

# Training Guide

## Skype for Business



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## Change Control

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## Document Approval

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V1.0	31 October 2017	Jo Menary	Lead Trainer
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## Hints and Tips

	This symbol suggests a tip or a good method of working for speed and efficiency
	This symbol suggests a caution or an action to be aware of
	This symbol indicates an Information Governance warning
	This symbol indicates hints and tips that support digital optimisation

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## Skype for Business

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Skype allows users to communicate and collaborate with each other via 1-1 video calls, video conferences/meetings and instant messages.

### Important License Information

There are 2 levels of license:-

1. **Standard CAL** - This enables users or devices to connect to Skype for Business to give them access to Status, Instant Message and 1-1 Voice and Video Calls. Standard CAL users cannot create Skype for Business Outlook meetings but they can join Outlook meetings created by others.
2. **Enterprise CAL** - This is an addition to the Standard CAL and enables users to schedule meetings with audio and video calls, desktop and application sharing as well as dial-in conferences on mobile phones, tablets PCs and Macs.

If a CAL license is needed, please be aware that there is an additional cost involved and any requests should be made via the Service Desk. The Service Desk will then log a call and put it in the Configuration Management queue.

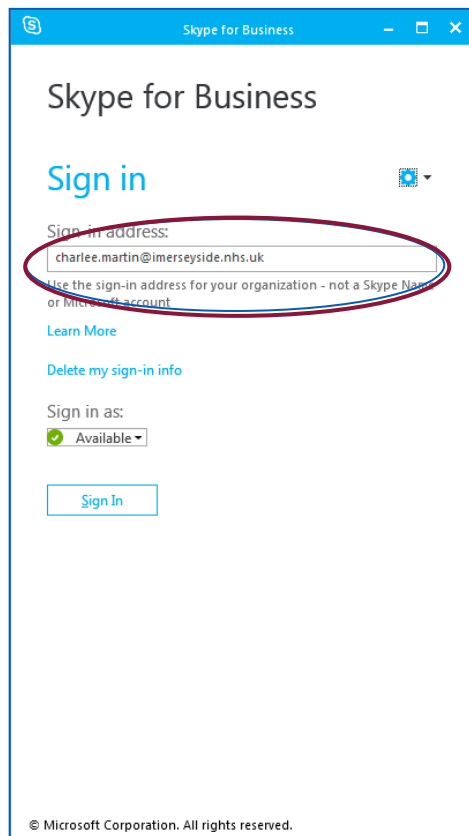
The user will be asked for management and budget authorisation due to the cost of the licenses. The user will also be advised that Skype for Business works better with earphones which they can also order through the Service Desk (although iPhone/Android earphones are ok).

## Access Skype for Business

- Click [Skype for Business](#) icon on the tile or desktop.



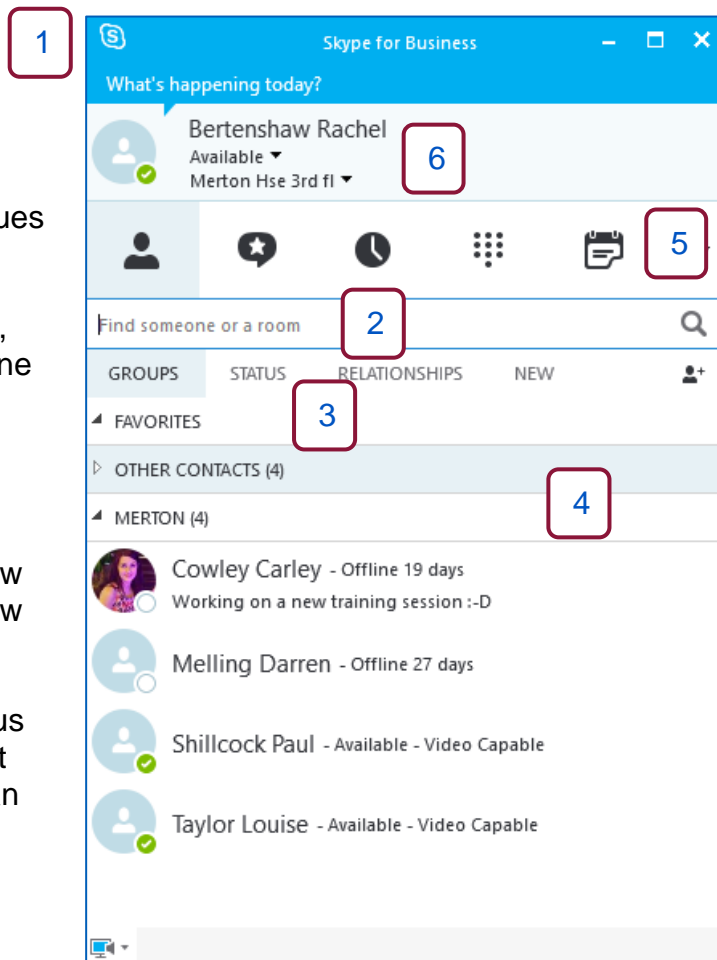
- The [Sign in](#) page for Skype for Business will launch.



Skype will automatically sign in.

## Navigate around Skype

1. **What's Happening today?** Type a message into the field; click the drop down arrow to change location.
2. Find contacts from your work email account.
3. Contacts that are added as Favourites will be listed here.
4. Create specific Groups of colleagues for easier access.
5. The five icons represent Contacts, Chat Rooms, Conversations, Phone and Meetings.
6. Option to set your location and change your availability status.
  - Click on the dropdown arrow with the current status below your name.
  - Select the appropriate status from the menu. This will let other users know if calls can be taken.

