Video calling with external parties

Microsoft Teams and Skype for Business (SfB) are available to all students and employees in Office 365. The tools can be used for various purposes. This instruction focuses on video calling with external parties.

Students can use Skype for Business (SfB) and Microsoft Teams (Teams) for online interviews or online focus groups. Interviewing professionals could also be a suitable alternative to an internship. Teams also allows access to files in the university's OneDrive (e.g. shared files in the chat function).

Using SfB on a Mac might prove problematic as the privacy settings do not allow sharing of the microphone and/ or camera. Consider reinstalling SfB or using Teams instead.

This instruction explains how to specifically use SfB and Teams to:
- Invite an external user to a conversation.
- Record the conversation, play and encode the recording.
- Destroy the recording after transcription.

Attention is also paid to privacy.

This instruction also refers to existing ISCC instructions on how to install SfB, Teams etc. For technical support you can contact the ISCC helpdesk. Call 071 527 8888 or ask your question in the ICT Helpdesk portal.

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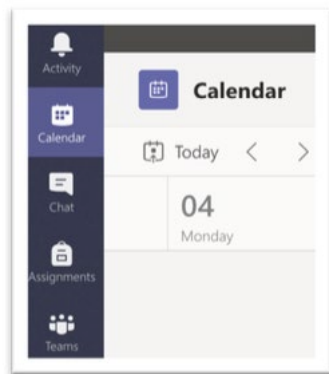
Universiteit Leiden

1. Microsoft Teams

1.1. Install and log in to Teams

- Teams can be used directly in a browser. Log in to the Office Portal (portal.office.com) on any device with internet access.
- Students log in with ULCNstudentnummer@vuw.leidenuniv.nl and ULCN password.

## 1.2. Start a Meeting in Teams

1. Go to *Calendar* on the left side of Teams

2. Start the meeting by selecting

Meet now

3. Before you start a meeting, you have the chance set up a few things:
- Title of meeting
- Audio and video settings
- Make a test call to ensure everything works properly. Select **Settings**, then **devices**. Make sure that the right audio devices are selected for the test and then click **Make a test call**.
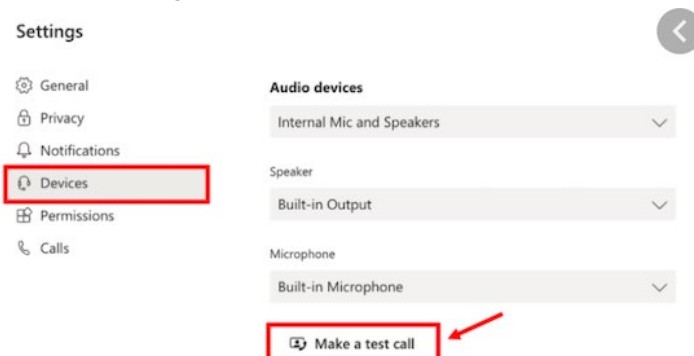
4. Start the meeting by selecting *Join now*.
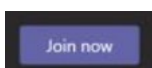
5. To invite someone to join a meeting, use the Invite **People** box to search for and invite people. Select **Show participants** in your meeting controls and fill in the ULCN – name in the search box.

1.3 Invite external users to a Teams meeting

External users can be invited to a Teams meeting with a meeting link.

