

# **SFB For Windows Conferencing Quick Reference**



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## Information for SFB 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 Presenters. 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.
- Attendee – can initiate instant message (IM) conversations and view items that are shared.

By default, meeting participants who dial-in from a non-SFB phone 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 can be given access 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. The Conference ID is assigned by SFB and appears in an Outlook Meeting Invitation. Meeting options include:

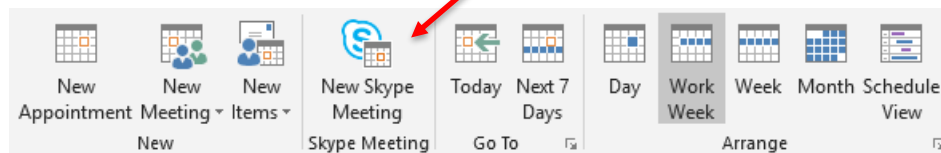
- Everyone waits in the lobby except the Organizer
- No one waits in the lobby
- Only the Organizer is a Presenter

## Schedule a Phone Conference or SFB Meeting

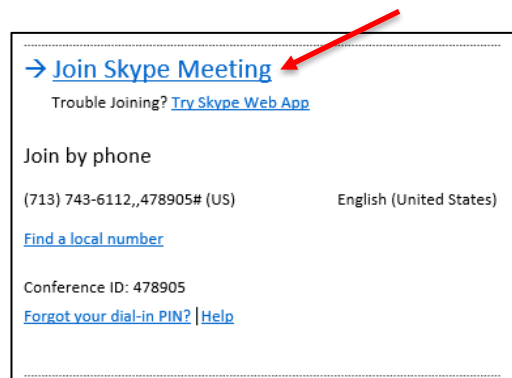
A SFB add-on is installed in Outlook that allows you to invite others to a phone conference or SFB meeting. You can even invite people who are not affiliated with UH and are not a SFB user - including students!

To schedule a phone conference or SFB meeting in Outlook:

1. Open your **Outlook Calendar**.
2. Click **New Skype Meeting** on the toolbar.



3. Set the **meeting date** and **time**, add **recipients**, and **send** the Meeting Invitation.



All recipients receive (shown above) a phone number to dial-in and a web address to join a SFB meeting using a browser. Joining a SFB meeting with a web browser allows non-SFB users to see what the SFB users see. The phone number and Conference ID provide 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.

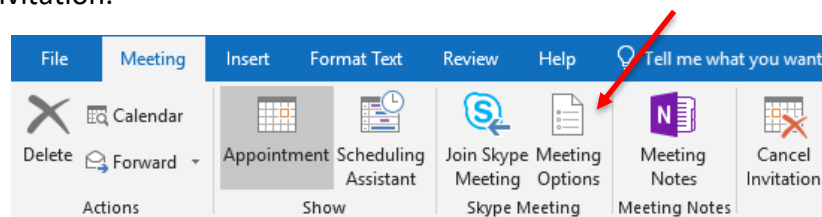
There are two main classifications of participants in a meeting: Presenter and Attendee. Presenters are able to share their desktop and applications, present files, and manage Meeting Options. By default, all faculty and staff at UH are Presenters. Anyone invited to a meeting

from outside of UH (or a student) is an Attendee. It is possible to set Meeting Options before sending a Meeting Invitation. 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 SFB meeting.
2. Before sending the Meeting Invitation, click **Meeting Options** on the toolbar of the Meeting Invitation.



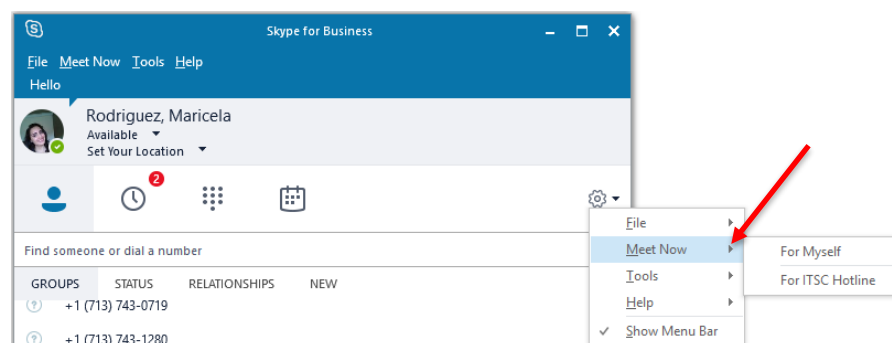
3. Choose the desired **meeting options** in the SFB Meeting Options dialog box.
4. Click **Ok**.

