

# Microsoft Teams meeting guidelines

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## 1. Introduction

This guide has been developed to help you as the meeting organiser ensure your meeting takes place with the correct controls in place for you to manage your meeting.

When you schedule a meeting all invitees to a meeting can by default record the meeting, share their screen and unmute their microphone.

There are a number of settings for you as the meeting organiser can change when you schedule a meeting to ensure the correct level of permissions for your participants and to ensure that you as the organiser can end the meeting for all participants once the meeting has completed.

These settings can be changed once you have scheduled the meeting in your Outlook or Teams calendar at any stage before the meeting starts or during the meeting by editing the meeting options.

## 2. Inviting participants to a Teams meeting

You can schedule a Teams meeting via the Teams Outlook calendar add in or directly via the calendar within Teams itself.

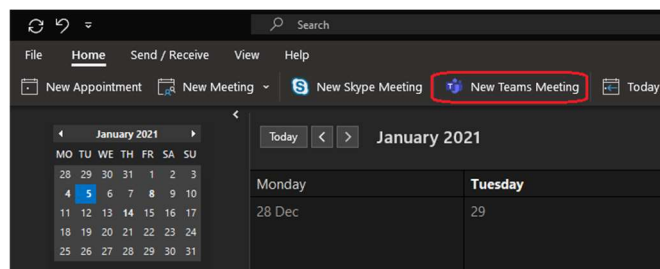
If you have the Microsoft Teams desktop client installed you can schedule a meeting via your Outlook calendar.

### 2.1 Scheduling a meeting via Outlook

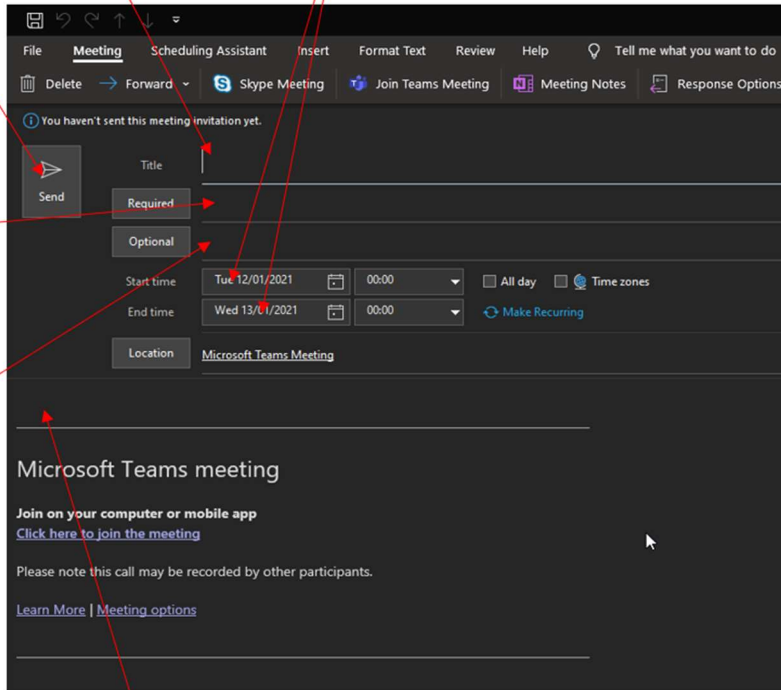
Click on the calendar icon in Outlook:



Then click on the 'New Teams Meeting' option to schedule your meeting:



Configure your meeting in the 'New meeting' window.



6. Once previous steps have been set, click on send to send your invite

2. Type email addresses of attendees. These can be users inside or outside of the University

3. Type email addresses of optional attendees (if required)

1. Add meeting title

4. Set a start and end date and time for your meeting

5. Add some text in relation to the meeting here

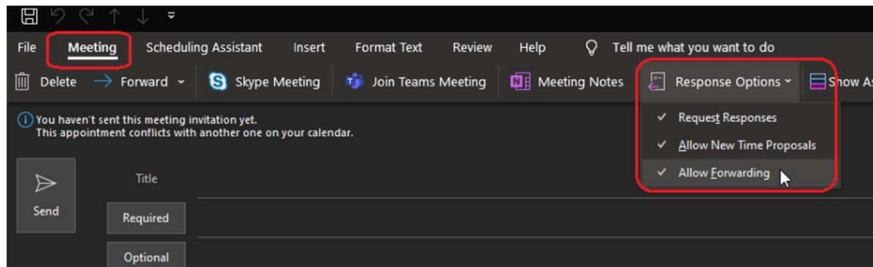
The screenshot shows the 'Meeting' window with the following fields and options:

