

Training Guide

Skype for Business



To book training or to speak to a trainer, please get in touch via:

e training@imerseyside.nhs.uk

t 0151 317 8408

Disclaimer

Periodically changes to business processes or updates to systems or applications result in the update of training guides and materials. It is the responsibility of the delegate to check that they have the most up-to-date guides. All guides contain a Change Control table at the front which will detail when the document was updated. If you want to check if you have the correct version please telephone 0151 317 8408 or email training@imerseyside.nhs.uk

Change Control

Document Type		Document Title		
Training guide		Skype for Business		
Version	Date	Owner	Change	Purpose
V4.1	24 September 2019	Rachel Bertenshaw	Updated images and page move	Quality
V5.1	31 October 2019	Rachel Bertenshaw	Updated with license information	Quality
V5.2	19 November 2019	Rachel Bertenshaw	Minor grammar changes	Proof Read
V5.3	17 March 2020	Rachel Bertenshaw	3G Wi-Fi switch update	Quality
V5.4	25 March 2020	Jo Menary	Minor format changes	Proof Read
V6.1	31 March	Rachel Bertenshaw	Licence information removed	Update
V7.1	20 April 2020	Rachel Bertenshaw	Meeting Options update	Update

Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	31 October 2017	Jo Menary	Lead Trainer
V2.0	22 February 2019	Jo Menary	Lead Trainer
V3.0	06 March 2019	Claire McGrady	IT Training Manager
V4.0	23 April 2019	Jo Menary	Lead Trainer
V5.0	26 September 2019	Jo Menary	Lead Trainer
V6.0	25 March 2020	Jo Menary	Lead Trainer
V7.0	31 March 2020	Julie Regan	Lead Trainer
V8.0	21 April 2020	Claire McGrady	IT Training Manager

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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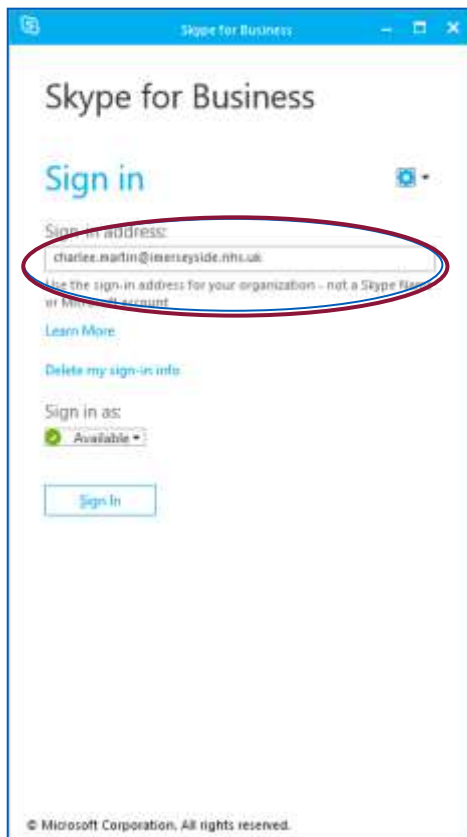
Access Skype for Business

If Skype has been set up to automatically login, the box below will appear and after a few seconds it will open up Skype and be ready for use. If this doesn't happen, follow the step below.

- 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.

