Recording and Sharing Videos with Course Instructor and Student Supervisors

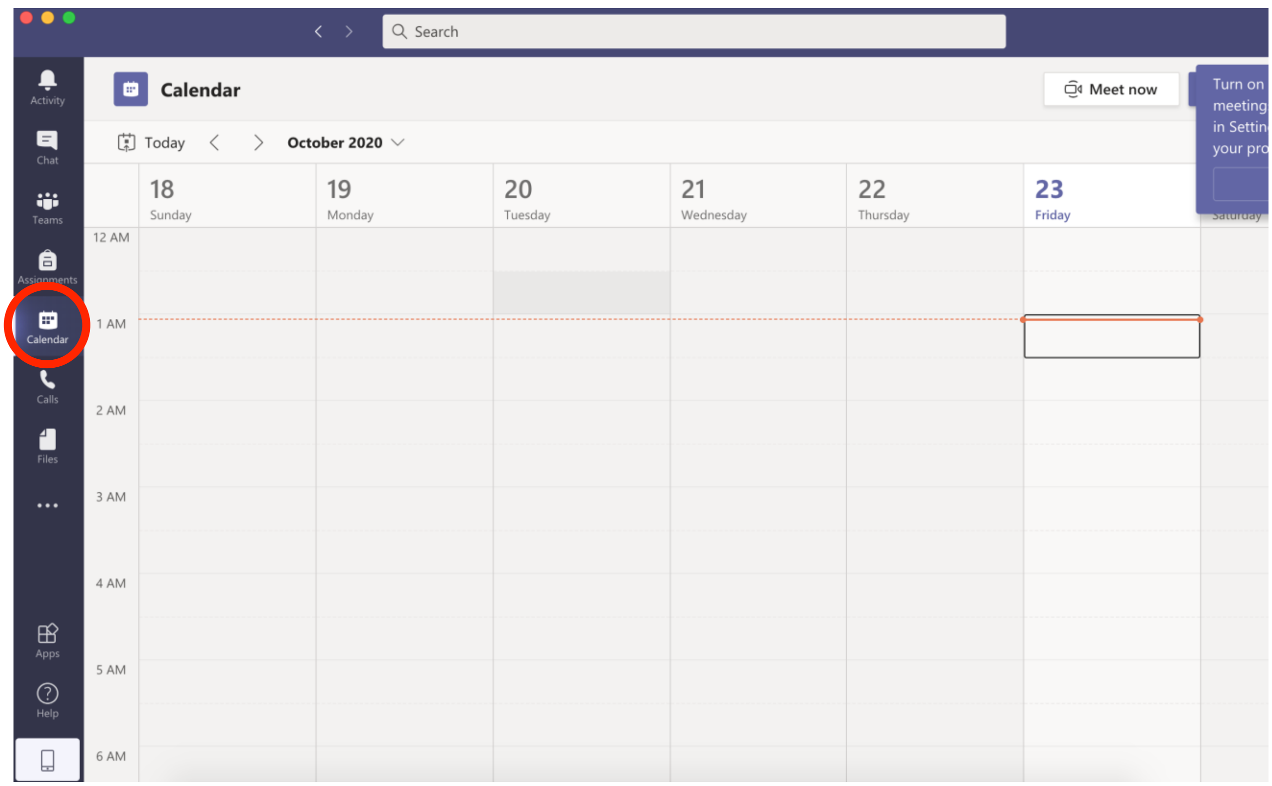
Download Microsoft Teams https://teams.microsoft.com/downloads

Step One: Set up a Teams meeting with client on Microsoft Teams

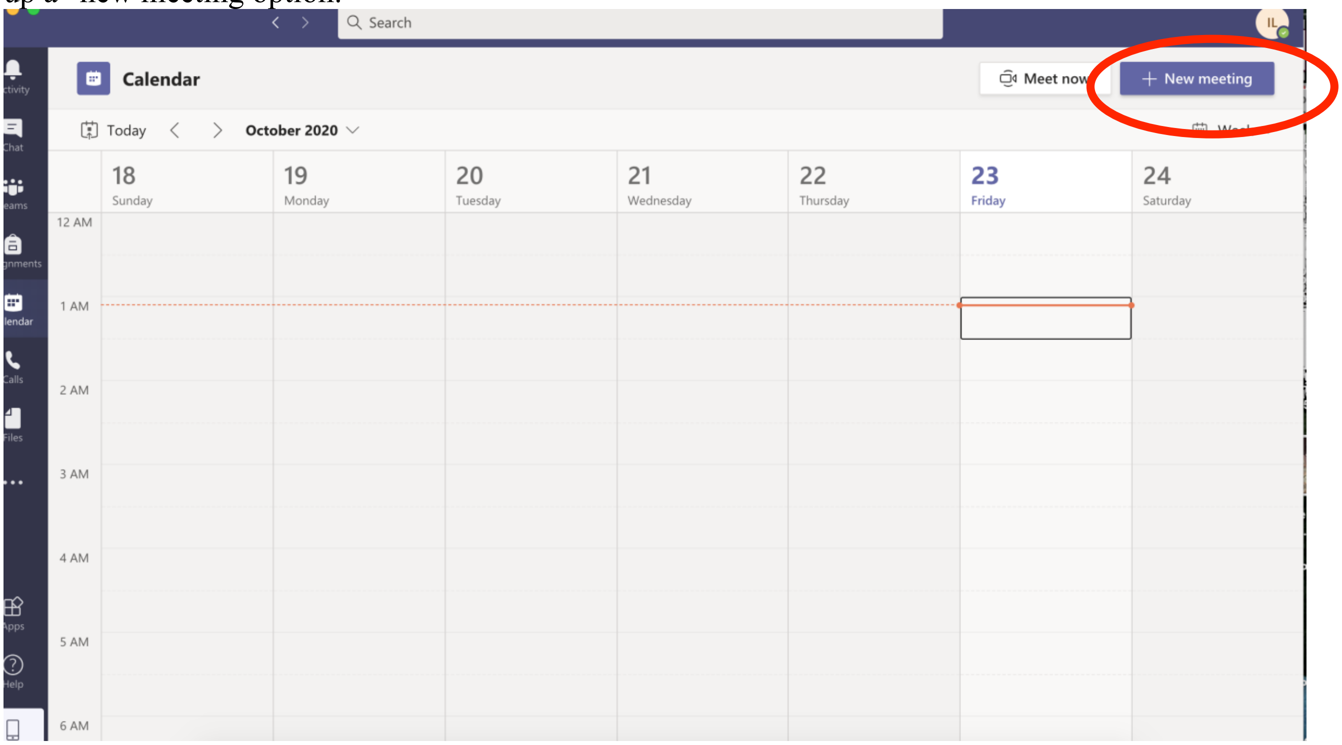
1. Open Microsoft Teams app.

   NOTE: Trainees in EDSP 682 and EDSP 705 will be assigned a designated "clinic" email address that is different from their McGill student email address. For these courses, Trainees must login to Teams with their clinic email accounts.

2. Dependent on your software/computer model, you will see an icon called "**Calendar"** either on the side bar or top bar of the Teams application; click on that icon. This will take you to a calendar laid out in week form.



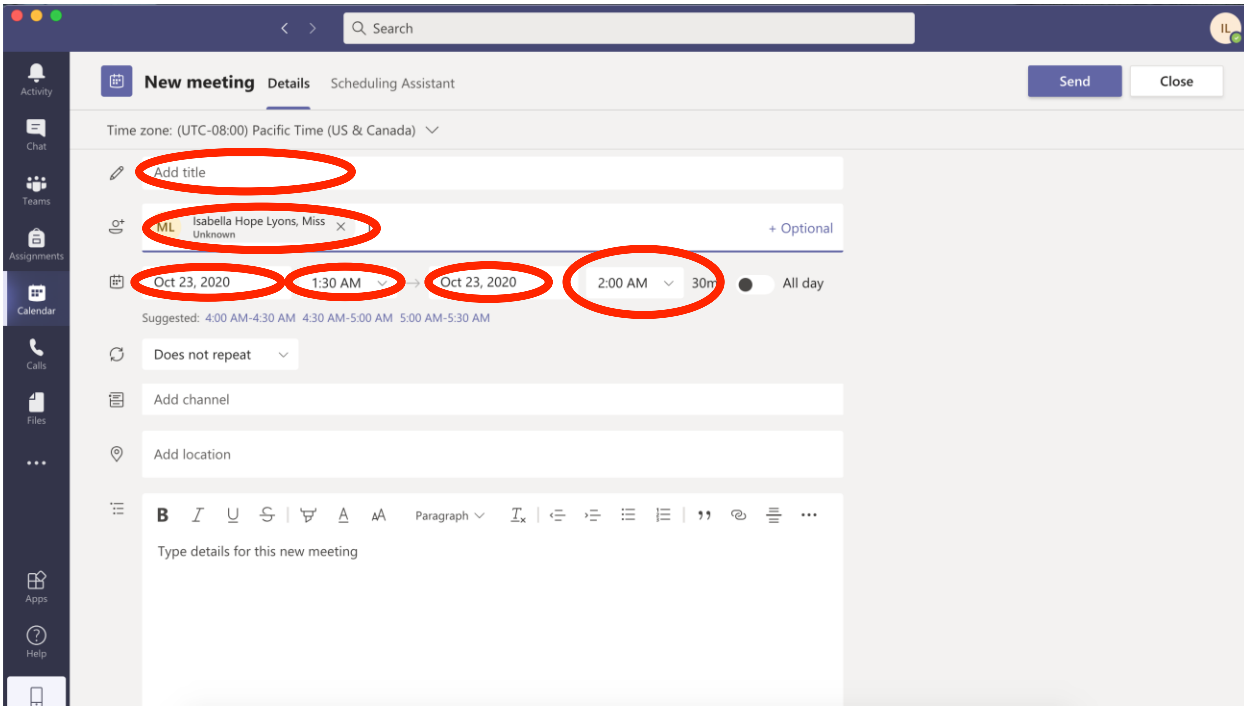
3. Set up the meeting by clicking "**New Meeting"** on top right of screen, which will also open up a “new meeting option.”



4. Enter the meeting details: Title[1], Date, Time, add Client’s email address[2] and Course Instructor and/or Student Supervisor’s email(s), click "**Send.”**

[1] The new meeting title should follow this naming convention: **Virtual meeting ECP [Trainee’s first name initial][Trainee’s lastname][Client code][Course number][DD MM YR HH:MM]**

[2] For security reasons, the Client **must always be invited using a non-McGill email address.** Even if the client is a McGill staff or student, you must invite them with a non-McGill email address, such as gmail or hotmail address, etc. This means the Clients email (used in the invitation) must **NOT** be a McGill address.

