



Schedule a Skype Meeting for Others

Job Aid



Introduction:

Using Skype to schedule meetings, especially for other people, can be hard unless you know a few tricks.

This job aid explains how to:

- Schedule a basic meeting without any participant limitations using Outlook
- Schedule a meeting that limits access, presenters, and interactions using Outlook
- Start an immediate Skype meeting

For more information about scheduling and attending a Skype meeting and using the controls, visit the *Skype for Business* intranet page using the link below or open the intranet and search for *Skype for Business*:



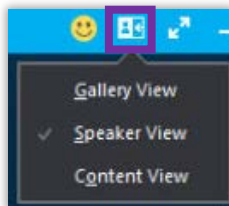
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Table of Contents

Terms Used.....	3
Meeting Tips.....	4
Getting Started	5
Schedule a Basic Skype Meeting in Outlook.....	6
Schedule a Meeting Space with Access and Presenter Controls.....	9
Start an Immediate Skype Meeting	12
Leave or Close the Meeting	14
Inside the Skype Meeting Place	15
Appendix	16
Schedule a Skype Meeting Quick Checklist	17
Start a Skype Meeting Quick Checklist.....	18
Troubleshooting.....	19
Presentation Controls	20
Participant Controls	21

Terms Used

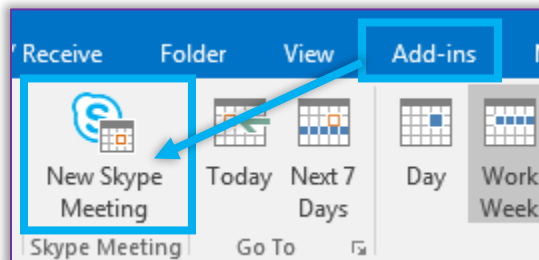
Here are some terms used in Skype.

Term	Definition
Presenter	The person sharing his/her desktop with the group
Organizer	The person scheduling the meeting, or the person the meeting is scheduled for
Video call	This uses the camera in the device used for the Skype meeting such as the laptop camera.
PIN	Your PIN is your <i>Personal Identifier Number</i> associated with the phone number you use to attend a Skype meeting. You need to use a PIN to attend a meeting if: - You're the meeting leader (organizer) and calling from a phone only (not initiated through the computer) - If you start the meeting through the computer and use the phone to join audio, no PIN is needed unless using a phone that is not registered (i.e., conference room phone) - You're an attendee, but the meeting is locked and you need to be identified before joining.
Bypass leader PIN	If the organizer is unavailable, or has forgotten the PIN, bypass it by: - Pressing * twice on the phone pad - Enter your phone number associated with your PIN - Enter your PIN
Meeting layout	When you want to change the layout that displays on the screen, click the layout icon and then select from the menu: <i>Gallery View</i> shows the video of all attendees across the top. The presentation is smaller to accommodate this view Note: Only displays when three or more attendees have joined the meeting. <i>Speaker view</i> is the default and shows the presentation screen and the speaker's video image in the bottom corner <i>Content view</i> shows only the shared screen and no video images 

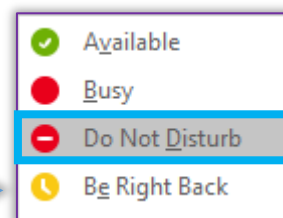
Meeting Tips

Here are some tips to help the meeting go smoothly:

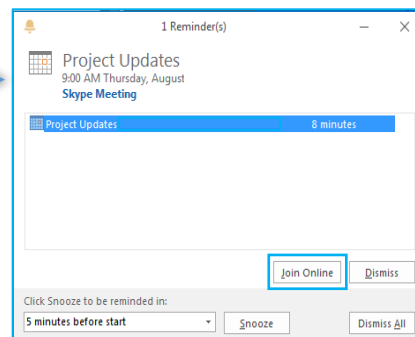
- If *New Skype Meeting* is not in your Outlook ribbon, go to the *Add-ins* in Outlook to add it



- If you are presenting your screen, set your Skype to *Do Not Disturb* to prevent any messages appearing on your screen



- Your Outlook meeting reminder contains a link that goes to the schedule meeting
- If you only want to use Skype as a conference line (no screen or video sharing), delete the link from the meeting request.
- If the organizer is unavailable, or has forgotten the PIN:



Note: If calling from a phone you must enter a PIN. If you start the meeting through the computer and use the phone to join audio, no PIN is needed unless using a phone that is not registered (i.e., conference room phone)

- o Press * twice on the phone pad
 - o Enter your phone number associated with your PIN
 - o Enter your PIN
- Attendee/Presenter etiquette:
 - o If hosting a group meeting, restate comments and questions from the room to the microphone to assure that virtual attendee can hear
 - o Talk to the microphone, not to each other
 - o Don't have side conversations which make it hard to hear the main conversation
 - o Mute your microphone if you are not speaking

Getting Started

Do you need to book or host meetings using Skype? Begin with these three steps:

1. Request Meeting Organizer access. Click [meeting organizer](#) to open a ServiceNow request. When you've completed this step in ServiceNow, navigate back to this page and complete Step #2 below.
2. Set your PIN Code. Click [Setting and resetting a PIN](#) set your PIN code.
3. Learn the basics!

