

ROCHESTER
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Technical Reference Guide

Skype for Business

Version 1.1

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Change History

Rev #	Date	Author	Section	Nature of Change
1.0	3/21/2020	Patrick Montana/Travis Rouleau	All	Initial Draft and release
1.1	3/25/2020	Patrick Montana	All	Updates throughout, added sections 8 & 9

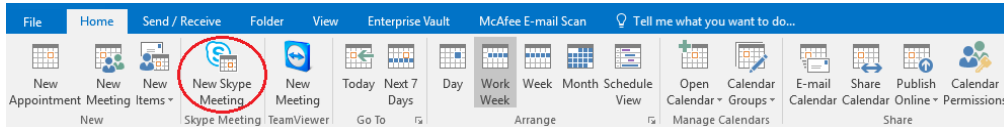
1 Introduction

What is Skype for Business?

This guide is for people who are new to Skype for Business, and provides information on how to begin using it to communicate with your colleagues. It is a communications platform that allows you to interact with your contacts using instant messaging (IM), audio and video conversations, and Skype for Business Meetings. It runs on Windows and Mac operating systems, and on mobile devices.

2 Scheduling a Skype meeting in Outlook

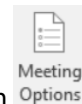
1. If you have recently been enabled for Skype Audio/Video Conferencing, it is a best practice to set a leader PIN. Please see section [7 Managing your Skype for Business Conference PIN](#) which can be found later in this document.
2. In Microsoft Outlook, navigate to your calendar and in the ribbon at the top, click **New Skype Meeting**, which will open a new untitled meeting.



NOTE: If you are unable to schedule a Skype meeting, your account is not enabled for this functionality. Please reach out to the Service Desk at (585) 922-4357.

3. Fill out the To and Subject fields as you normally would for any meeting. Leave the Location field as is, or you can copy and paste the conference ID (found at the bottom of the meeting request) to make it easier for people who are joining by phone.

To...	<input type="text" value="_____ , Patrick"/>
Subject	<input type="text" value="Team Meeting"/>
Location	<input type="text" value="Skype Meeting - Conference ID: 1234567"/>

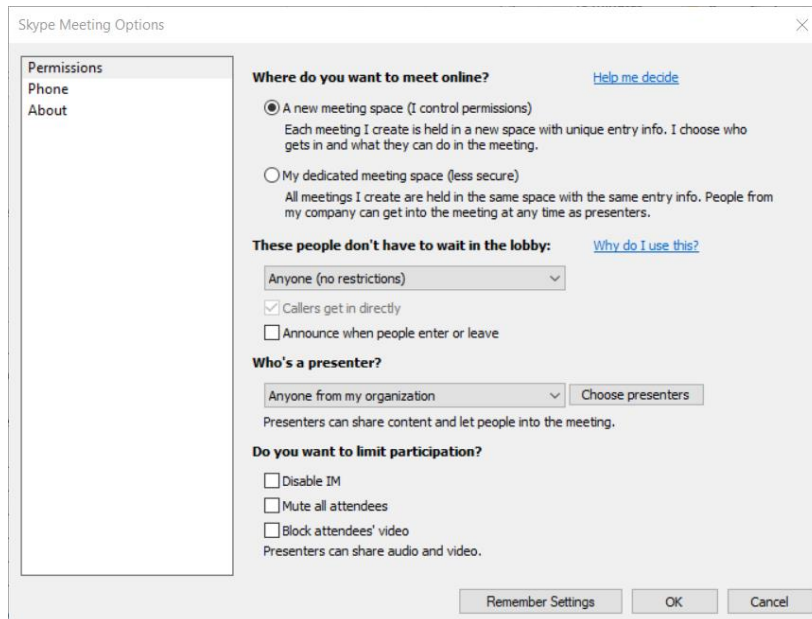


4. To further customize the online meeting experience click the Meeting Options button and you will be presented with two meeting options:
 - a. **My dedicated meeting space** – This is your own meeting room and will always have the same Conference ID and permissions. This is a good option for informal meetings with coworkers, which lets them sign in at any time with presenter permissions.
 - b. **A new meeting space** – With this option, you get a brand new meeting with a *unique* ID, and can customize permissions such as who gets to be a presenter, mute people or prevent them from sharing video.

NOTE: For best practices for small and large Skype meetings, see [section 6](#).

5. After you have made your selections, click **OK**.

Additional options within the **new meeting space** setting are described below.



1. **These people don't have to wait in the lobby** - You decide who gets into the meeting directly, and who waits until you let them in. When the meeting starts, you see the names of the people who want to join the meeting and can grant or deny access.