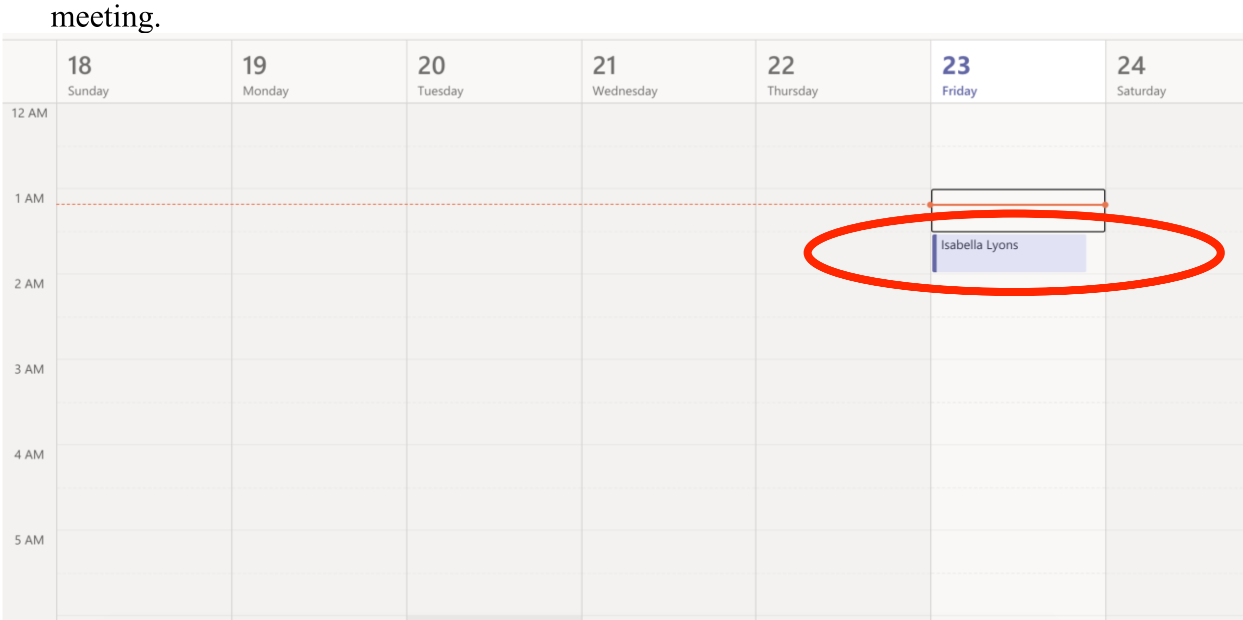


5. Client, Trainee, Course Instructor, and Student Supervisor will be alerted by an automatic RSVP email as well as a pop-up message that a meeting has been set up.

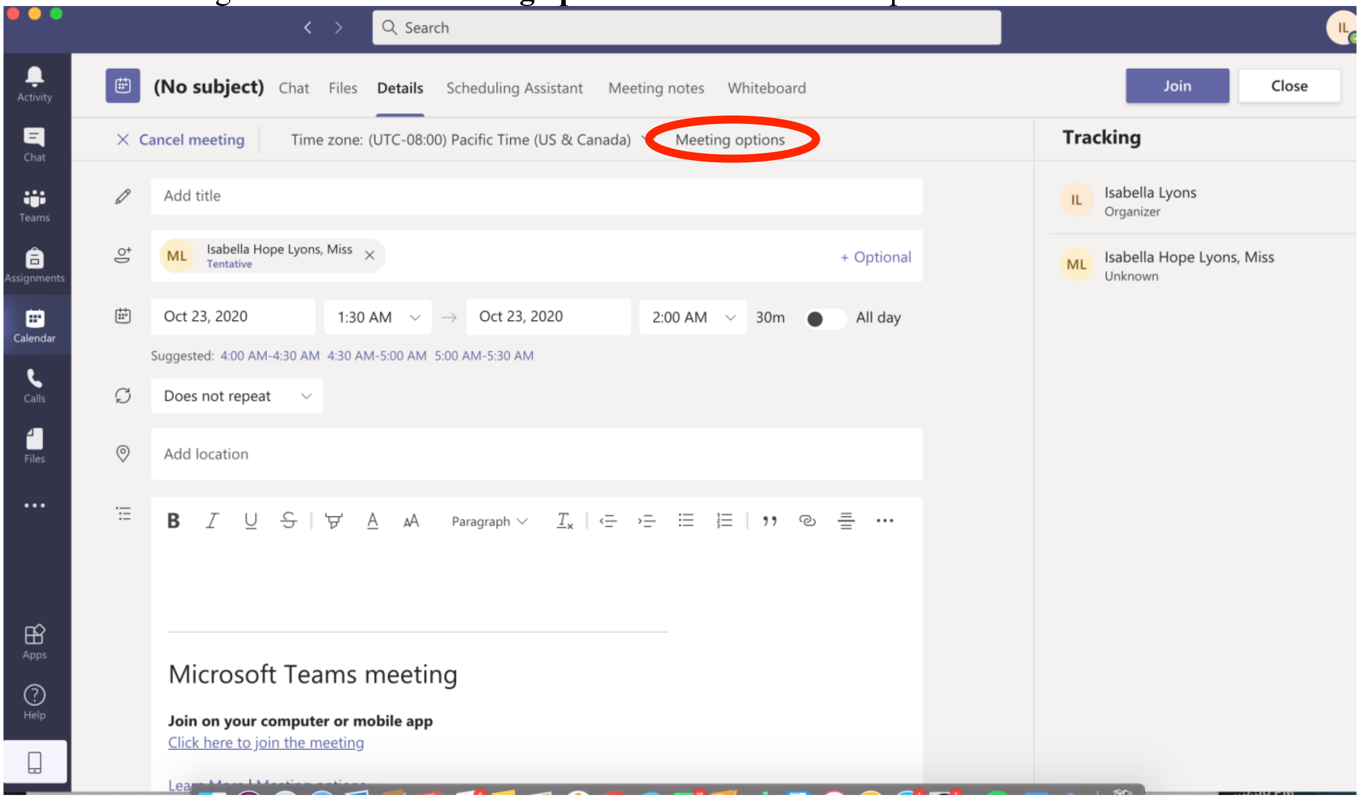
6. Alert Client that the email may end up in “Junk email” and that they should check that folder, in case they don’t see your email.

<u>Step 2: Setup the “Present” option to allow yourself to record the meeting</u>

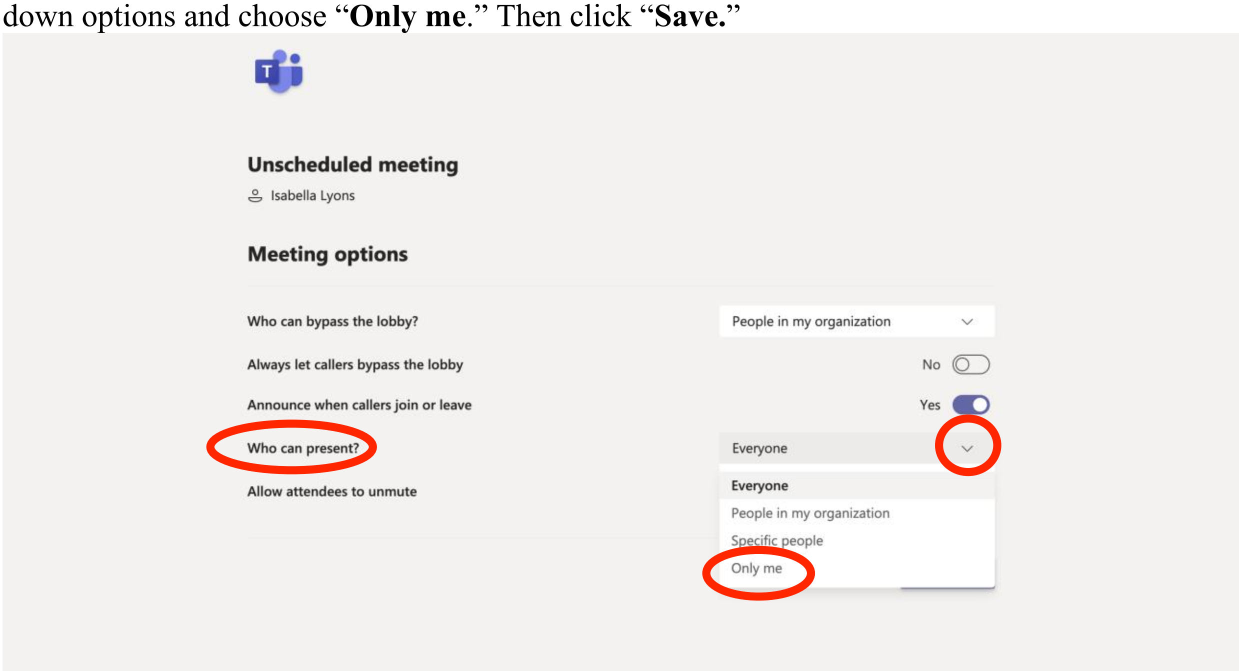
1. Open the scheduled meeting in your Microsoft Teams app calendar by double clicking meeting.



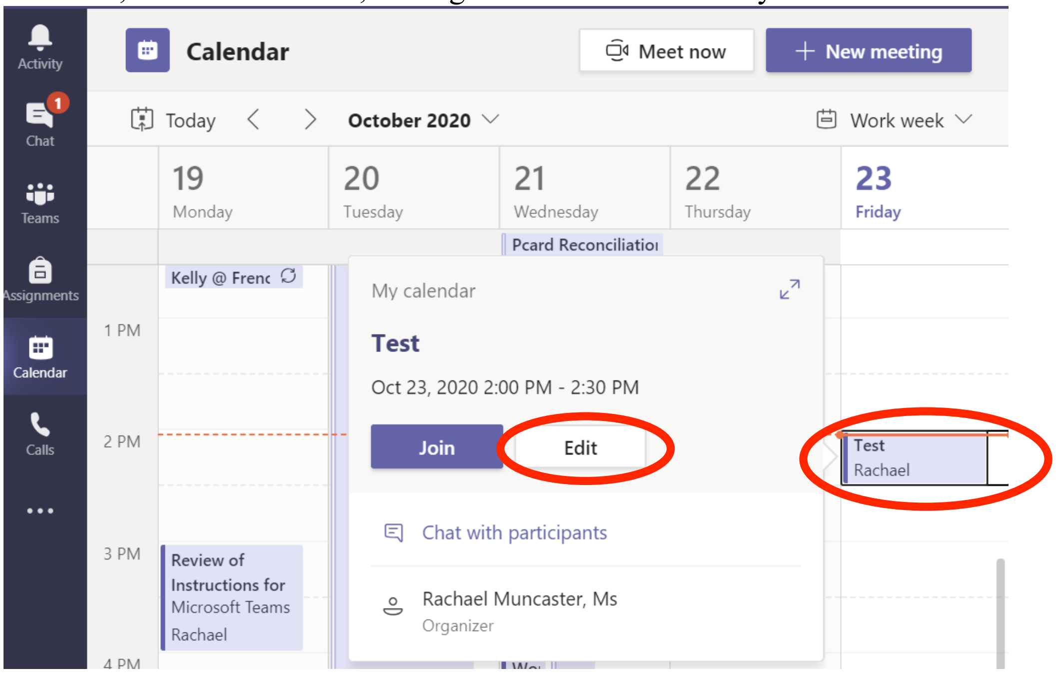
2. Click the meeting then find the "**Meeting options**" button near the top center of the screen.