If you run into any issues please contact the IT Helpdesk at 860-545-8090 or open an IT self-service request here:

<https://ctchildrens.service-now.com/ess/main.do>



Schedule a Basic Skype Meeting in Outlook

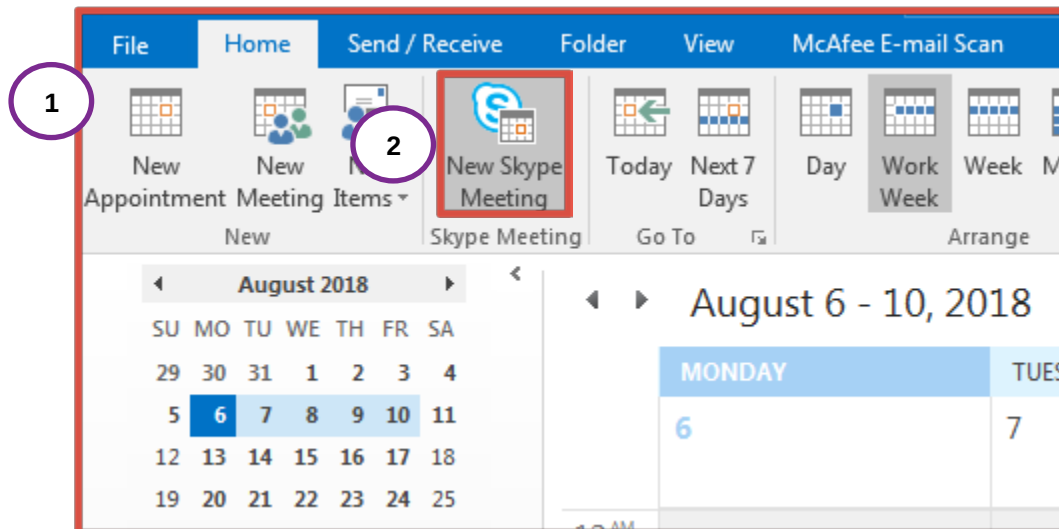
Basic Skype meetings are the most common type of meeting scheduled. The basic meeting is a *dedicated meeting space* which:

- Creates one space for all your meetings with the same meeting entry information and Conference ID
- Allows all attendees to enter the meeting space immediately

Begin scheduling your basic Skype meeting in Outlook.

Step 1: Open your **Outlook calendar**.

Step 2: Click **New Skype Meeting**



An Outlook meeting invitation opens with the participant's Skype information already in it. The information includes:

- A. The link to join the meeting
- B. A phone number that participants can use to join the meeting if they cannot join using a computer or other device
- C. The conference ID number
This number is the same for all your basic Skype meetings. If you schedule overlapping meetings this way, both meetings end up in the same space at the same time. You can change the ID in *Meeting Options*.
- D. Help links

Enter you meeting information.

Step 1: Enter the **people** you want to send the invitation to

Step 2: Enter a descriptive **Subject**

Step 3: Specify the **date** and **time** of the meeting

Step 4: Insert **information about the meeting** including your agenda and any attachments

If needed, specify who the organizer of the meeting is and the PIN needed to initiate it in the meeting invitation.

The screenshot shows the Outlook 'Meeting' form with the following elements and annotations:

- 1**: Points to the 'To...' field.
- 2**: Points to the 'Subject' field.
- 3**: Points to the 'Start time' and 'End time' fields.
- 4**: Points to the 'Location' field.
- A**: Points to the 'Join Skype Meeting' link.
- B**: Points to the 'Join by phone' section, specifically the phone number '18608378800 (CT)'.
- C**: Points to the 'Conference ID: 963127'.
- D**: Points to the 'Forgot your dial-in PIN? | Help' link.