Who gets in directly?	What happens	Recommended when...
Only me, the meeting organizer	You are the only one who gets into the meeting directly. Everyone else has to wait until admitted.	You have a high security meeting and confidential information.
People I invite from my company	Only people who were invited to join the meeting directly. Everyone else has to wait until admitted.	You're discussing confidential information and want to only allow specific people to join.
Anyone from my organization	Anyone who has an account on the RRH Skype for Business system, even if not directly invited.	You don't have external participants and are not discussing confidential information.
Anyone (no restrictions)	Anyone who has access to the meeting link gets into the meeting directly.	You're inviting outside participants and you're not discussing anything confidential

NOTE: Don't forget to also check or un-check the options for people who call in:

- **Callers get in directly** - People who call in with a phone get connected directly.
- **Announce when people enter or leave** - Everyone will hear a ding as people come and go, which is not recommended for large meetings.

2. **Who's a presenter?** - Here you can choose who gets to be a presenter in your meeting. Remember that all presenters have full control over the meeting, and can share

content, record the meeting, change meeting options, mute people, and other meeting tasks.

Who's a presenter?	What happens	Recommended when...
Only me, the meeting organizer	Only you as the meeting organizer will have presenter permissions.	Participants don't have to interact with the meeting content. You can designate additional presenters during the meeting if you change your mind.
Anyone from my organization	Anyone who has an account on the RRH Skype for Business system can be a presenter.	Suitable for causal meetings with your teammates, where all participants can share and modify content.
Anyone (no restrictions)	Everyone you invite will be a presenter.	Use when you have external participants and want them to present.
People I choose	You and the people you choose.	Pick this option when you want specific people to be presenters.

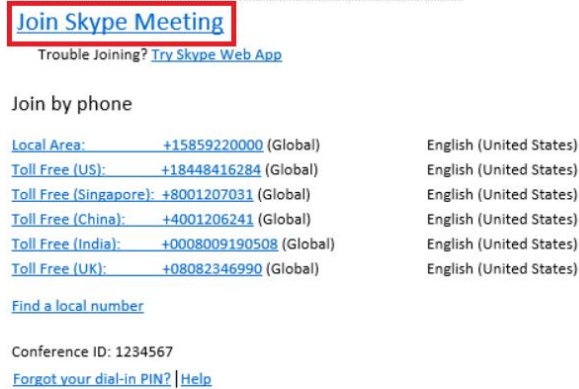
NOTE: When you select **People I choose**, click **Choose Presenters** and move the participants from **Attendee** to the **Presenters** side. If no attendees are listed, you **must** populate the To line of the meeting invite *prior* to selecting this option or attendees you wish to pick as presenters will not be listed under the **Choose Presenters** section. External invitees and distribution lists can't be added as presenters with this option, but you can give presenter permission to individuals when you are in the meeting.

3. **Do you want to limit participation?** - If you are setting up a large event or want to eliminate interruption, you can mute all attendees, disable meeting Instant Messaging, or prevent attendees from using their webcam, by checking these boxes:
 - Disable IM
 - Mute all attendees
 - Block attendees' video

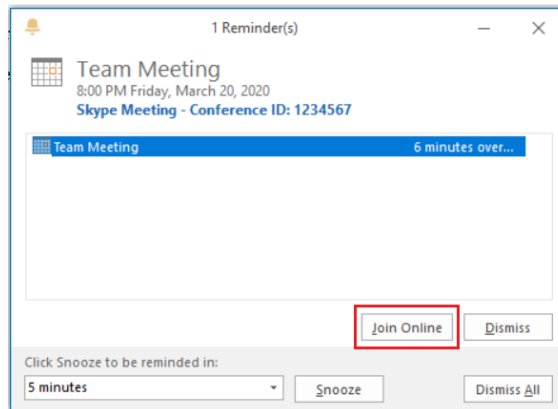
NOTE: The settings above only apply to attendees. Presenters can always share audio and video in the meeting, if their account is enabled for it.

3 Joining a Skype Meeting from your Windows PC

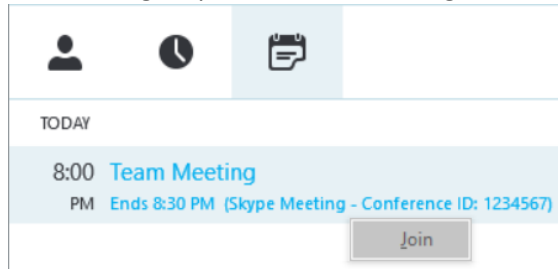
1. To join a Skype meeting
 - a. Open the meeting on your calendar and click the **Join Skype Meeting** link.



