

SMARTER  TOGETHER



Guide to Roles

Who's who in MS Teams

Introduction

When planning a Teams meeting, particularly a large meeting with many attendees, and/or a number of elements (e.g. presentation + breakout rooms), it is important to understand the difference between the 'organiser' and the 'presenter' roles. It is also important to decide who will do which task in the meeting. As there can be only one organiser and only he/she can carry out certain functions (*see below*) he/she may wish to assign 'presenter' permission to colleague(s) so that they can help to run the meeting.

Role	Permissions
Organiser	<ul style="list-style-type: none"> • One, non- transferable organiser per meeting • Set up meeting options permissions e.g. designate 'presenter(s)' • Set up and manages breakout rooms • Download attendance list • End meeting <p>...also has all of the presenter permissions</p>
Presenter	<ul style="list-style-type: none"> • Share content/take control of content • Admit/remove participants. • Mute/unmute attendees and/or prevent attendees from unmuting. • Confer 'presenter' status on another attendee
Attendee	<ul style="list-style-type: none"> • Turn own audio and video on/off (unless audio is restricted by organiser or presenter) • Chat (unless chat disabled in the meeting) • Adjust own view of content- turn on 'live captions' for example

Organiser

If you schedule a meeting via Outlook or start it using the 'Meet Now' tool in Teams, you are automatically the organiser.

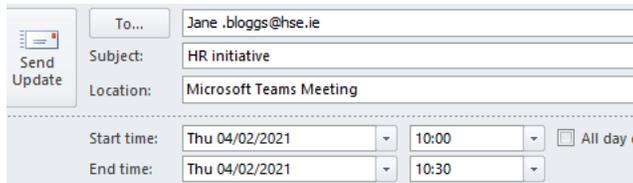
Currently there can be only one meeting organiser; the role cannot be transferred and *only* he or she can do the following:

(i) Set up Meeting Options

Only the organiser can set up the '**Meeting Options**' before and during the meeting; here the organiser can for example confer 'presenter' status on colleagues, as well as manage lobby settings. It is a good habit to assign permissions in the 'Meeting Options' before you send out the meeting invitation.



- a) **Before the meeting**; before you send the meeting invitation, see 'Meeting options' under the 'Join Meeting' link



The screenshot shows a meeting invitation form with the following details:

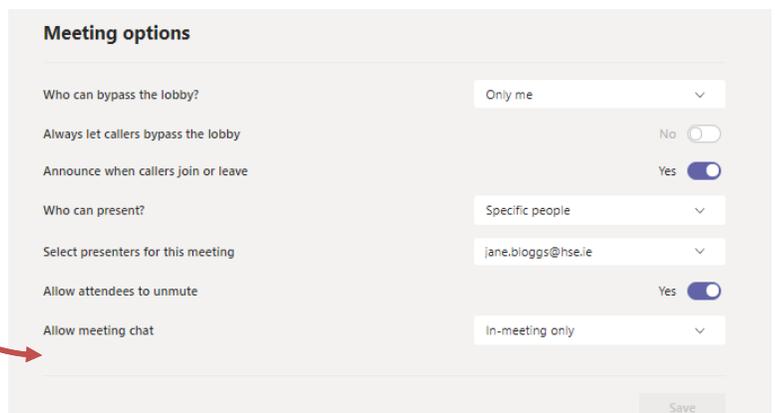
- To: Jane .bloggs@hse.ie
- Subject: HR initiative
- Location: Microsoft Teams Meeting
- Start time: Thu 04/02/2021, 10:00 (All day event checkbox is present)
- End time: Thu 04/02/2021, 10:30

Microsoft Teams meeting

Join on your computer or mobile app
[Click here to join the meeting](#)

Or call in (audio only)
[+353 1 592 3510,490540379#](#) Ireland, Dublin
Phone Conference ID: 490 540 379#
[Find a local number](#) | [Reset PIN](#)

[Learn More](#) [Meeting options](#)