A callout box on the right contains the following text:

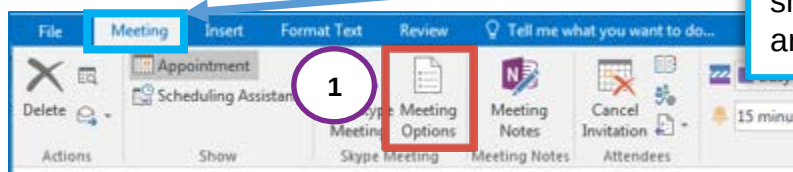
If calling from a phone you must enter a PIN. If you start the meeting through the computer and use the phone to join audio, no PIN is needed unless using a phone that is not registered (i.e., conference room phone)

An orange exclamation mark icon is located next to the callout box.

Schedule a Skype Meeting for Others

Review the meeting options.

Step 1: Click **Meeting Options**



If *Meeting Options* is not showing, make sure you are in the *Meeting* tab.

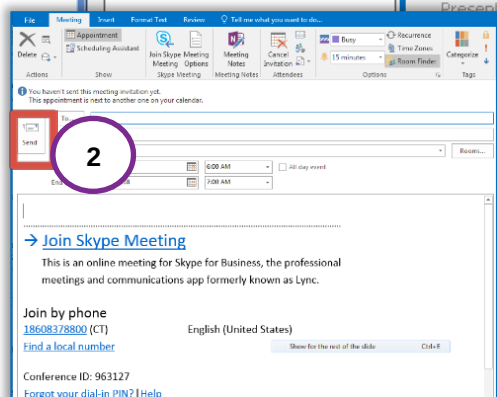
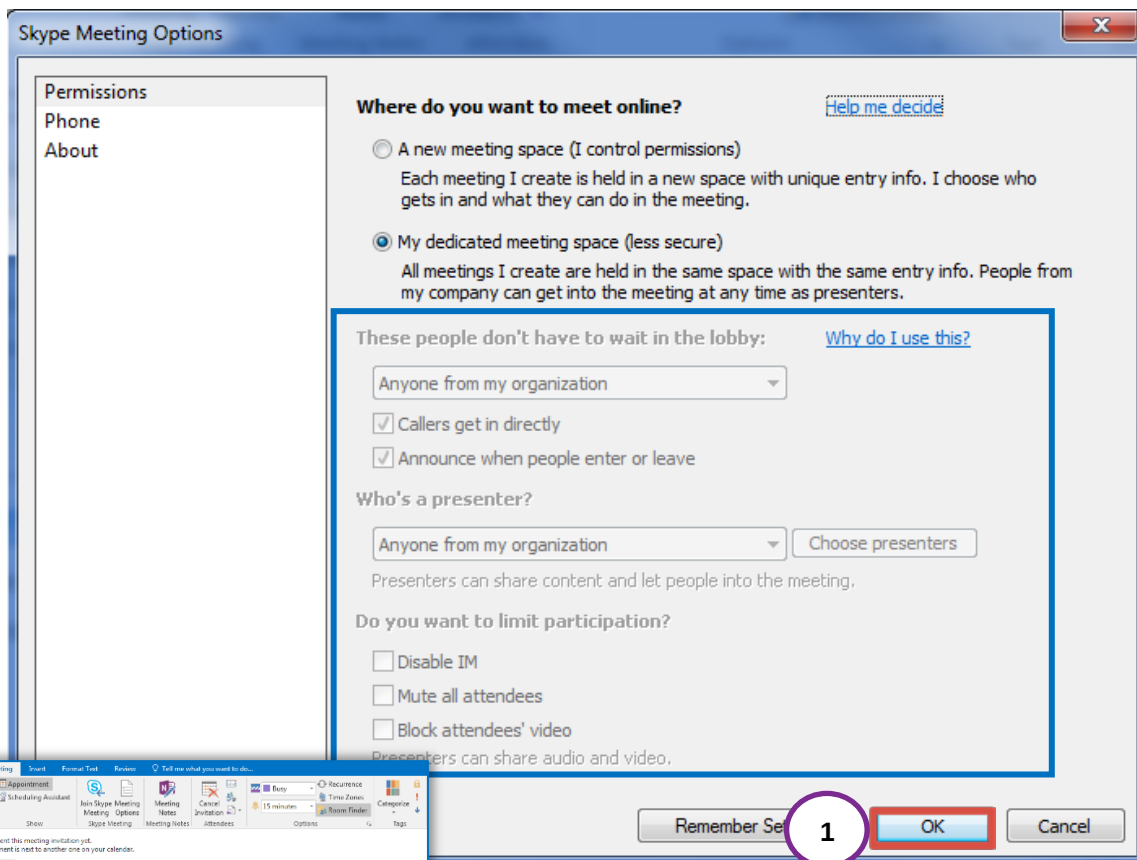


The *Skype Meeting Options* window appears.