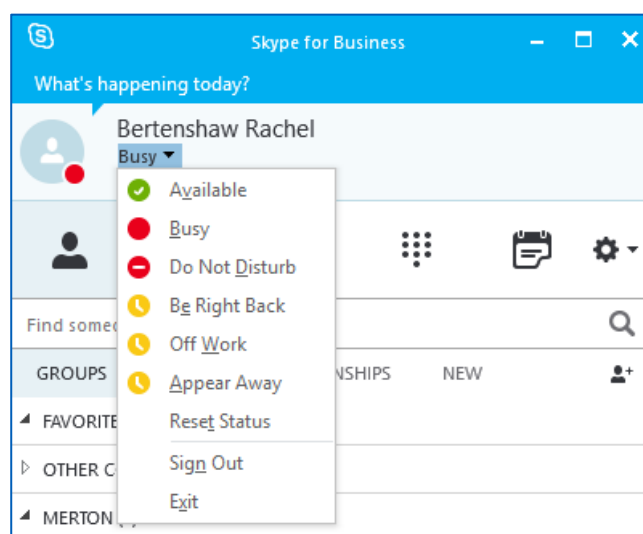


## Status options

**Available** - the usual default setting unless there is an appointment in the **Outlook** calendar.

**Busy** - This can be set up to change if the user has been inactive on Skype for a set amount of minutes. This would indicate the user may not be at their desk when sending an IM.


**Do not disturb**—this setting will allow IM to be sent but there will be no sound to the notification.

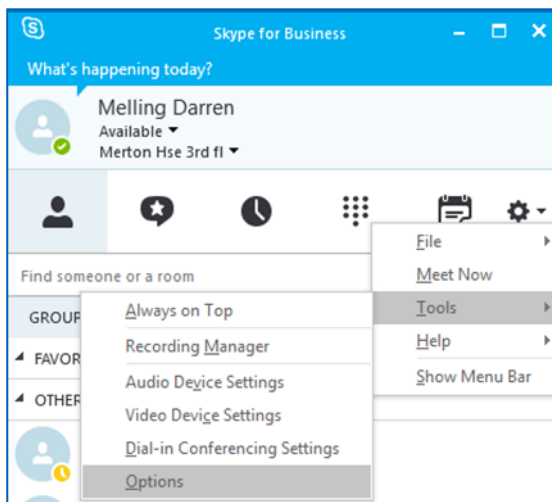


## Configure Skype for Business

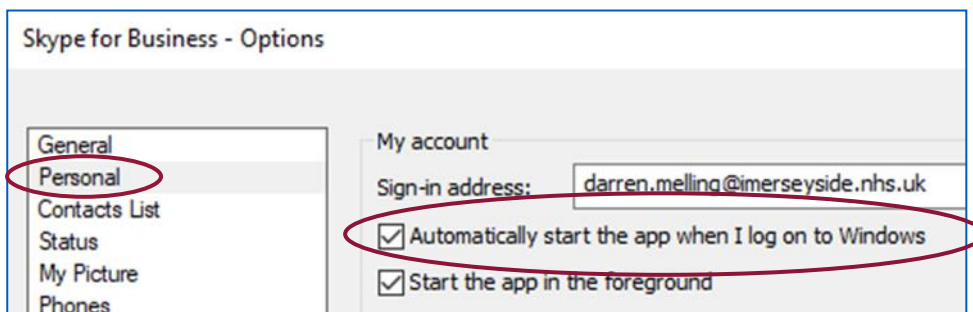
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Skype can be configured to automatically log in on Windows Start-up.

- From the [Contact](#) screen, select the [Settings](#) icon .
- Select [Tools](#) → [Options](#).



- From the [Options](#) screen → select [Personal](#) on the left menu.
- Tick [Automatically start the app when I log on to Windows](#).




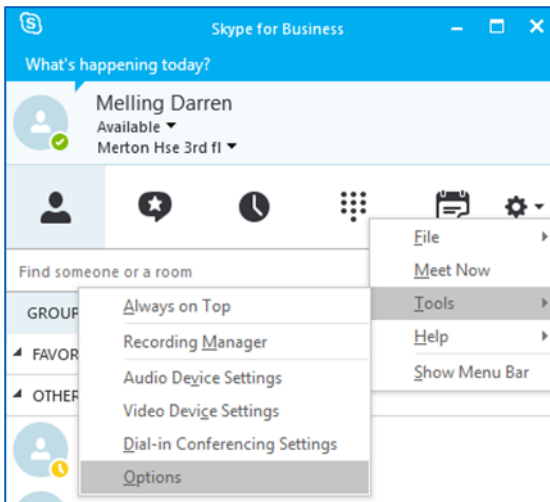
- Click [OK](#).

## Configure Phone Numbers

Certain account rights make it possible to call a contact on their phone.

However, if phone numbers are not configured, the number displayed on the contact's phone will be a Skype generated American number.

- From the [Contact](#) screen, select the [Settings](#) icon .
- Select [Tools](#) → [Options](#).



- Select **Phones** from the menu on the left.
- Select the phone number to enter and enter the numbers in the box provided.
- Click **OK**.


A list of phone numbers in the **My phone numbers** field will be displayed.

- Choose whether or not to include these in the contact card on **Skype**.

## Integrate Skype with Outlook and Exchange

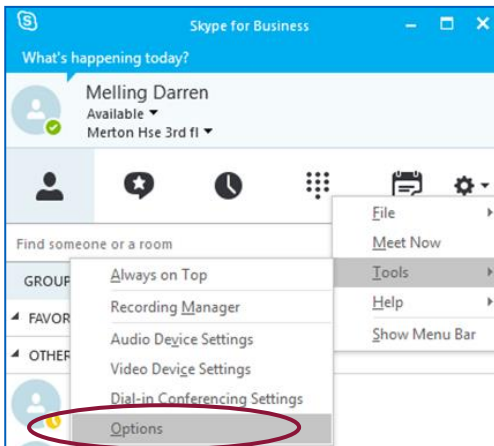
Skype will automatically synchronise contacts and availability in accordance with your Microsoft Outlook and Exchange account.

This will automatically update your Availability status.

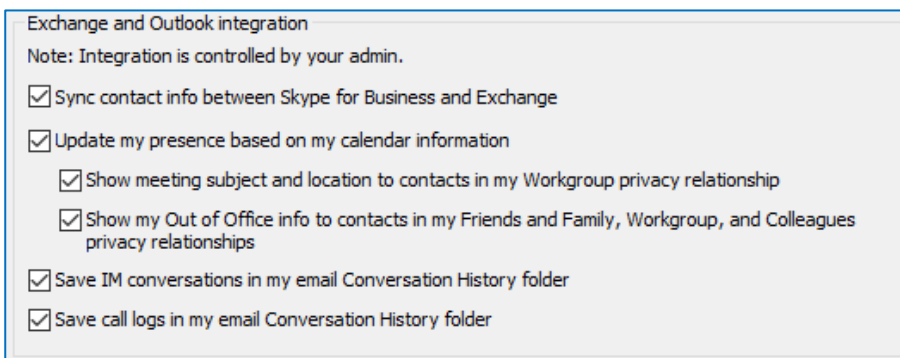
- From the **Contact** screen, select the Settings icon .



