Skype for Business User Guide

Skype helps you stay connected to the people who are important to you via instant messaging, email, audio and video calls, persistent chat rooms, and online meetings and presentations.

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Basics

Skype for Business Icons
The Skype for Business application has five main icons along the top to access the main Skype feature:

- **Contacts icon**: Add and manage your contacts
- **Conversations icon**: View your history of instant messages, conversations, and phone calls
- **Phone/Dial icon**: Make outbound calls using the dial pad
- **Meeting icon**: Join Skype meetings on your calendar
- **Settings icon**: Manage your Skype for Business settings and options
Find and add a contact

In Skype, contacts are the online identities of the people you interact with most often. They’re a key part of the Skype experience. One of the first things you’ll want to do as you begin using Skype is to start building a list of contacts.

1. In the search field on the Skype main window, type the name, email address, or phone number of the person you want to add.

2. A list of Contacts will appear. Point at the picture (or picture display area) of the person, and click the “...” icon for More Options.

3. Navigate to Add to Contact List and select a group for your new contact to belong to.
Create a Contact List/Group

1. Navigate to your Skype main window and make sure you’re in the Contacts tab (click this icon to be sure).
2. Navigate to the Groups sub tab.
3. Right-click on any of the Group Names and navigate to Create New Group to create a Contact List/Group.

Send an instant message (IM)

To start an IM conversation:

1. Locate the person you want to send an IM to, either through search or your Contacts list. Then do any one of the following:
   a) Double-click anywhere on their contact listing.
   b) Right-click their listing and click Send an IM.
   c) Hover over their picture in the Contacts list, and click the Send an IM button on the Quick Skype menu.

2. Type your message in the text field at bottom of the window, and press Enter.
   a) **Bonus Tip:** Add carriage return lines using Shift+Enter before finally sending your message.
Before your call, check your audio device

Before using Skype to make a call or join a conference, set up your audio device to ensure it is working correctly. You can use your computer’s mic and speakers, or plug in a headset.

1. Click **Select Your Primary Device** in the lower-left corner of Skype.

2. Click **Audio Device Settings**.

3. Click the menu under **Select the device you want to use for audio calls**.

4. If you have more than one audio device, pick the one you prefer from the dropdown menu.

5. Under **Customize your device**, drag the sliders to adjust the speakers and microphone.

6. Click the green arrow next to the speaker to hear a sample tone.

Adjust and test your microphone.

**The blue indicator** helps you choose the appropriate level. If you have a handset (aka desk phone) pick up the receiver and speak into it. If you have a headset, speak into the microphone.

Under **Secondary Ringer**, make sure **Also ring** is checked and your computer speakers are selected if you would like your computer speakers to ring during an incoming call as well as your headset.

If you aren’t able to hear the ring from your computer speakers, then you will need to go into the sound volume settings (click on the speakers icon on your taskbar) and make sure the volume is loud enough for you to hear.
Set your Voicemail Greeting

1. Click on the Phone/Dial icon
2. Click on the Voicemail icon
3. Click **Change Greetings** to set your voicemail greeting.
Calls

Make a call

Call someone from your contact list

1. Hover over the contact listing for the person you want to call.

2. Click the Phone icon to call the contact.
   –or–
   Click the arrow next to the Phone icon and select an alternate number if one is available (like a cell).

   ** Keep in mind: The next time you place a call to an individual you have called before, it will default to the last number used. **

Call someone using the dial pad

1. In the Skype main window, click the Phone/Dial icon to navigate to the dial pad.

   ![Dial Pad]

2. Click the numbers on the dial pad or type the number in the search box using your keyboard.
   a) You can also type in the number on the main contact list tab instead of having to switch to the Phone/Dial tab.

3. Click Call.
Answer a call
When someone calls you, an alert pops up on your screen.

Do one of the following:
1. To answer the call, click anywhere on the photo area.
2. Click **Ignore** to reject the call and send to Voice Mail.
3. Click **Options** to take other actions:
   a) Send the call to Voice Mail.
   b) To redirect the call, click **Mobile** or **Home**.
   c) **Reply by IM** instead of audio or video
   d) Set to **Do not Disturb** to reject the call and avoid other calls.
   e) If you get a video call, but want to answer with audio only, click **Answer With Audio Only**.
Transfer a call (Direct)
You can directly transfer your current call to another person.

1. Click the **Call Controls** icon

2. Click the **Transfer** icon

3. Type in the name or number of the person you want to transfer the call to. Hover over their picture and click the down arrow to select which number to transfer to.

   ![Transfer Call](image)
Transfer a call (Consultative)

With a consultative transfer call, you can talk to the other person you wish to transfer the call to, prior to making the call transfer. In this case while you are already on a call, you will call another person. This will put the first call on hold and allow you to talk to the second person. Then you can transfer the call and connect the first person with the second person.