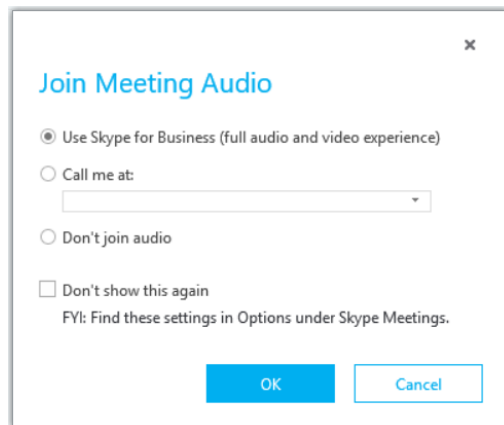
- b. When the meeting reminder displays on your computer screen, click **Join Online**.



- c. On the **Meetings** tab within the Skype for Business client by right clicking on the meeting in question and selecting **Join**.



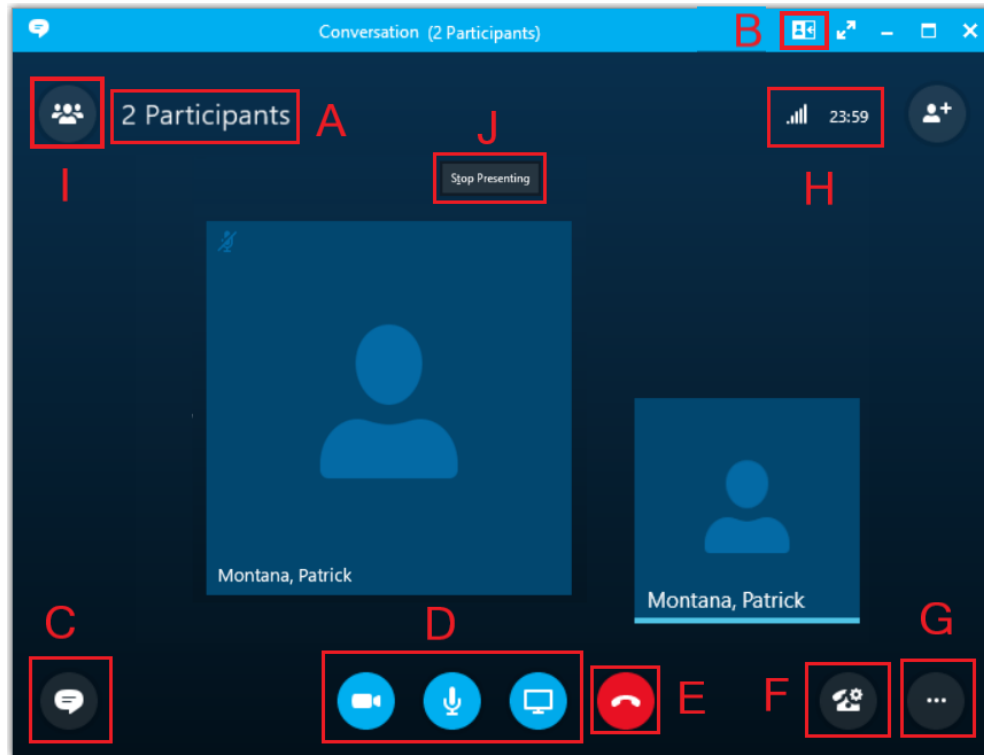
2. Regardless of which option you pick above, when you join the meeting, Skype will ask how you would like to **Join Meeting Audio**.



- a. The preferred method is to select the **Use Skype for Business (full audio and video experience)**. This option will use your PC microphone and speakers for the meeting. **NOTE:** Audio quality depends on the network and the device you use. Use a wired network connection whenever possible. If you have to use wireless connection, make sure you have a strong signal. Consider using a dedicated headset and microphone for better audio.
- b. If you are in a noisy environment or do not have a dedicated headset and microphone, pick the **Don't join audio** option. You will be required to dial-in to the meeting and key in the Conference ID.

4 Navigating a Skype Meeting as the Presenter

1. After you have successfully joined the meeting as the **presenter**, you will have the Skype for Business Meetings App on your screen.



A – Number of Participants

B – Choose Meeting View - You can change the layout of the meeting window depending on what you want to focus on. In the upper-right corner of the window, click this icon and choose a view such as Gallery, Speaker or Content.