- Select **Tools** → **Options**.



- Select **Personal**.
- In the **Exchange and Outlook Integration** section, select the options to integrate:



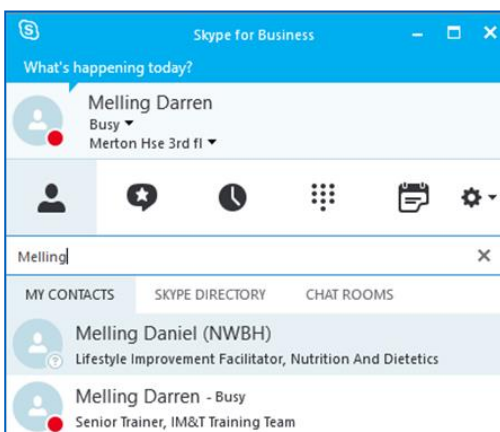
- Select **OK**.

## Add a Contact

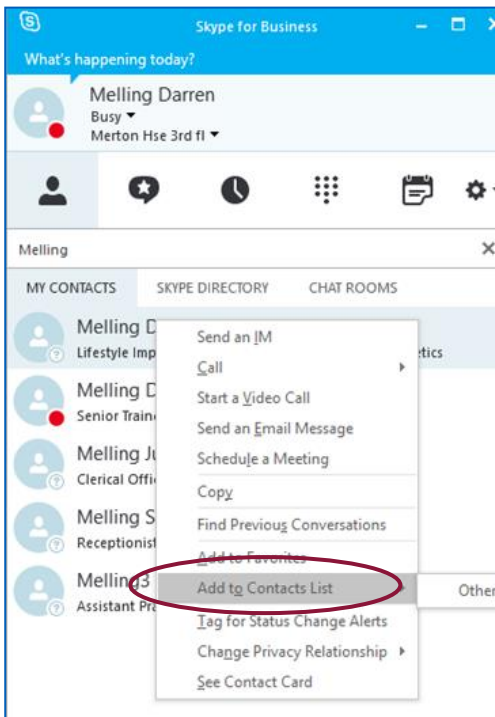
**Contacts** can be added to the **Skype Contacts List** in two ways:

If contacts are integrated with Exchange:


- Type a person's name in the search bar and anyone who matches that name will display.

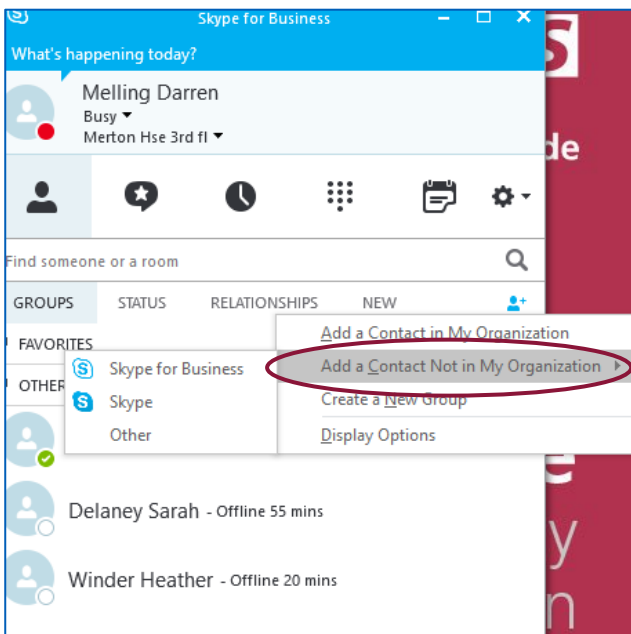


- Right click the contact → select [Add to Contact List](#)



If contacts are not integrated or the user doesn't want to use the search option:

- Select the [Add a Contact](#) logo .
- Select [Add a contact from within the organisation](#) or [Add a contact from outside the organisation](#).



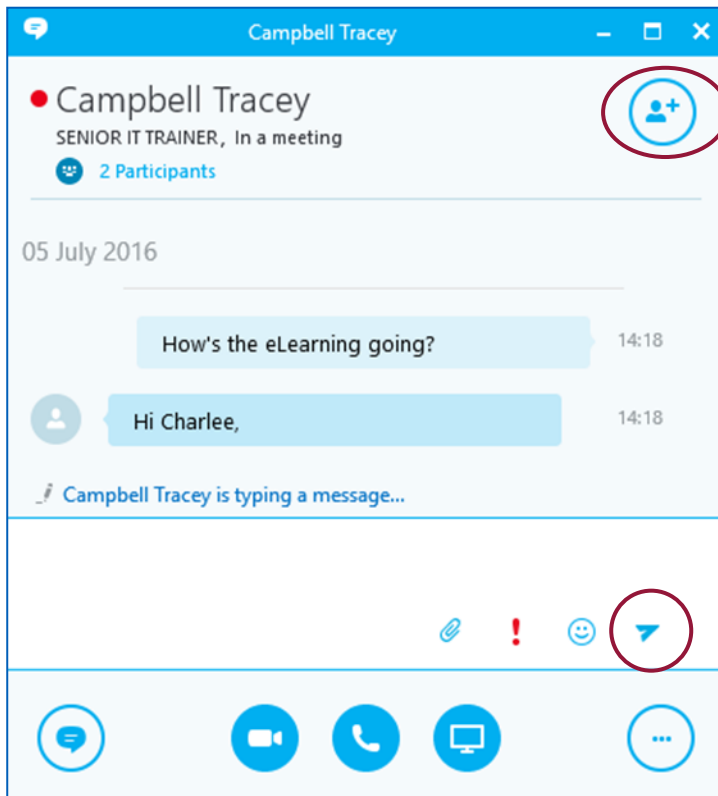
## Send an Instant Message (IM)

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An IM is similar to a text message sent online but with no character restrictions.