1. Click on ⟳ in the box under **People** to copy the meeting link. Paste the meeting link in an email to the person.
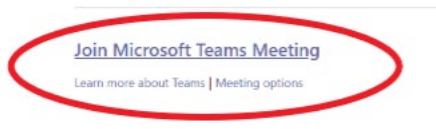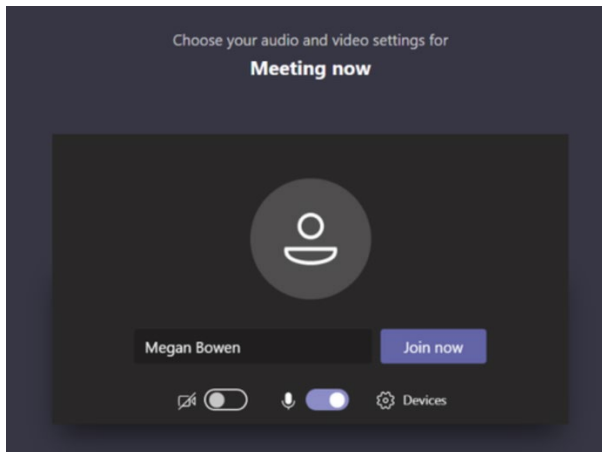
2. By opening the link, the person can join via the web or via the Teams application (if installed). It is not necessary for that person to install Office 365 or have an Office 356 account.
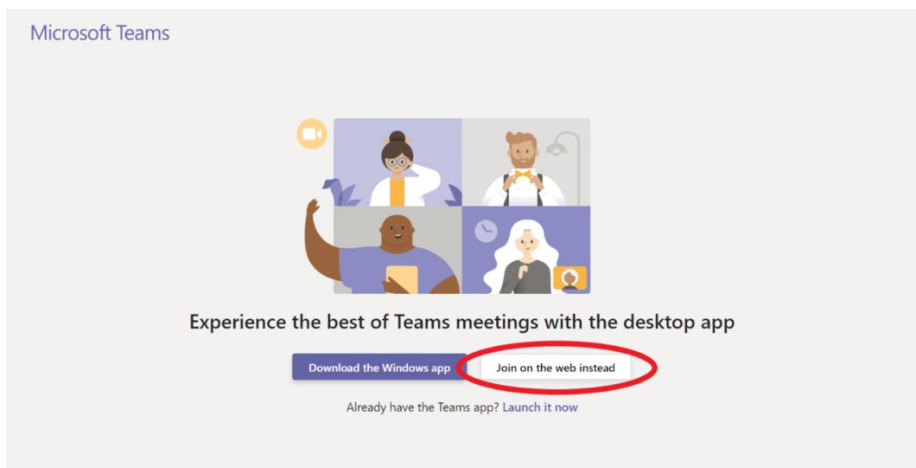
Whereas the Chrome browser allows you to join on the web with the meeting link, the Safari browser requires external users to adjust a setting:

- If you want to use Teams in Safari go to **Settings > Privacy** and disable **Prevent cross-site tracking**. Enable again once you have finished your Teams meeting.
- For more information check: https://support.microsoft.com/en-gb/office/safari-browser-support-1aac0a7c-35a8-42c1-a7df-f674afe234df

3. The person can now choose their preferred audio and video setting and **join** the meeting.

4. The student will get a pop-up notification that somebody is waiting in the lobby. Select **Admit** and start the conversation.
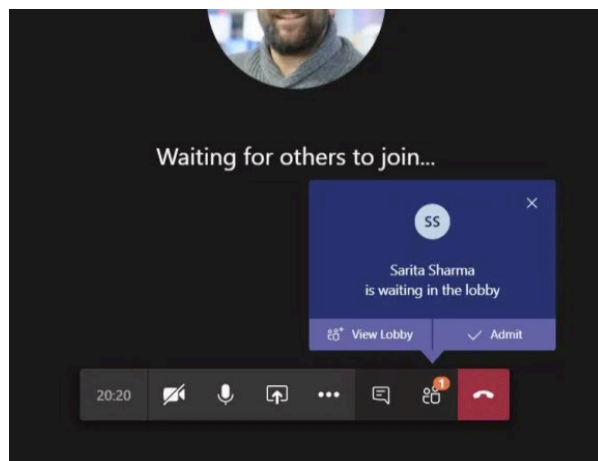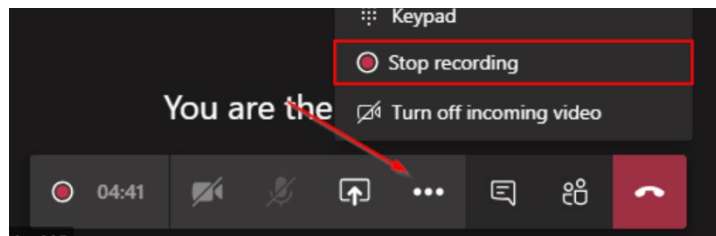
1.4 Record a Teams meeting

It is possible to record a Teams call. Everyone in the meeting is notified the recording has started.

