

# Creating a Teams meeting or interview you will not attend

Some of you will be arranging meetings on behalf of others but will not be attending the meetings yourself, such as interviews, Board meetings, etc.

To set up a meeting on someone else's behalf, the most effective way is to set the meeting up **in their Outlook calendar using delegate permission**, which some PAs do have. The benefit of this is that it makes them the Organiser, not you.

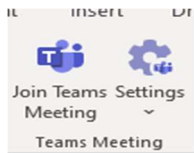
However, if you do not have delegate permission for someone else's Outlook account, there are things you should consider.

Currently, there can be only one Organiser per meeting. The Organiser has a few extra permissions such as **changing any of the meeting options and creating and managing breakout rooms**. Microsoft is looking into changing this so we can have co-Organisers but not for now.

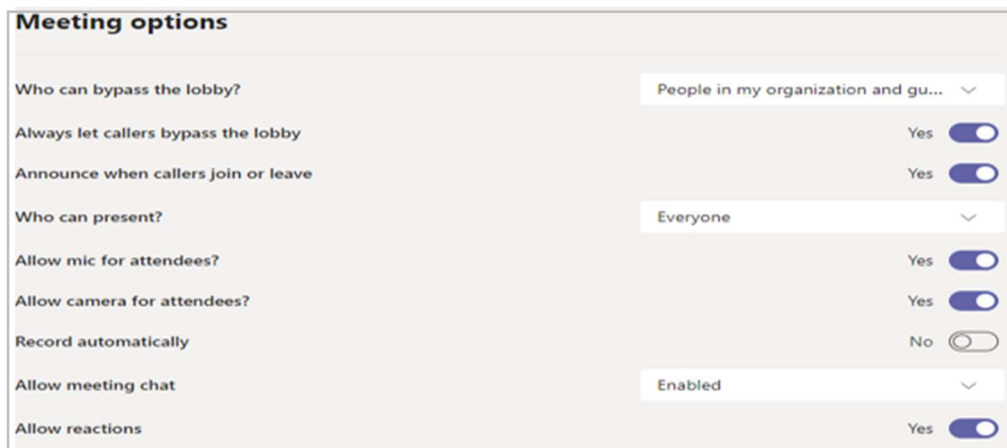
As Organiser, the meeting will automatically appear in your own calendar, whether you will attend or not.

## Meeting Options

The meeting options can be set whilst creating the meeting or any time before the start of the meeting by using the Settings along the top of the invite.



Meeting options cover the settings for who can bypass the lobby and enter the meeting automatically, who can present their screens, whether to record automatically, when the meeting's chat function is going to be available.

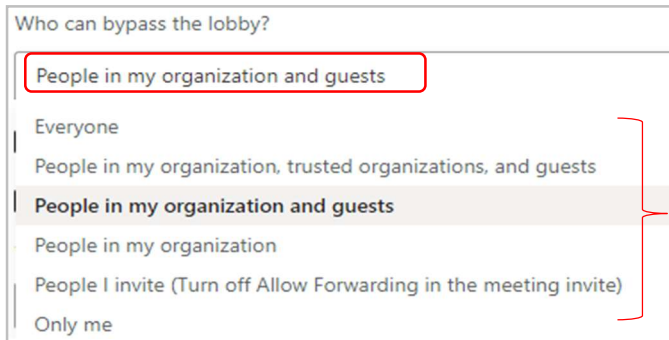


## Who can bypass the lobby?

The waiting room for a Teams meeting is called the lobby.

The default at Barnardo's is 'People in my organisation and guests' can enter a meeting without having to be admitted. Only the meeting Organiser can change this default.

There is a drop-down area to choose other settings:



- Everyone = anyone who has access to the meeting link gets into the meeting directly. Use this if you don't want anyone to wait in the lobby so they join the meeting without approval.
- Only me = the Organiser opens the meeting and everyone else waits whilst the Organiser admits them to the meeting.
- People in my organisation = only people within your own organisation can get into your meeting directly. Everyone else will wait in the lobby. Teams uses the email addresses to figure this out.
- People I invite = anyone who receives the invitation, including those to whom it's forwarded, will join the meeting directly. If you don't want people to forward the invite to others, turn off 'Allow Forwarding' in the invitation. This doesn't include distribution lists—people must be invited individually.
- People in my organisation and guests = *People in your organisation and guests (including those with different email domains than yours) can get into your meetings directly. You want all external people (anyone outside your organisation, except 'guests') to wait in the lobby so you can approve them one by one.*
- People in my organisation and trusted organisations and guests = *people in your organisation, external participants from trusted organisations and guests can get into your meetings directly.*

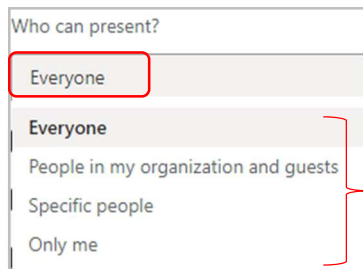
(Note: the last two options are more geared towards a meeting within a Teams channel, where 'guests' have been made members of that team, and/or people from 'trusted organisations' have been added to a clearance list).

## Who can present?

The default at Barnardo's is 'Everyone' has a Presenter role in a Teams meeting. Only the meeting Organiser can change this default.

See the 'Roles in a Teams meeting' table below to find out what a Presenter can do in a meeting.