C – Show IM Window - Select the IM button to open or close the meeting IM pane. If the IM pane is closed, a yellow ribbon will indicate if new IMs are available. **NOTE:** These instant messages are viewable by anyone in the meeting, regardless of role.

D – Start/Stop Video, Mute/Unmute Audio, Present Content – Click the Present button to share your Desktop, a Program, a PowerPoint file, or to add attachments to the meeting.

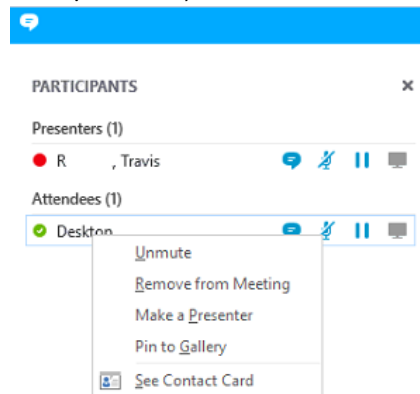
E – Disconnect from audio - Disconnect your audio device but stay in the meeting. Use this option when you plan to call in to the meeting.

F – Audio and Device options - Put your audio on hold, adjust the volume, or choose a different audio device.

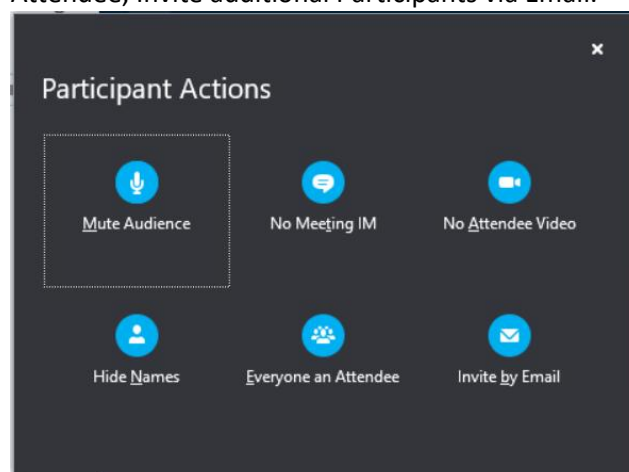
G – Set meeting options or exit – Record the meeting, manage recordings of past meetings, change the IM text size, change the font, view meeting entry information, change Skype Meeting options or end the meeting.

H – Signal Strength and Meeting Duration

I – Show/Manage Participants – Allows you to view and manage individual participants. If you are a presenter you can right click on an attendee and Mute/Unmute, Remove them from the Meeting or make them a presenter.



Click the **Participant Actions** button at the bottom for additional options such as Mute Audience, No Meeting IM, No Attendee Video, Hide Names, make Everyone an Attendee, Invite additional Participants via Email.

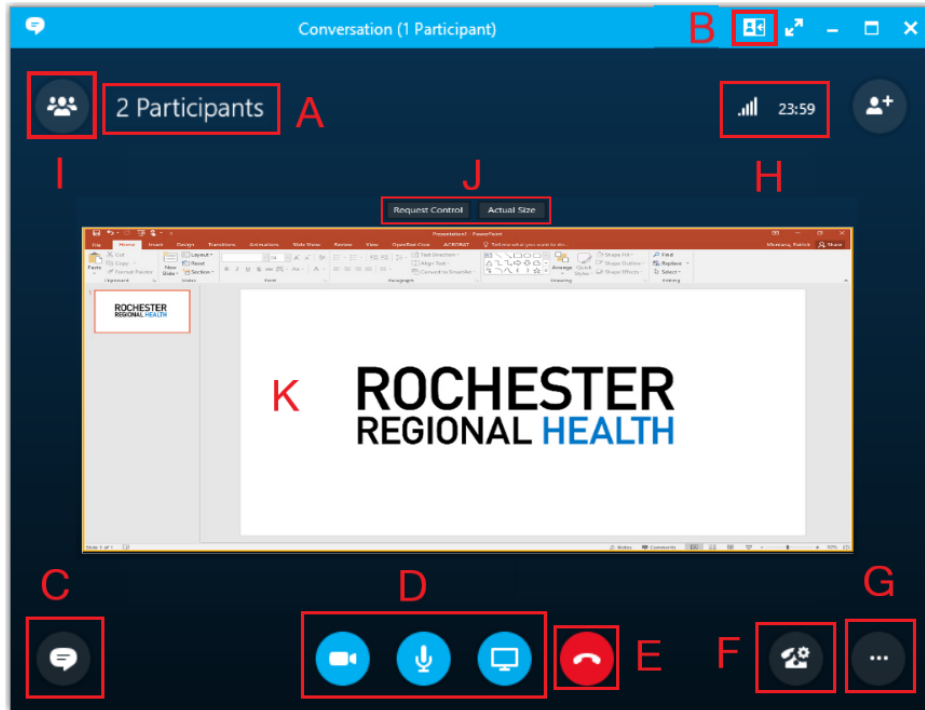


J – If you are currently presenting content, click Stop Presenting to

NOTE: For more information please visit: [Explore the Skype Meetings App](#)