The 'Meeting options' panel includes the following settings:

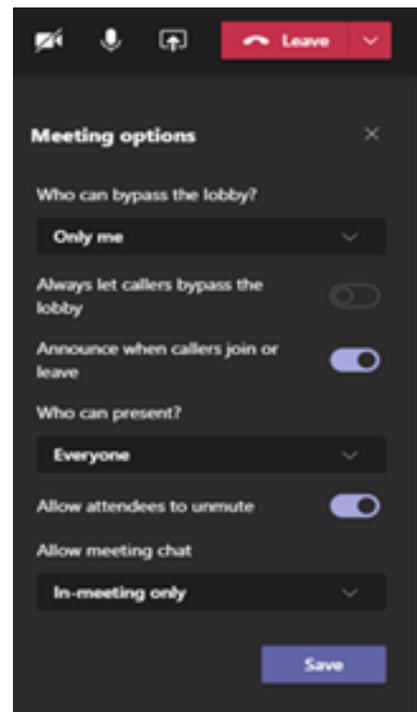
- Who can bypass the lobby?: Only me (dropdown)
- Always let callers bypass the lobby: No (toggle)
- Announce when callers join or leave: Yes (toggle)
- Who can present?: Specific people (dropdown)
- Select presenters for this meeting: jane.bloggs@hse.ie (dropdown)
- Allow attendees to unmute: Yes (toggle)
- Allow meeting chat: In-meeting only (dropdown)

- b) **During the meeting**, go to the '3 dots' in your toolbar and choose 'Meeting options'

Changing the settings while **in** the meeting can be useful if for example, you want to designate a **new presenter**

OR if you decide, for convenience to now allow 'everyone' bypass the **lobby** (as the 'ding' of late attendees arriving from the lobby can be distracting for the presenter)

OR if you want to disable **the chat**



The 'Meeting options' panel during a meeting shows the following settings:

- Who can bypass the lobby?: Only me (dropdown)
- Always let callers bypass the lobby: (toggle)
- Announce when callers join or leave: (toggle)
- Who can present?: Everyone (dropdown)
- Allow attendees to unmute: (toggle)
- Allow meeting chat: In-meeting only (dropdown)

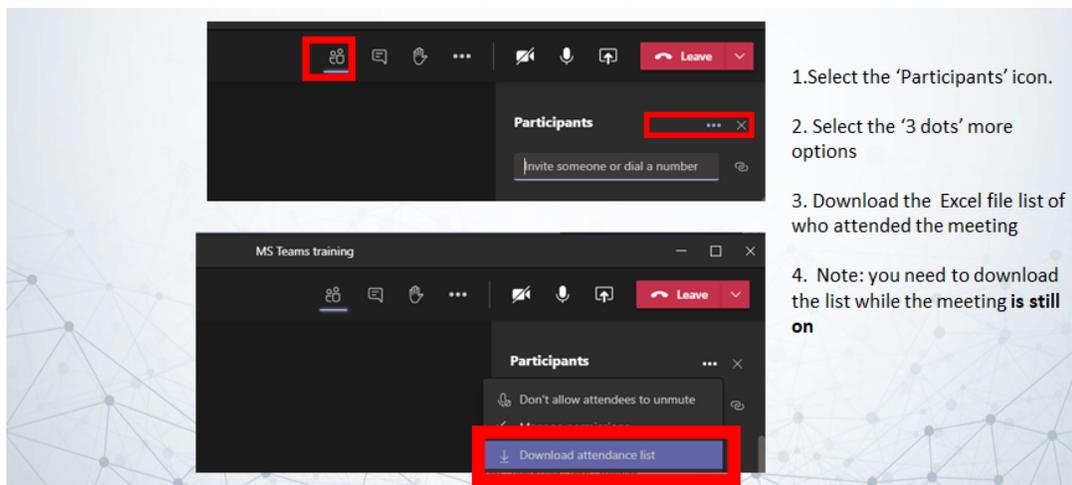


(ii) Set up and Manage Breakout Rooms

Only the organiser can set up and manage [breakout rooms](#) in the meeting. Consider how best to divide up tasks; e.g. ask a colleague to schedule the meeting so that he/she can run the breakout rooms as the organiser. He/she can then use the 'meeting options' to confer presenter status on the principal speaker so that that person can concentrate on their presentation, while the organiser manages the rooms.

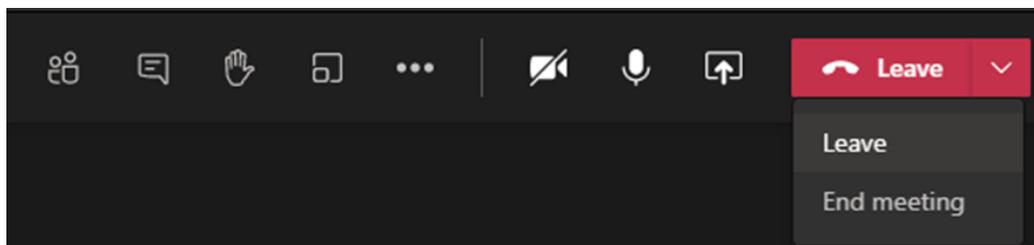
(iii) Download the attendance list

This can be done only by the organiser before the meeting ends.



(iv) End the meeting for everyone.

To **end** a meeting, right-click on the arrow beside 'Leave' on your toolbar). If you as organiser simply '**leave**' the meeting rather than end it, then any remaining attendees can remain in the meeting and continue chat etc., which may not be desirable.



Note: The organiser also has all of the **presenter permissions**, as set out below.

Presenter

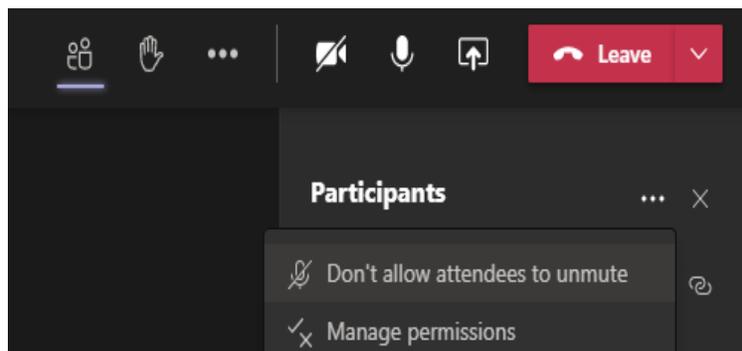
By default, **everyone** invited to a Teams meeting has presenter permissions. This means all attendees could potentially share content, bypass the lobby and unmute themselves. As an organiser you will not typically want 'everyone' to be able to for example, share content, particularly where attendees are not known to the organiser.

However, as above, the organiser may wish to designate **specific attendee(s)** as **presenter(s)** and so should adjust the permissions in meeting options accordingly.

Once designated, a **presenter** can:

- (i) **Admit attendees** from the lobby
Any presenter can admit attendees from the lobby (where the lobby has been enabled in 'Meeting Options')
- (ii) **Mute attendees**
When assigning meeting tasks, it may be useful for the organiser, if busy speaking or running breakout rooms, to assign the task of muting attendees (especially latecomers) to a 'presenter'.
- (iii) Control **microphones of** attendees

The presenter can also control the attendees' **ability to unmute** themselves by clicking on Participants and choosing 'Don't allow attendees to unmute'. Anyone who has a question can use the 'raise hand' button and a presenter can then give them permission to unmute.



- (iv) Designate an attendee as another **presenter** or revoke presenter permission

By clicking on the 3 dots beside an attendee's name in the meeting, a presenter can designate that attendee as a **presenter** or indeed vice versa i.e. re-designate a fellow presenter as an attendee only-in the unlikely event that 'presenter' permission needs to be revoked e.g. incorrect or inappropriate material being shared.