- Title:** A text input field with a 'Required' label.
- Optional:** A text input field with an 'Optional' label.
- Start time:** A date and time selector set to 'Tue 12/01/2021 00:00'.
- End time:** A date and time selector set to 'Wed 13/01/2021 00:00'.
- Location:** A dropdown menu set to 'Microsoft Teams Meeting'.
- Buttons:** 'Send', 'Delete', 'Forward', 'Skype Meeting', 'Join Teams Meeting', 'Meeting Notes', 'Response Options'.
- Options:** 'All day', 'Time zones', 'Make Recurring'.
- Message Body:** 'Microsoft Teams meeting', 'Join on your computer or mobile app', 'Click here to join the meeting', 'Please note this call may be recorded by other participants.', 'Learn More | Meeting options'.

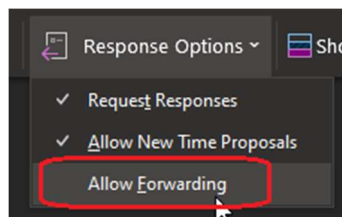
Once you click **‘Send’** the meeting will be added to your calendar and the invite will be sent to all participants.

**Note:** It is important to confirm you have included the correct participant email addresses (both internal and external to UL) before you send the invite.

Scheduling a Teams meeting via Outlook gives you a few more options when sending the invite than scheduling via Teams itself. For example, under **“Meeting>Response Options”** you have the option to stop people you send the meeting invite to from forwarding it onto other people.



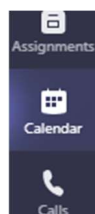
If you click on the **‘Allow Forwarding’** option above it will unselect it and this will stop the email from being forwarded to anyone.



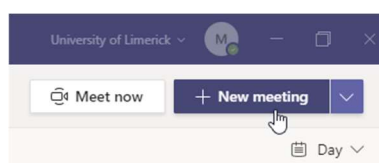
If left selected and someone does forward your meeting invite onto someone else the meeting organiser will get a notification by email that they have done so. If you are scheduling an important/confidential meeting it might be worth considering blocking the forwarding of the meeting invite. You can also change the meeting options to control who can access the meeting before it starts. Please refer to section 3.1 of this guide for more information.

## 2.2 Scheduling a meeting via Microsoft Teams

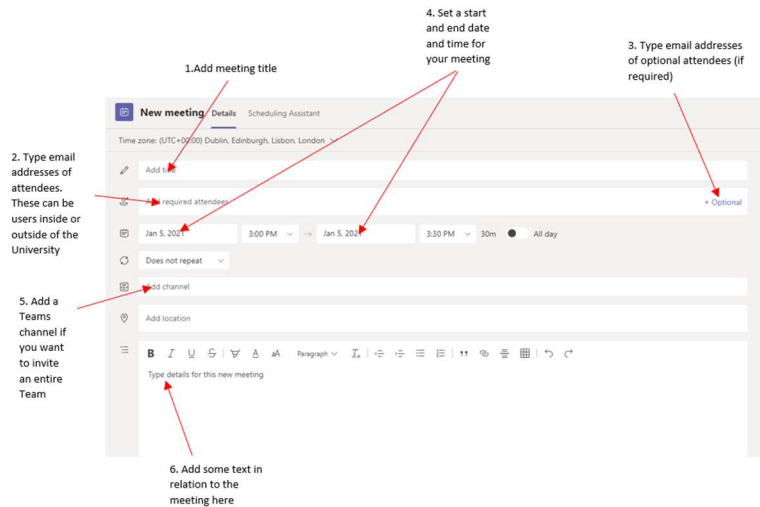
Click on the calendar icon in Teams:



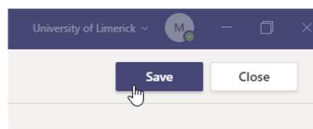
Then click on **‘New meeting’** to schedule your meeting:



Configure your meeting in the 'New meeting' window.



Once you have set the settings above click on 'Save' to add the meeting to your calendar and send the invite.