5 Navigating a Skype Meeting as an Attendee

1. After you have successfully joined the meeting as an **attendee**, you will have the Skype for Business Meetings App on your screen. As you are not a presenter, your options will be limited.



A – Number of Participants

B – Choose Meeting View - You can change the layout of the meeting window depending on what you want to focus on. In the upper-right corner of the window, click this icon and choose a view such as Speaker or Content.

C – Show IM Window - Select the IM button to open or close the meeting IM pane. If the IM pane is closed, a yellow ribbon will indicate that new IMs are available. **NOTE:** These instant messages are viewable by anyone in the meeting, regardless of role.

D – Start/Stop Video, Mute/Unmute Audio, Present Content – Click the Present button to take notes using OneNote or Manage any meeting content.

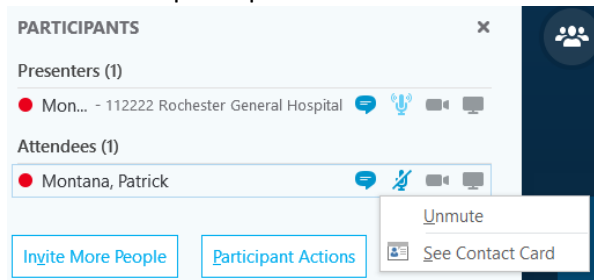
E – Disconnect from audio - Disconnect your audio device but stay in the meeting. Use this option when you plan to call in to the meeting.

F – Audio and Device options - Put your audio on hold, adjust the volume, or choose a different audio device.

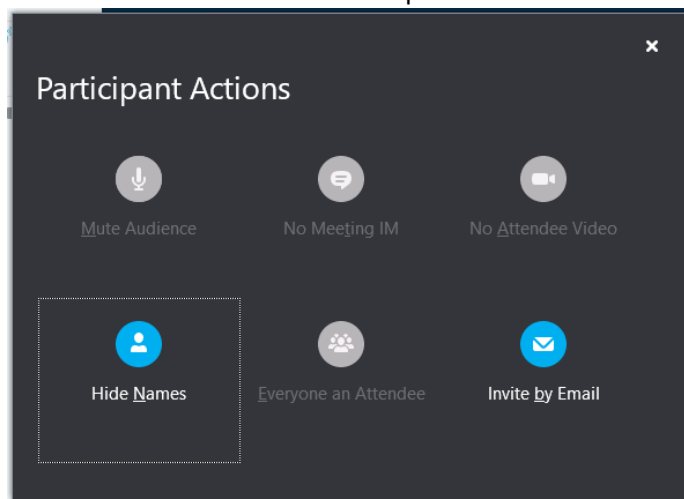
G – Record the meeting, manage recordings of past meetings, change the IM text size, change the font, or view meeting entry information.

H – Signal Strength and Meeting Duration

I – Open/Close Participant List – Allows you to view meeting participants. Since you are an attendee, the only option you have is to unmute yourself or see the Contact Card of other participants.



Click the **Participant Actions** button at the bottom for additional options such as Hide Names or Invite additional Participants via Email.



J – Request Control / Actual Size – If you request control, the presenter will be prompted with a ribbon at the top of their screen to allow or deny you control of the presentation. Actual Size/Fit To Window will change the size of the presented content on your screen.

K – Presented content

NOTE: For more information, please visit: [Explore the Skype Meetings App](#)

6 Best Practices for Skype Meetings and General Meeting Etiquette

Best Practices for Small to Medium Meetings (less than 50 users)

Skype Meeting Options:

- For small to medium meetings with people inside the company, use the default meeting options instead of changing the settings. Remember that the default options let everyone be a presenter and join the meeting directly.
- If you have a specific meeting requirement, for example, secure data, or external customers, be sure to change your meeting options to fit the requirement.

Best Practices for Large Meetings (greater than 50 users)

Note: The **maximum** number of meeting participants is **250** which includes presenters and attendees.