## Meet Now

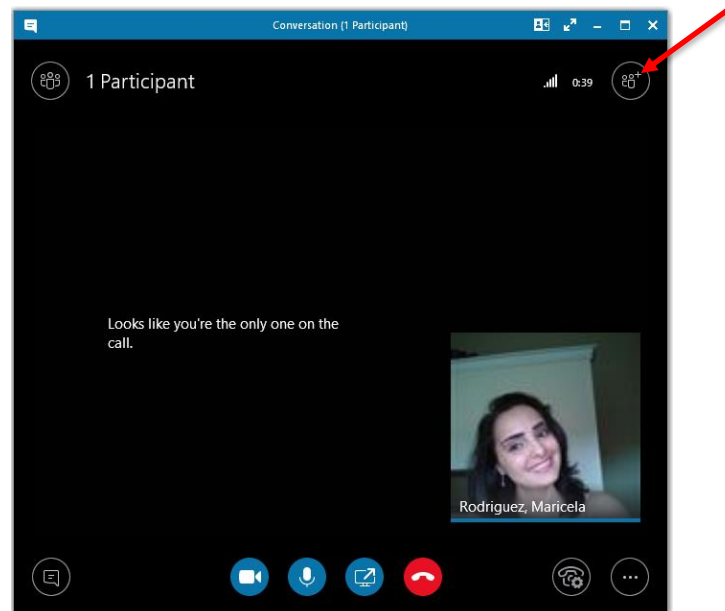
Meet Now allows you to immediately start a meeting or conference call.

To use Meet Now:

1. Open **SFB**.
2. Click **Meet Now** on the SFB menu bar or click the arrow next to the **Options** button and select **Meet Now**.
3. Select an **option** to create the meeting.



4. In the Group Conversation window that appears, click **Invite More People**.



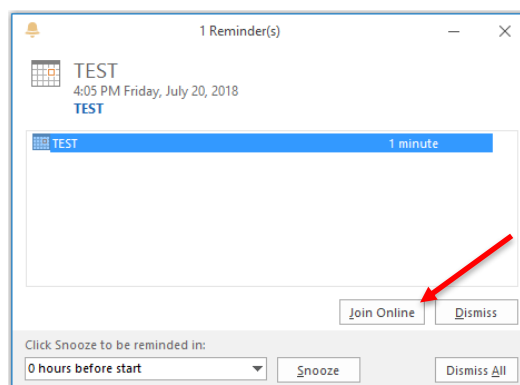
5. In the Invite by Name or Phone Number dialog box that appears, select a **contact**, enter a **name**, or enter a **phone number**.
6. Click **Ok**.

**Note:** Drag and drop names from your Contact list to the Group Conversation window for a faster way to invite others.

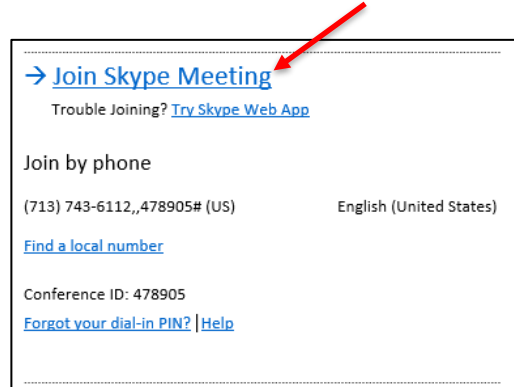
## Join a Scheduled SFB Meeting

To join a SFB meeting, choose one of two options:

1. In the Outlook Meeting Reminder, click **Join Online**.



2. In the Outlook Meeting Invitation, click **Join Skype Meeting**.



## Group IM Conversation

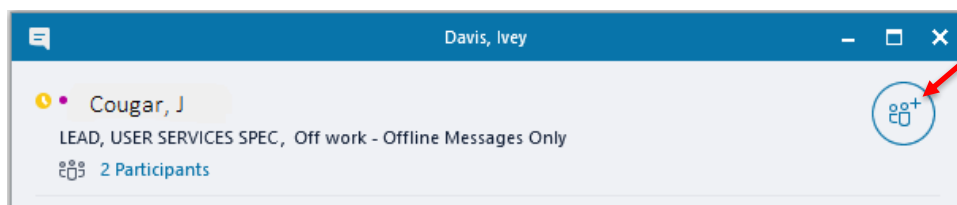
You can start a group instant message (IM) conversation by selecting multiple contacts or a contact group in your Contacts list. You can also escalate an IM conversation with one person into a group conversation.