Note that the participant and presenter controls are not available.

Step 1: To accept the options, click **OK**

Step 2: You return back to the meeting invitation; click **Send**



Schedule a Meeting Space with Access and Presenter Controls

The *Meeting Options* panel allows you to select *A new meeting space*, which provides you control over permissions and the Conference ID.

To schedule a new meeting space:

Step 1: Select A new meeting space

This activates the rest of the controls in the panel.

Step 2: Select who must wait in the **lobby** until the presenter starts the meeting
Select to allow only the organizer to enter first and begin the meeting, or select to let others enter the meeting before the presenter. Those options include only those invited, anyone in the organization, and anyone.

See additional explanation on next page.

Step 3: Select the **presenter(s)**

This allows you set that you are the only presenter (You can change this during the meeting), choose specific people (Click *Choose presenter* and select from invitee list), anyone from the organization, or anyone.

Step 4: Select any desired **participation limitations**

You can stop the participants from instant messaging, mute all the attendees, or block all the attendees' videos. Note that these do not apply to anyone selected as a presenter.

Step 5: When done, click **OK**

The screenshot shows the 'Skype Meeting Options' dialog box. It has a sidebar with 'Permissions', 'Phone', and 'About'. The main area is titled 'Where do you want to meet online?'. It has two radio buttons: 'A new meeting space (I control permissions)' (selected) and 'My dedicated meeting space (less secure)'. Below the first radio button is a text box: 'Each meeting I create is held in a new space with gets in and what they can do in the meeting.' Below the second radio button is a text box: 'All meetings I create are held in the same space w the meeting at any time'. There are five numbered callouts: 1 points to the 'Where do you want to meet online?' section; 2 points to the 'These people don't have to wait in the lobby:' section, which has a dropdown menu set to 'Anyone (no restrictions)' and two checked checkboxes: 'Callers get in directly' and 'Announce when people enter or leave'; 3 points to the 'Who's a presenter?' section, which has a dropdown menu set to 'Anyone from my organization' and a 'Choose presenters' button; 4 points to the 'Do you want to limit participation?' section, which has three unchecked checkboxes: 'Disable IM', 'Mute all attendees', and 'Block attendees' video'; 5 points to the 'OK' button. There are also two text boxes: one at the bottom left says 'If you want your selections set as default, click Remember Settings.' and one at the bottom right says 'Note: Most meetings do Not require limitations on entering the meeting, presenting, or participating. Leave these options open to Anyone.' with an exclamation mark icon.

Skype Meeting Options

Permissions
Phone
About

Where do you want to meet online?

☐ A new meeting space (I control permissions)
Each meeting I create is held in a new space with gets in and what they can do in the meeting.

☐ My dedicated meeting space (less secure)
All meetings I create are held in the same space w the meeting at any time

These people don't have to wait in the lobby:

Anyone (no restrictions)

☒ Callers get in directly

☒ Announce when people enter or leave

Who's a presenter?

Anyone from my organization

Choose presenters

Presenters can share content and let people into the meeting.

Do you want to limit participation?

☐ Disable IM

☐ Mute all attendees

☐ Block attendees' video

Presenters can share audio and video.

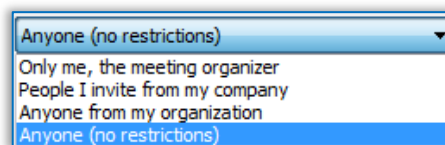
Remember Settings

OK

Note: Most meetings do Not require limitations on entering the meeting, presenting, or participating. Leave these options open to Anyone.

Waiting in the Lobby

When you create a *new Skype for Business meeting*, you decide who gets into the meeting directly, and who waits until you let them in. We recommend that you change these options for large meetings, or when you have confidential or sensitive information.



You can set the following options in a *new Skype for Business meeting*.

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 can 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 from your company can get in to the meeting directly, even if not invited.	You don't have external participants and you are not discussing confidential information.
Anyone (no restrictions)	Anyone who has access to the meeting link gets in to the meeting directly.	You're inviting outside participants and you're not discussing confidential information.



Note: If any option other than **Anyone** is checked, presenters using the Skype for Business desktop client won't be able to see the dialed-in users waiting in lobby and admit them to the meeting.

Send the invitation.

Step 1: Click **Send**

1


Send

To...

Listed Attendees

Subject

Descriptive Subject of Meeting

Location

Skype Meeting

Start time

Tue 8/7/2018



6:00 AM

▼

☐ All day event

End time

Tue 8/7/2018



7:00 AM

▼

→ [Join Skype Meeting](#)

This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync.

Start an Immediate Skype Meeting

There are times you want to do a Skype meeting immediately.