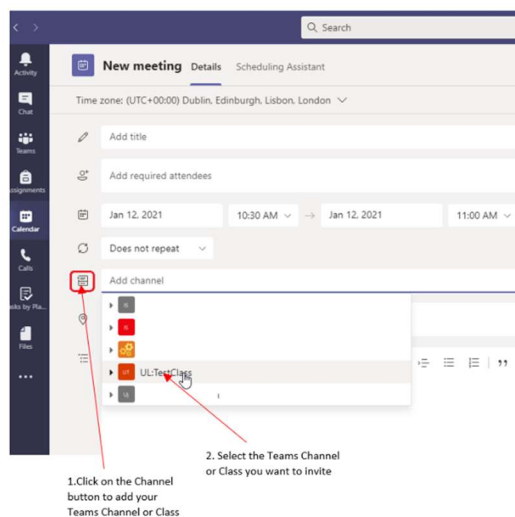


**Note:** It is important to confirm you have included the correct participant email addresses (both internal and external to UL) before you send the invite.

### 2.3 Schedule a Teams Channel or Teams Class meeting

You can schedule a Teams Channel or Classroom meeting the same way as scheduling a regular Teams meeting as shown above.

The only difference is when inviting users, you select the Channel or Class you have created when you are scheduling the meeting.



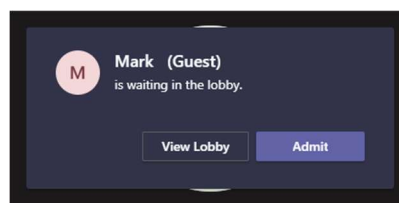
## 2.4 Inviting an external user to a Teams meeting

You can invite an external user (someone from outside the University) to a Teams meeting using their email address. They don't need to have an Office365/Teams account in order to join the meeting.

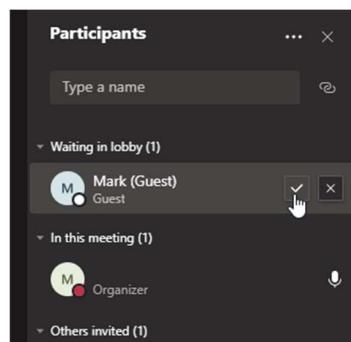
If the external user does not have the Teams desktop client installed they can join the meeting via the web browser.

It is good practice to set the meeting to have guest users wait in the lobby rather than join the meeting before you as the organiser has started the meeting. This can be set in the meeting options.

Once the guest has joined the meeting you will receive a notification to say they are waiting in the lobby.



Click on **'Admit'** to allow them into the meeting or you can allow them in by clicking on the participant list and allowing them in from there.



## 3. Teams meeting permissions

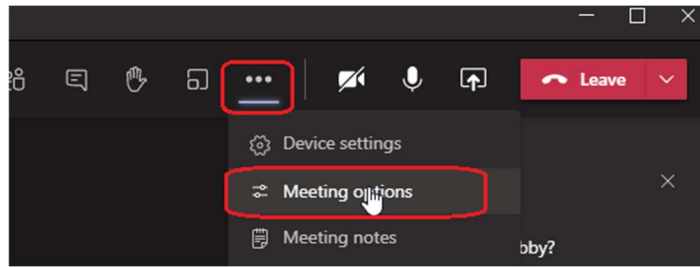
When you schedule a Teams meeting there are 3 types of participant:

- i.) **Meeting Organiser** – The person who schedules the meeting
- ii.) **Presenter** – By default when you schedule a meeting all attendees can present and record a meeting
- iii.) **Attendee** – If you select yourself as the only person who can present or if you select specific users who can present all other participants in the meeting will be 'attendees' and will not be able to record a meeting or share their screen.

To edit these settings before or during your meeting you can open the meeting options to control these settings.

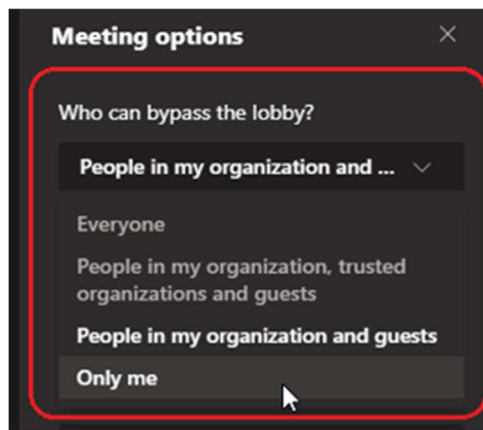
### 3.1 Edit meeting permissions during the meeting

Click on the ellipsis (three dots) in the menu bar and select **'Meeting options'**.



#### Who can bypass the lobby

Select who can bypass the lobby i.e., who can directly join the meeting.