To start a group conversation from your Contacts list:

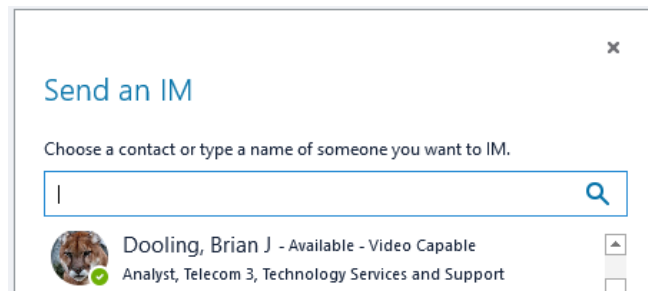
1. Hold down the **<CTRL>** key and click each **contact** you want to invite.
2. Right-click the last **contact** selected and select **Send an IM** from the menu that appears.
3. In the Group Conversation window that appears, type your message in the message input area.
4. Press **<ENTER>**.

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

1. Click **Invite People Options**.



2. In the Send an IM dialog box that appears, select the **contacts** you want to invite.
3. Click **Ok**.

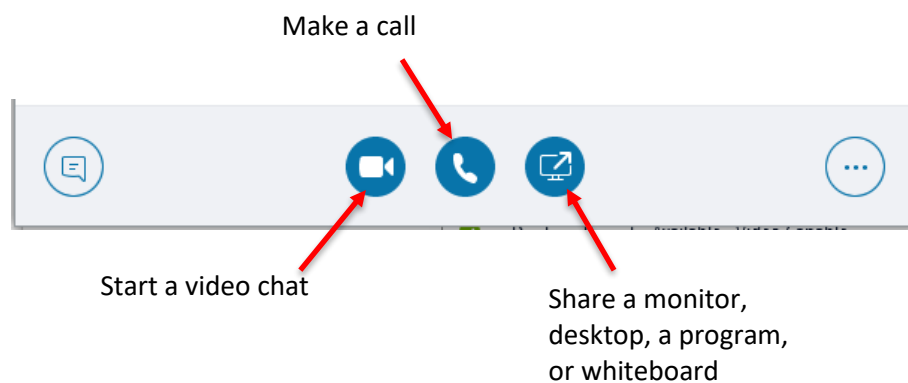


## Enhance an IM Conversation

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 a monitor
- Share a document
- Share a program
- Share your desktop

To add a communication or collaboration tool to an IM conversation, click on one of the following:



## Join a Phone Conference

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

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

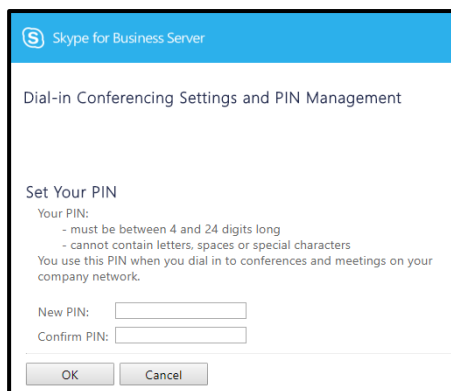
**Note:** Your Dial-in PIN is identical to the Sign-in PIN used to sign-in to the CX600 phone. If you don't have a Sign-in PIN or if you would like a new Sign-in PIN, follow the instructions in the next section.

## Set Your PIN

Your SFB Dial-in PIN is identical to the Sign-in PIN for the CX600 phone. The Dial-in PIN identifies you as someone with authorized access to our network. A Dial-in PIN is required if you are dialing in from a non-SFB phone, i.e., Rolm, Cisco, mobile, or any off-campus phone.

To create or reset a Dial-in 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.

The image shows a screenshot of a web-based dialog box titled "Skype for Business Server". The main heading inside the box is "Dial-in Conferencing Settings and PIN Management". Below this, there is a section titled "Set Your PIN". Under "Set Your PIN", it says "Your PIN:" followed by two bullet points: "- must be between 4 and 24 digits long" and "- cannot contain letters, spaces or special characters". Below the bullet points, it says "You use this PIN when you dial in to conferences and meetings on your company network." At the bottom of the section, there are two input fields: "New PIN:" and "Confirm PIN:". At the very bottom of the dialog box, there are two buttons: "OK" and "Cancel".

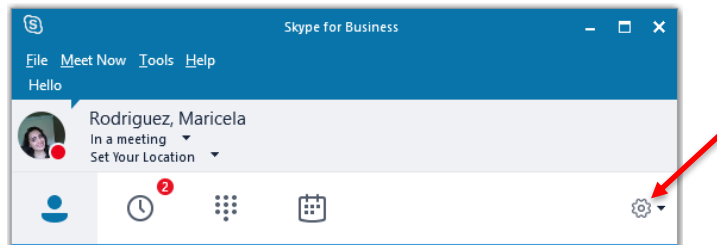
**Note:** If you forget your PIN, you can reset it using the steps listed above.