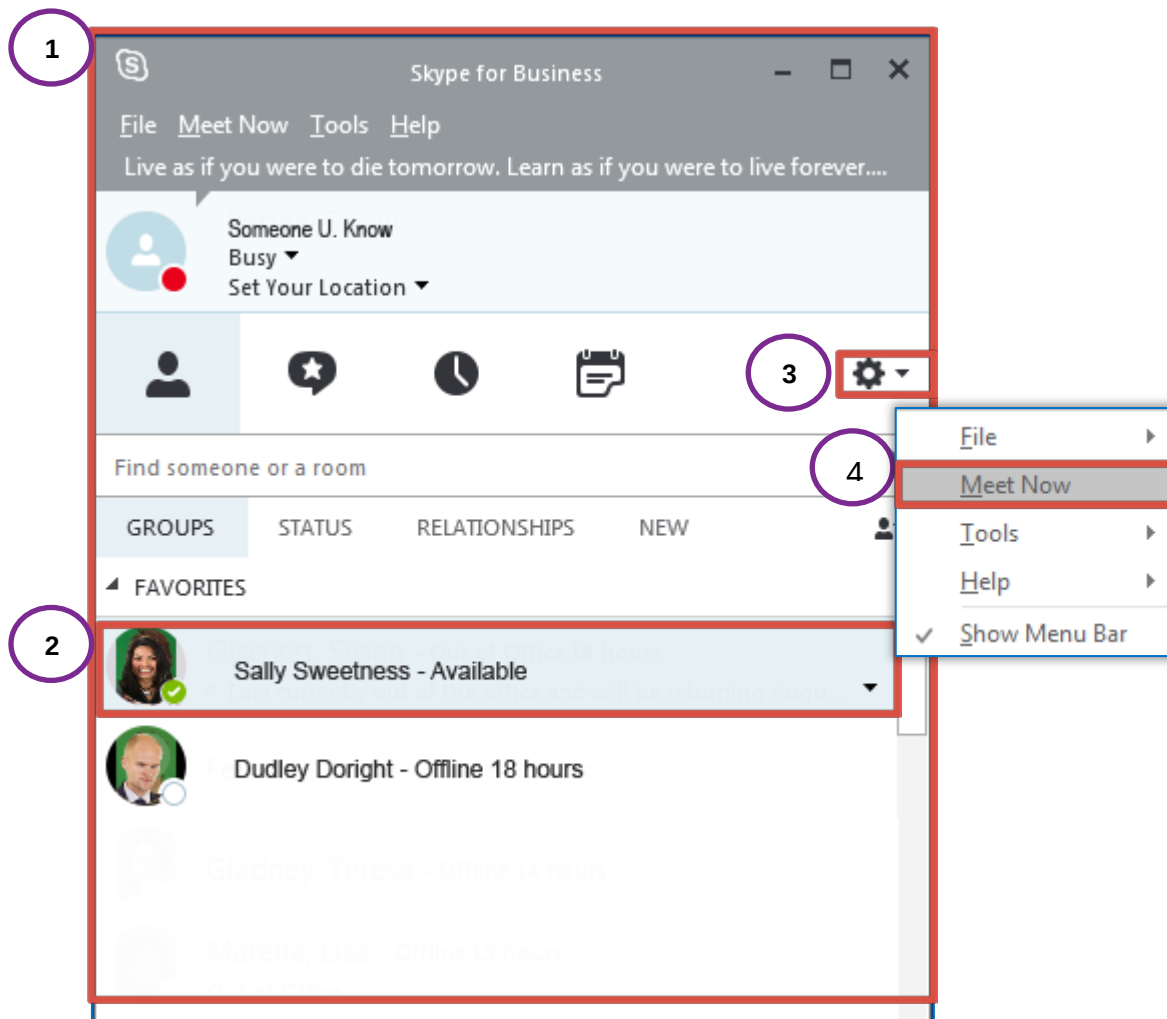
To meet immediately:

Step 1; Open **Skype**

Step 2: Select the **person** you want to meet with

Step 3: Select the **Options menu**

Step 4: Select **Meet Now**



Set your meeting audio:

Anytime you join a Skype meeting, select your audio preference.

Step 1: Select how you want to **join**

- *Skype for Business* uses the microphone/speaker (or headset) in your computer/device
- *Call me at:* displays your office phone number for attendees to call
- *Don't join audio* is selected if you are joining the Skype meeting

Step 2: Click **OK**

1

2

Warning - It is important to select how you are joining the meeting to prevent feedback noise.