1. Select **More options ··· > Start recording**.
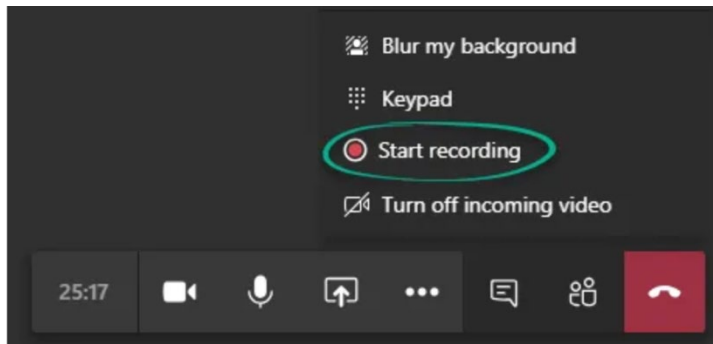
2. The recording has now started. You will be notified that the recording will appear in the <u>chat section</u> and MS Stream.

3. See step 1 on how to **Stop recording**.

Since Leiden University does <u>not</u> use Microsoft Stream, the video service in Microsoft 365, an error notification will appear as you end the recording: "Recording failed to upload to Stream". The meeting was recorded though and will show up in the meeting chat. The video will stay available in the chat for all (ULCN) participants for twenty days. The recording, an mp4 file, can be downloaded and saved to your OneDrive. (see chapter 3, page 11, for guidelines on how to safely save, share, encode and delete recordings.)
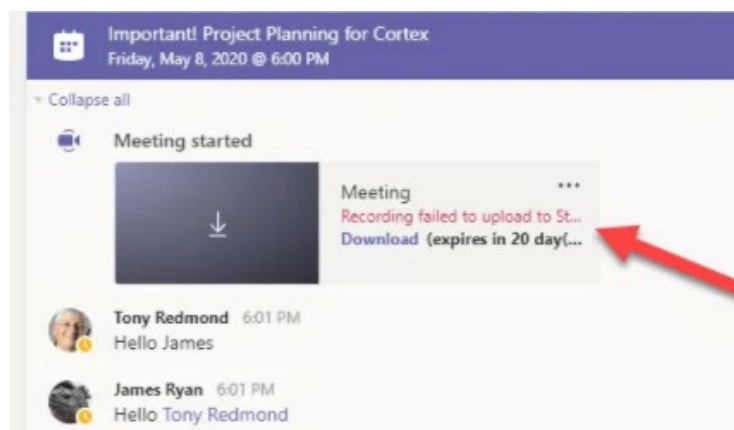
2. Skype for Business

2.1 Install and log in to SfB

You can install SfB on a Windows PC. If you do not use Office 365 yet, choose the 32-bit installer. If you do, download SfB from the Office 365 portal > *Settings > Software.* SfB for Apple iOS 8.0+ is available in the App store. The regular Skype app is <u>not</u> suitable for SfB (though SfB users can chat - IM- and call with regular Skype users).
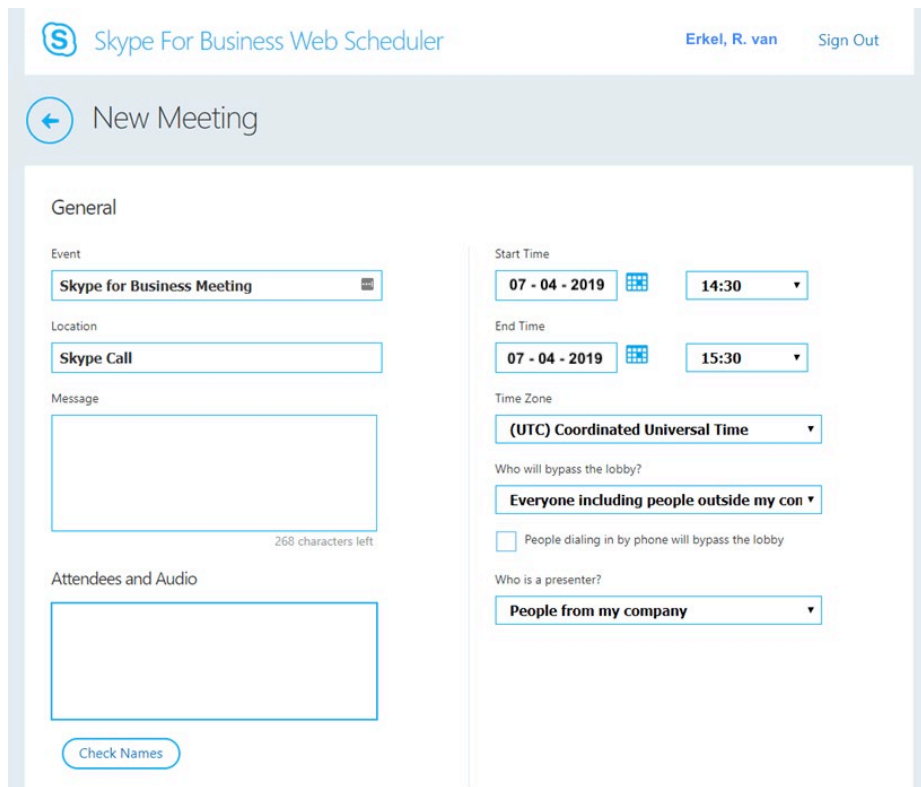
1. Start the application and sign in with your username: ULCNusername@vuw.leidenuniv.nl (studentnummer@vuw.leidenuniv.nl; e.g. s1234567@vuw.leidenuniv.nl) and your ULCN password.
2. Skype now requires you to accept the security certificate. Tick the "Don't ask this again" box and accept.