Only users with Skype are able to send Instant Messages (IMs).



- Double click on the contact to display a new window.
- Type the message.
- Press the **Enter** on the keyboard **or** click the **paper plane icon** at the bottom of the IM.

As the recipient replies, a pencil icon will display to indicate that text is entered.

Additional contacts can be added if required, click the plus contact button on the right of the window.

Icons below the text field are for attachments high priority, and emoji's.

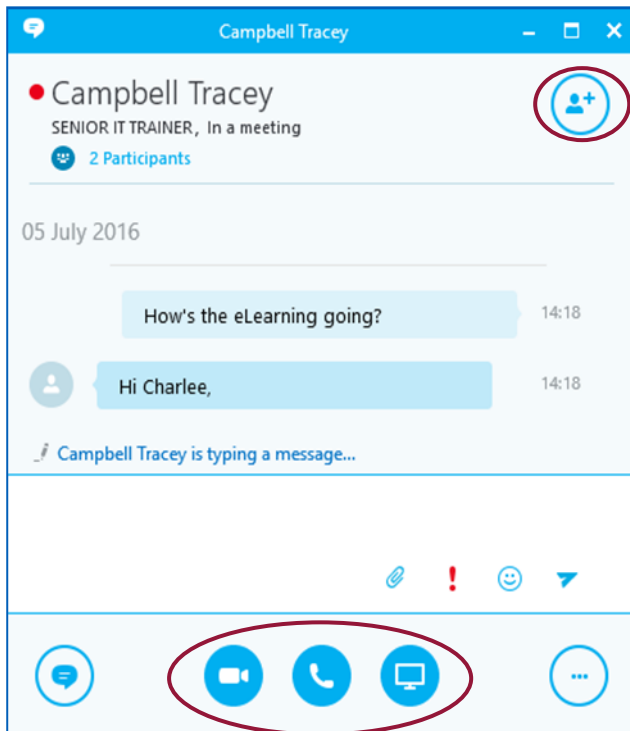


Icons at the very bottom are for Video Call, Call and Present.



## Add Participants to an IM

- Select the icon in the top right corner.



The message will load and display the users at the top of the screen. This will show who has sent the message.

The meeting can be changed to become a video conference call or an audio conference call.



**Video Conference** - allows the option to visually see those in the meeting. When a person speaks, they will appear on the screen in a bigger picture to the others.



**Call Conference** - The users will have their names and if a photo has been set up their image will also display. The name and image will show bigger when a person speaks.



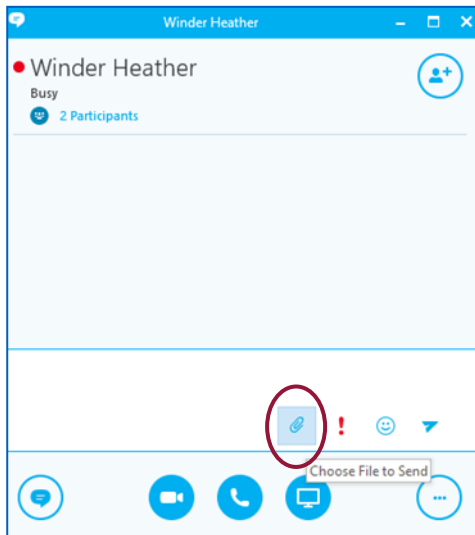
**Screen Sharing** - allows the caller to show everyone on the call their screen. This is ideal for presentations.

## Send a Document or File

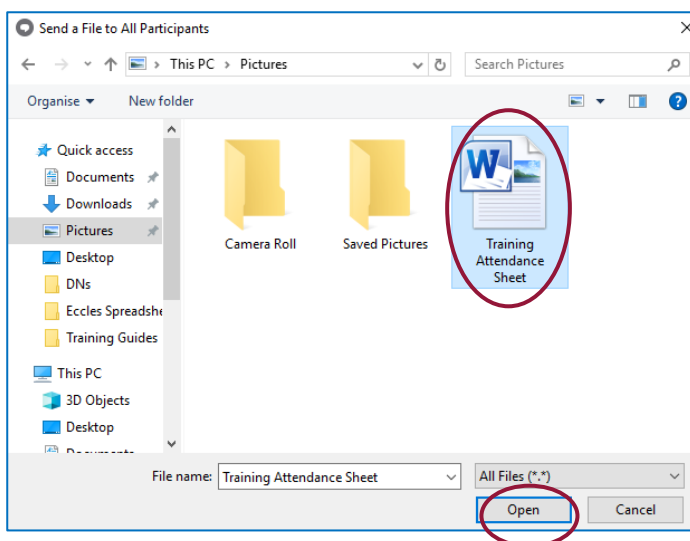
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Skype for Business has the ability to allow the user to share documents with other contacts via Instant Message.

- From the IM window click on the [Paperclip](#) icon.



- Select the file to send to the contact → click [Open](#).

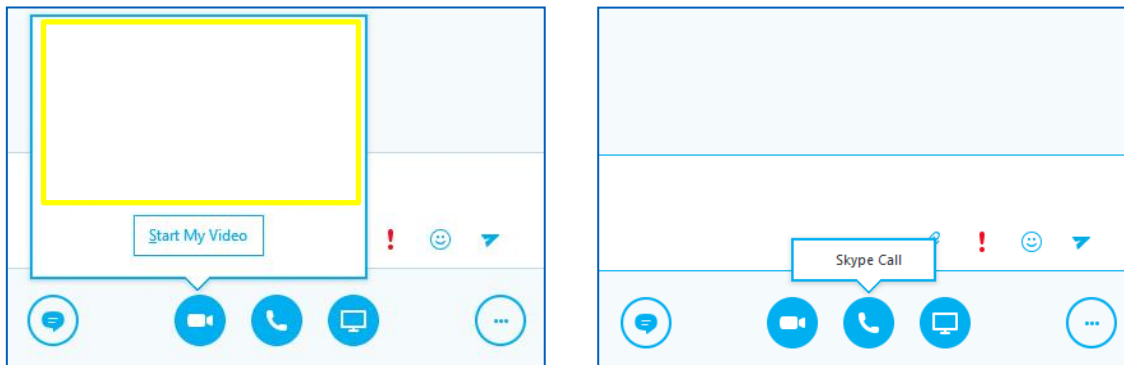


The document will send to the selected contact.