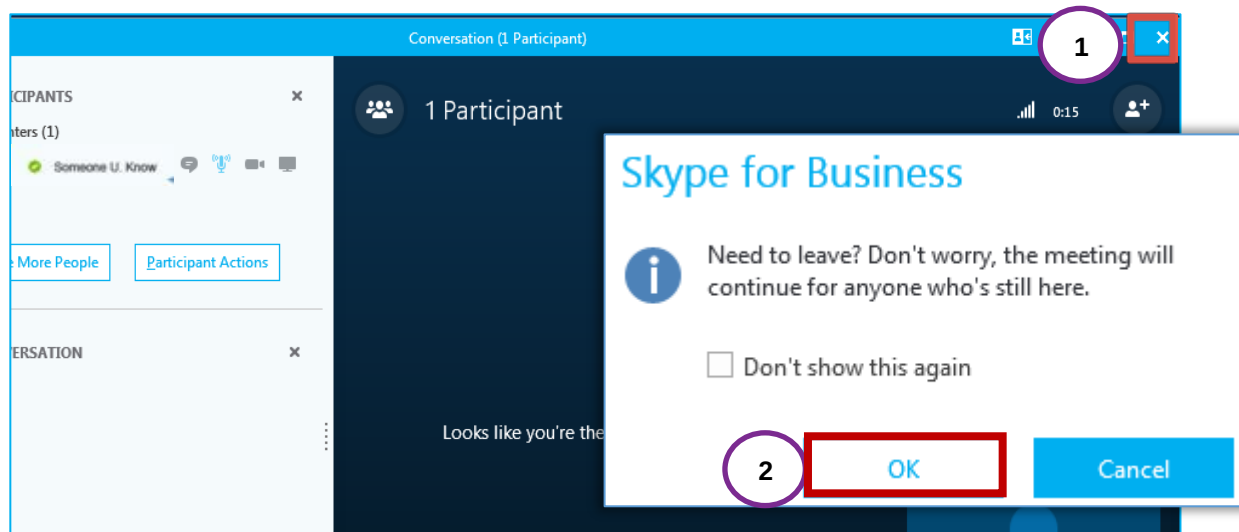
Leave or Close the Meeting

You can either leave the meeting or end the meeting for everyone.

To leave the meeting:

Step 1: Click **X** in the top corner

Step 2: In the confirmation box that appears, click **OK**. Note that it does not end the meeting for everyone unless you are leading the meeting.

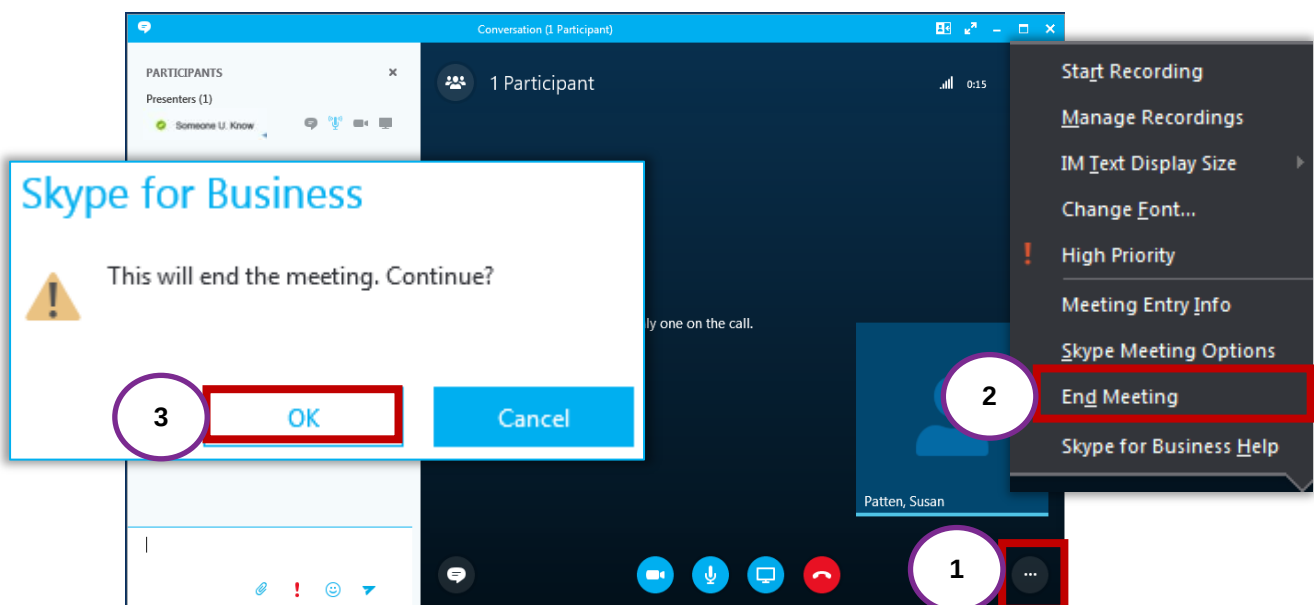


To end the meeting for everyone:

Step 1: Click **...** in the lower corner

Step 2: Select **End Meeting** from the list.