2.2 Plan and invite people to an SfB conversation

You can plan a conversation with one or more people in your uMail calendar or in the research project calendar in your group mailbox. In order to send a meeting invitation, you only need their email.

Because implementation of Office 365 was rushed, it is not yet possible to directly create an SfB invitation in the calendar. As a temporary solution, just send a 'regular' calendar invitation with a copied, SfB meeting URL.

1. Go to https://sched.lync.com/ and sign in to your Office 365 account. (studentnummer@vuw.leidenuniv.nl).
2. Set up a New Skype Meeting and fill in Subject, Date and Time. Hit [**Save**].

3. Copy the SfB meeting URL

4. Paste the meeting URL in a 'regular' calendar invitation to whomever you want to invite to the meeting.

If any meeting details change, adjust the meeting URL on https://sched.lync.com. Do not forget to change the meeting details in the 'regular' calendar invitation as well.
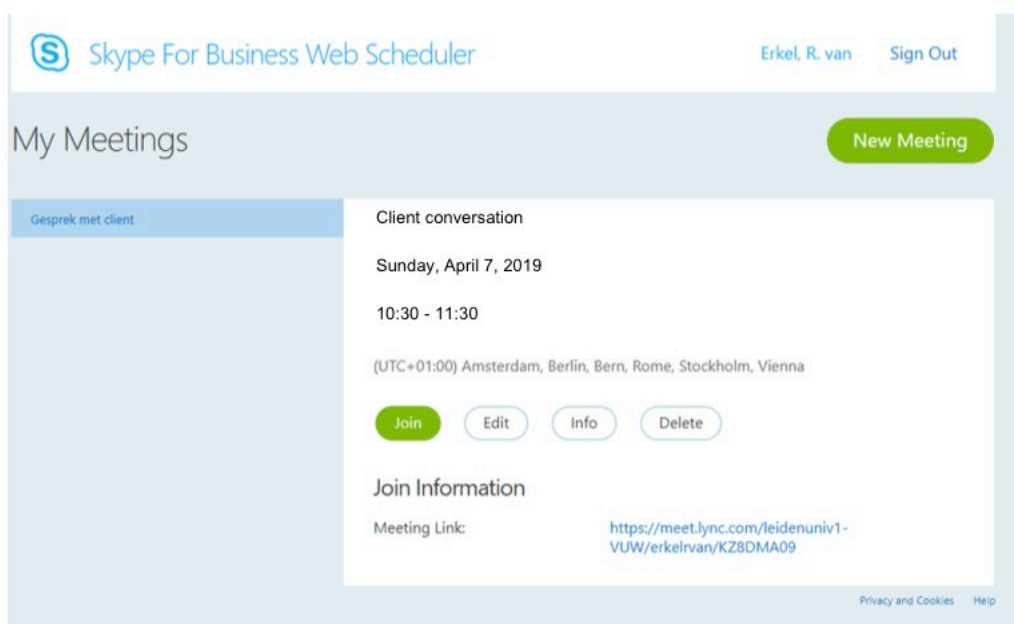
2.3 Directly invite participant

A conversation is also possible without scheduling it. All you need to do is send an SfB link to the participant.