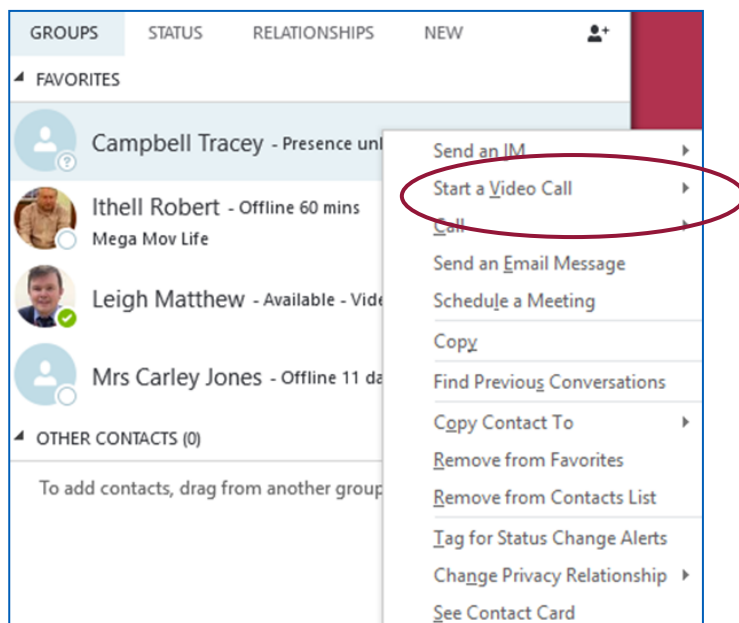
## Start a Call or Video Call

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Use the icons located at the bottom of the screen to start a call from within an IM.



A call can be created whilst IM is closed.



- [Right-click](#) on a contact to display another window.
- To start a video call click [Start Video Call](#).

The list of profiles for that user will be displayed.

- For a call with no video click [Call](#).
- To end the call; click the [red telephone icon](#) at the bottom of the window.



The contact will need to be logged in for the call to connect. Otherwise, a dial tone sound will be heard with an IM message that reads [Couldn't reach contacts name](#).

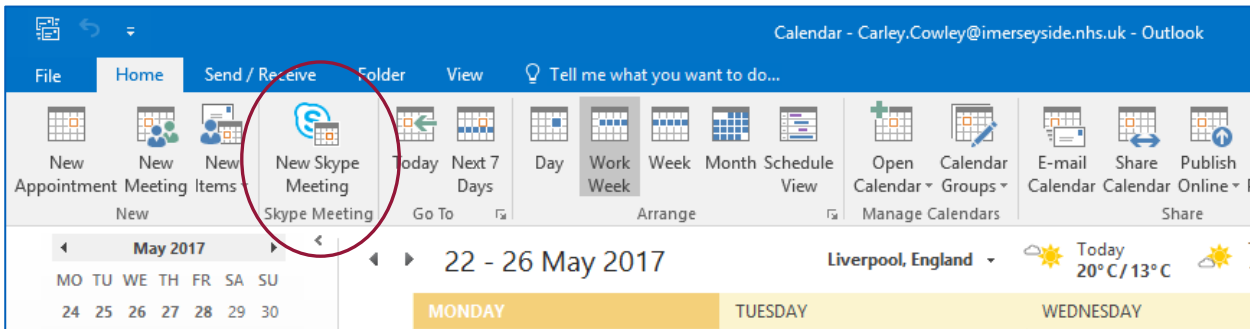


## Create a Skype Meeting

This option is only available with [Enterprise CAL licenses](#).

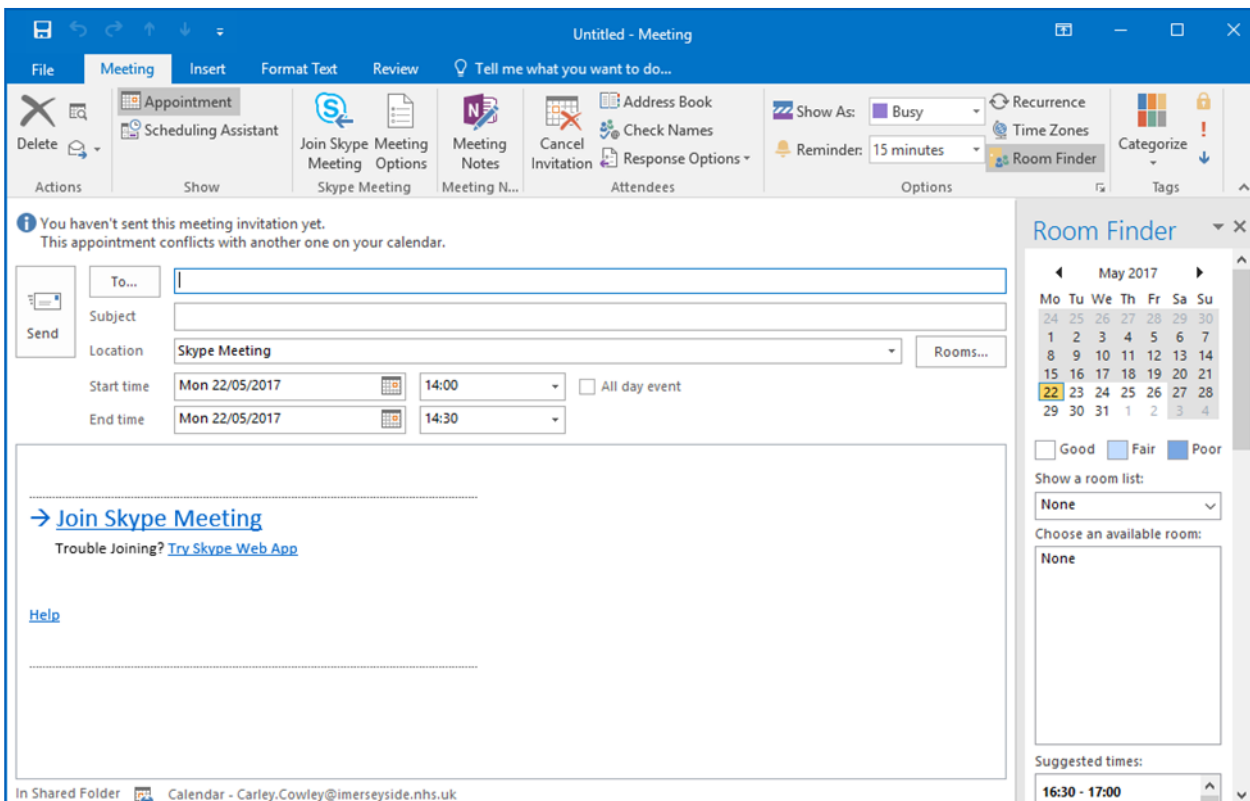
A future meeting can be created via Outlook Calendar.