Step 3: In the confirmation box that appears, click **OK**. This ends it for everyone.



Inside the Skype Meeting Place

The Skype meeting screen offers many additional controls for the presenter.

For more information about attending a Skype meeting and using the controls, visit the *Skype for Business* intranet page at the link below or open the intranet and search for *Skype for Business*:



<http://intranet.connecticutchildrens.org/skype-for-business>

Participants

Change screen layout

Invite other attendees

Share your screen

End the call

Meeting call options

Additional Options

Mute yourself

Start a video call using your computer camera

See page 21 for more information

Instant Message

1 Participant

0:15

Looks like you're the only one on the call.

Start My Video

Click to share your video

See instructions to set up microphone/speakers and do a video call at:
http://intranet.connecticutchildrens.org/workfiles/departments/InfoServices/Skype/Audio_and_Video.mp4

Hold Transfer Devices

1 2 3
4 5 6
7 8 9
* 0 #

Start Recording
Manage Recordings
IM Text Display Size
Change Font...
High Priority
Meeting Entry Info
Skype Meeting Options
End Meeting
Skype for Business Help

See page 20 for more information

Appendix

Schedule a Skype Meeting Quick Checklist.....	17
Start a Skype Meeting Quick Checklist	18
Troubleshooting	19
Presentation Controls.....	20
Participant Controls.....	21

Schedule a Skype Meeting Quick Checklist

To schedule a Skype meeting with a unique Conference ID, and does not limit users:

1. Open **Outlook Calendar**



2. Click **New Skype Meeting**



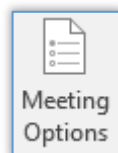
(top of the Outlook calendar)

3. Enter all meeting **information**

Including:

- Attendees
- Subject
- Date and time
- Agenda /a attachments

4. Click **Meeting Options**

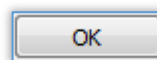


(top of the meeting invitation)

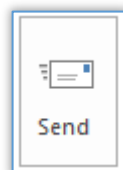
5. Select **A new meeting space**

☒ A new meeting space (I control permissions)
Each meeting I create is held in a new space with unique entry info. I choose who gets in and what they can do in the meeting.

6. Click **OK**



7. Click **Send**



(back on meeting invitation)

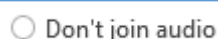
Start a Skype Meeting Quick Checklist

Start a Skype meeting in a meeting room:

1. Click the **link** that is in the Outlook Calendar invite

A blue button with a white right-pointing arrow followed by the text "Join Skype Meeting" in blue.

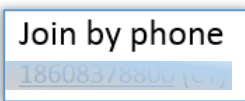
2. If you are not using the computer to talk through, and using a star phone or other method, select **Don't join audio** in the *Join Meeting Audio* panel.

A button with a radio button icon and the text "Don't join audio".

3. Click **OK** in the *Join Meeting Audio* panel.

A blue button with the text "OK" in white.

4. Call the number provided in the Outlook Skype Meeting invitation.

A button with the text "Join by phone" and a phone number "18608378800" below it.

If calling from a phone you must enter a PIN.

Note: If you start the meeting through the computer and use the phone to join audio, no PIN is needed unless using a phone that is not registered (i.e., conference room phone).

If the organizer is unavailable, or has forgotten the PIN, bypass it by:

- Pressing ***** twice on the phone pad
- Enter your **phone number** associated with your PIN
- Enter your **PIN**

5. The *Skype for Business* meeting panel opens. Present the screen by clicking the **icon**, selecting the **screen view**, and **acknowledging** that everyone can see it.