1. Select [**Meet now**] (Find the *Meet Now* button in the *Conversations tab* on your Mac).
2. Select [**More options**].
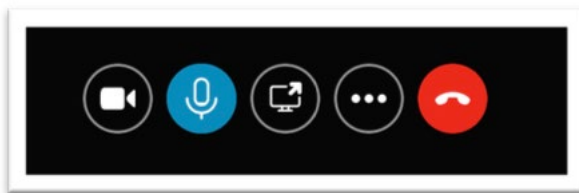
3. Select [**Meeting entry info**] (*Show Meeting Info* for Mac).
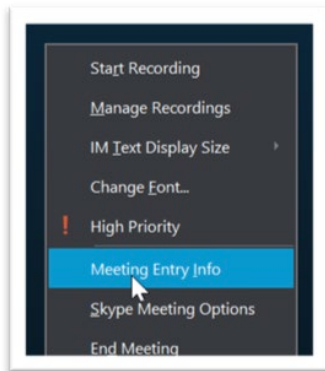
4. Copy and email the meeting link to the participant.
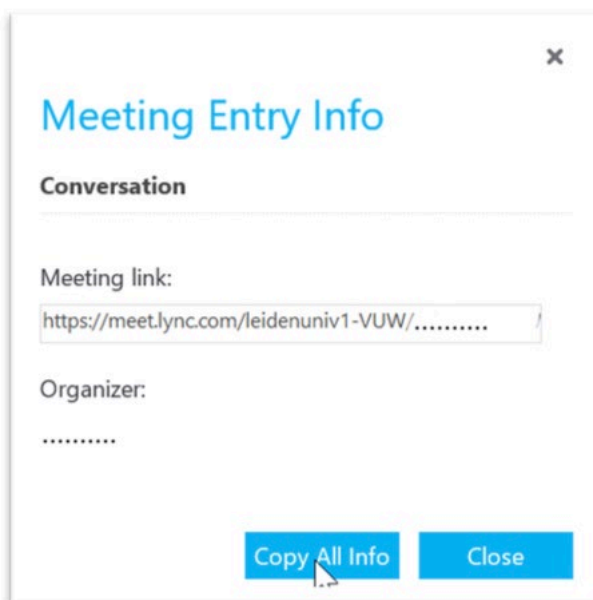
2.4 Inform participant on practical matters

Check these practical matters in advance:
- Use a neutral background for your online interview. Do not have any sensitive documents regarding your research project visible.
- Check whether you have a stable internet connection and a well-functioning camera and microphone. Participants must be able to rely on the quality of the recording.

Inform the participant in advance about the use of SfB. The participant needs to be informed about the practicalities of participating in an SfB online interview:

1. Click on the Skype **meeting URL** in the received email.
2. Choose **Skype Meeting App** (web)
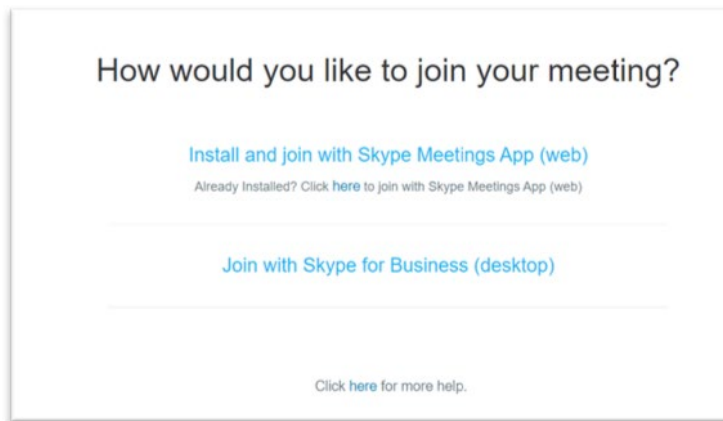
3. If the participant has not used the app before, installation is necessary:

Wait until the Skype Meetings App installer is downloaded, and then open it to install the app.

SkypeMeetingsAp....msi
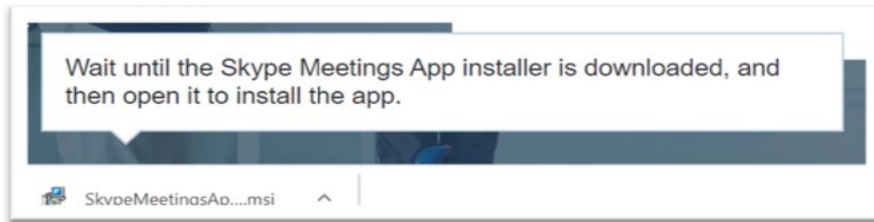
4. If the participant has used the app before, he can start the video call immediately by choosing **Open Skype Meetings App**:

Open Skype Meetings App?

https://webpoolam41e03.infra.lync.com wants to open this application.

Open Skype Meetings App   Cancel
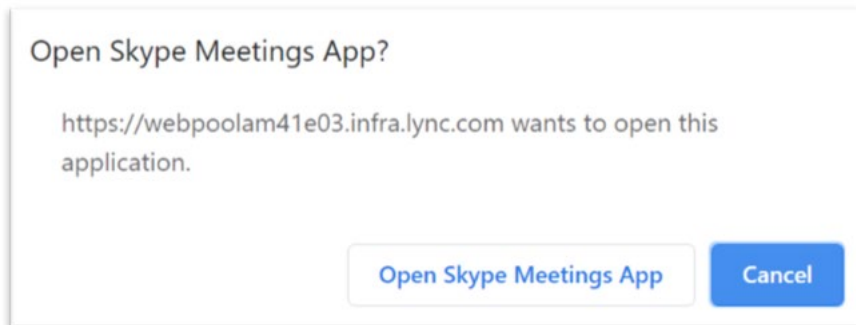
5. Use the email address as **Name** and the video call will start (see image below):
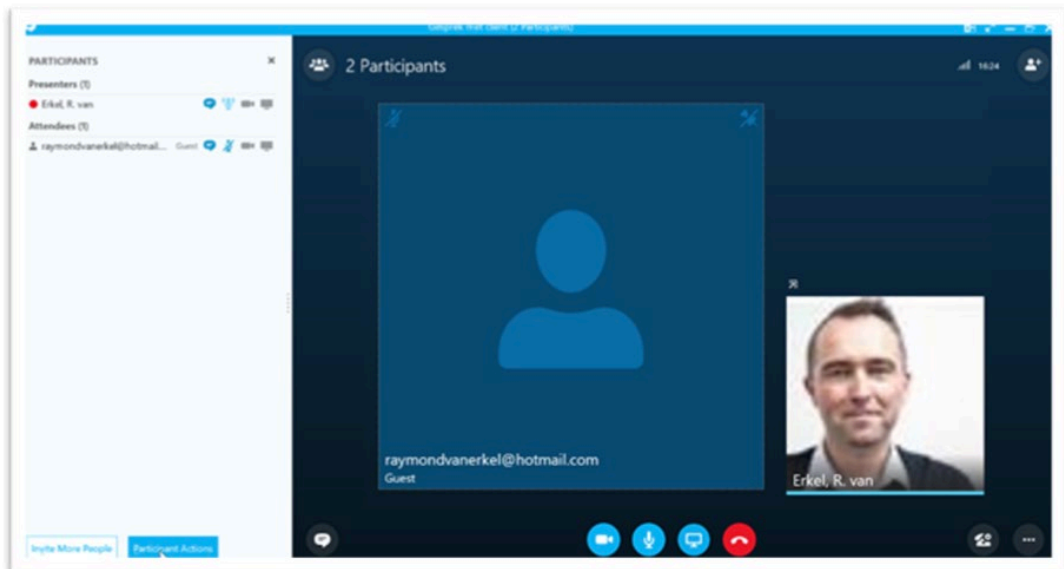
2.5 Record an SfB conversation

1. Click [**Start recording**] to record the video call. All participants will be notified.
2. The recording is saved in Documents\Videos\LyncRecordings (see below). The file is only accessible to you, the organizer of the call.
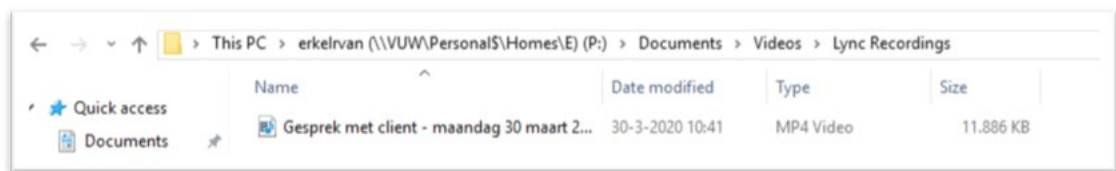
As is stated in the agreement between Leiden University and Microsoft, deleted data from SfB is deleted permanently. In chapter 3 (see below), you will find guidelines on how to safely save, share, encode and delete recordings.