1. Click the Call Controls icon

2. Click the Consult icon

3. The first call will be put on hold. Type in the name or number of the person you want to consult with before transferring the call to them, then click Consult. A chat window will open and you can either IM or call who you want to consult.

4. When you’re ready to transfer the call, click the Transfer icon.
Call forwarding / Simultaneous Ring

Call forwarding: You can set Skype to forward your calls to another phone. This is useful if you are away from the office and are expecting an important phone call.

Simultaneous ring: You can enable simultaneous ring so both your Skype phone and another phone (ie. mobile phone) will ring simultaneously.

- **Note:** If you do not answer the phone, your mobile phone voicemail may pick up before your Skype voicemail.
- **Note:** If your mobile phone is turned off, your calls will go straight to voicemail.
Conference Calls

Joining a Skype Meeting

From your computer
1. Click on the Meeting icon to view your calendar.

![Meeting Icon](image)

2. Right click on the meeting and select “Join” to automatically join the Skype meeting/call.

From your phone (full Skype experience)
Use this option if you are on a reliable WiFi connection.

1. Open the Skype app on your phone and perform the same steps as you would to join from your computer.
2. Select the option for Use Skype for Business (full audio and video experience), then tap OK.

![Join Meeting Audio](image)

From your phone (audio-only)
Use this option if you are not on a reliable WiFi connection.

1. Open the Skype app on your phone and perform the same steps as you would to join from your computer.
2. Select the option for Call me at, enter your mobile phone number, then tap OK. (It will call you)

![Join Meeting Audio](image)
Scheduling a Skype Meeting via Outlook

Follow these steps to create a future Skype meeting and invite participants. You can have up to 100 participants.

1. Open your calendar in Outlook and click the New Skype Meeting button

2. A new meeting request appears that has a hyperlink to the meeting and all the relevant dial-in information pre-populated.

Meeting participants with Skype installed: They simply click the link to join the online meeting.
Meeting participants calling from a phone: They simply call the conference # and enter the conference ID.
Meeting participants joining from a computer without Skype installed: When they click the link, they will have two choices:
   1. They can download the Skype Web App plug-in. This is preferred as it provides the full Skype experience including audio/video.
   2. They can join the meeting via their web browser. This method has no audio or webcam video, but allows screen sharing so users can view your shared desktop or program. They will need to dial in from a phone to hear the audio.

TIP: Replace the meeting location with the conference phone number and access code (formatting example: 855-239-0158; 15716). This will allow cell phone users to click the location from their calendar app, and their phone should automatically call the phone number and input the access code for them.

TIP: Avoid scheduling conflicts when using shared organizational conference lines by either creating the meeting invite on the conference line’s calendar or inviting the conference line to your calendar.
Share your desktop or a program

Skype lets you share information on your computer in a couple of ways: Desktop sharing when you need to switch between programs or work on documents from different programs. Program sharing when you need to present specific programs or documents but don’t want people to see anything else on your desktop.

1. Click the Present icon

2. Then do one of the following:
   a) Click Present Desktop to share the content on your desktop (shares everything on the selected monitor).
   b) Click Present Program, and select the specific program you want to share (shares only the program window’s content).

3. Your Skype status now changes to Presenting, and you won’t receive instant messages or calls.
4. Use the sharing toolbar at the top of the screen to stop sharing, or give control to participants. You can only give control to other meeting participants within your organization.

Best practices for conference calls

One staff member required on all calls

- A leader is required for a Skype meeting to begin. A leader can be you or another meeting organizer from your organization.
- You can join the call as a leader by doing one of the following:
  - Joining via Skype (from your desktop or mobile app)
  - Calling in from a phone number connected to your Skype account
  - Calling into the conference line and entering your PIN to be designated as a meeting leader.
- If no one on the call has joined as a leader from your organization, your call will not start and everyone will be stuck in the lobby.
- If you can’t make it to the call, make sure someone else from your organization hops on the call as a leader.

Screen sharing with external participants

IF you need to share your screen / you need participants to share their screen:

- It’s better to use a third-party client, such as Go To Webinar, unless you know for sure that participants are able to install Skype or use the web app.
Due to varying security policies at other organizations, some participants may simply not be allowed to install Skype or use the web app.

**Choosing a conference line**

*If your call is audio-only / you want to record a webinar to send out later:*

Use Skype for Business (you’ll often get better audio quality when using Skype)
  - Use your organization’s conference line call-in info for larger meeting invites (more than 5 people).
  - Use your individual Skype call-in info for smaller meeting invites (less than 5 people).

**Leading/Managing a call**

You can decide who gets into a call and who has to wait until you let them in.

**Adjusting Skype Meeting Options**

Join your call ahead of time to adjust the Skype Meeting Options.

1. When you have joined your call, click the *Options* icon, then click *Skype Meeting Options*.

2. You can read more about the different options on the [Microsoft Website here](#) to decide what’s best for your meeting.

