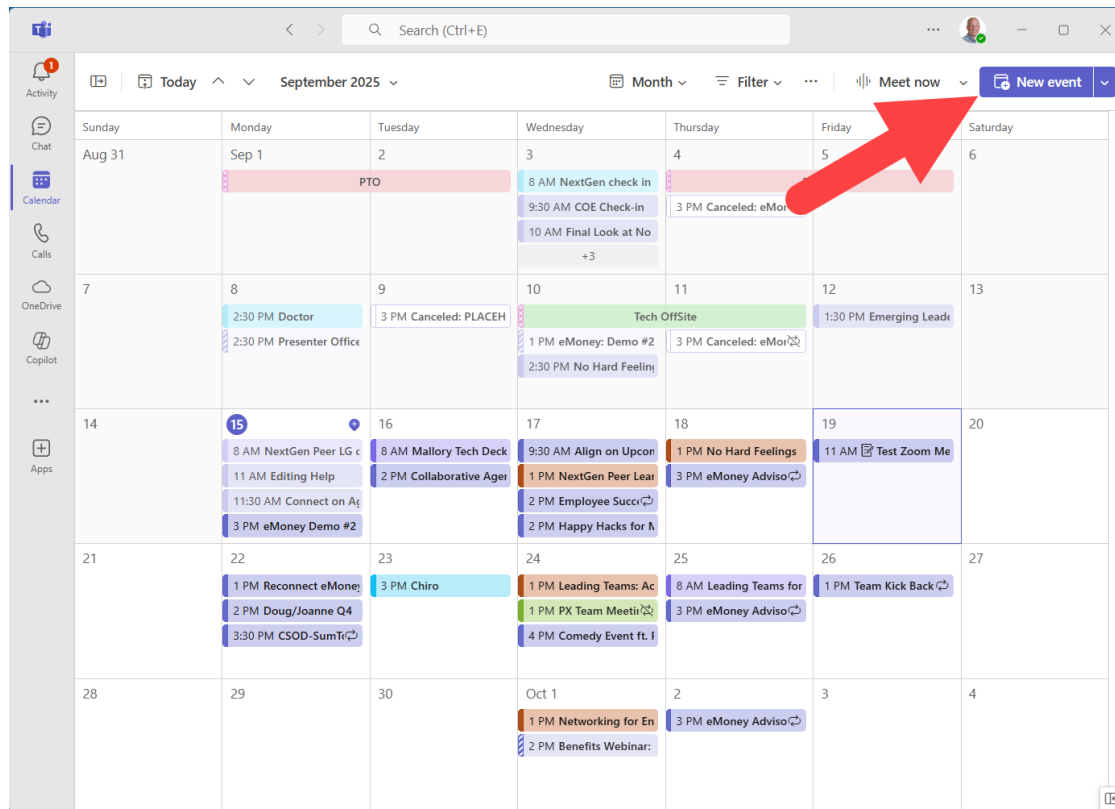


Schedule a Meeting in Teams with Loop Agenda

Using Loop agendas may be helpful for **internal meetings**, **collaborative** agendas for multiple contributors, **real-time updates**, or **ongoing** projects or **recurring** meetings.

STEP 1: Open Microsoft Teams and Go to the Calendar

- Launch the **Microsoft Teams** desktop or web app.
- In the left-hand sidebar, click on “**Calendar**.”
- Click “**New Event**” (top right corner).



STEP 2: Fill in Meeting Details

- A. **Title:** Enter the name of your meeting.
- B. **Required attendees:** Add participants by name or email.
- C. **Date & Time:** Set the start and end time.
- D. Click the **<Teams meeting>** radio button
- E. Click **<Add an agenda>**

Teams Meeting with Loop Agenda - Meeting - Calendar

Event Scheduling Assistant

Meeting options Response options Busy 15 minutes before Sensitivity Categorize Private

Send | Calendar (dcooper@emoneyadvisor.com)

Teams Meeting with Loop Agenda A

Mallory Romani X B Optional

10/31/2025 10:30 AM to 10:55 AM C Recurring All day

Find a Time >

Add a room or location

Teams meeting D

Add an agenda E

Fri, Oct 31, 2025

8 AM	
9 AM	
10 AM	Test Team with Loop Agenda 10:30 AM - 10:55 AM Everyone is available
11 AM	
12 PM	
1 PM	
2 PM	
3 PM	
4 PM	
5 PM	

Two participants are shown at the bottom right.

STEP 3: Create a Loop Agenda

The loop component is created.

A. Add agenda items to the check list like:

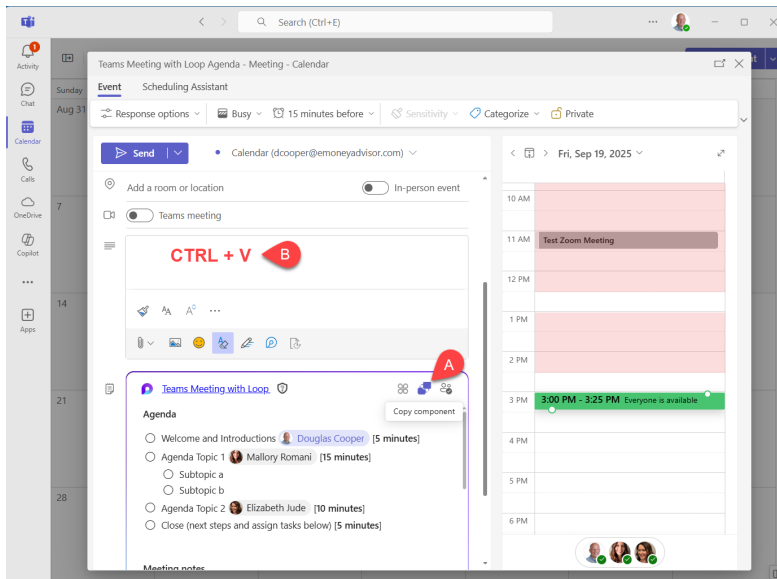
- a. Welcome
- b. Topics
- c. Closing

B. Enter any supporting notes

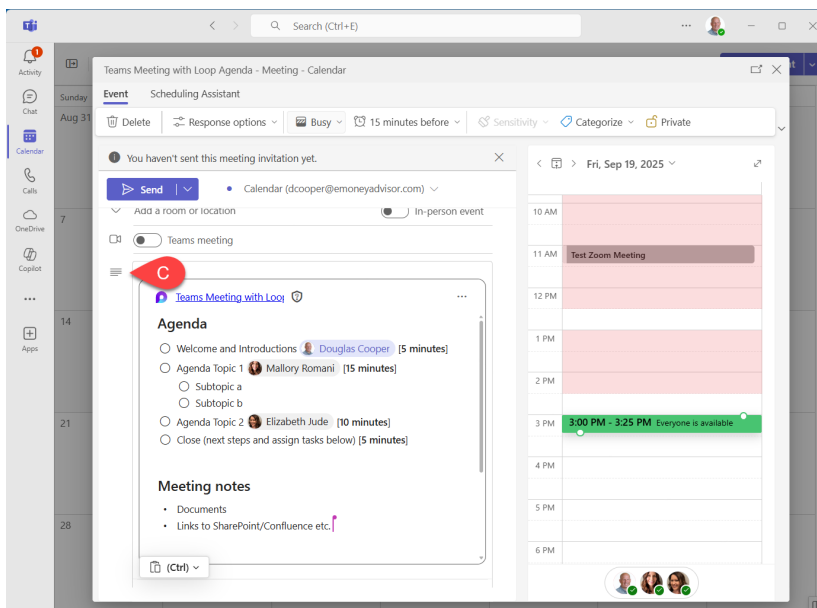
The screenshot displays a Microsoft Teams window titled "Teams Meeting with Loop Agenda - Meeting - Calendar". The interface is split into two main sections. On the left, the "Event" tab is active, showing a "Scheduling Assistant" for the calendar "Calendar (dcooper@emoneyadvisor.com)". It includes options for "Response options", "Busy", "15 minutes before", "Sensitivity", "Categorize", and "Private". Below these is a "Send" button and a list of agenda items under the heading "Teams Meeting with Loop". The agenda items are: "Welcome and Introductions" by Douglas Cooper (5 minutes), "Agenda Topic 1" by Mallory Romani (15 minutes) with subtopics "a" and "b", "Agenda Topic 2" by Elizabeth Jude (10 minutes), and "Close (next steps and assign tasks below)" (5 minutes). Under "Meeting notes", there are two bullet points: "Documents" and "Links to SharePoint/Confluence etc.". A red callout bubble with the letter "A" points to the agenda items, and another red callout bubble with the letter "B" points to the meeting notes. On the right, a calendar view for Friday, September 19, 2025, is shown. It features a timeline from 10 AM to 6 PM. A "Test Zoom Meeting" is scheduled for 11 AM. A green bar indicates a time slot from 3:00 PM to 3:25 PM where "Everyone is available". At the bottom of the calendar view, three participant avatars are visible.

STEP 4: Embed the Loop Agenda in the Teams Meeting Invite

- Click the <Copy component> button in the upper right of the agenda
- In the **description box**, paste (You must use the keyboard shortcut CTRL + V) the Loop component.



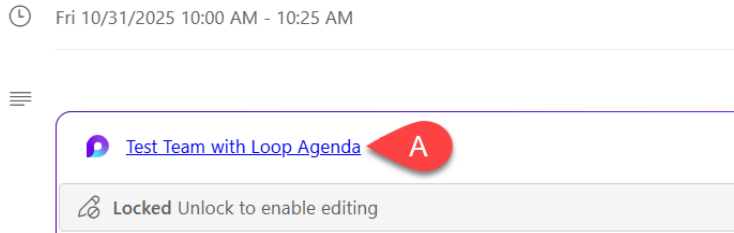
- The agenda will appear as a live, collaborative agenda in both Teams and the Outlook Calendar event that attendees can edit.



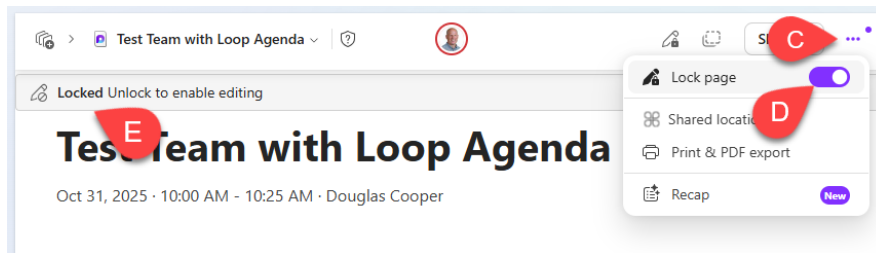
STEP 5: Manage access to edit the agenda (optional)

By default, all invitees will be able to edit. If you want to limit access to view only do this:

- A. Click on the loop component title



- B. Loop will open (in a browser tab/window)
- C. Click ... (More options) in the upper left corner
- D. Click <Lock page> toggle switch
- E. The Loop component will be labeled as "Locked"

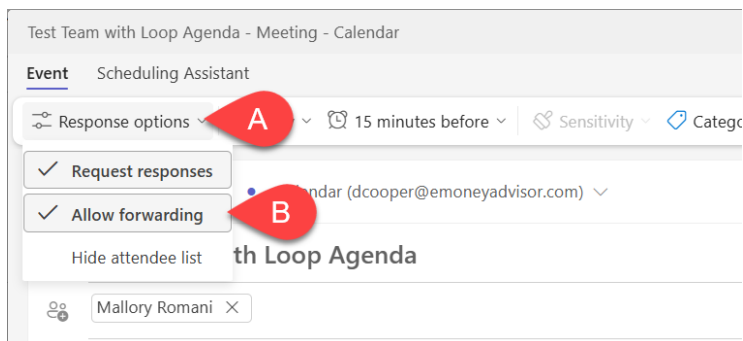


(The loop agenda must be unlocked to make additional edits)

STEP 6: Turn off Allow Forwarding (optional)

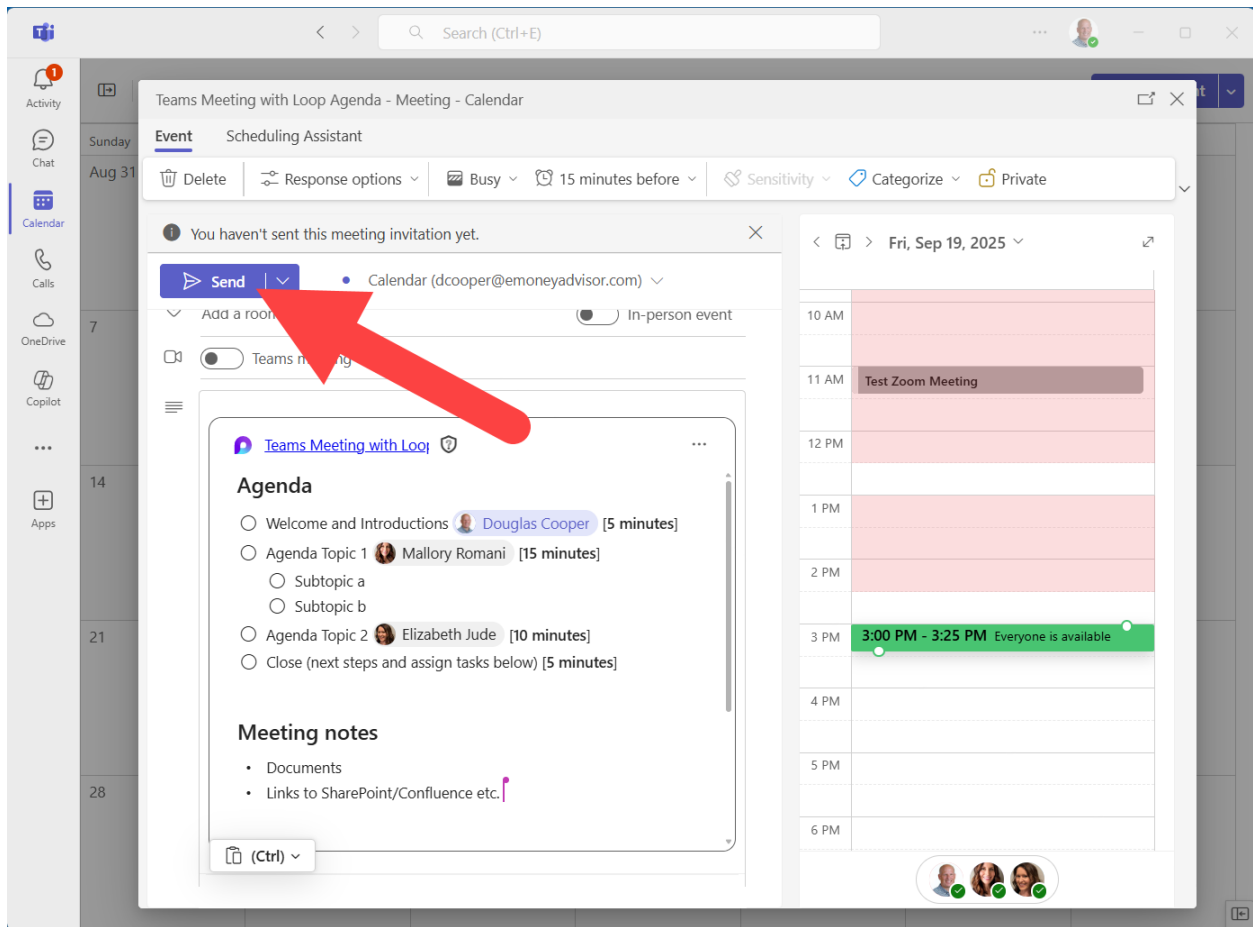
If you want to limit who can share the meeting details, Outlook allows you to disable the forwarding option. This can help maintain control over attendance and ensure sensitive information stays within the intended group.

- A. Click <Response Options>
- B. Uncheck Allow forwarding



STEP 7: Send the Invite

- Click “**Send**” to schedule the meeting.



What Happens Next?

- The meeting appears in both **Teams** and **Outlook** calendars.
- The **Loop agenda** is embedded in the meeting invite and is visible in:
 - **Teams**: via the meeting details or chat.
 - **Outlook**: in the calendar event body.
- Attendees can collaborate on the agenda before, during, and after the meeting.