- Select [New Skype Meeting](#).
- Choose who to invite to the meeting.
- Set a date and time.



This will send an email invitation to the other users.

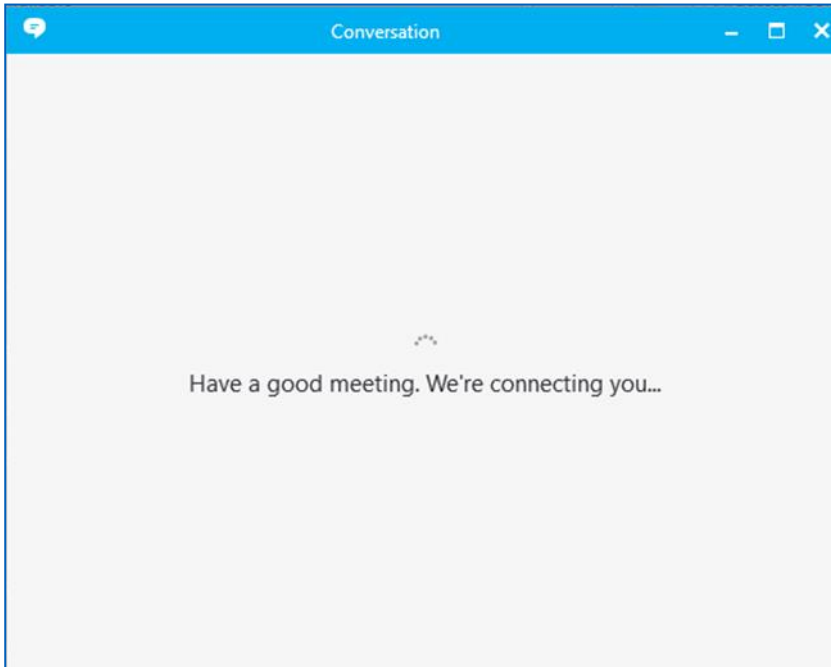
If the invitation is accepted an appointment will save in both Outlook Calendars.



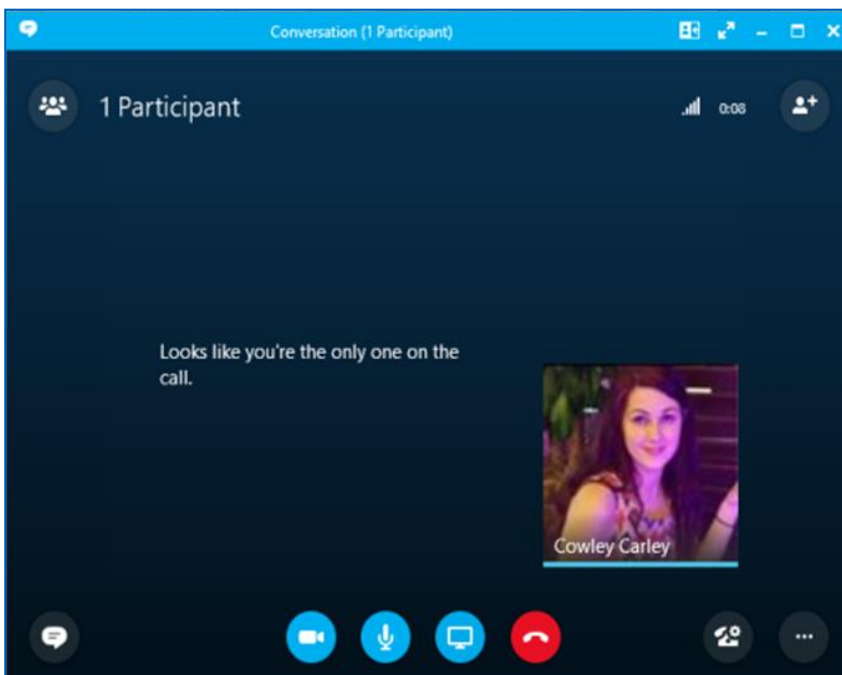
## Join a Skype Meeting

- Open the [Appointment](#) in [Outlook Calendar](#).
- Click the [Join Skype Meeting link](#) to open Skype.

The link will load Skype and open the meeting.



The Skype Meeting will load and if the internet connection is slow, it may take a few minutes. Once it has loaded it may show that no one else is on the call yet. When another person joins their name appears and the participation number increases.





## Join a meeting as a Guest user

Where a user does not have [Skype for Business](#) installed, or no [Skype](#) account at all, they can join a meeting as a [Guest](#).



A meeting invitation must be sent via Outlook by the meeting organiser.

- From within the invite, click on the [Join Skype Meeting](#) link:

The screenshot shows an Outlook meeting invitation. The 'To...' field is empty. The 'Subject' field is empty. The 'Location' field is 'Skype Meeting'. The 'Start time' is 'Mon 22/05/2017' at '14:00'. The 'End time' is 'Mon 22/05/2017' at '14:30'. Below the meeting details, there is a link that says '→ Join Skype Meeting' which is circled in red. Below this link, there is a smaller link that says 'Trouble Joining? Try Skype Web App'.