3. Save, encode, share and delete recordings

Apply the following guidelines as soon as you start working the recording:

1. Password protect files and folders and save them in a secure location.
2. Save the original audio/ video recording separate from the key file.
3. In case of structured interviews: when you encode the recording with ATLAS.ti, you can save the analysis project file with or without the research data. The latter option allows you to further analyse the data when you choose to import the so-called *Project Bundle* to a different computer. We do ask you to limit the number of ATLAS.ti file copies. ATLAS.ti licences are available for at home use via SOLO.
4. In case of unstructured interviews: when transcribing a spoken recording the transcription software Amberscript can speed up the process by automatically drafting a transcription (carefully read the transcript and correct mistakes). The university has a data processing agreement with Amberscript. Transcription hours are available via SOLO.
5. The university's Kaltura video platform allows teachers and students to (temporarily) share a video recording via a private channel on the platform or via Kaltura in Brightspace.
6. Delete the video recording after it has served its purpose. Personal data cannot be saved longer than absolutely necessary. As soon as the recording is redundant, delete it from every device, including your own (laptop, PC, encrypted USB-drive or external hard drive).
7. Use Teams (and OneDrive) or J:\Workgroups\FSW\ to collaborate on documents in your research project if the nature of the data allows this. With extensive data use J:\ResearchData\FSW\Students. SURFdrive also enables safe sharing of documents and data

in a teacher's folder. However, SURFdrive saves various versions of the document when different people are simultaneously working on the same document. Regardless of the location you choose to store data, it is of the utmost importance to minimise the amount of data, data access and to password protect files.

4. Practical matters

Check these practical matters in advance:
- Use a neutral background for your online interview. Do not have any sensitive documents regarding your research project visible.
- Check whether you have a stable internet connection and a well-functioning camera and microphone. Participants must be able to rely on the quality of the recording.
- Inform the participant in advance about the use of SfB. The participant needs to be informed about the practicalities of participating in an SfB online interview.

5. Inform participant about privacy

A code of conduct has been written for remote teaching. A student honour code is used in research projects, covering confidentiality and careful treatment of personal and research data. Guidelines are applicable when conducting an online interview or focus group.

1. Be transparent in your communication with participants. Explain how you will use Teams and what you will use it for. Once you have informed participants by sending a letter of information, also provide additional information on video calling. Clearly state the purpose of the recording and do not use it for any other purposes. Indicate the period in which the recording will be used.
2. Before you can start recording you need a valid reason to process the recording in which participants are identifiable. As soon as the content and/ or voice can identify the participant, you are working with personal data. Only collect personal data with the participant's (or their legal representative's) consent for their participation in the research. Ask for consent to record audio in advance. Unless it is of added value to the research, the camera is switched off. Ask for consent to record video in advance. Do not take any screenshots or record anything without consent.
3. Collect as little personal data as possible (data minimisation). Only use the video recording and other participant data for the intended purpose you were given specific consent for.
4. Treat all research data and the online interview confidentially. When you use personal data in research forms or reports, make sure people, institutions and specific situations are not identifiable.

5. Third parties, including teachers and aid workers, are not permitted access to the online interview and research data, unless written consent has been provided by the research teacher.
6. Do not share any information you gain on individual participants that does not pertain to the research, even anonymously. Report any troublesome situation(s) involving a participant to your supervising teacher.
7. Non-public images involving a third party can only be used in an interview after their consent. Both privacy and portrait rights are important.
8. Make sure you record the correct personal data (e.g. use the correct spelling of speakers' names in the video).
9. Secure your own equipment to safeguard personal data.

Be aware that you are on screen and use professional language when you are conducting an online interview. Behave the way you would in a physical interview. Bear in mind that there might be a little delay. Regularly check in with the participant to make sure he can follow the questions and give ample time to reply.

More information

- https://helpdesk.universiteitleiden.nl/tas/public/ssp/content/search?q=Teams
- https://helpdesk.universiteitleiden.nl/tas/public/ssp/content/search?q=KI+1400
- https://helpdesk.universiteitleiden.nl/tas/public/ssp/content/search?q=sfb
- Two-factor authentication will be added as an additional layer of security. As of 22 April, employees will no longer be able to log in Teams, Office 365 and OneDrive with their ULCN details alone. As soon as the same two-factor authentication will be used with students, this instruction will be elaborated.
- For technical support contact the ISSC helpdesk. Call 071 527 8888 or ask your question via the ICT Helpdesk portal.