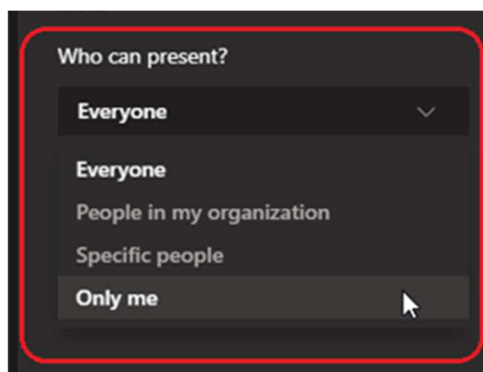
If you select **'Only me'** it means all invitees will be held in the lobby until you admit them.

**Note:** If your meeting is of a very important/confidential nature it is recommended that all invitees have to wait in the lobby until they are let in by the meeting organiser. This way you as the meeting organiser can ensure only the people who were invited to the meeting are allowed into the meeting.

#### Select who can present

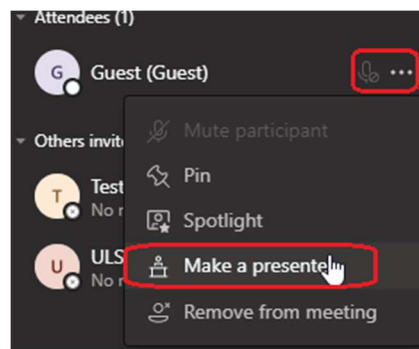
If you select **'Only me'** it means only you as the organiser will be able to share your screen and all other participants will not be able to share their screen or record the meeting.

Once you select who can present all other participants will then be **'Attendees'** at the meeting and will have limited permissions in the meeting. They will not be able to present, record or mute/unmute their microphone (if you have selected that setting in the meeting options).



You can also specify certain users from the University who can present also. You can only select participants you have invited to the meeting from the University when configuring the **‘Who can present’** option.

If you have configured this setting and you have a guest speaker (someone from outside of the University) you can during the meeting give your guest speaker the **‘Presenter’** role instead by clicking on the ellipsis button beside their name and selecting **‘Make a presenter’**



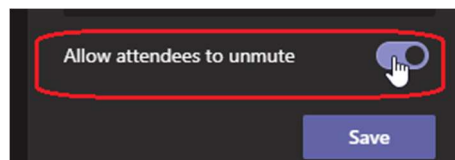
Alternatively, as with other attendees you can inform your guest they can raise their **‘virtual hand’**. As the organiser you can unmute them to allow your guest to speak if you do not want to give them the full presenter role.

**Note:** A guest speaker cannot record a Teams meeting even with the ‘Presenter’ role.

#### *Allow attendees to unmute*

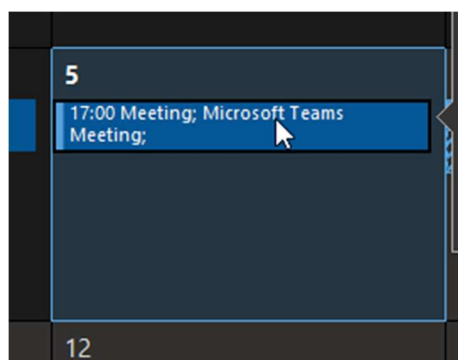
This can be particularly useful if you have a large number of people at the meeting and you have set them as **‘attendees’** in the meeting options.

If you set this setting to **‘disabled’** it will mean attendees will not be able to unmute their microphone until you give them permission from the participant list.