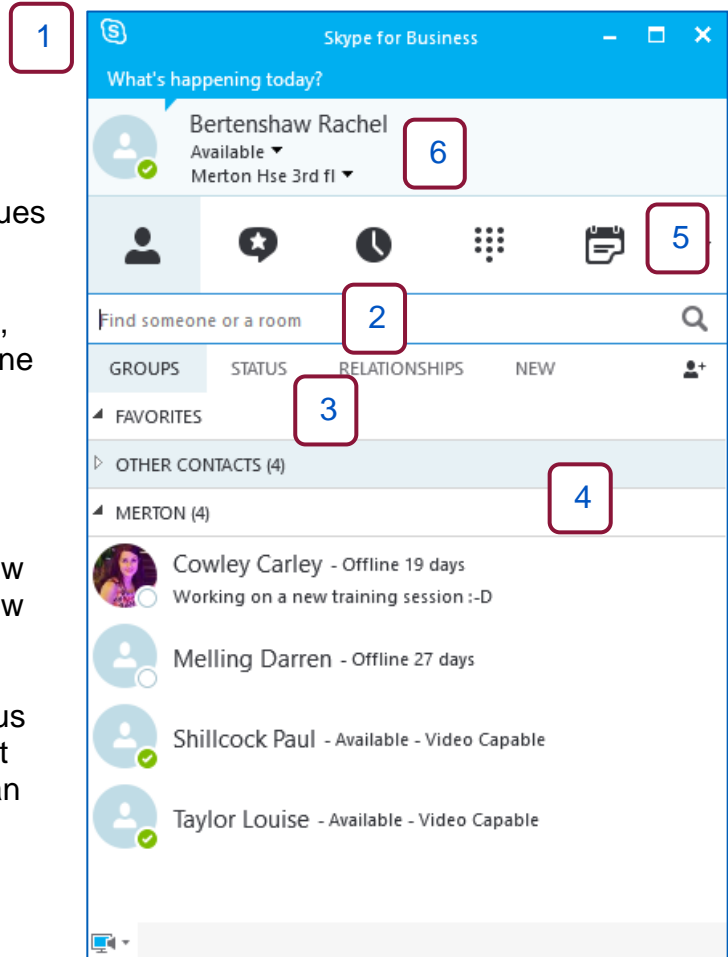


If the error message below appears, disable the Wi-Fi and use the mobile broadband connection. Remember to [switch back](#) to Wi-Fi so that 3G is not used continuously.



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.

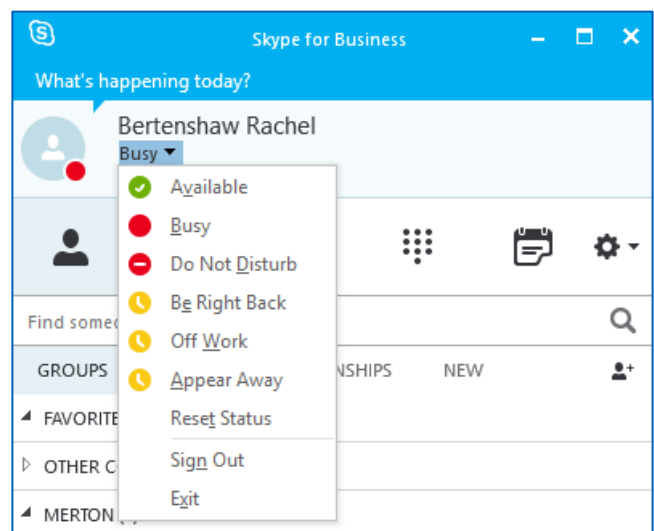


Status options

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.



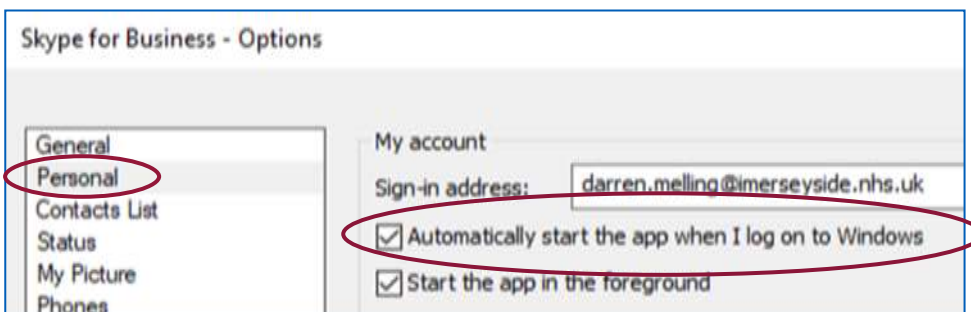
Configure Skype for Business

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](#).