- Click [Sign in as a guest to the meeting](#):

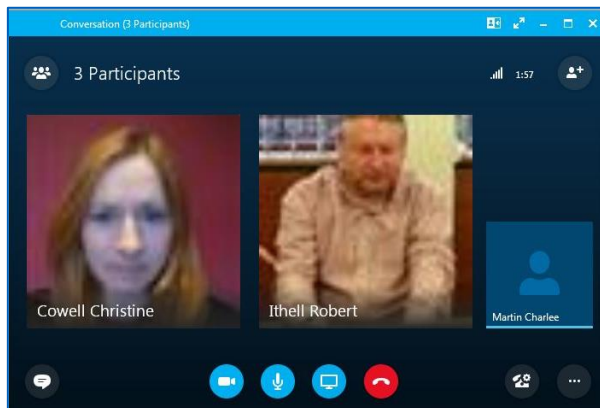
The screenshot shows the 'Skype for Business Web App' sign-in page. It has fields for 'User name' and 'Password'. Below these fields, there is a red error message that says 'Your account is not configured to join meetings.' Below the error message, there is a checkbox labeled 'Remember me'. At the bottom, there are two buttons: 'Join the meeting' (green) and 'Sign in as a guest to the meeting' (blue), with the latter being circled in red.

- Enter your name in the box provided:

The screenshot shows the 'Skype for Business Web App' guest sign-in page. It has a text input box with the placeholder text 'Guest, type your name below' which is circled in red. Below the input box, there is a checkbox labeled 'Remember me'. At the bottom, there are two buttons: 'Join the meeting' (green) and 'Sign in if you are from the organizer's company' (blue).

## Meeting View

Once a meeting has been joined, the participants will be visible on the screen. Each time someone speaks they will have their image prominently displayed.

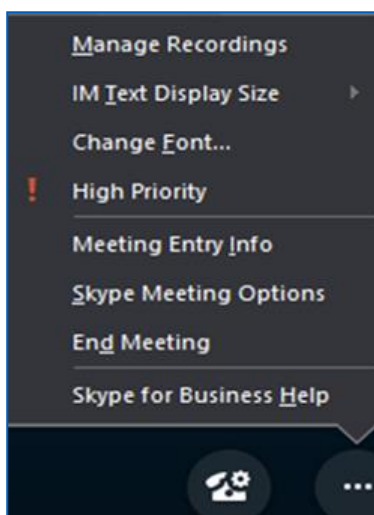


The icons at the bottom enable different aspects of call management:

- The [speech bubble](#) icon is to send an [IM](#) message.
- The [camera](#) icon is to [Share Video](#).
- The [microphone](#) icon is to [Mute](#) or [Unmute](#) audio.
- The [red telephone](#) icon is to end a call.
- The [rotary telephone](#) icon is to [transfer calls](#), [hold or switch](#) devices.
- The [browser button](#) is for options such as [record](#).

### In Meeting Settings

- Click the [browser button](#) at the bottom of the meeting.
- Click [IM Text Display Size](#) to increase the size of the words in an IM.
- Click [Change Font](#) to change the font of text within an IM.
- Click [End Meeting](#) to end a Meeting currently in progress.

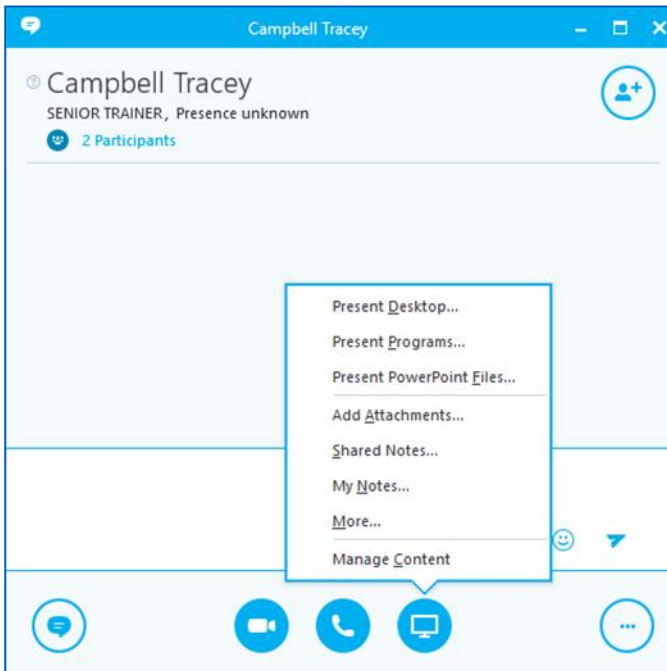


## Screen Sharing



This option is only available with Enterprise CAL licenses.

Users are able to share their screen with others within the call.



**Present Desktop** - mirrors what is on the screen to the other users.

**Present Programme** - gives the user the option to choose which open programme they wish to present to others in the meeting.

**Present PowerPoint Files** - ideal for presentations. Others on the call will only see the PowerPoint and not the full laptop screen.

## Present Desktop

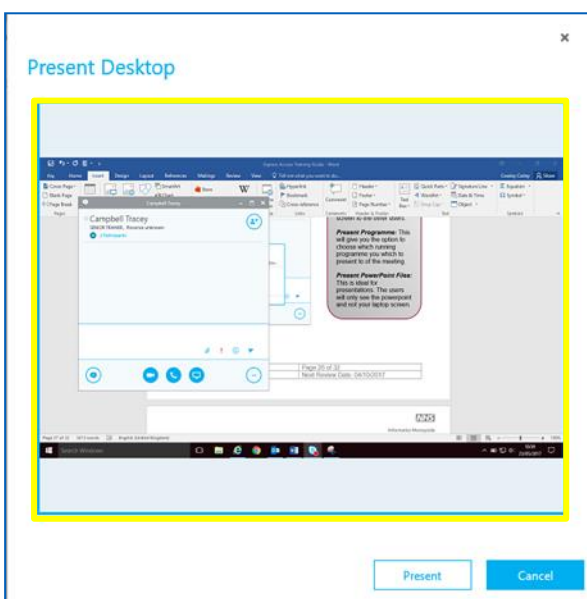


This option is only available with Enterprise CAL licenses.

Users are able to present their screens to other users. A yellow border will indicate what is presented to the other users on the call.

To stop the presentation:

- Select **Cancel**.