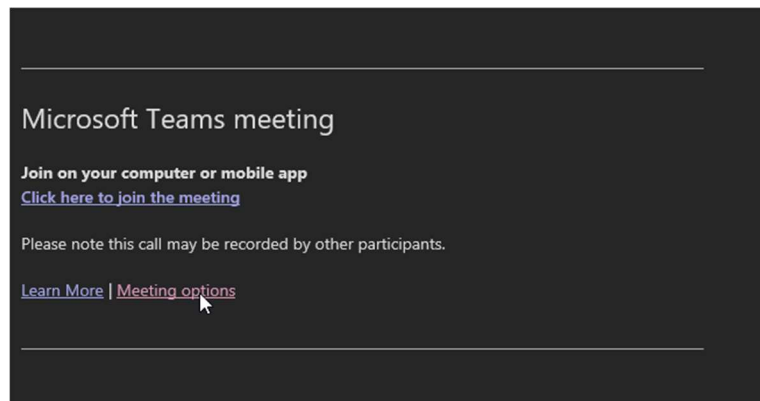


### 3.2 Edit meeting permissions before the meeting starts in Outlook

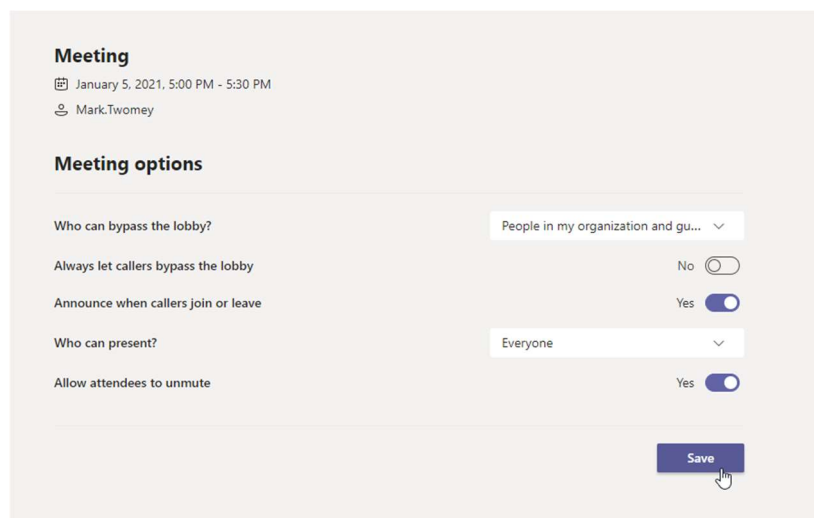
In your Outlook calendar double click on the meeting you have scheduled.



Click on **‘Meeting options’**.

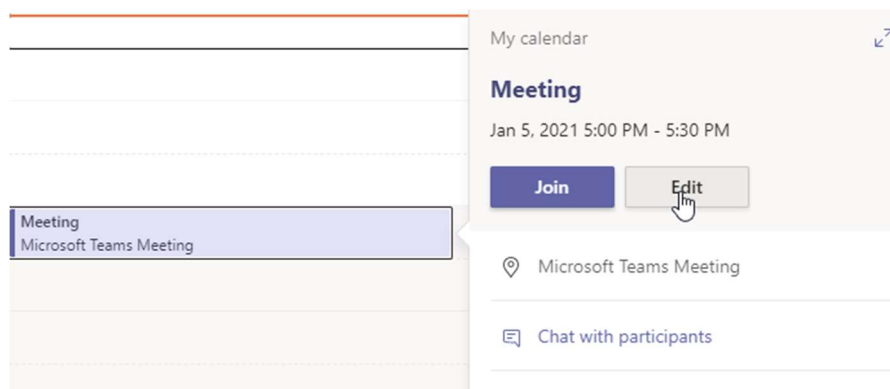


This will open up your meeting options in your web browser where you can configure your meeting settings. Once configured click on **'Save'**.



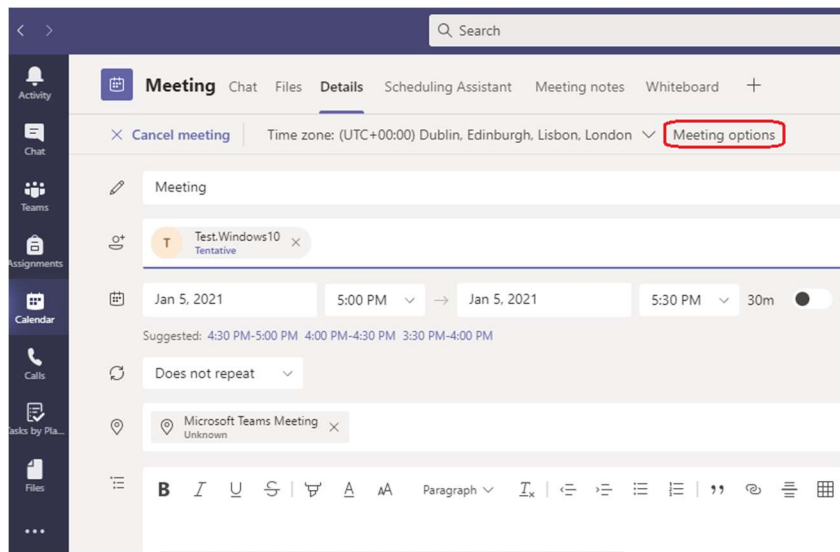
### 3.3 Edit meeting permissions before the meeting starts in Teams

In the Teams calendar click on the meeting you have scheduled and click on **'Edit'**.