Skype Meeting Options:

In the Skype **Meeting Options** section:

- **Where do you want to meet online?** - Use a **new meeting space** for each large meeting instead of reusing the dedicated meeting space.
- **These people don't have to wait in the lobby:** Specify the meeting access level as follows:
 - If at least one invitee is external to the Rochester Regional organization, set the meeting access type to **Anyone (no restrictions)**. This avoids having to manage a potentially large lobby when the meeting is in progress.
 - If the meeting is an internal-only meeting, set the meeting access type to **Anyone from my organization**.

NOTE: Avoid setting the meeting access type to **People I invite from my company** because when you use this setting, organizers must add all user email addresses to the invitee list and you cannot invite a distribution group. Avoid setting the meeting access type to **Only me, the meeting organizer** because this setting requires that every meeting participant, including presenters, must be put in the lobby at meeting run time. The person responsible for running the large meeting must then constantly monitor the lobby and admit new users who are in the lobby.

- Allow users who dial-in from phones to enter the meeting automatically by checking the **Callers get in directly** setting.
- Uncheck the **Announce when people enter or leave** option as this will be distracting for large meetings and could interrupt the presentation. **NOTE:** If you forget to disable this when sending the meeting invite, it can be turned off during the meeting by clicking the ellipsis in the bottom right corner, then selecting **Skype Meeting**

Options then unchecking the box labeled **Announce when people enter or leave**, then click **OK**.

- **Who's a presenter?**

Explicitly manage presenters, instead of setting the presenter option to one of the auto-populated values. Be sure to add the following users as presenters:

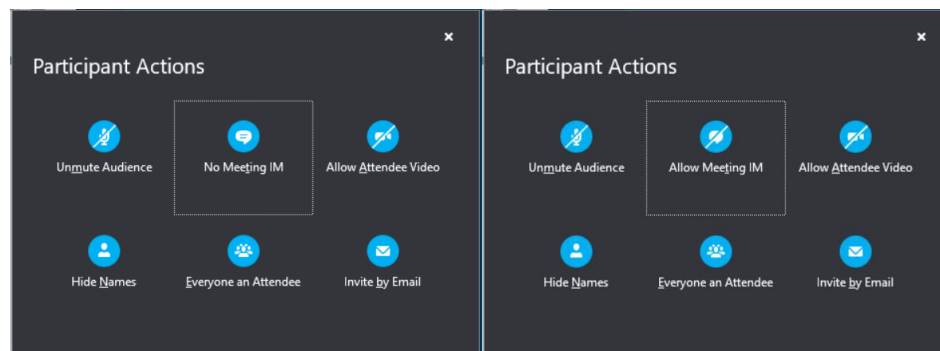
- Only me, the meeting organizer
- People I choose (click the **Choose presenters** button)

By explicitly managing presenters, you can limit presenters to a small enough number to make it possible to have an effective large meeting. If the majority of meeting participants have the attendee role, it helps reduce the chance of people accidentally taking control of the presentation, deleting a PowerPoint presentation, muting/unmuting presenters, and other disruptions to the meeting.

- **Limit Participation:**

- If you wish to prevent attendees from sending IMs during the entire meeting, you can check the **Disable IM** setting. **NOTE:** If this option is checked when the *meeting invite is sent*, this **cannot** be re-enabled during the meeting regardless of your role.

If you wish to use IM as a method for Q & A, leave the **Disable IM** setting unchecked. Disabling and enabling IM can be accomplished on the fly from within the **Participant Actions** section.



- Check the **Mute all attendees** setting to ensure that only presenters can broadcast audio into the meeting. If you wish to allow audio once the meeting has started, this can be re-enabled in the **Participant Actions** section.
- Check the **Block attendees' video** setting to ensure only presenters can broadcast video into the meeting. If you wish to allow video once the meeting has started, this can be re-enabled in the **Participant Actions** section.

General Meeting Etiquette

All Meeting Participants

1. If possible, use a headset and microphone to avoid echoes or other audio issues.
2. Mute your audio unless you are speaking.
3. If you are joining a meeting alongside other attendees sitting in the same room, only use one computer to log on to the meeting to prevent audio feedback.