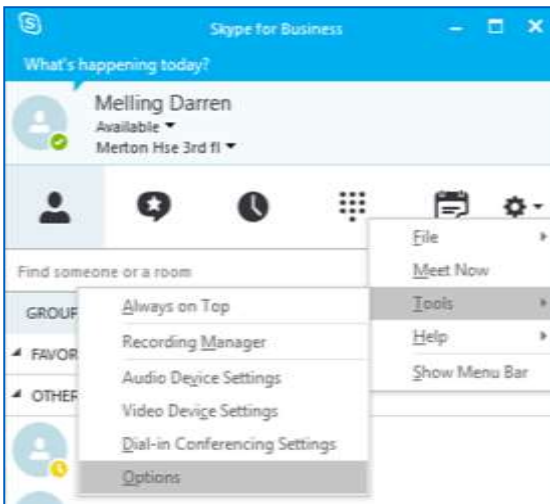
- Click [OK](#).

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**.

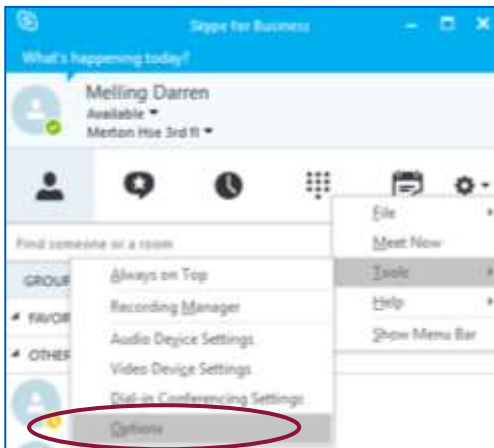
Integrate Skype with Outlook and Exchange

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

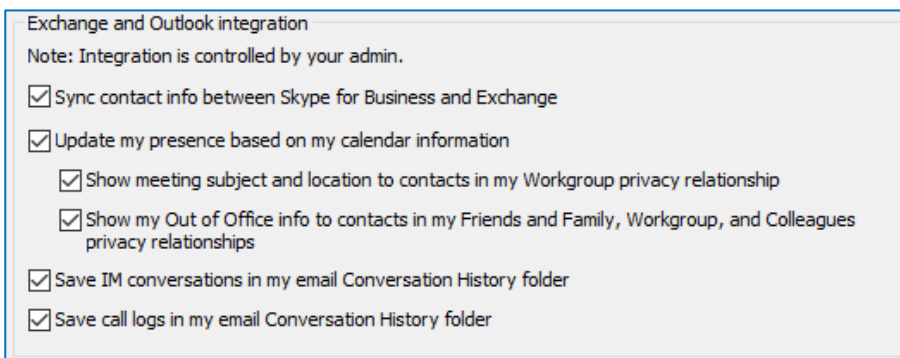
This will automatically update your Availability status.

- 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:



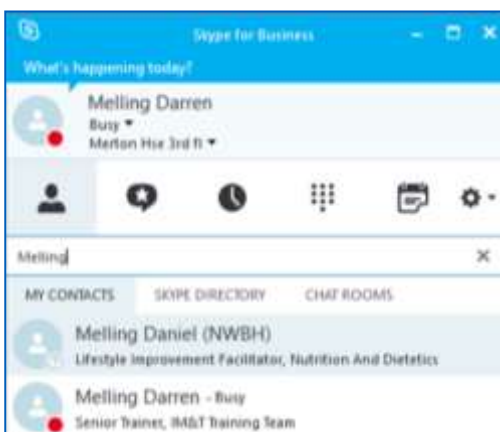
- Select **OK**.