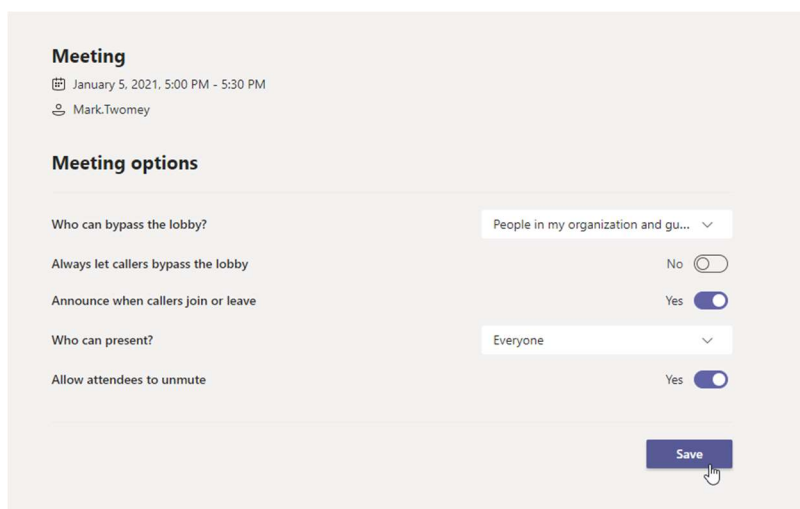


Then click on **'Meeting options'**.





This will open up your meeting options in your browser where you can configure your meeting settings. Once configured click on ‘Save’.



#### 4. Teams meeting options

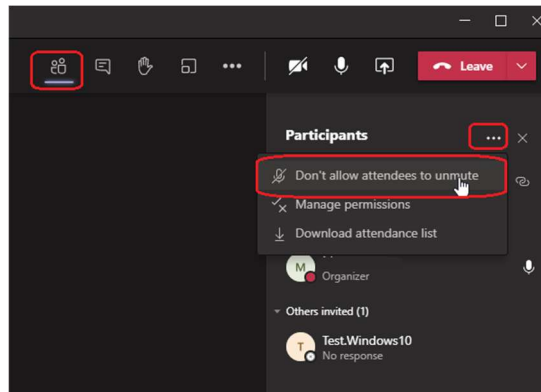
During the meeting you have some additional options for controlling the meeting.

##### 4.1 Control who can unmute during a meeting

By default, all attendees can unmute during a meeting unless you have disabled this setting in the meeting options as show previously.

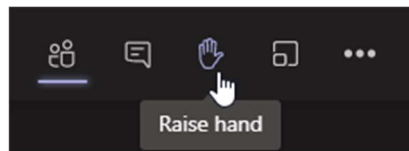
To stop attendees from unmuting their microphone, if you click on the ‘Participants’ icon and select the ellipsis button for more options you can select ‘Don’t allow attendees to unmute’. This will prevent anyone from unmuting.

**Note: ‘Attendees’ does not refer to all users at the meeting. It refers to users you have specified as ‘attendees’ in the meeting options i.e. persons at the meeting who do not have ‘Presenter’ permission. Presenters can still unmute their microphone during the meeting.**



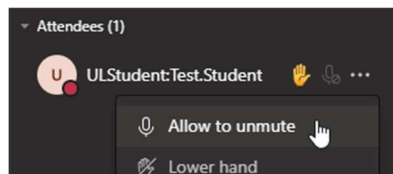
#### 4.2 Raise virtual hand

Before the meeting you can let your attendees know they can raise their hand by clicking on the **'Raise hand'** button.



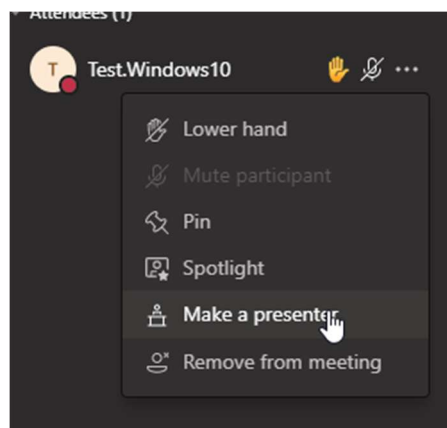
You can then allow them to speak or present by granting them extra permissions in the meeting by clicking on the participants list and selecting the user.

You can unmute the persons microphone to allow them to speak by clicking on **'Allow to unmute'**. This will allow them to speak without granting them any extra permissions to record or mute/unmute other users.

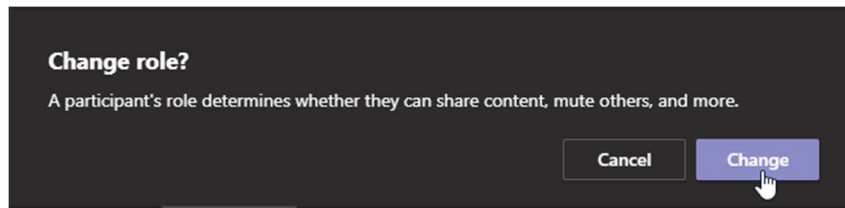


You can then mute that person when they have finished speaking.