**Skype Meeting Options**

- *Conversation*
  - These people don’t have to wait in the lobby:
    - People I invite
    - Announce when people enter or leave
  - Who’s a presenter?
    - People scheduled as presenters
    - Presenters can share content and let people into the meeting.
  - Who can look at content on their own?
    - Presenters only
    - This lets people browse a separate copy of what’s being shared without affecting what everyone else is seeing.

**From your computer:**
If you have two monitors, you can keep the Skype conference call window open on one monitor, then your notes or screenshare on the other monitor. That way, you can see if someone needs to be admitted to the call.

**From the conference room (phone-only):**
- Prior to your call, make sure to set the Skype Meeting options to allow anyone into the call.
  - This is to prevent an automated voice from interrupting your call to tell you someone is waiting to be admitted from the lobby. What happens in that situation is that while you are following the automated voice’s instructions to admit participants from the lobby, the rest of the people on the call will just think you dropped off the call.

**From the conference room (computer and phone):**
- Make sure to designate one person to checking the Skype conference call window on the computer in case anyone needs to be admitted to the call (especially if they join late to the call).
- If the call gets put on hold randomly or something strange happens, always check the USB connecting the conference phone to the computer first – it may have been disconnected, which would then put your call on hold automatically.

**Leading from a cell phone:**
- Using the app will provide the best experience, rather than calling in directly.
What others can see about you: Presence Information

Your presence information includes your availability status (such as Available or Away), a color-coded presence indicator (such as green, yellow, or red), your schedule, your location, and your personal or out-of-office notes.

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Response Group Check In/Out

If you are part of a response group (i.e. main office line group), then you can check in and out of the response group to be able to answer calls.

1. Click on the down arrow next to the gear (settings) icon.

2. Navigate to Tools > Response Group Settings

3. Log in using your email address and password.

4. You can see which response groups you are a member of and can check in and out of the response group.
Resetting Your Pin

If a subscriber access number has been setup for your organization, then you can call that number and access your voicemails and update your voicemail greeting. You will need a PIN to access your voicemail. You should have received an email from “Microsoft Outlook” with your PIN when your Skype account was first setup.

If you need to reset your PIN, follow the below steps:

1. Click on the Phone/Dial icon and then the PIN icon. This will open a window in Internet Explorer.

2. Click on the Sign In link and reset your PIN.

Dial-in Conferencing Settings and PIN Management

Personal Identification Number (PIN)

To set your PIN and Conference ID you must first sign in.

Sign In

Conference Dial-in Numbers

Region Number Available Languages
Recording a Polished Webinar to Share Later

Scenario: You want to record a webinar called “How to Record a Webinar 101” to share with staff later, but you don’t necessarily want the hassle of moderating a webinar as you record it – you want a polished, finished product with no interruptions.

1. Schedule a meeting with a conference line.
   a. This won’t work if you call one other person or if you join your own Skype meeting.

2. Join the conference line’s call.

3. Click the **Options** icon and then click **Start Recording**.

4. When you have stopped your recording, it will take Skype a while to process your recording file, depending on how long your recording is.

5. When Skype is done processing your recording, you can find it in the **Options** icon menu by clicking on **Manage Recordings**.
FAQ

Can I access Skype on my home computer?

Yes, but the help desk cannot support or install software on your personal computer.

Do my conversations get saved?

Yes, your conversations get saved in your Outlook under the Conversation History folder.

Do I need some type of audio device?

Yes. At the office, you will be provided a headset or handset that will connect to your computer so you can make and receive phone calls. If you have a laptop, most have an integrated microphone, speakers, and webcam.

How will I hear the phone ring for an incoming call if I have a headset?

Your computer speakers ring simultaneously with your headset so you can hear incoming calls. Your speakers need to be on and the volume audible to hear the calls. Navigate to the “Before your call, check your audio device” section for more details.

What if we have volunteer accounts or staff who move around to different work stations?

Your phone number is tied to your login. If you happen to use a different machine on a particular day, you will need to login with your credentials and your settings will be available.

For any further questions, please contact the HelpDesk.
Skype for Business

Cheat Sheet

Skype main window
Skype for Business is an enterprise-ready unified communications platform. Skype provides a consistent, single client experience for presence, instant messaging, voice, video, meetings, and desktop sharing.

NOTE: Voicemails will be kept within Skype for 14 days. You can always listen to your voicemail from your Gmail account.

NOTE: When someone calls you, both the computer speakers (if they are not muted) and headset will ring.
Skype conversation window
This is your conversation window where you can communicate with others via IM, phone call, or video conference.

- Conversation window where you can type an IM
- Start a video conference
- Call person using Skype
- Share your desktop (for sharing your entire screen) or program (when you just want to share one program but you don’t want people to see anything else on your desktop)
- More options

**TIP:** You can drag and drop people from your contacts list into the window to make it a group conversation. This works with phone calls as well.