Add a Contact

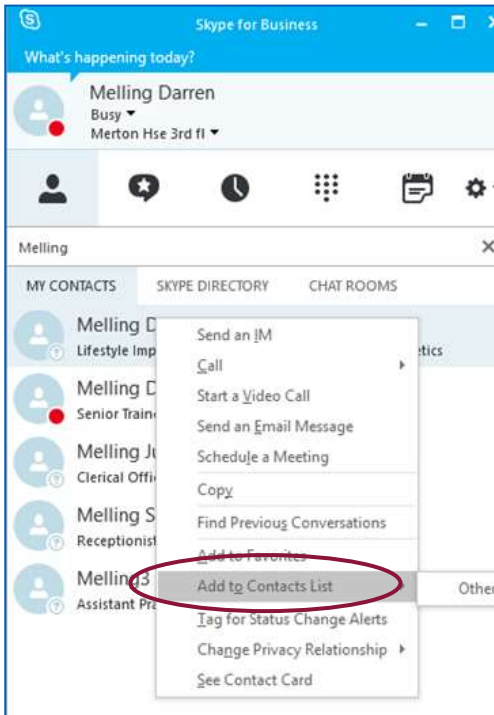
Contacts can be added to the **Skype Contacts List** in two ways:

If contacts are integrated with Exchange:


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

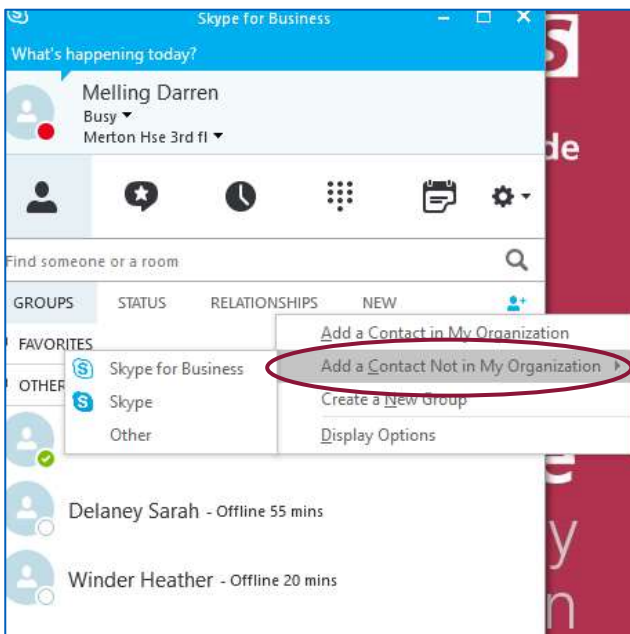


- Right click the contact → select Add to Contact List.



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.

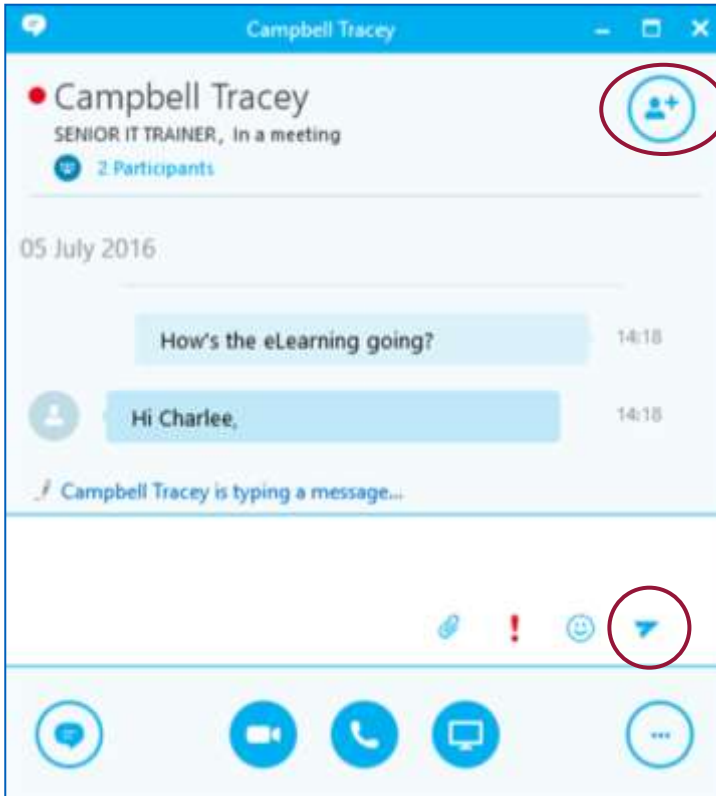


Send an Instant Message (IM)

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.