3. Under "**Meeting options**" there will be a question: "**Who can present?**" Click the scroll down options and choose "**Only me**." Then click "**Save.**"

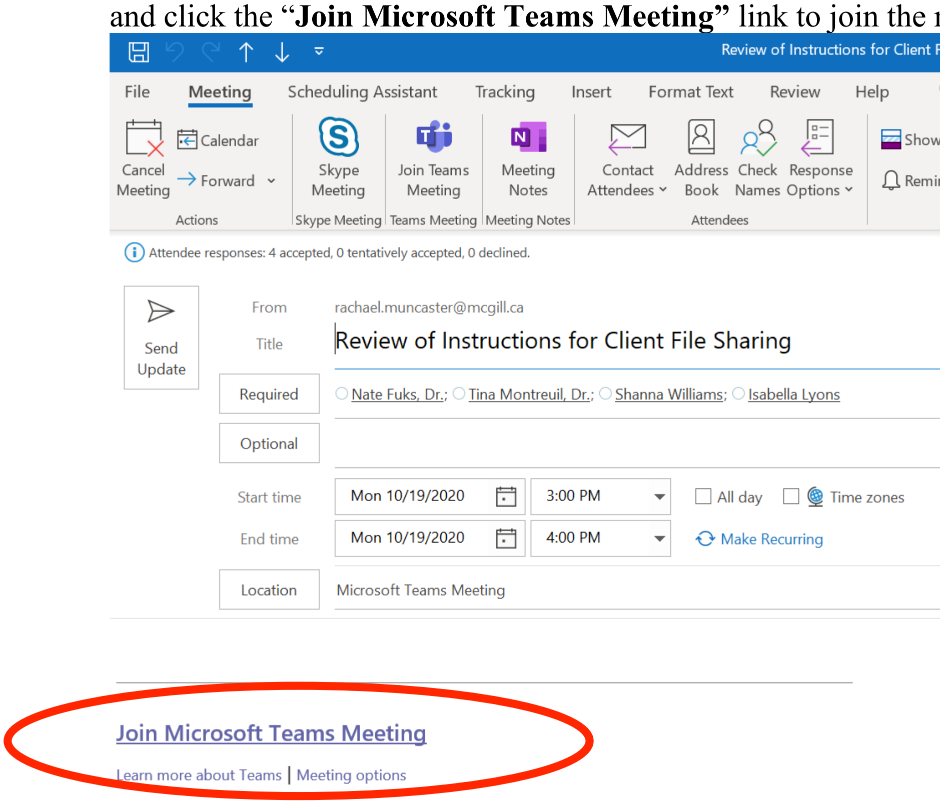


Note: To change the date or time of a scheduled meeting: Click the meeting in the Teams Calendar, and choose “**Edit**,” change date/time as necessary.

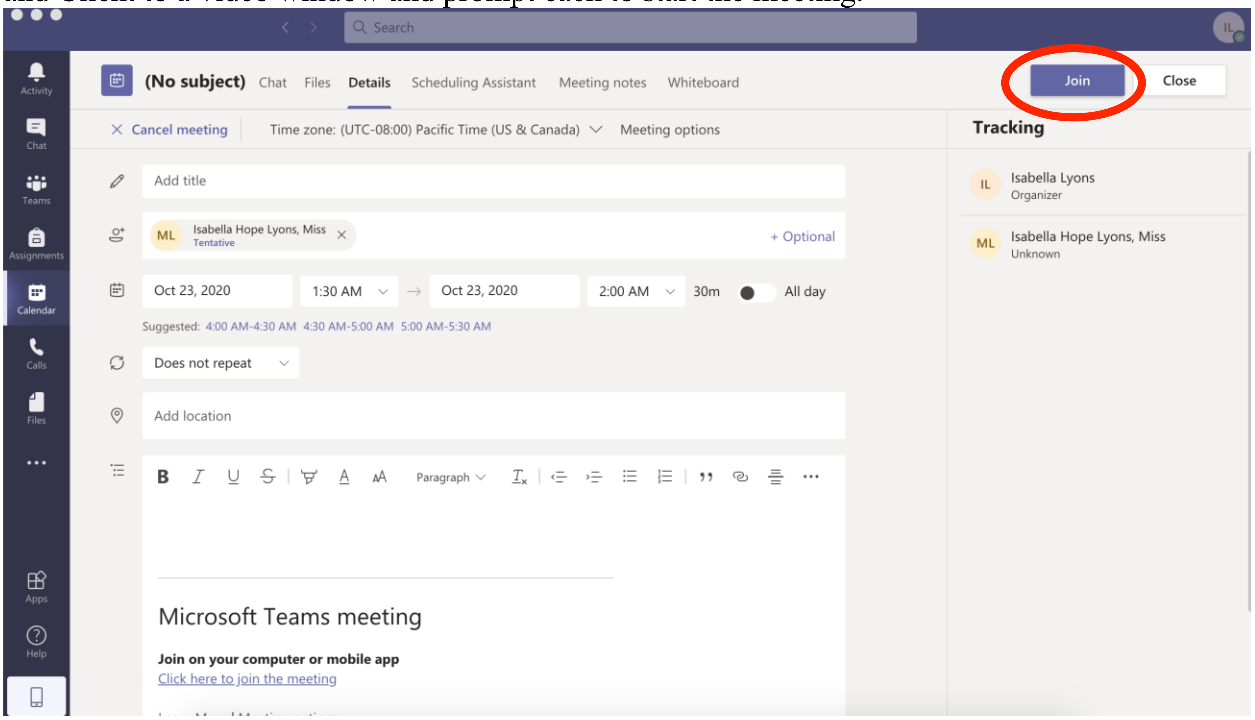


Step 3: Join the scheduled meeting

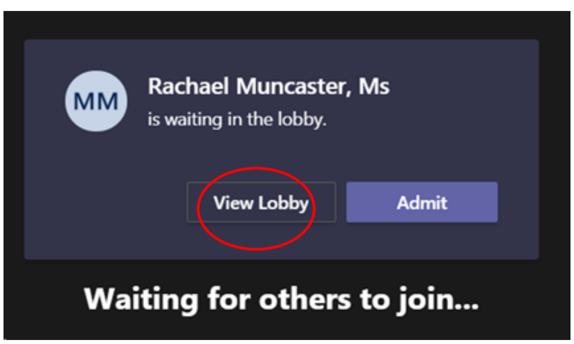
1. At the time of the scheduled meeting, both the Trainee and Client can open the RSVP email and click the “**Join Microsoft Teams Meeting”** link to join the meeting.

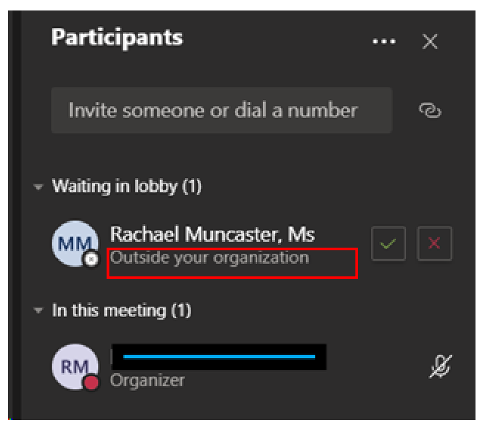


2. There is also an option to join the meeting directly from the MS Teams Calendar, by clicking on the scheduled meeting and then clicking the **“Join”** button, which will take the Trainee and Client to a video window and prompt each to start the meeting.



a. When the Client arrives to the meeting, the Trainee will be notified that they are waiting in the lobby. Prior to admitting the Client to the meeting, the Trainee should verify that the Client is joining with their non-McGill email address. First, select "View Lobby" and then verify that the Client is joining from "Outside your organization".





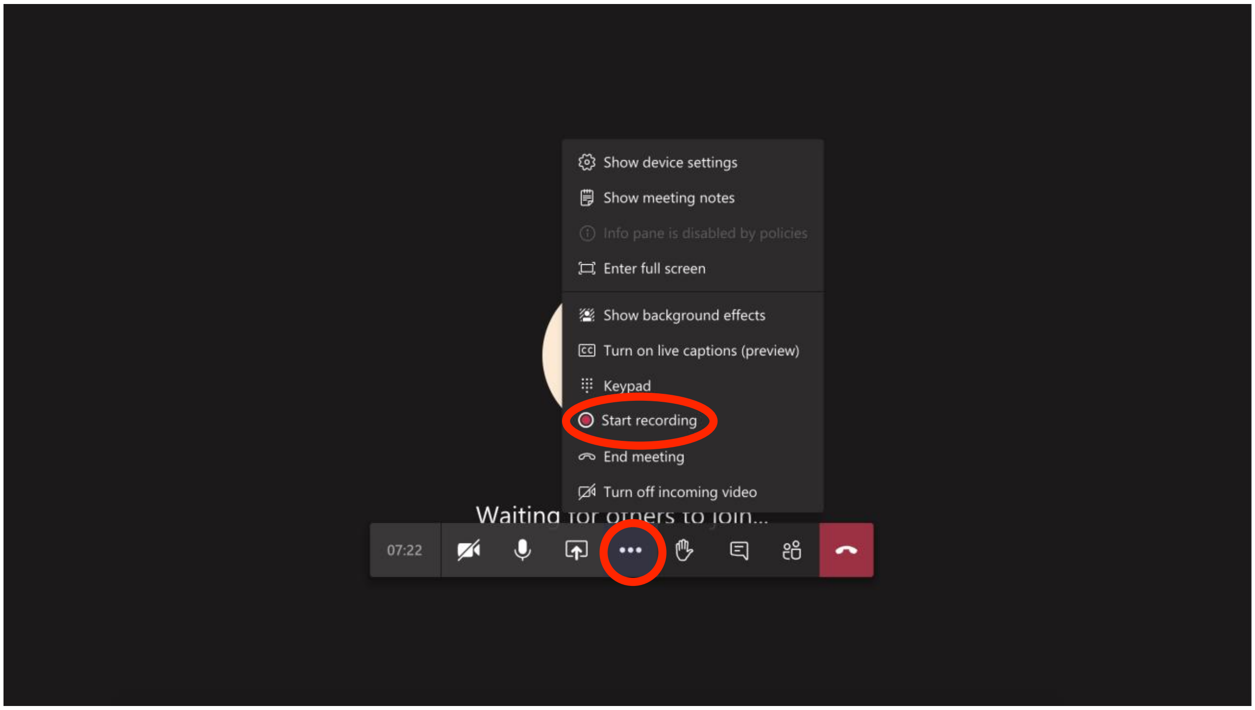
b. If the Client attempts to join with a McGill email address, admit them into the meeting room from the lobby and ask them to sign out of Teams, and sign back in with their non-McGill email address to join the meeting. Once the Client joins the meeting with their non-McGill email address, the recording can begin.

c. If the Trainee is not able to verify which email address the Client has joined with, the Trainee will have to go into MS Stream after the meeting ends, to make sure the Client does not have access to the recording. Follow #1 - 6 of Step 5. Once these steps are complete, make sure to uncheck the box beside the Client's name to ensure the Client does not have access to the video.

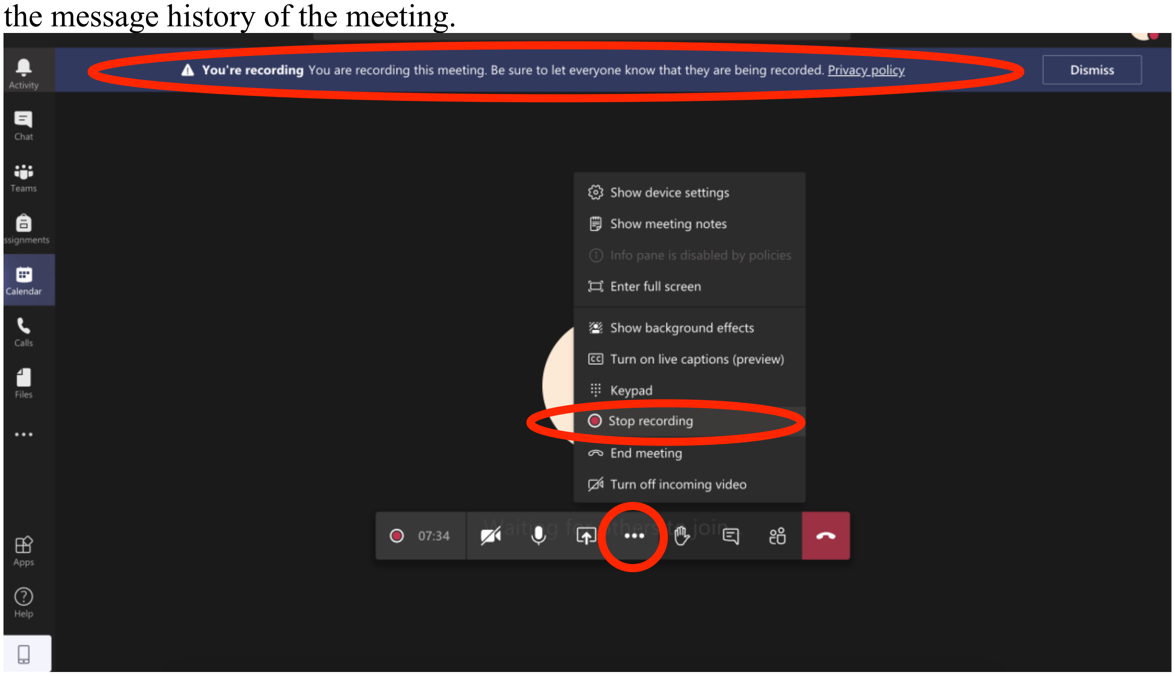
***Before starting the recording of the meeting, make sure all client consent forms are signed.

Step 4: Recording the meeting

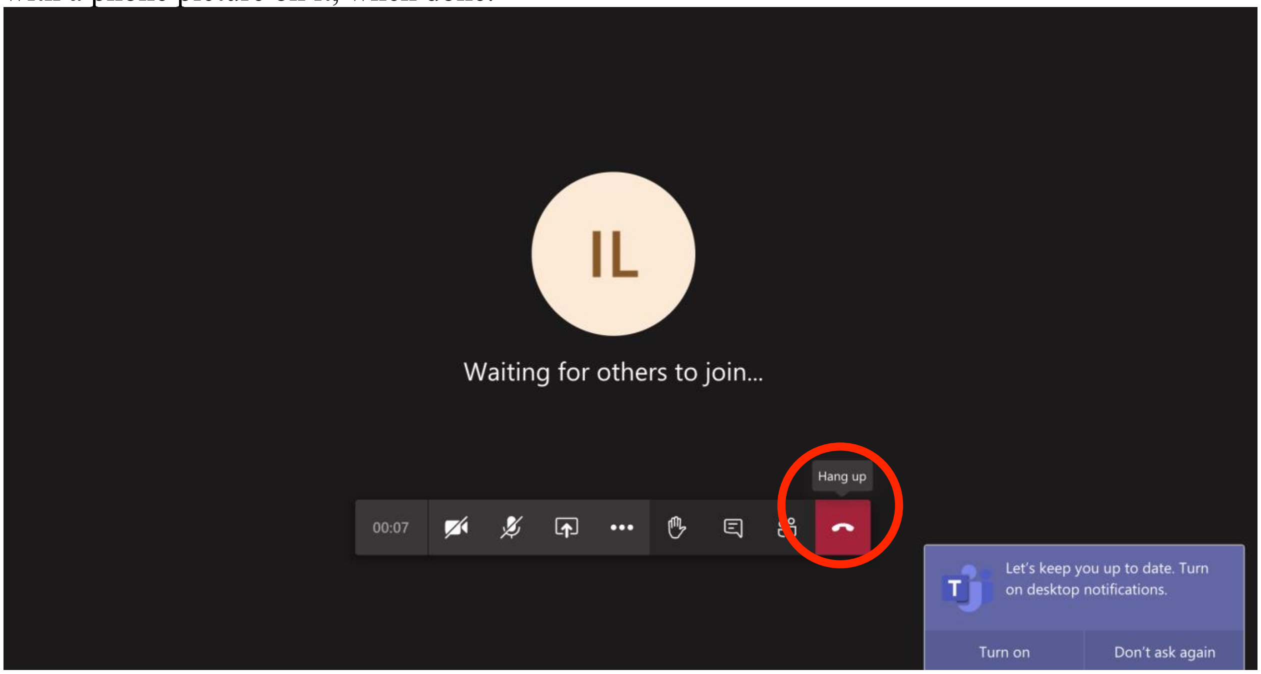
1. Once in the meeting, click the button with three dots on the central bar called the "More actions" button.



2. Choose "**Start recording,**" you will see a blue bar appear at the top of the screen alerting you that the session is being recorded. End the recording by clicking the "More actions" button (same as before) and clicking" **Stop recording.**" A blue bar will appear at the top to alert you that the recording has stopped and that you can find the recording in link form in the message history of the meeting.

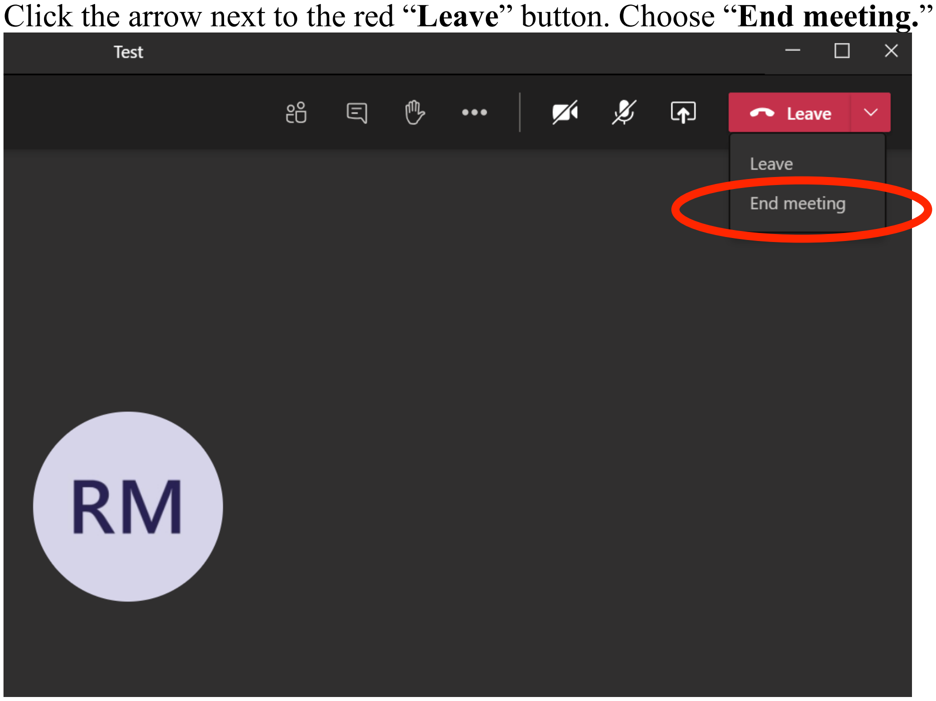


3. To end the meeting, click “hang up” (**not just “leave meeting”**) by clicking the red button with a phone picture on it, when done.