## Transfer to Your Mobile Phone

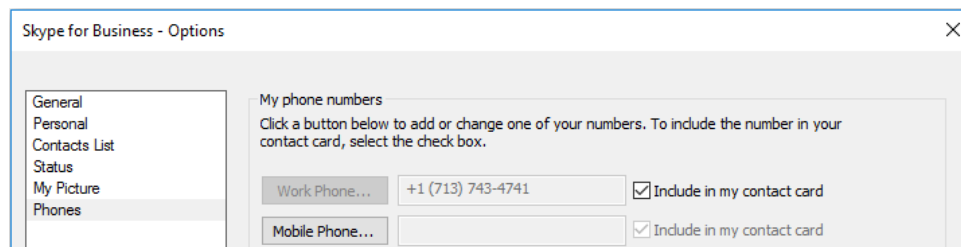
If you are in a phone conference or SFB meeting and are pulled away from your desk, you can continue the audio portion of the group conversation on your mobile phone. Before transferring audio to your mobile phone, your mobile number must be entered in SFB.

To add your mobile number to SFB:

1. In the SFB window, click the **Options** button.

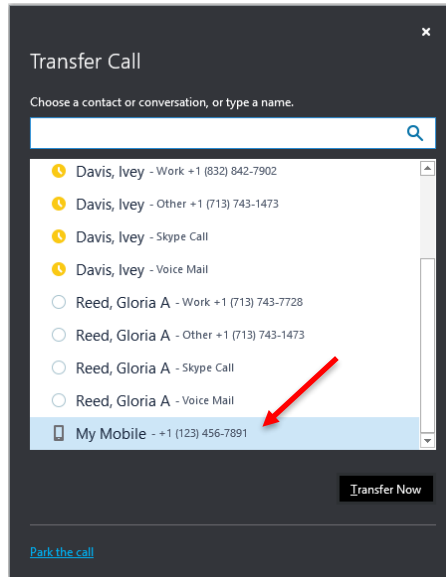


2. In the Options dialog box, click **Phones** in the left column.
3. Click **Mobile Phone**.
4. In the Edit dialog box, enter your **mobile number**.
5. Click **Ok**.
6. Uncheck **Include on my contact card** if you want the number to remain private.
7. Click **Ok**.



To transfer the audio of a group conversation to your mobile phone:

1. In the Group Conversation window, click the **Call Controls** button.
2. In the box that appears, click **Transfer**.
3. Select your **mobile number**.
4. Click **Transfer Now**.

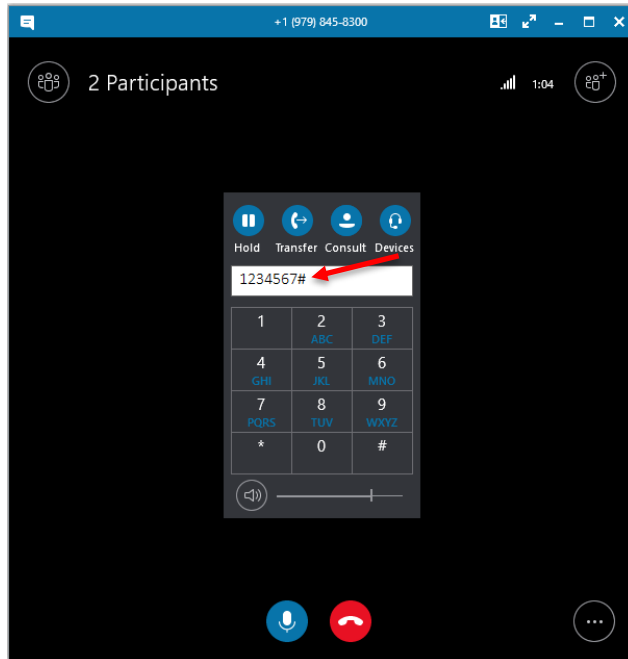


## Add a Long-Distance Number

Adding a person with a long-distance number to a conference call must be done by making a separate call, and then merging the two conversations together. A long-distance authorization code is required to add someone with a long-distance number to a conference call or SFB Meeting. Your long-distance authorization code must be entered using the SFB keypad.

To make a long-distance call while a conference call is on Hold:

1. In the Search field, using your keyboard, enter a **domestic long-distance number** or **011 followed by an international long-distance number**.
2. Press **<ENTER>**.
3. After the long-distance number is dialed, one or two beeps can be heard. After hearing the beep(s), enter your **long-distance authorization code** using the keypad. If you enter your long-distance code too soon, the call will fail.



To merge a long-distance call with a conference call:

1. In the Conversation window of the long-distance call, click **More Options** (ellipsis).
2. From the menu that appears, select **Merge This Call Into** -> **the desired call**.