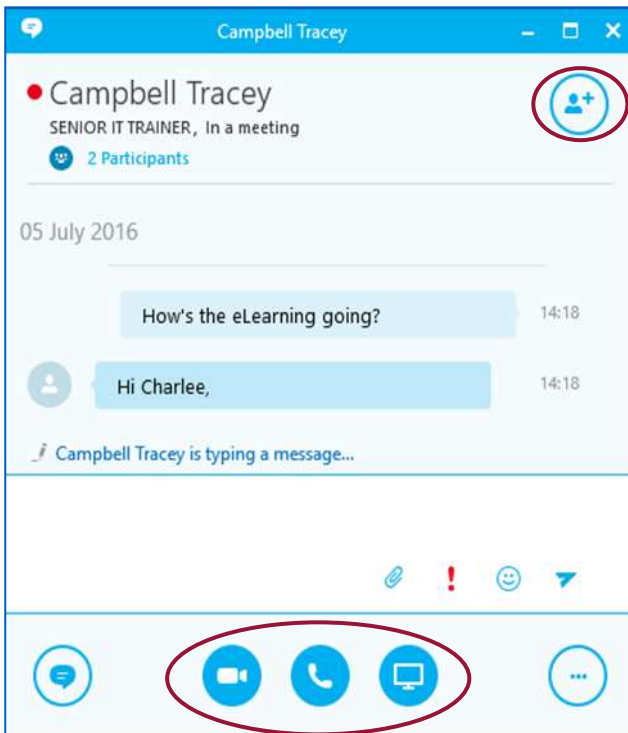


Icons at the very bottom are for Video Call, Call and Present.



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.

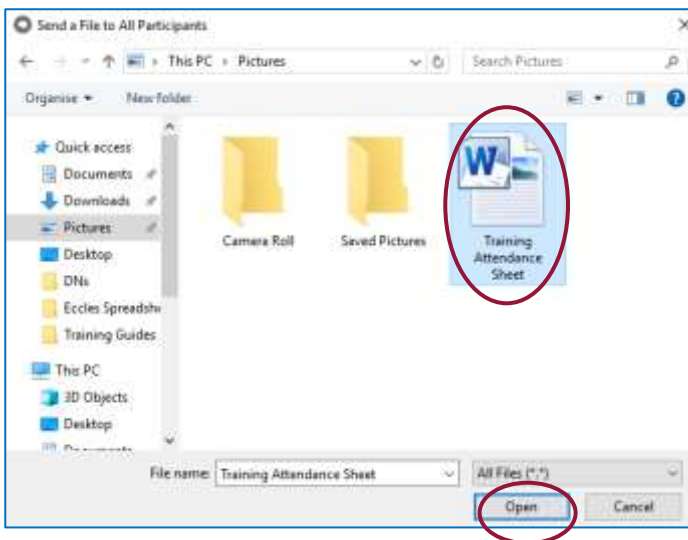
Send a Document or File

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.



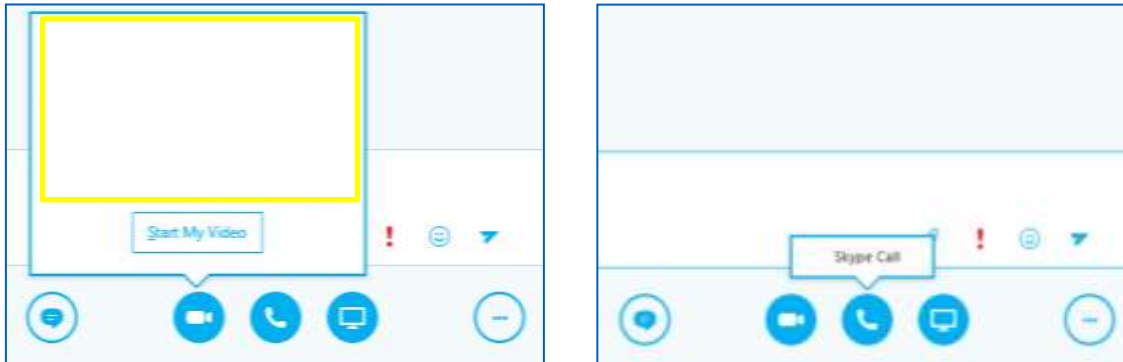
- Select the file to send to the contact → click [Open](#).



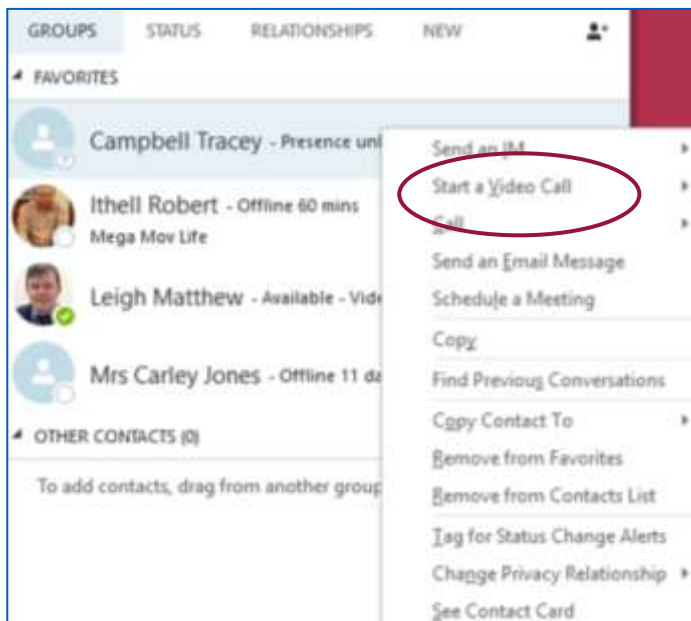
The document will send to the selected contact.

Start a Call or Video Call

- 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.

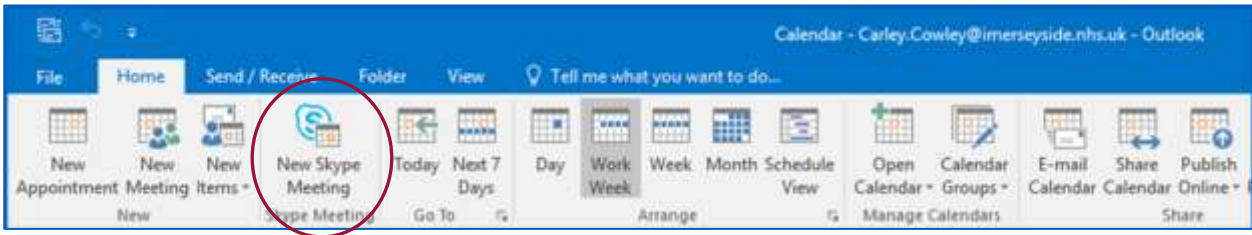
- For a call with no video click [Call](#).
- To end the call; click the [red telephone icon](#) at the bottom of the window. 

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

A future meeting can be created via Outlook Calendar.

- Select **New Skype Meeting**.