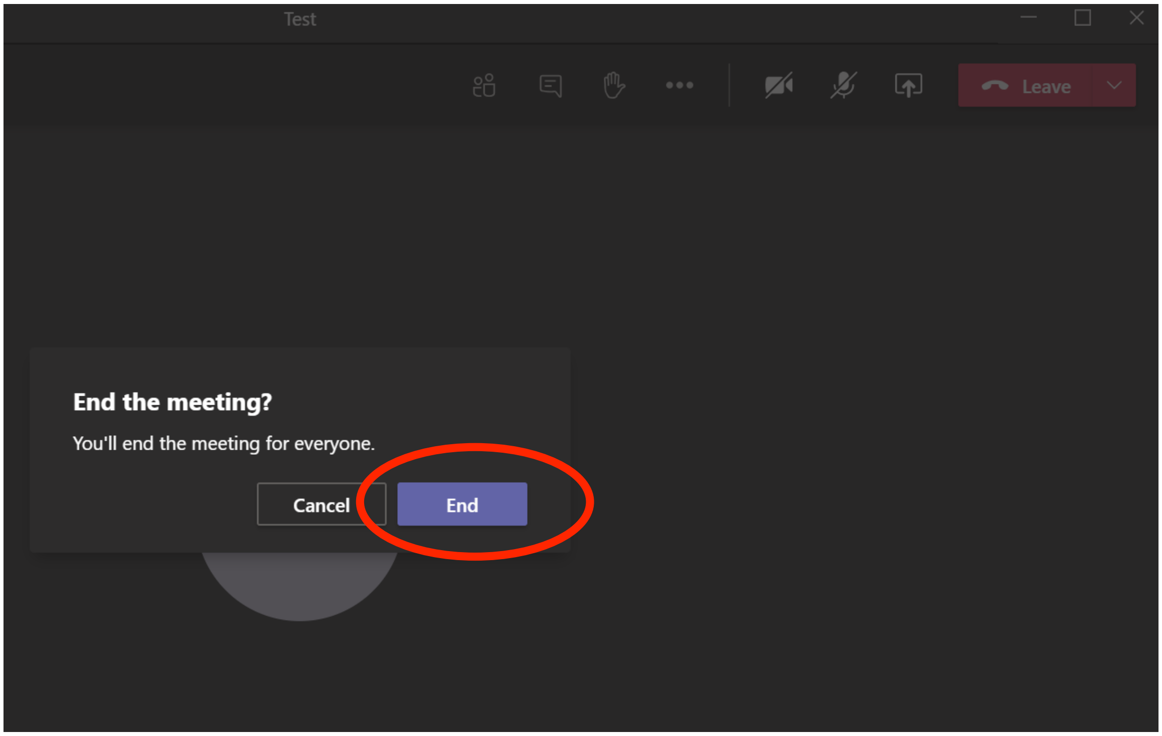


If your desktop looks different than the above, follow the instructions below to end the meeting:

a. Click the arrow next to the red “**Leave**” button. Choose “**End meeting.**”



b. Confirm “**End**.”

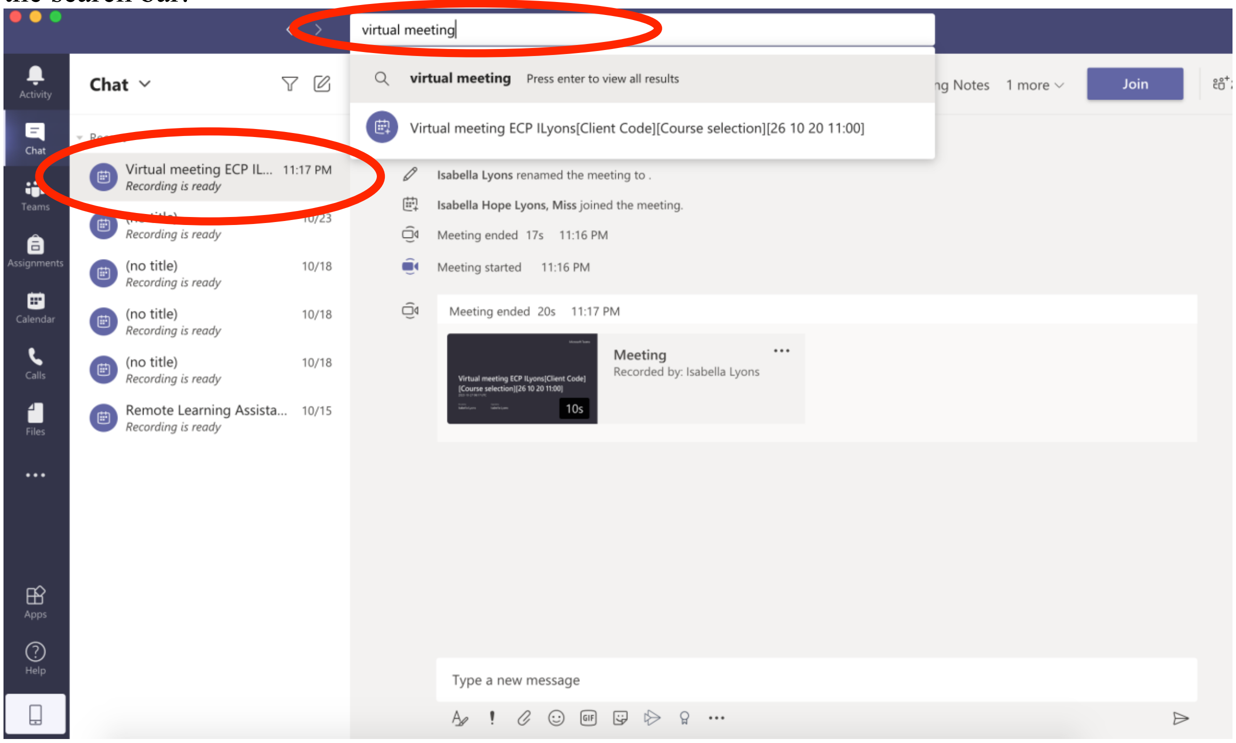


Step 5: Sharing the recording/access the recording

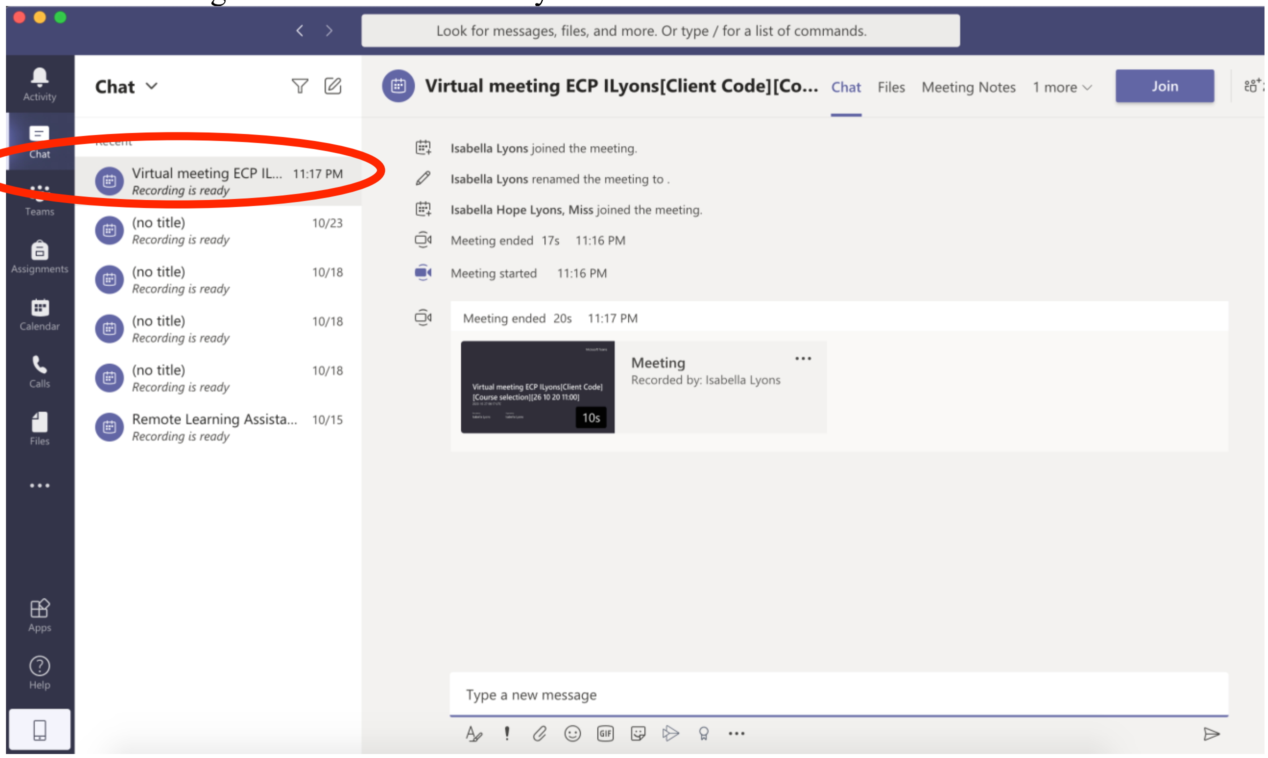
NOTE: Make sure NOT to share with everyone in the organization!!! ******