Presenters

1. Set up and test your audio devices before starting.
2. Provide a clear and complete invitation, including a meeting agenda.
3. Join your meeting early to prepare your content. Upload slides or documents to be shared, and start applications you want others to view during sharing.
4. Mute participants who cause a poor audio experience.
5. Enlist the help of an assistant for larger meetings.
6. If you use dual monitors, make sure that you choose which monitor to share when clicking the Present button. If you choose not to share all monitors, make sure that you drag content to the relevant monitor (Primary or Secondary) when you display content on your computer.
7. If you're using PowerPoint:
 - Keep the slide deck to approximately 15 slides or fewer, with larger fonts (above 30 points) and a simple background, to avoid distraction.
 - Upload your presentation in advance, and practice with the controls to move the slides or annotate. For example, you can call out important points by using the laser pointer or stamps.

7 Managing your Skype for Business Conference PIN

Your Skype for Business PIN

Your Skype for Business PIN (personal identification number) is a unique number you must choose in order to access some Skype for Business tools and services.

Your PIN will enable you to validate your identity while you:

- Log in to the audio portion of a Skype for Business conference as the call organizer or conference leader (if not using the Skype for Business Mobile app).
- Join a secure meeting as a participant – that is, meetings that are limited to identified participants only, without waiting in the lobby.

PIN Requirements:

- Be a minimum of 4 digits
- Not be a part of your phone number
- Not use sequential numbers (e.g. 1234 or 4321)
- Not use repeated numbers (e.g. 1111 or 6666)

Set or Reset Your Skype for Business PIN

To set or reset your PIN:

1. In the Skype for Business client, click the down arrow next to the gear and select **Tools | Dial-In Conference Settings** or open a web browser and go to <https://dialin.rochesterregional.org>
2. Click on the **Sign In** link under the Personal Identification Number (PIN) section
3. If prompted to select your language from the dropdown, do so then click **Sign In**.
4. If prompted for credentials, enter **viahealth\Logon ID**, your **password**, then click **Sign In**.
5. Under the **Personal Identification Number (PIN)** section, click the **Reset your PIN** link
6. Type the desired PIN number, type it again to confirm it, and then click **OK**.

8 Setup and Testing Audio

On this page, you can learn how to adjust the volume, check the call quality, or add an additional ringer using your headset, microphone, and / or your device's speakers in Skype for Business.

Learn how to set up and use your computer's built-in mic and speakers, or a headset, or another device for Skype for Business audio. For the best audio quality during a Skype for Business meeting or call, use a [Certified for Skype for Business](#) audio device.

Set up your device and testing audio quality:

1. In the Skype for Business client click the down arrow next to the gear and select **Tools | Options | Audio Device**, and then choose the device you want.
2. Click the green arrow next to **Speaker** to hear a sample tone, and drag the slider if you need to adjust the volume.
3. To test your mic volume, speak for a few seconds. The volume is optimal when the progress bar reaches the middle of the test area. Drag the slider next to **Microphone** to adjust the mic volume.
4. Click the green arrow button next to **Ringer** to hear a sample ring when you get a call, and drag the slider to adjust the ringer volume.
5. Click **Check Call Quality** and follow the prompts to record a short message and play it back. Adjust audio as needed.
6. If you have more than one audio device, you can choose to set both to ring when you get a call. Under **Secondary Ringer**, select **Also ring**, and then select an additional device. You can also select **Unmute when my phone rings**, which will automatically unmute your speakers when you receive a Skype for Business call.
7. Select **Allow stereo audio playback when available** to make sure that the best audio quality is available during a meeting.
8. Click **OK** when you're done.

Tip You can select different devices for microphone and speakers under each section. To avoid echoing, it's better to use the same device for both. If you have to use separate devices, minimize echoing by lowering your speaker's volume.

If you don't see your device in the list, make sure it's connected directly to your computer and follow the instructions that came with the device to install it.

Test your audio quality

On iOS and Android

Before you start a Skype for Business meeting or call, make sure your audio device sounds the way you want.

1. In the Skype for Business window, click in the **contacts search bar**.
2. Type **Audio Test** and press enter.

3. The first result that comes up should be **Audio Test Service**. Start a call with this account. Multiple results may come up for this search, but as long as you are only searching under **My Contacts** and not the global Skype Directory you will only get the Audio Test Service that is operated by RRH.
4. The call will give you a prompt to record a short message, before then playing it back for you to hear, you may hang up when you are finished.

