



IT-MAN-004
Special Configurations Guidelines –
Teams, Outlook, and Zoom User
Manual

Version 1.0



Special Configurations Guidelines - Teams, Outlook, and Zoom
USER MANUAL

Doc. ID: IT-MAN-004

Version: 1.0

Effective Date: 21-Jan-2026

Owner: Information Technology

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2. PURPOSE AND SCOPE

Guidelines for accessing Teams, Outlook and Zoom using special configurations to meet collaboration activities between MMS, Clients, and 3rd parties.

3. PROCESS STATEMENTS

- MMS IT collaborates with external stakeholders to establish effective and efficient communication methods between MMS colleagues, clients and 3rd parties.
- All process steps in this manual may be executed by an appropriate delegate when requested and have approved access.

4. TRAINING AUDIENCE

Curricula Assignment	TSP Assignment	TSF Assignment	Applicable Sections	Training Recurrence
Just in Time Training	If applicable	If applicable	Defined at assignment	N/A

5. PROCESS DETAILS

5.1 TEAMS – SPECIAL CONFIGURATIONS

5.1.1 Teams Chat with External Users to your Organization

After IT completes the Teams sync with the External Domain (Other Organization), you can chat with users from other organizations by following the steps below.


1. **Enter External Email:** In the "Search" field, type the full email address of the person.
2. **Select Contact:** Teams will find them as an "External" user; select their name from the list that appears. If Teams find them as "Guest" user, then below "Guest" user you will have the option to search as external. Click on that and Teams will find them as an "External" User
3. **Send Message:** Type your message in the chat box and send it.
4. **Invitation Sent:** An email invitation is sent to the external user, prompting them to join the chat. If user is online on Teams, user can see the invitation in Teams.
5. **User Joins:** Once they accept and join, you can chat freely.

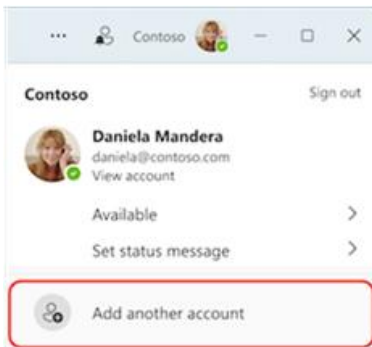
Note: External Chats are an informal means of communication and should be used for quick questions, follow up or clarification. Detailed project related discussions should occur via email or team meetings.

5.1.2 Teams Guest Access

After you have a Teams account from other organizations, you can log into Teams for other organizations and switch between organizations account. Please follow the steps below.

Sign in to additional accounts:

1. Select your profile picture in the top right of the Teams desktop client.
2. Select **Add another account**.
 - a. Choose an account you've previously signed in with.
 - b. Select **Create or use another account** .



Switch Accounts:

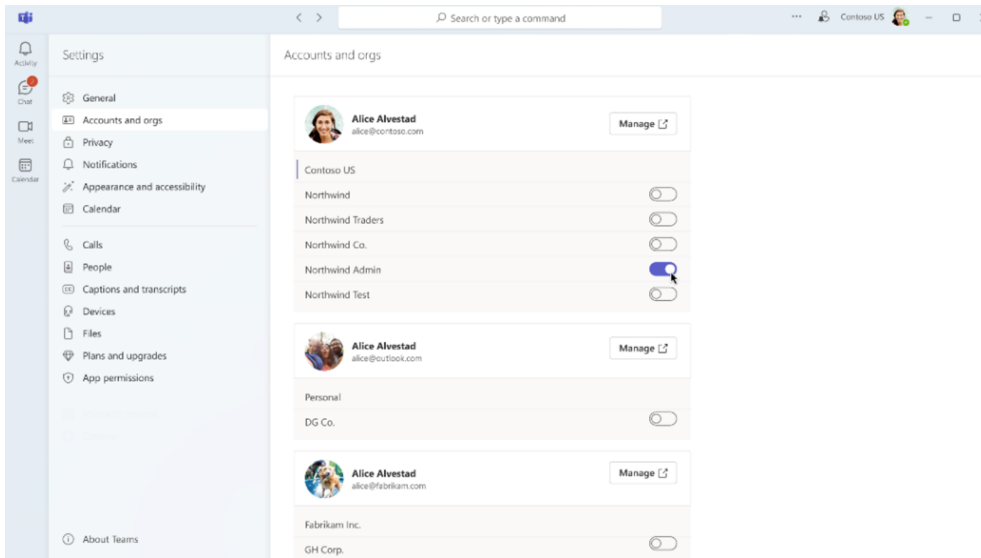
- To switch to a different account, select your profile picture and choose a different account at any time.