There is a drop-down area to choose other settings:



Who can present	What happens?
Everyone	Anyone who has access to the meeting link will join as presenter
People in my organisation	Only those in Barnardo's will be presenters. Externals will join as attendees
Specific people	Only those you choose from list of invitees will be presenters
Only me	Just you as presenter. All others will join as attendees

## Roles in a Teams meeting

Apart from Organiser, there are two roles to choose from: Presenter and Attendee. Presenters can do most things that need doing in a meeting, while the role of an Attendee is much more controlled.

The role of Organiser cannot be changed and is always the person who created the meeting.

Below are the specific capabilities of each role:

Capability	Organiser	Presenter	Attendee
Speak/appear on camera and use the chat function	✓	✓	✓
Share content	✓	✓	✗
Take control of another's PowerPoint	✓	✓	✗
Mute others or remove attendees	✓	✓	✗
Admit from lobby	✓	✓	✗
Start/stop recording and transcription	✓	✓	✗
Change meeting options	✓	✗	✗
Manage breakout rooms	✓	✗	✗

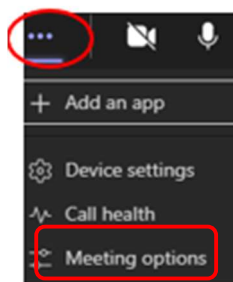
These roles can only be changed by the meeting Organiser.

**Before a meeting:**

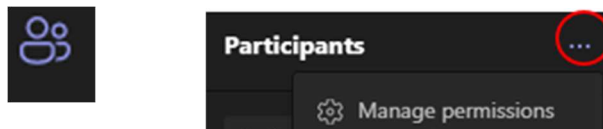
- Go to Calendar, double-click the meeting you just created, and select 'meeting options'.
- This will show you a few choices under 'Who can present'?
- You'll need to send your meeting invite directly to anyone you want to select as a Presenter if you want some participants as Attendees.

**During a meeting: there are two ways to change meeting roles:**

- Whilst meeting is in progress, double click it in the calendar to get Meeting options and make the changes – for recurring meetings, this will change the roles for all sessions of that meeting.

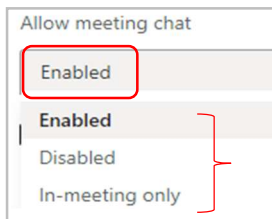


- Or choose 'show participants', hover over a name when they display and go into the ellipsis. Choose 'make an attendee' or 'make a presenter' depending on what they already are. If the meeting is recurring, the changes only apply to that single occurrence.



## When should the chat function be active?

A meeting's chat function has three settings: enabled, disabled and in-meeting only. You should check with the person who asked you to set up the meeting.



- The default is that chat is **Enabled** and, therefore, available before, during and after the meeting.
- **Disabled** means nothing can be added to the chat from that point – you can disable a chat any time, even after a meeting ends.
- **In-meeting only** is the option if you just want participants to converse during the meeting and for the chat to close when the meeting ends. The chat is still available to read but nobody can add to it.
  - You may have a meeting where you do not want any chat to take place after the meeting; for example, an interview panel needs to be aware that an internal interviewee could see anything they write in that chat even once the interview is over!

## Things to think about (or ask the person who will run the meeting)

- Does the meeting need a lobby to control who can enter the meeting straightaway without having to be admitted?
  - For example, an interview will need a lobby for the panel to be able to admit the interviewee, as will a meeting where some people are only attending for part of the agenda.
- What will be needed in the meeting – do participants plan on using breakout rooms?
  - If breakout rooms are planned, someone actually attending needs to create the meeting to become the Organiser.
- Do you want the meeting to be in your own calendar too or is it nothing to do with you?
  - If you don't want it in your own calendar, you need to ask about getting delegate permission for other calendars.
- Does the meeting need a chat function and for how long after the meeting ends?

## Setting up interviews using Microsoft Teams

It is best practice to send separate invitations to the individual candidates and interview panel. Do offer all involved a trial call as some people may be more used to this format than others.

### **For those on the interview panel**

Create a calendar invitation setting up a Microsoft Teams meeting link in the body of the invitation (the same as any other meeting) and invite all those on the panel.

Of course, you will need an individual meeting for each candidate and it is best practice to avoid the use of candidate names so use meeting Title 'Candidate 1', etc.

If all the candidates are external to Barnardo's, ensure that in the meeting options you are only allowing people from your organisation to bypass the lobby.

If there are internal candidates, make sure you allocate only 'specific people' to bypass the lobby, you will then be asked to name them.

At the start of the meeting the organiser will need to admit the candidate held in the lobby. It is recommended that you wait for all panel members to have joined the call before admitting the candidate

It is useful to schedule separate meetings for the beginning and end of the interview session for the panel to convene and compare notes.

In advance, agree with panel members how long a break to have between meetings to allow enough time for writing up notes, time away from the screen and technical checks. Allow sufficient time to manage any delays due to technical difficulties (e.g. 10-15 minutes)

### **For the candidates**

Having discussed with the candidate their availability, scheduling and accessibility requirements, you should send them the link for the relevant meeting in the calendar and confirm their interview time.

Copy the meeting link by right clicking on "Join Microsoft Teams Meeting" in the body of the calendar invitation you have set up for the panel. This will ensure the candidate will only be able to access that meeting (interview) and they will not have access to the email addresses of those on the panel.

Include detailed information on the IT arrangements and back-up plans, including dial-in options and an emergency contact number in case they have problems on the day.