1. Go to the chat menu after the meeting by choosing the "**Chat**" button from the side bar.

2. Find desired meeting from the history by locating it in the chat column, or looking it up in the search bar:

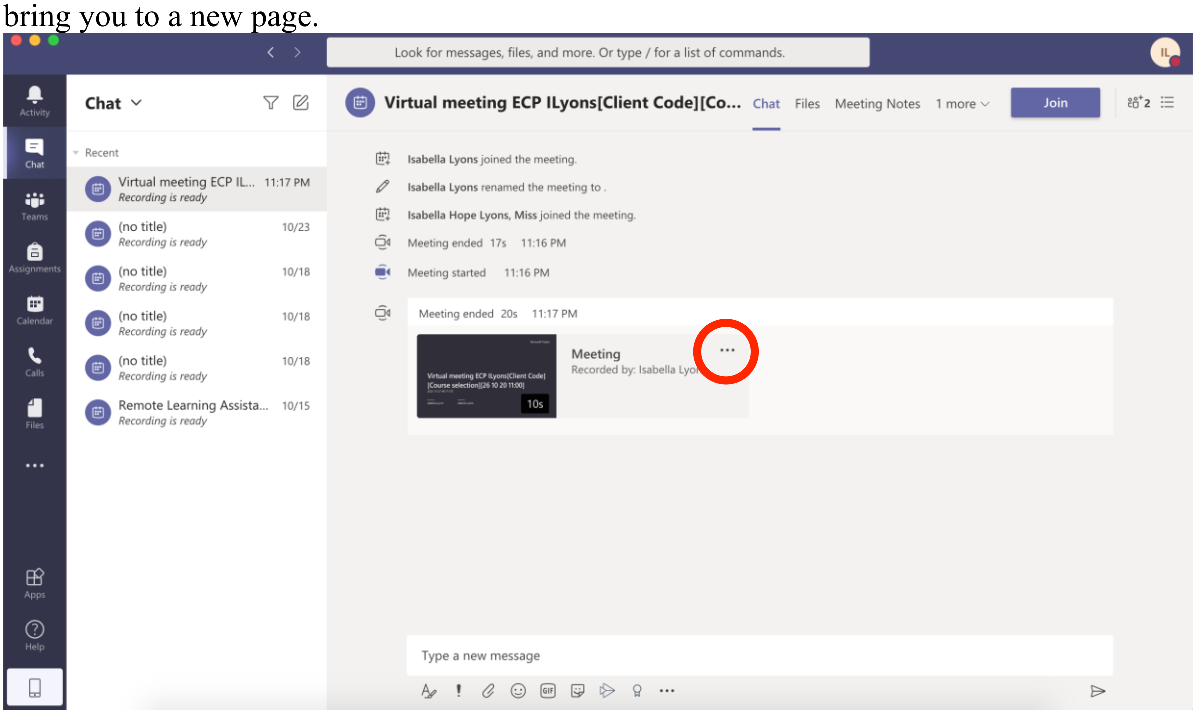


3. Click on meeting to reveal the chat history.

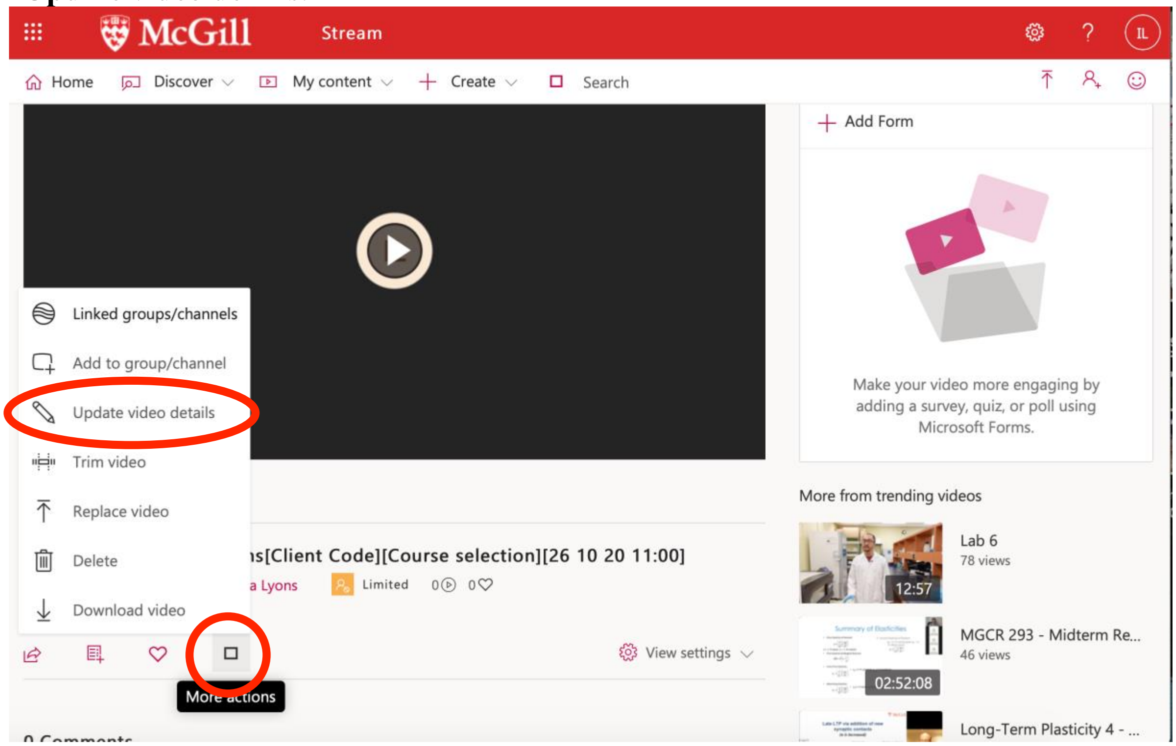


4. There should be a screenshot of your video screen under the "**Meeting ended**" statement in the chat that says "**Meeting**" ("Meeting Recorded by: *your name*").

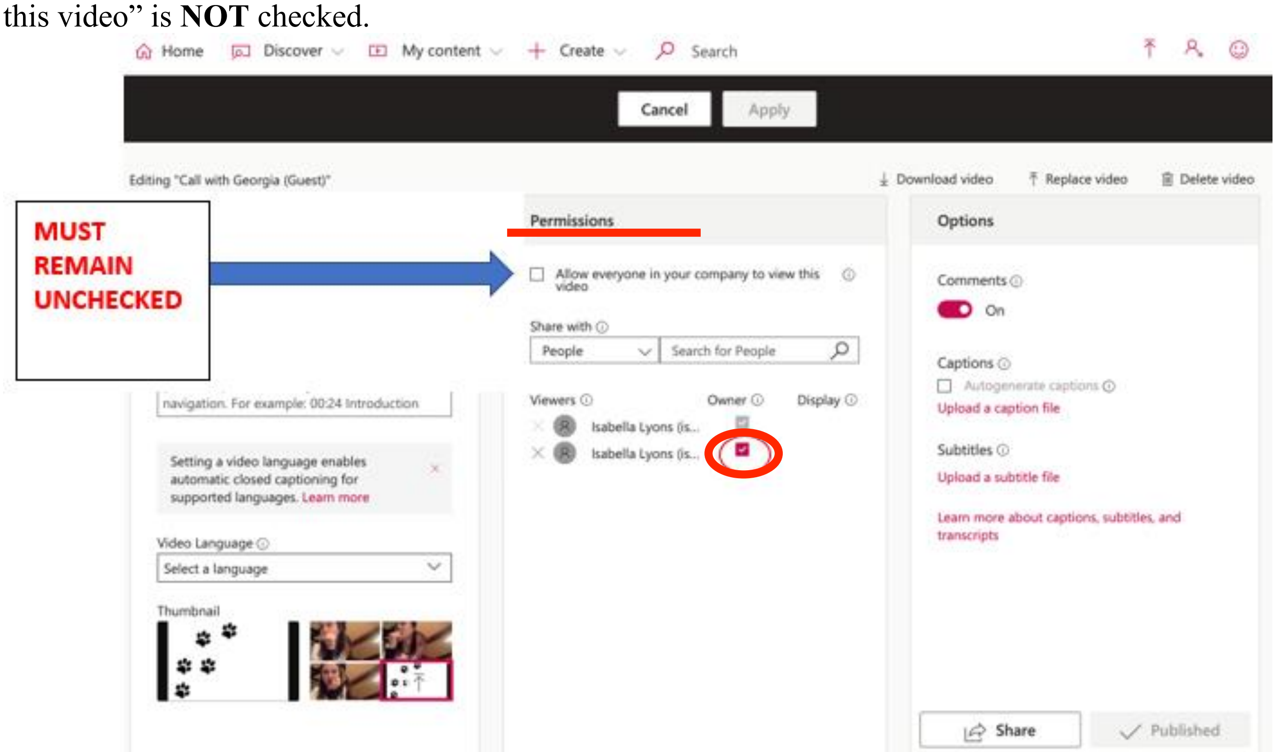
5. Click the three buttons at the top right, choose "**Open in Microsoft Stream**" which will bring you to a new page.



6. Under your video recording there should be an icon next to a heart icon, choose that and click "**Update video details.**"



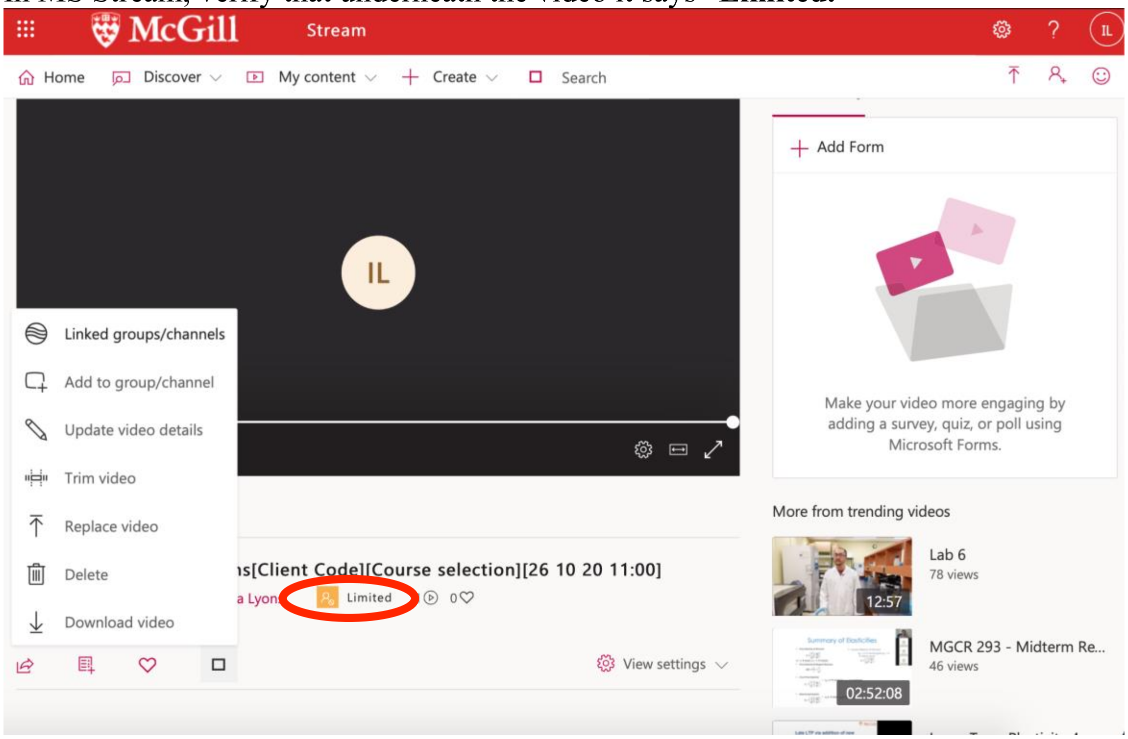
7. Give permission to your Course Instructor and/or Student Supervisor to view video. Under "**Permissions**" > viewers, make sure the box next to your Course Instructor's and/or Student Supervisor's name is checked, and make sure that "Allow everyone in your company to view this video" is **NOT** checked.



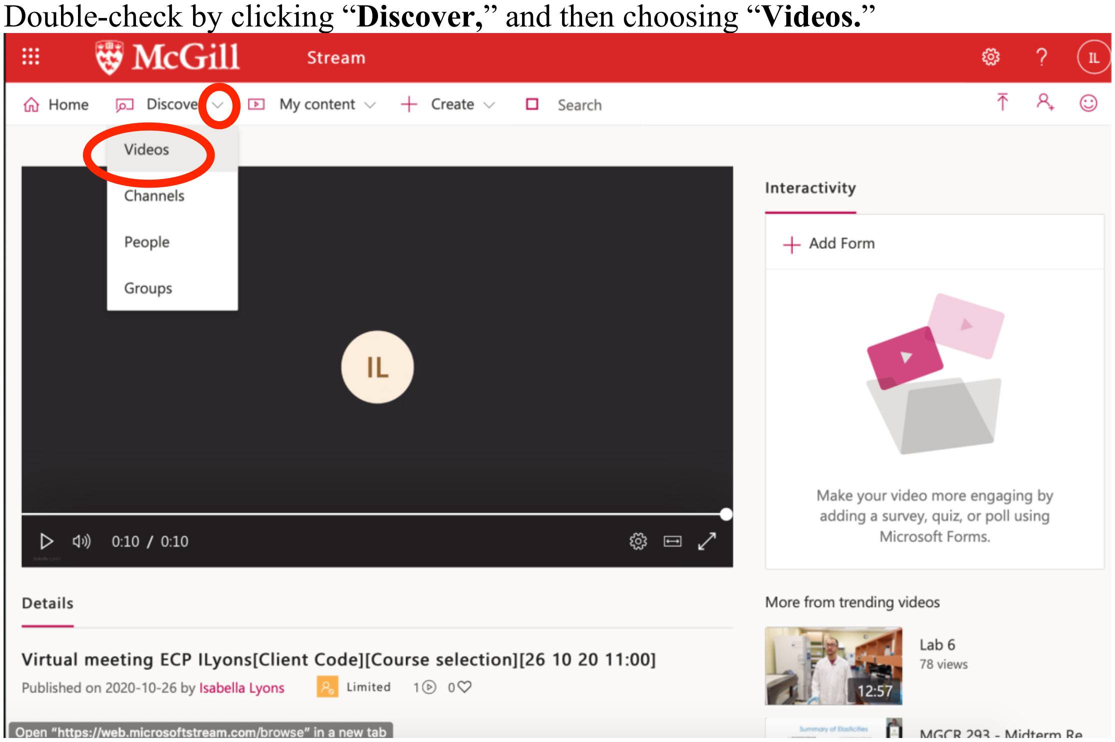
8. Click “**Apply**.”

Step 6: Verify that your video is not public/shared with the “company”

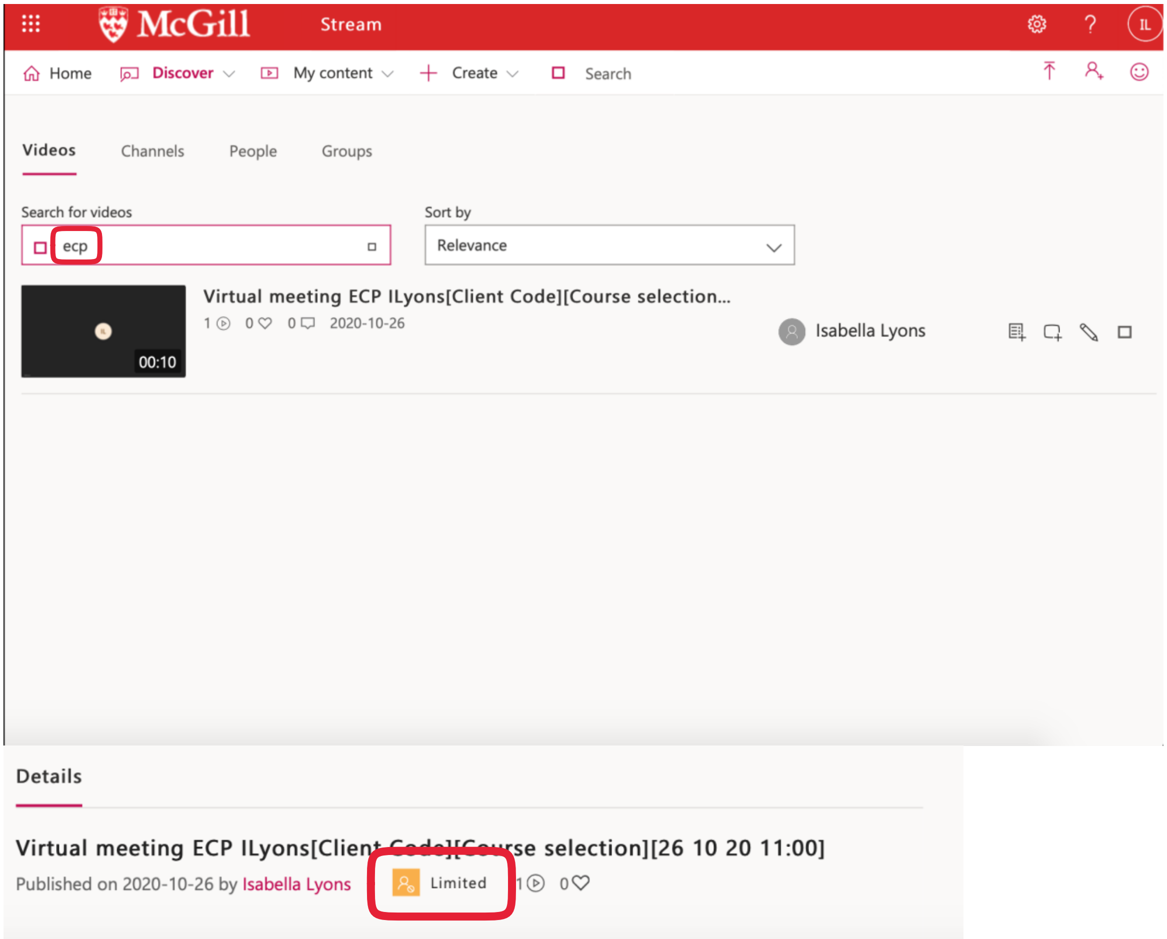
1. In MS Stream, verify that underneath the video it says “**Limited.**”



2. Double-check by clicking “**Discover,**” and then choosing “**Videos.**”



3. Type "ECP" in the search bar, choose it, and see if your video is once again "**Limited**" or "**Public.**"



DO NOT EVER DOWNLOAD THE VIDEO: McGill IT will perform a weekly audit to determine if any videos have been downloaded. This audit report will be reviewed by the Clinic Director or Clinic Coordinator. Trainees must follow every aspect related to video recording, file maintenance and file sharing outlined in this document. **Failure to do so will have serious consequences that may include failing a Clinic-based course. Decisions concerning the consequences of not adhering to policies will be made by the Course Instructor who may consult with the Clinic Director or the Clinic Advisory Committee.**

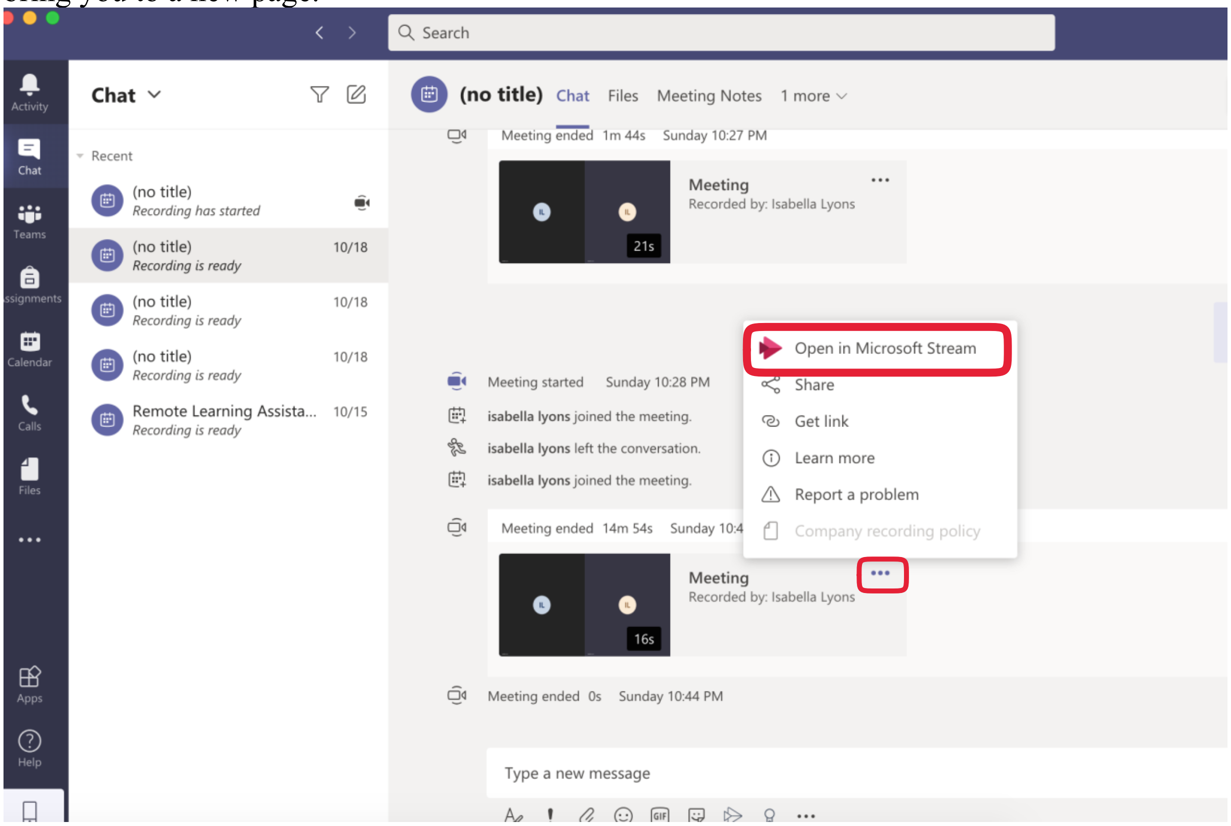
In order to ensure that you did not accidentally share a video with the entire organization, follow these cautionary steps as an extra precaution or in case you discover that it was shared, to proceed deleting it

1. Go to the chat menu after the meeting by choosing the "**Chat**" button from the side bar.

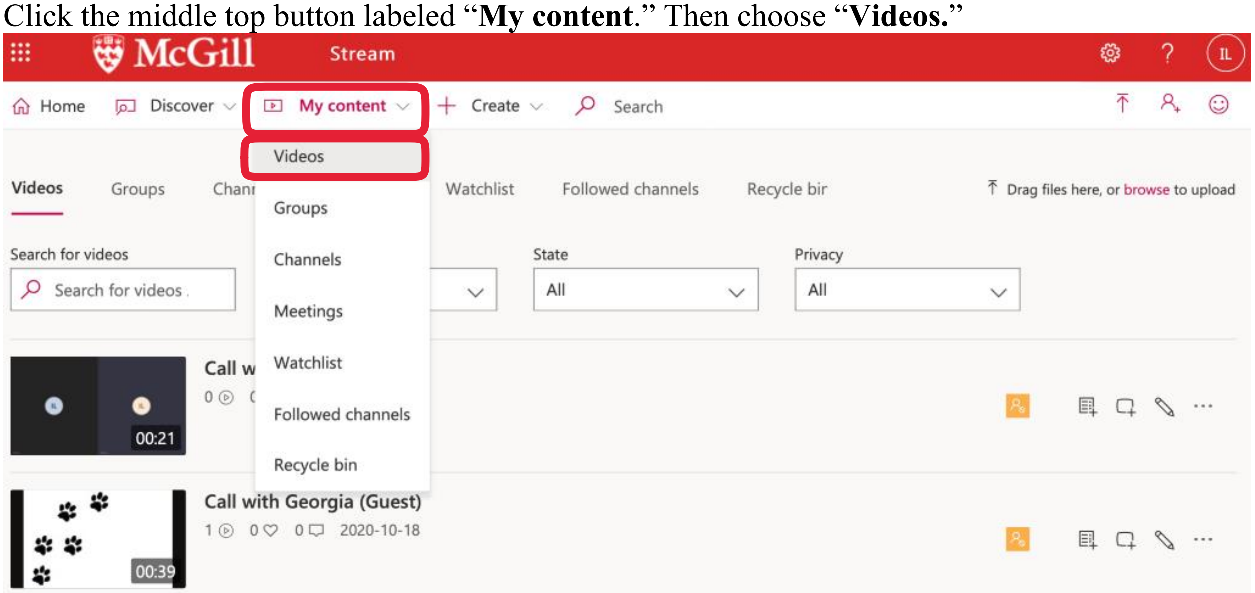
2. Find the desired meeting from the history, click on the title of the meeting to reveal the chat history.

3. There should be a screenshot of your video under the "**Meeting ended**" statement in the chat that says "**Meeting**" ("Meeting recorded by: *your name*").

4. Click the three buttons at the top right, choose "**Open in Microsoft Stream**" which will bring you to a new page.

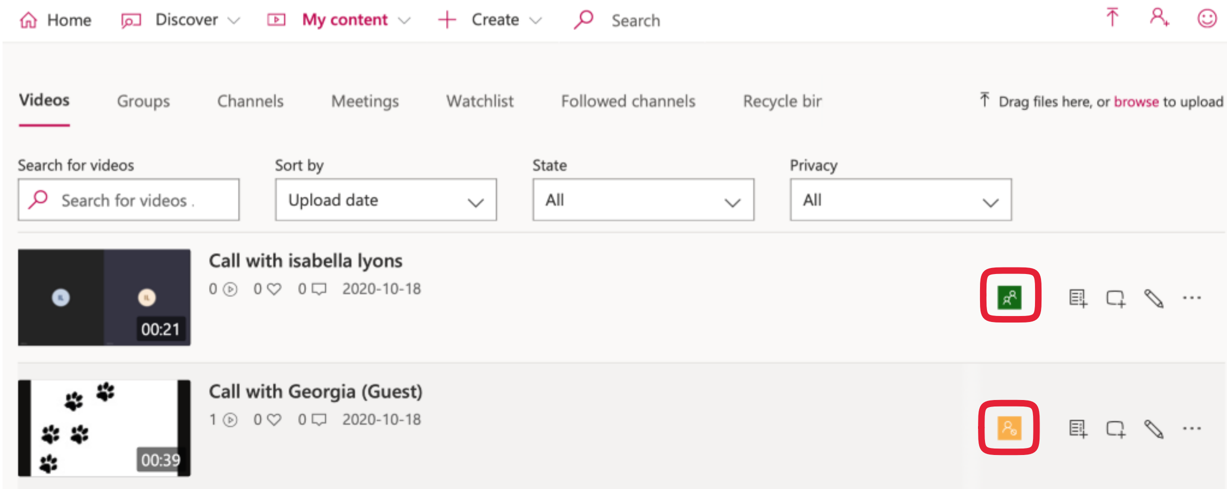


5. Click the middle top button labeled "**My content**." Then choose "**Videos.**"

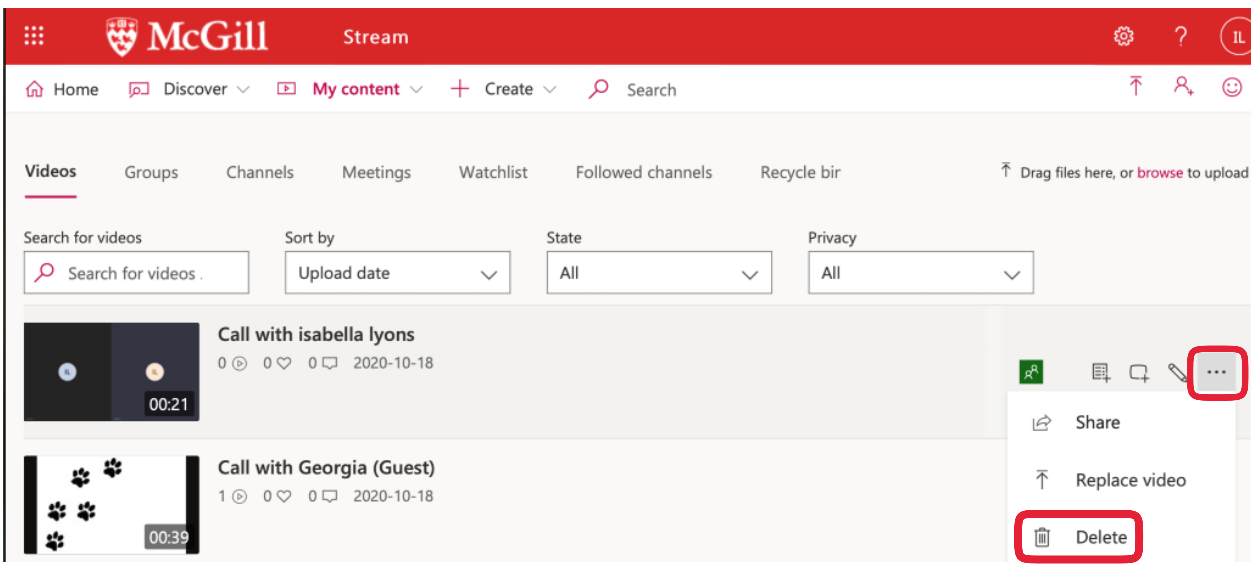


6. All the videos will appear. You can see if the video is limited or public by looking at the colour of the icon to the right of the video. If the video has limited access, the icon will be

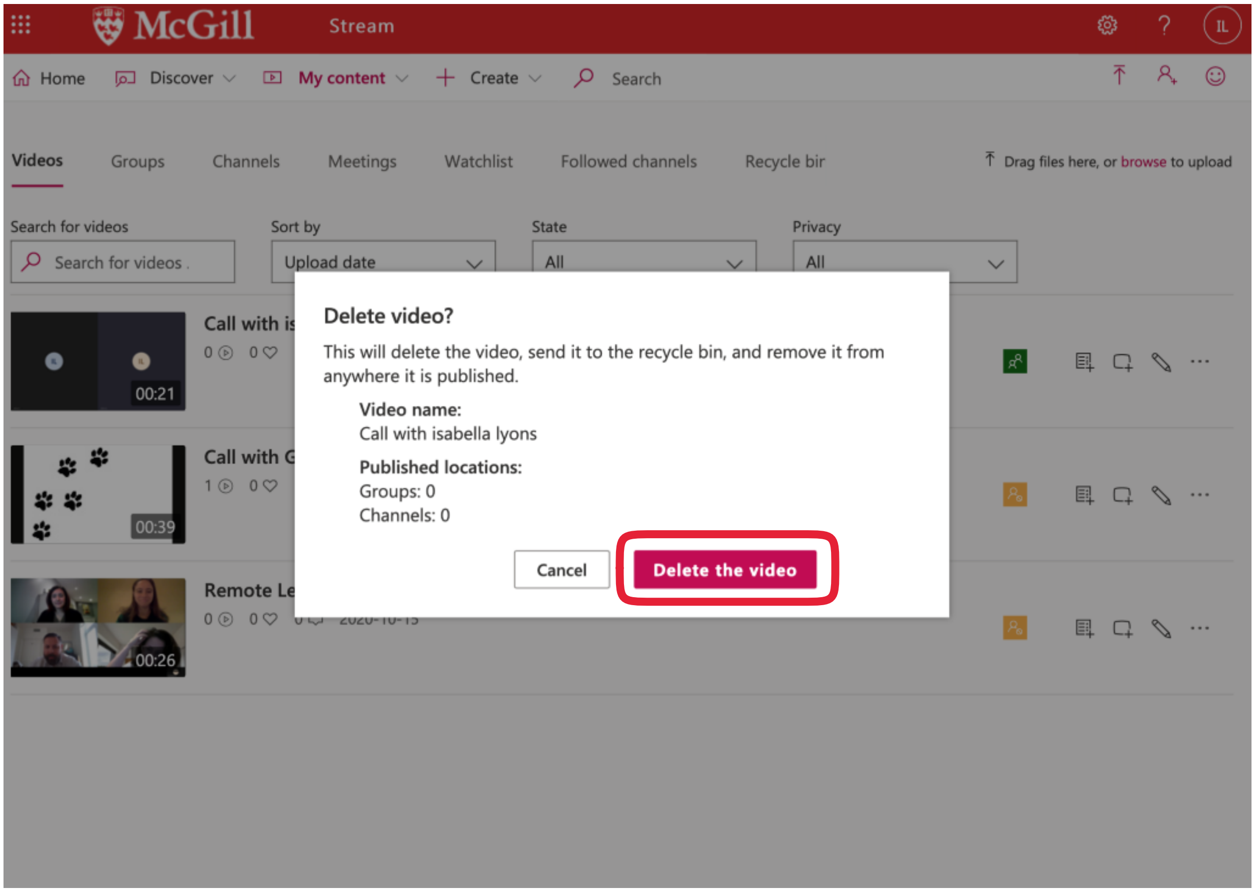
orange/yellow, if the video has public access the icon will be green.



7. Click the three dots to the far right of the video you made a mistake with, choose “**Delete.**”



8. Click "**Delete the video.**"



9. Search "ECP" to see if your video still appears. If you have successfully deleted your video, it will not appear in the search results.

10. If you accidentally shared the video with somebody else other than your supervisor, following deletion please NOTIFY your supervisor immediately.