Manage notifications for accounts and organizations:

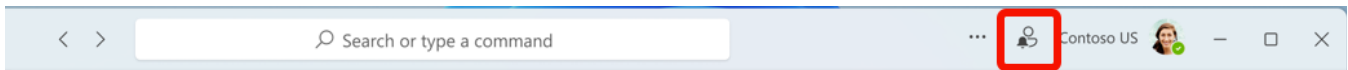
By default, notifications are turned on for any organization you've previously joined as a guest. You can manage which notifications you see from your Teams settings.

To manage notifications across multiple accounts and organizations:

1. Go to **Settings and more (at ellipsis to left of profile picture) > Settings > Accounts and orgs**.
2. Turn on the toggle next to the org you want to receive notifications from.



In the **Activity**  tab, you can only see missed activity from one active account at a time. To view activity from other accounts, select **Activity in your other accounts and orgs**  to the left of your organization’s name. Select a notification to automatically open that account.



5.2 OUTLOOK CALENDAR – SPECIAL CONFIGURATIONS




5.2.1 Outlook Calendar sharing with External Users to your Organization

After IT completes the Outlook Calendar sharing sync with the External Domain (Other Organization), you can follow the steps below to set up a meeting with users from other organizations and be able to see their free/busy status.

1. Outlook Calendar meetings are scheduled using Scheduling Assistant.
2. **Start a new meeting** in Outlook (desktop or web).
3. **Add internal attendees as usual**; their free/busy shows automatically.
4. **Add external attendees** by their full email address.
5. Click the **Scheduling Assistant** button to see availability.
6. **Colors indicate status**: White (Free), Blue (Busy), Purple (Out of Office), etc.
7. **Select a time slot** that works for everyone/ most people and send the invite.

Note: For the Outlook Calendar Federation (Outlook Calendar sharing sync with another organization), access is provided for all MMS users; access cannot be limited to select individuals.




5.3 ZOOM GUIDELINES

On the Zoom desktop app, you can easily schedule a meeting from the **Home**  tab or on the **Calendar**  or **Meetings**  tab. Your setup depends on whether you have the calendar and contacts integration enabled or disabled.




5.3.1 Scheduling a Meeting (Calendar and contacts integration **enabled**)

If you have synced your third-party calendar service with Zoom, follow the steps below to schedule a meeting.

Schedule from the Home tab:

1. Sign in to the Zoom desktop app.
2. Click the **Home** tab .
Note: If you do not see the **Home** tab, click the **More** tab , then click **Home**.
3. Click **Schedule** .
This will open the **New event** window.
4. Enter a topic or name for your meeting.
5. Set the date and time you want to meet.
6. (Optional) Add invitees by entering their email. You can also invite others to your meeting after scheduling.
7. (Optional) Click **Settings** to choose from additional meeting options.
8. Click **Save** to finish scheduling.



Schedule from the Calendar tab:

1. Sign in to the Zoom desktop app.
2. Click the **Calendar** tab .
Note: If you do not see the **Calendar** tab, click the **More** tab , then click **Calendar**.
3. Select a time slot on the calendar view, or in the top-left corner, click the add icon  then click **Create event**. This will open the **New event** window.
4. Set the date and time you want to meet.
5. (Optional) Add invitees by entering their email. You can also invite others to your meeting after scheduling.
6. (Optional) Click **Settings** to choose from additional meeting options.
7. Click **Save** to finish scheduling.



5.3.2 Scheduling a Meeting (Calendar and contacts integration **disabled**)

If you do not have a third-party calendar service synced with Zoom, follow the steps below to schedule a meeting.

Schedule from the Home tab:

1. Sign in to the Zoom desktop app.
2. Click the **Home** tab .
Note: If you do not see the **Home** tab, click the **More** tab **...**, then click **Home**.
3. Click **Schedule** .
This will open the **New event** window.
4. Enter a topic or name for your meeting.
5. Set the date and time you want to meet.
6. (Optional) Add attendees by entering their email. You can also invite others to your meeting after scheduling.
7. Choose from the available meeting options such as meeting ID, meeting security, video and audio, and more.
8. (Optional) Click **Advanced** to enable or disable additional options.
9. Click **Save** to finish scheduling.

Schedule from the Meetings tab:

1. Sign in to the Zoom desktop app.
2. At the top of the app, click the **Meetings** tab .
Note: If you do not see the **Meetings** tab, click the **More** tab **...**, then click **Meetings**.
3. In the top-left corner, click the add icon  then click **Create event**.
This will open the **New event** window.
4. Set the date and time you want to meet.
5. (Optional) Add attendees by entering their email. You can also invite others to your meeting after scheduling.
6. Choose from the available meeting options such as meeting ID, meeting security, video and audio, and more.
7. (Optional) Click **Advanced** to enable or disable additional options.
8. Click **Save** to finish scheduling.



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6. DOCUMENT VERSION HISTORY

Version	Effective Date	Description of Changes	Version Author(s)
1.0	21-Jan-2026	New document release.	Devik Patel

7. APPENDIX A

N/A