Another option if you want to let the person present is to click on the ellipsis button next to their username and select the option to **'Make a presenter'**.



You will see a message letting you know you are about to change the permissions for an attendee.



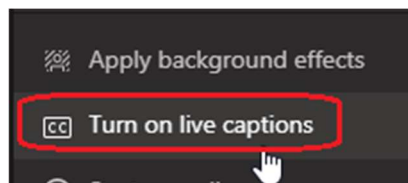
This will also allow them to share their screen if required. You can remove this permission by repeating the above steps but instead select the option to **'Make an Attendee'**.

#### 4.3 Turn captions on and off

Live captions can make your meeting more inclusive to participants who are deaf or hard-of-hearing, people with different levels of language proficiency, and participants in loud places by giving them another way to follow along.

**Note:** Teams does not save captions. Caption data is permanently deleted after the meeting is over.

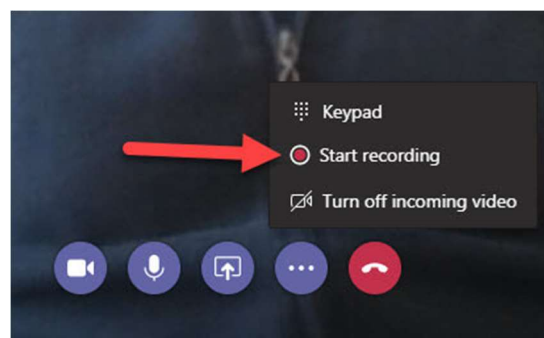
To use live captions in a meeting, go to your meeting controls and select **More options** **\*\*\*** > **Turn on live captions**.



### 5. Teams meeting recording

It is important to note that by default when you schedule a meeting all invitees will have present permissions and will also have the permission to record the meeting.

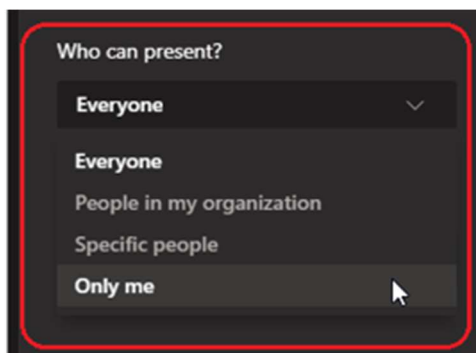
To start recording the meeting click on the ellipse and select **'Start Recording'** as shown below:



When a meeting recording starts, Teams shows a notification to all participants on the Teams desktop, web, and mobile apps, as well as to people who joined via phone.

To stop recording, go to the meeting controls again and click on **'Stop Recording'** from the same menu. If another participant (someone with the Presenter role) starts recording the meeting without your permission you can stop the recording by following the steps above.

If you do not want anyone to record the meeting it is important you change the meeting permissions so that you (or selected user's, you specify) are the only ones that can present.



It is important to note that if a user has the ability to present they will also have the ability to record the meeting. The only exception to this is for a 'Guest' presenter (someone from outside the University).

### 5.1 Where are meeting recording stored?

Firstly, there are two types of meetings in Teams.

- Channel or Classroom meetings (If you are a member of a MS Teams 'Channel' and the meeting is scheduled within that team or if as a Lecturer you have created a Teams classroom for delivering a lecture):**  
Meeting recording link is located in the meeting chat history. Permissions are inherited from the Team channel owner/members already assigned permissions.
- All other meetings (Individual or group meetings scheduled via Teams Outlook calendar add-in or from within the calendar in Teams. An ad-hoc meeting initiated between two or more users):**  
Meeting recording link is located in the meeting chat history. The person who click's record can edit the recording. The person who scheduled the meeting can edit it. Every other person at the meeting can view the recording. External users have no access but can request access.

**Again this is why it is important to define at the start of the meeting or before the meeting starts who can present as this will determine who can record the meeting.**

For Channel or Class meetings, the recording is stored in the Teams site documentation library in a folder named **Recordings**. Example: **Teams name - Channel name/Documents/Recordings**

For non-Channel meetings, the recording is stored in a folder named **Recordings** that is at the top level of the OneDrive for Business that belongs to the person who started the meeting recording. Example: **recorder's OneDrive for Business/Recordings**

## 6. Manage Teams meeting participants

It is important to note that if you have regular Teams meetings (a re-occurring or frequent Teams meeting or a Channel meeting) and you invite a participant to one or a couple of those meetings, that participant may still be able to see the meeting chat of subsequent meetings after they no longer are attending the meeting.

