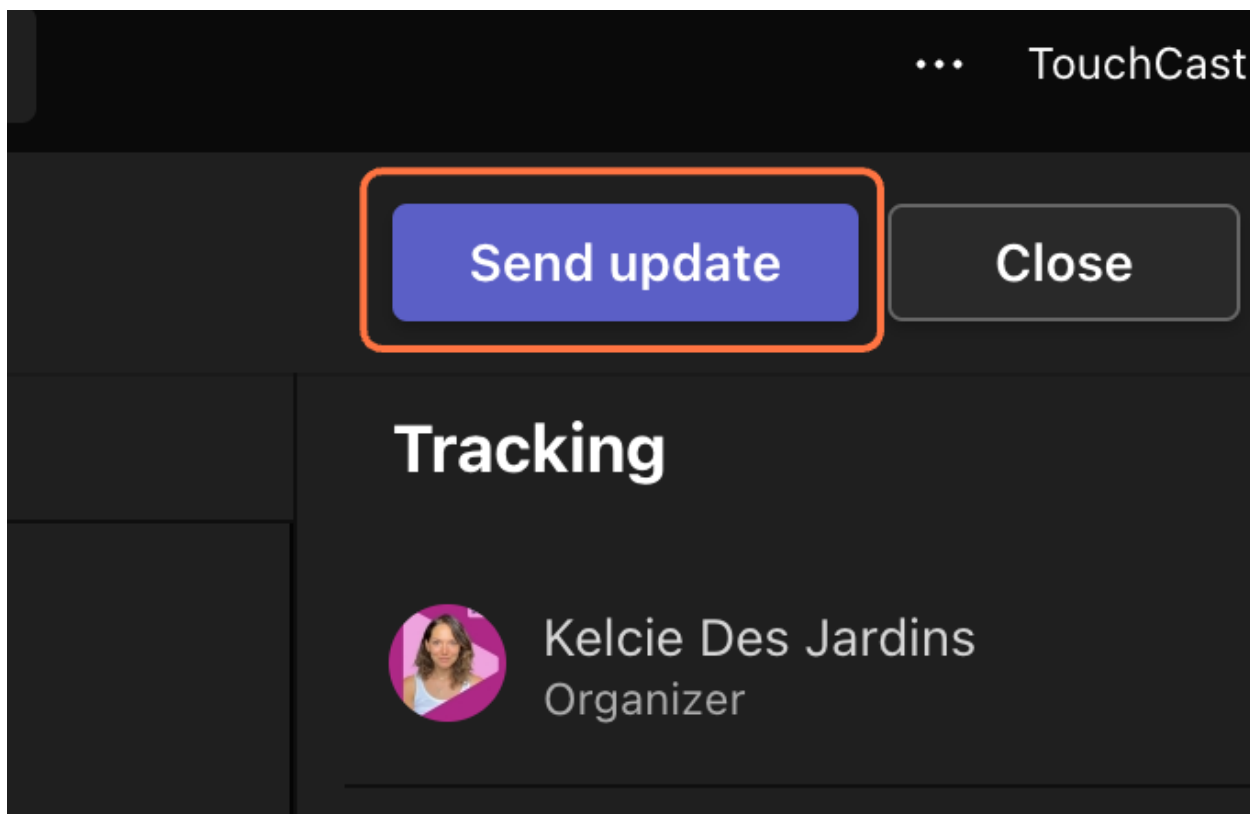
19. Click on the meeting cell and select **Edit**.



20. Add your attendees' names and/or emails in the **Attendees** field.



21. Click **Send update** to save the new details and send an email invite to your attendees.



Best Practices

Set Up

- ✔ Double-check you've added the correct email addresses for your participants.
- ✔ Run at least one demo or test meeting with the Touchcast for Teams extension prior to sessions with external attendees.
- ✔ Review your logo or additional imagery uploaded to your virtual venue; depending on your venue selection, different variations or sizes of your asset may be required.
- ✔ Ensure that macro-edits to one meeting room are reflected in the other (e.g. if changing the time of the speaker meeting, make sure to manually change the time of the attendee meeting).
- ✔ If attendees will be viewing via the web, copy the experience link before saving and closing your meeting editor.

In Meeting

- ✔ Have a good internet connection and a quiet environment.
- ✔ Aim for natural lighting; avoid overhead lights or being backlit.
- ✔ If you have a stakeholder or colleague joining the speaker meeting who *will not* be actively involved in presenting, they should be advised to keep their microphone muted and camera off for the duration of the call.