8 Installing the Skype for Business app on your iPhone/iPad

1. Open the Apple App Store
2. Tap the **Search** button
3. In the search field enter **skype for business** and tap the corresponding result in the list
4. Tap the **GET** button
5. If prompted, enter your Apple ID credentials
6. Wait until the app has finished downloading then tap **OPEN**
7. If prompted to allow “Business” to send Notifications, tap **Don’t Allow** or **Allow**
8. If prompted to allow “Business” to access the Contacts on your iPhone/iPad, tap **Don’t Allow** or **Allow**
9. If prompted to allow “Business” to access the **Microphone** tap **Allow**. If you choose **Don’t Allow**, the Skype for Business app will not be able to use your microphone for meetings.
10. At the Skype for Business Sign In screen, in the **Organization sign in address** field, enter your SIP address which for most people is the same as your e-mail address.
11. Tap **Advanced Options** which is located under the Sign In field.
12. In the **Username** field, which is at the top of the **Advanced Options** screen, enter **viahealth\<Network ID>**, such as **viahealth\p311862** or **viahealth\jsmith**. You **must** use a back slash, a forward slash will not work. Leave the rest of the settings on this page as-is then tap the blue X in the top left corner to close the Advanced Options screen.
13. In the **Enter your password** field, enter your network password.
14. **Do not** select the option to **Save Password** as this can lead to account lockout issues when your password changes.
15. Tap **Sign In**.
16. If prompted to save your password in your Keychain, tap **Not Now**.
17. Enter your mobile phone number with area code then tap the blue arrow. This is required for you to make and receive calls as well as join meetings from the Skype for Business app.
18. At the “We’ve merged some calling features with your phone” screen, swipe left.
19. At the bottom tap Got it
20. Taping the Calendar button (2nd to the right) will display any upcoming meetings you may have. To join a listed meeting, tap **Join** to the right of that particular meeting.
21. To access your Skype for Business Contacts, tap Contacts in the top right.
22. To start a conversation with one of your contacts, just tap on them and enter your message at the bottom of the screen then tap Send.
23. To change your Location or Status, tap the Profile icon in the top left.
24. When you wish to sign out, tap the Profile icon and select Sign Out.
25. The next time you use the app, you can simply tap the icon associated with your account and enter your password.

For more information about using Skype for Business on an Apple device, please visit the Microsoft Skype for Business help page [here](#).

9 Installing the Skype for Business app on your Android

1. Open the Google Play Store and Sign In if required
2. Tap the **Search** bar
3. In the search field enter **skype for business** and tap the corresponding result in the list
4. Tap the **INSTALL** button
5. Wait until the app has finished downloading and installing then tap **OPEN**
6. If prompted to allow Skype for Business to access photos, media and files on your device, tap **Deny** or **Allow**
7. If prompted to allow Skype for Business to make and manage phone calls, tap **Allow**
8. If prompted to allow Skype for Business to record audio tap **Allow**. If you choose **Deny**, the Skype for Business app will not be able to use your microphone for meetings.
9. If prompted to allow Skype for Business to take pictures and record video, tap **Allow**. If you choose **Deny**, the Skype for Business app will not be able to use your camera for meetings.
10. If prompted to allow Skype for Business to access your contacts, tap **Deny** or **Allow**
11. At the Terms of Use screen, tap **Accept**.
12. At the Welcome to Skype for Business screen, tap the blue arrow.
13. At the Skype for Business Sign In screen, in the **Organization sign in address** field, enter your SIP address which for most people is the same as your e-mail address.
14. Tap **Advanced Options** which is located under the Sign In field.
15. In the **Username** field, which is at the top of the **Advanced Options** screen, enter **viahealth\<Network ID>**, such as **viahealth\p311862** or **viahealth\jsmith**. You **must** use a back slash, a forward slash will not work. Leave the rest of the settings on this page as-is then tap the blue X in the top left corner to close the Advanced Options screen.
16. In the **Enter your password** field, enter your network password.
17. **Do not** check the box to **Save Password** as this can lead to account lockout issues when your password changes.
18. Tap **Sign In**.
19. Enter your mobile phone number with area code then tap the blue arrow. This is required for you to make and receive calls as well as join meetings from the Skype for Business app.
20. You will be shown a few screens with app information, swipe left.
21. At the bottom of the final screen, tap the blue arrow.
22. Taping the Calendar button (2nd to the right) will display any upcoming meetings you may have. To join a listed meeting, tap **Join** to the right of that particular meeting.
23. To access your Skype for Business Contacts, tap Contacts in the top right.
24. To start a conversation with one of your contacts, just tap on them and enter your message at the bottom of the screen then tap Send.
25. To change your Location or Status, tap the Profile icon in the top left.
26. When you wish to sign out, tap the Profile icon and select Sign Out.
27. The next time you use the app, you can simply tap the icon associated with your account and enter your password.

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