The same applies to a Teams channel meeting if someone is no longer a member of that team, they may still have access to the chat of the Teams channel.

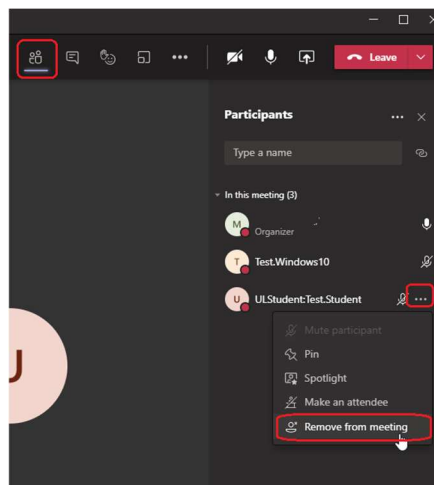
A person may also be able to join a re-occurring meeting via the original meeting invite link after their attendance is no longer required.

If your meeting settings allow direct entry into the meeting (refer to section 3.1 of this guide to see how to manage this setting) then a person whose attendance is no longer required at the meeting may be able to join it directly.

As the meeting organiser you have some options to manage your meeting participants.

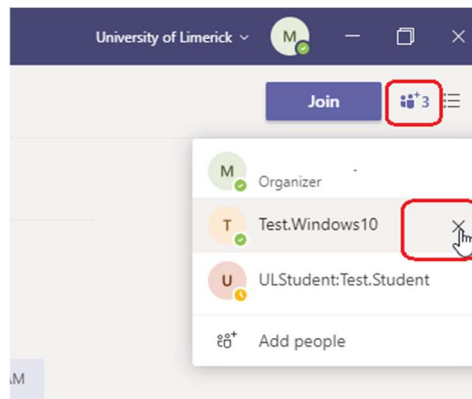
### 6.1 View participants during the meeting

You can view who is currently attending your meeting by clicking on the participants tab. If you see someone listed who should not be attending, then you can remove them from the meeting by clicking on the ellipses (three dots) beside their name and selecting **'Remove from meeting'**.



### 6.2 View participants in the meeting chat

You can also see who is listed as participants in your meeting via the meeting chat history for that meeting. Click in the top right of the meeting chat where you can see the number of participants.



If you see a person listed who should not be attending the meeting, click on the 'X' to remove them and then click on **'Remove'** to confirm.

Remove Test.Windows10 from the conversation?

They'll still have access to the chat history.

Cancel

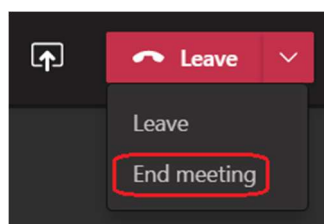
Remove

As you can see from the above message people removed from a meeting chat will be able to view previous chat history. They will not be able to send new messages, react to messages, and won't be able to view new conversations or files shared by the group.

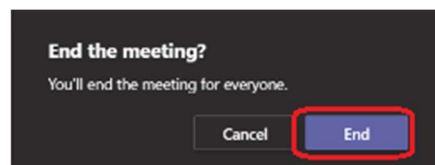
## 7. End meeting for all participants

As the meeting organiser you have the option to end the meeting for everyone. This will ensure that your microphone and camera are no longer being shared with participants.

Select the 'drop down' arrow next to the **'Leave'** button and select **'End meeting'**.



Confirm you want to end the meeting and the meeting will end for all participants.



This will also ensure that no other participants remain in the meeting once you have left.

## 8. Full list of Teams meeting participant permissions

For a full list of Teams meetings permissions refer to the table below:

Capability	Organizer	Presenter	Attendee
Speak and share video	✓	✓	✓
Participate in meeting chat	✓	✓	✓
Share content	✓	✓	
Privately view a PowerPoint file shared by someone else	✓	✓	✓
Take control of someone else's PowerPoint presentation	✓	✓	
Mute other participants	✓	✓	
Prevent attendees from unmuting themselves	✓	✓	
Remove participants	✓	✓	
Admit people from the lobby	✓	✓	
Change the roles of other participants	✓	✓	
Start or stop recording	✓	✓	

The table above illustrates the level of permissions each type to invitee at a Teams meeting has and shows the importance of managing these permissions for your meeting for your invitees either before the meeting starts or during the meeting.