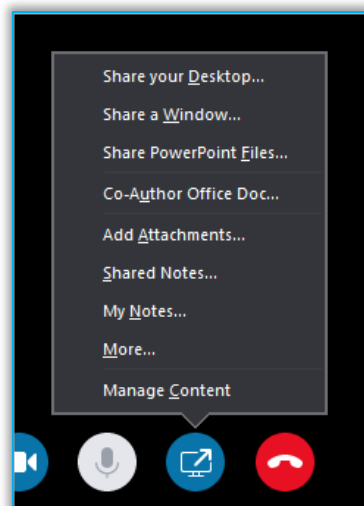


Troubleshooting

Problem	Try this:
Loud, echoing noise	Someone is likely connected to both the computer and phone audio, causing feedback. One needs to be shut off.
Scheduling a Skype meeting as an Outlook Calendar delegate but get a message saying you do not have permission	You must be set up as a <i>Delegate</i> for that calendar, and the other person must define you as having <i>Editor</i> rights under <i>Delegate Access</i>. 1. In Outlook, click File > Account Settings > Delegate Access > Add. 2. Find and add the name of the person who is going to be the delegate. 3. Click the Calendar menu, and select Editor rights.
Can't hear one or more attendees	Ask attendees to check if they are muted.
A defined presenter cannot attend	Give an attendee presenter control during a meeting.
No PIN number to get in when calling	Set your PIN Code. Click setting and resetting a PIN to set your PIN code.
Organizer does not have or remember PIN	Bypass it by: • Pressing * twice on the phone pad • Enter your phone number associated with your PIN • Enter your PIN

Presentation Controls

If you're presenting in the meeting, click the **Share Content** button  , and choose what you want to do.



- **Share your Desktop** (For details, see [Share your screen in Skype for Business.](#))
- **Share a Window** (For details, see [Present programs in Skype for Business.](#))
- **Share PowerPoint Files** (For details, see [Present PowerPoint slides in a Skype for Business meeting.](#))
- Use PowerPoint to upload a video to Skype for Business. See [Play a video in a Skype for Business meeting.](#)
- **Co-Author Office Doc** (For details, see [Co-author in a Skype for Business meeting or conversation.](#))
- **Add Attachments** (For details, see [Add a file to a Skype for Business meeting.](#))
- **Shared Notes** (For details, see [Use shared and private notes in a Skype for Business meeting.](#))
- **My Notes** (For details, see [Use shared and private notes in a Skype for Business meeting.](#))
- **More**
 - **Whiteboard** (For details, see [Use the whiteboard to collaborate in a Skype for Business meeting.](#))
 - **Poll** (For details, see [Take a poll in a Skype for Business meeting.](#))
 - **Q & A** (For details, see [Have a Q&A session in a Skype for Business meeting.](#))
- **Manage Content** to add, save, or delete meeting attachments and to specify permissions for who can access the content.

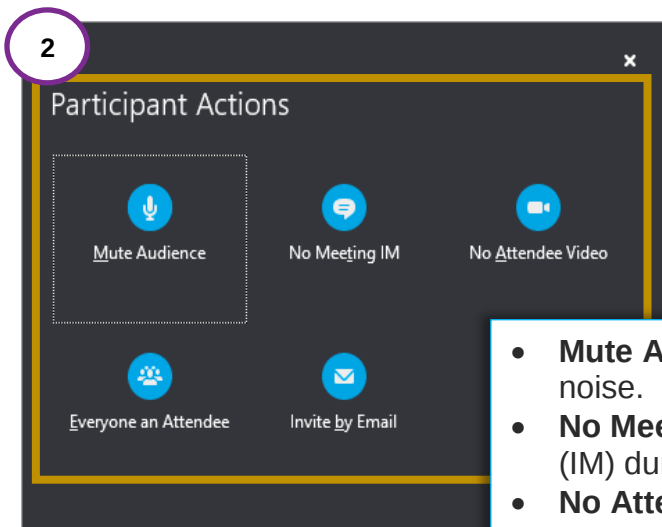
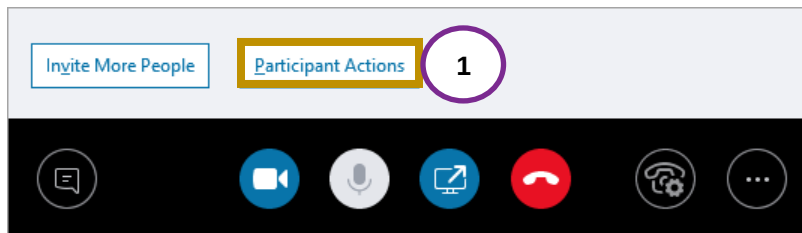
Participant Controls

If you're a presenter, you have access to participant controls, such as muting the audience or inviting more people.

To control participation:

Step 1: In the meeting window, open the Participants list, click **Participant Actions**

Step 2: choose **what** you want to do



- **Mute Audience** to eliminate background noise.
- **No Meeting IM** to disable instant messaging (IM) during the meeting.
- **No Attendee Video** to disable letting attendees start the video.
- **Everyone an Attendee** to reduce the number of presenters if you have too many.
- **Invite by Email** to send email invitations to additional people.

Notes: