SFB for Macintosh Conferencing Quick Reference Guide

Skype for Business

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Information for Online Meetings and Conference Calls

There are four classifications for meeting participants:

- Organizer – the person who schedules a meeting or conference call.
- Leader – the first person to dial-in to a conference call from a SFB phone.
- Presenter – can invite others to an active meeting or conference call. During a meeting, a Presenter can change the classification of other Presenters to an Attendee. Only a Presenter can record a meeting, distribute files and share items, such as the desktop, a program, whiteboard and conduct a poll. By default, all faculty and staff members are a Presenter. If desired, the meeting Organizer can change the permissions level of any participant from Presenter to Attendee before the Meeting Invitation is sent. This is done using Meeting Options. For information on accessing Meeting Options, see **Conferencing Quick Reference for Macintosh**.
- Attendee – can initiate instant message (IM) conversations and view items that are shared.

By default, meeting participants who dial-in from a non-SFB must wait in the lobby until a Leader dials-in. The first person to dial-in from a SFB phone becomes the Leader and anyone waiting in the lobby is automatically connected to the meeting.

If you want to be a Leader or need to be (for instance, if all other participants are not affiliated with UH) and you dial-in from a non-SFB phone, you must enter your Dial-in PIN to become the Leader. The Dial-in PIN is identical to the Sign-in PIN for CX600 phones. If you can't remember your Dial-in PIN or if you never received a Dial-in PIN, go to **dialin.central.uh.edu** to reset your PIN or obtain your first PIN.

Before sending a Meeting Invitation, the Organizer can change the Meeting Options. It is very important to change Meeting Options before sending the Meeting Invitation because changing the options can potentially change the meeting link and Conference ID. Meeting options include:

- Everyone waits in the lobby except the Organizer
- No one waits in the lobby
- Only the Organizer is a Presenter

## Schedule a Phone Conference or Online Meeting

A SFB add-on is installed in Outlook that allows you to invite others to a phone conference or an online meeting. You can even invite people who are not affiliated with UH and are not a SFB user - including students!

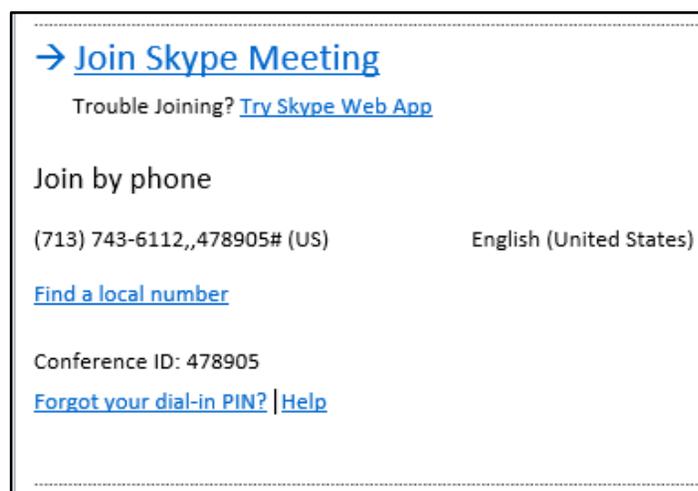To schedule a phone conference or online meeting in Outlook:

1. Open your **Outlook Calendar**.
2. Click **Meeting** on the toolbar.
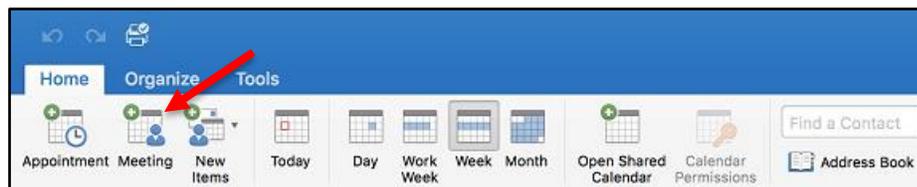
3. In the Meeting Invitation that appears, click **Skype Meeting**.
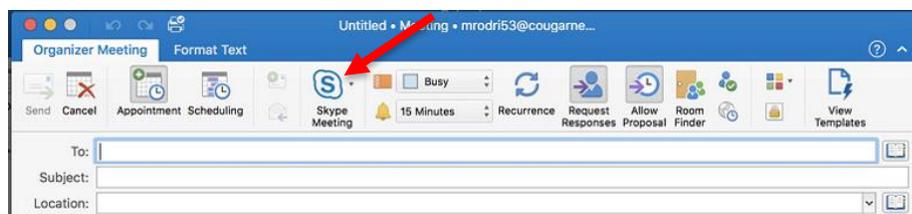
4. Set the **meeting date** and **time**, add **recipients**, and **send** the meeting invitation.

All attendees will receive (shown above) a phone number to dial-in and a web address to join an online meeting using a browser. Joining an online meeting with a web browser allows non-SFB users to see what the SFB users see. The phone number and conference ID provides non-SFB users with a speaker and microphone. There is no need to call UIT to set-up a phone bridge. You can do it all using Outlook.
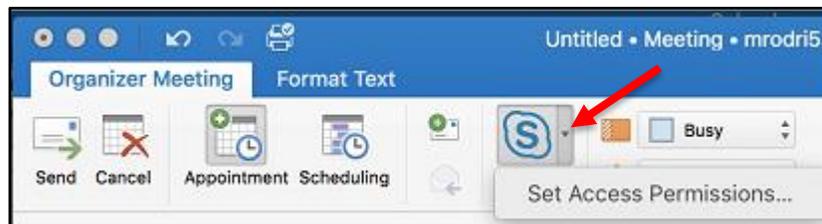
Set Meeting Options

Note: Changing meeting options can potentially change the conference ID for the current meeting. Make sure any changes to meeting options are made before you send the meeting invitation.

There are two main classifications of people in a meeting: presenter and attendee. Presenters are able to share their desktop and manage meeting options. By default, everyone at UH is a presenter. Anyone invited to a meeting from outside of UH is an attendee. It is possible to set meeting options before sending a meeting request. Some of the configurable options are:

- Designate who is an attendee or presenter
- Designate who waits in the lobby until the organizer is present
- Turn on entry and exit announcement

To set meeting options:

1. Follow the steps in the previous section for scheduling a phone conference or online meeting.
2. Before sending the meeting invitation, click the drop-down arrow next to **Skype Meeting** on the toolbar of the meeting invitation.
3. Select **Set Access and Permissions** from the menu that appears.

4. Choose the desired **meeting options** in the Online Meeting Options dialog box.
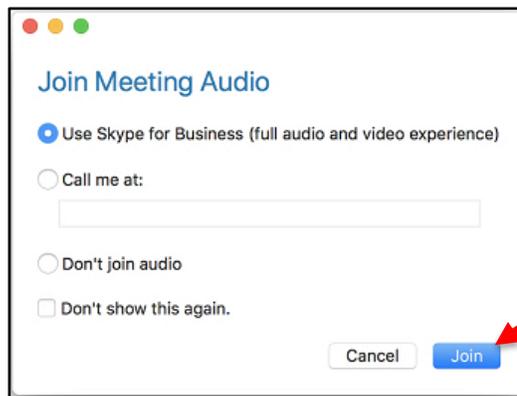5. Click **Ok**.

Meet Now

Meet Now allows you to immediately start a meeting or conference call.

To use Meet Now:

1. Select **Conversations** from the **Toolbar** menu.
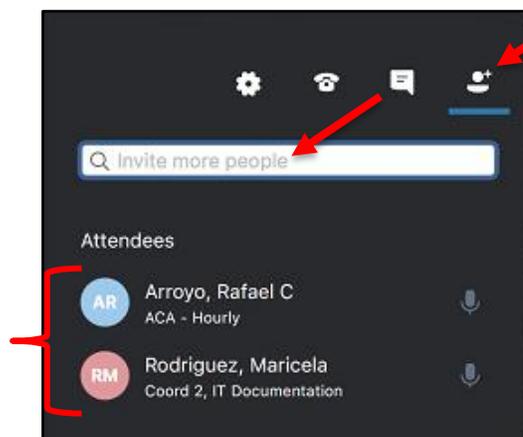2. Select **Meet Now** from the menu that appears.

3. Click **Join**.

4. Click the **People** icon.
5. Type in a **contact name** or **phone number** in the search field.
6. Double click the **contact name** or **phone number** that appears underneath the search field.

Note: The individual will be added to the meeting once the call is answered.
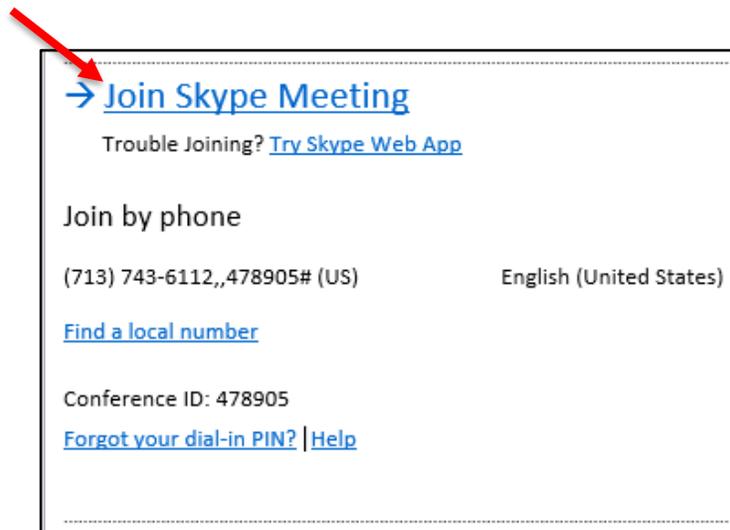
Join a Scheduled Online Meeting

To join an online meeting, choose one of two options:

1. In the Outlook meeting reminder, click **Join Online**.
2. Click **Allow**.
3. Click **Join**.

OR

1. In the Outlook meeting request, click **Join Skype Meeting**.
2. Click **Allow**.
3. Click **Join**.

Group IM Conversation

You can start a group instant messaging (IM) conversation by escalating an IM conversation with one person into a group conversation.

To escalate a one-on-one IM conversation to a group conversation, in the Conversation window:

1. Click the **People** icon.
2. Type in a **contact name** in the search field.

3. Double click the **contact name** that appears underneath the search field.

Enhance an IM Conversation

The Conversation window is your gateway to all of the communication and collaboration tools at your disposal. During an IM conversation, you can add one or more of these tools:

- Audio
- Video
- Share your desktop

To add any of the previously mentioned communication or collaboration tools to an IM conversation:

1. In the Conversation window, click **Call**, **Video** or **Share**.
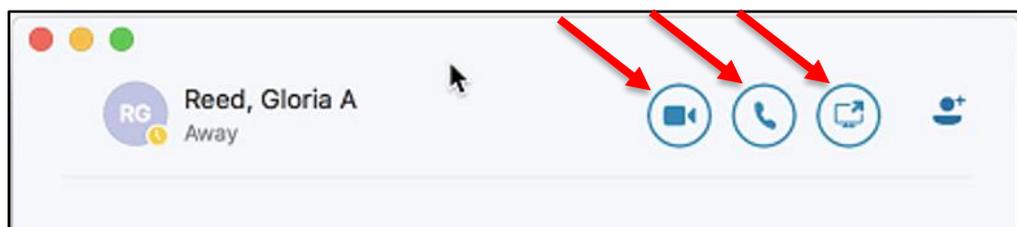
Join a Phone Conference

If you receive a request to join a phone conference, access information is included in the meeting request. To dial-in as the leader or an authenticated caller, you will need the following information:

- Dial-in phone number
- Conference ID
- Your conference PIN
- Your phone number

Note: Your Conference PIN is identical to the PIN used to sign-in to the CX600 phone. If you don't have a PIN or if you would like a new PIN, follow the instructions in the next section.
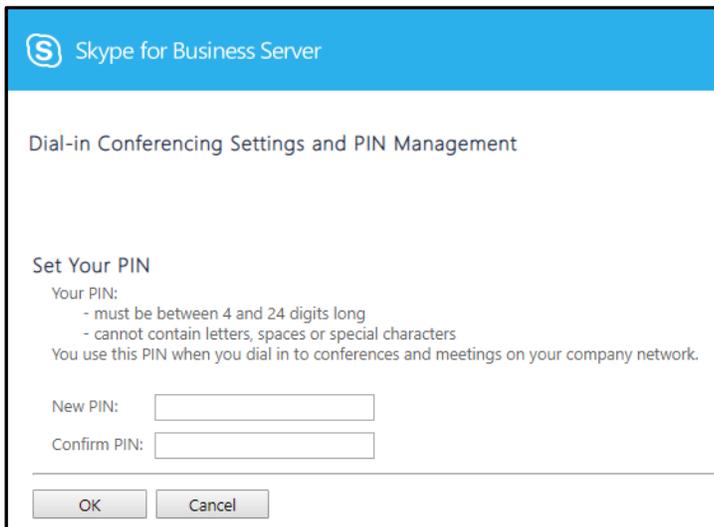
Set Your PIN

Your SFB Conference PIN is identical to the Sign-in PIN for the CX600 phone. The PIN identifies you as someone with authorized access to our network. A Conference PIN is required if you are dialing in from outside of our network.

To create or reset a Conference PIN:

1. In a web browser, go to **dialin.central.uh.edu**.
2. Click **Sign-in** and choose **Language**.
3. Click the **Sign-in** button then enter your CougarNet **username** and **password**.
4. Following the criteria on the PIN management screen, enter your PIN in the fields provided.

Note: If you forget your PIN, you can reset it using the steps listed above.

Skype for Business Server

Dial-in Conferencing Settings and PIN Management

Set Your PIN
Your PIN:
- must be between 4 and 24 digits long
- cannot contain letters, spaces or special characters
You use this PIN when you dial in to conferences and meetings on your company network.

New PIN:
Confirm PIN:

OK   Cancel

Add a Long-Distance Number

Unfortunately, it is not possible to add a long-distance number to a phone conference or online meeting. If a person with a long-distance number needs to join a phone conference or online meeting already in progress, send the person a meeting invitation or email the dial-in number and conference ID. You cannot add them, but they can dial-in.