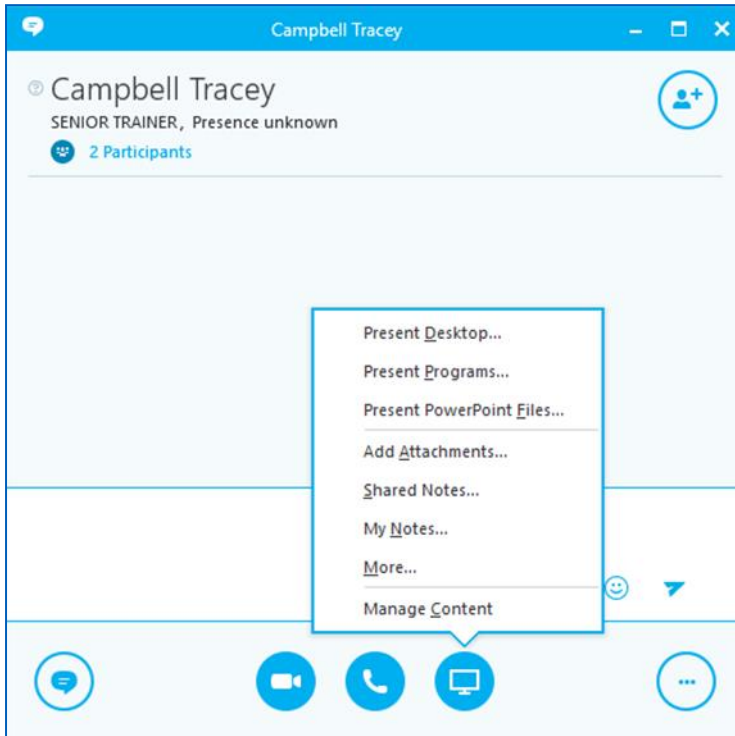
This will end the presentation and screen will no longer be visible.



## Present PowerPoint Presentation

This option is only available with Enterprise CAL licenses.

Users are able to present a full PowerPoint presentation to others within the conference call. The user can expand their notes and they will not be visible to the others.

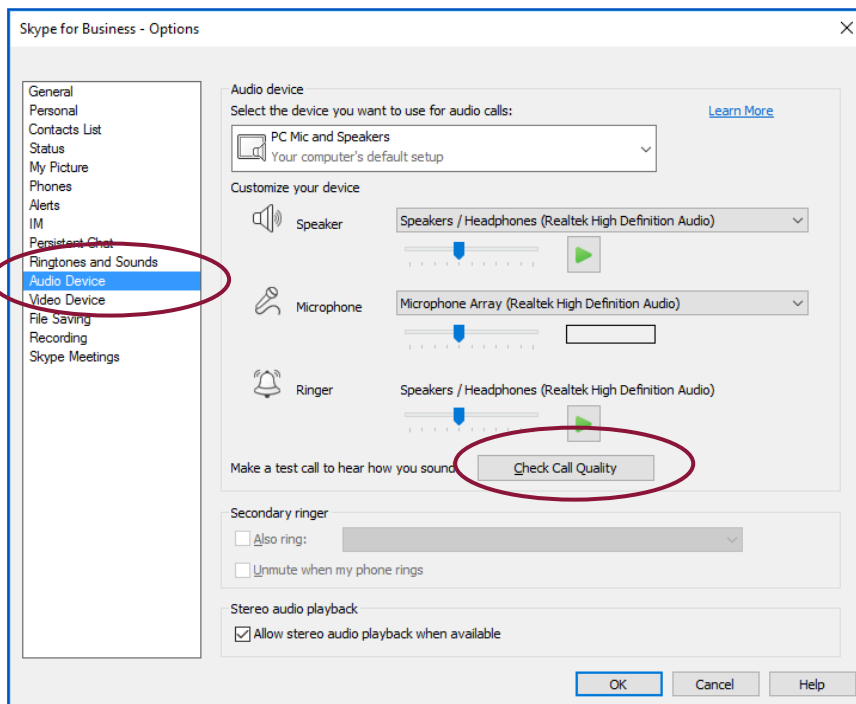


## Test Audio and Video Settings

- On the Skype hub (homepage) click the [cog](#).
- Click [Audio Settings](#).
- Select the button in the centre for [Check Call Quality](#).

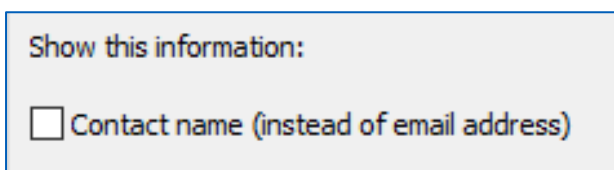
A Skype [Test Call](#) will commence.

- Listen to the prompts.
- If the sound quality is satisfactory close the window.
- If the sound quality is [unsatisfactory](#) open the [Audio Device](#) and [Video Device settings](#) and adjust as required.
- Click [OK](#) when complete.



## Sort Contacts by Email Address instead of Name

- Click on the cog for [Settings](#) → click [Contact List](#).
- Click [OK](#).



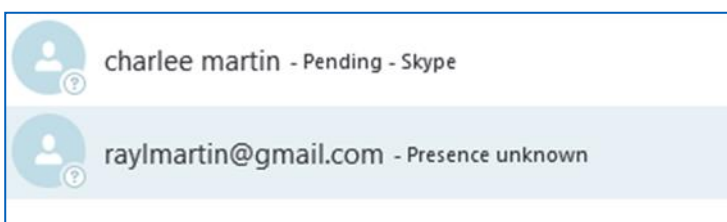
## Add External or Private Skype Contacts

- Enter the email address into the search bar.

A message will display to say that it is an external contact.

- Right click → [Add to Contacts](#)

A contact request will be sent and the contact will be pending. Recipients with private Skype accounts will have [Skype](#) displayed next to the email, while recipients with unconfirmed private Skype accounts will have [Presence Unknown](#).



## Contact Details

System Queries	Informatics Merseyside System Support & Development Team	0151 296 7777
IT Queries	Informatics Merseyside IT Service Desk	0151 296 7777
Training Queries	Informatics Merseyside Training Service	<a href="mailto:training@imerseyside.nhs.uk">training@imerseyside.nhs.uk</a> 0151 317 8408