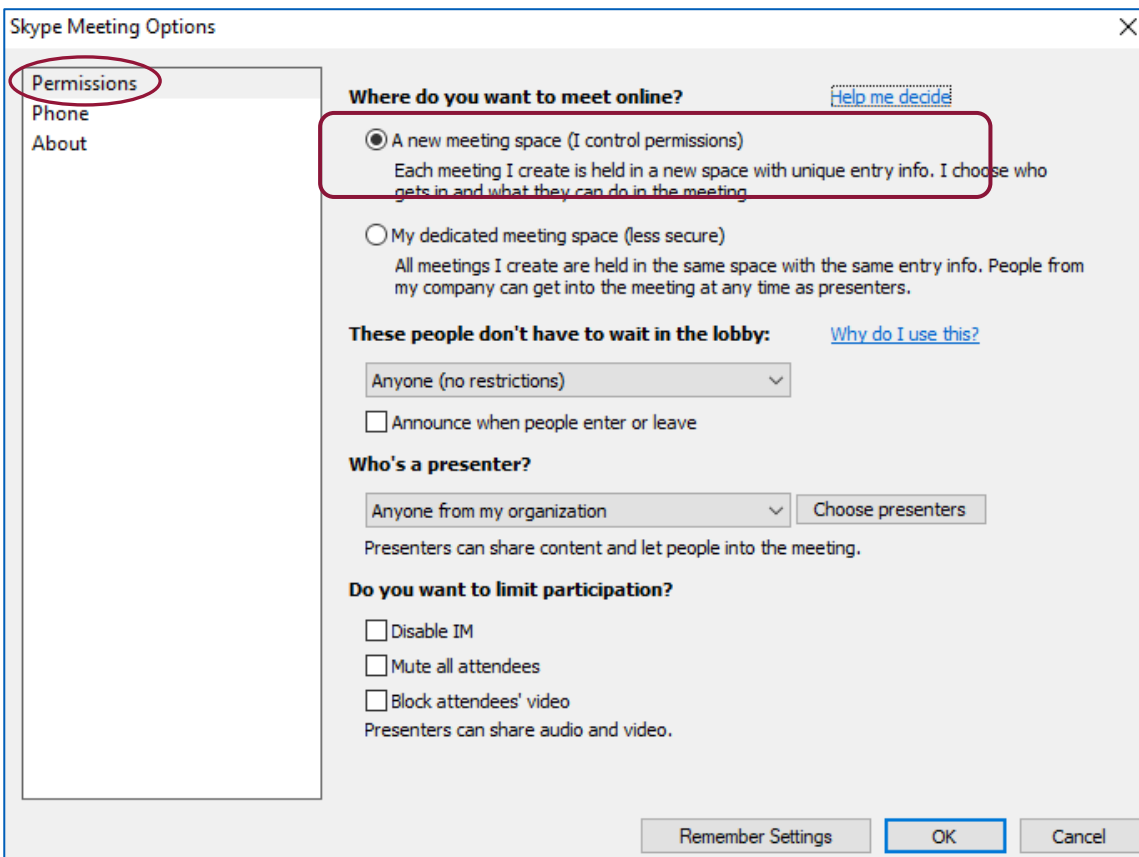
Current Skype account configuration has the default Meeting Options set to **My dedicated meeting space**. This means that all online meetings will be held in the same space with the same entry information. This is not secure and previous meeting links could enable access to newly created meetings, therefore it must be updated.

Update Meeting Options

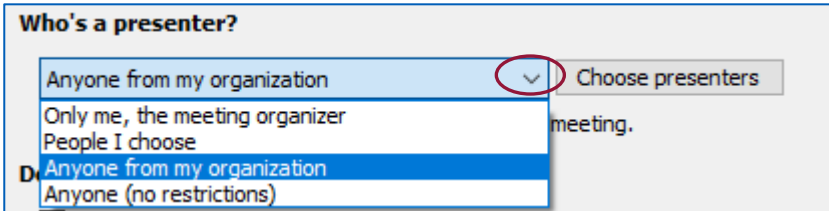
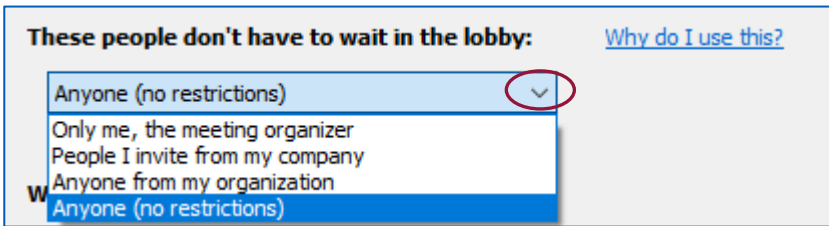
- Click the **Meeting Options** button on the top ribbon.



- Click **Permissions** then select **A new meeting space**.

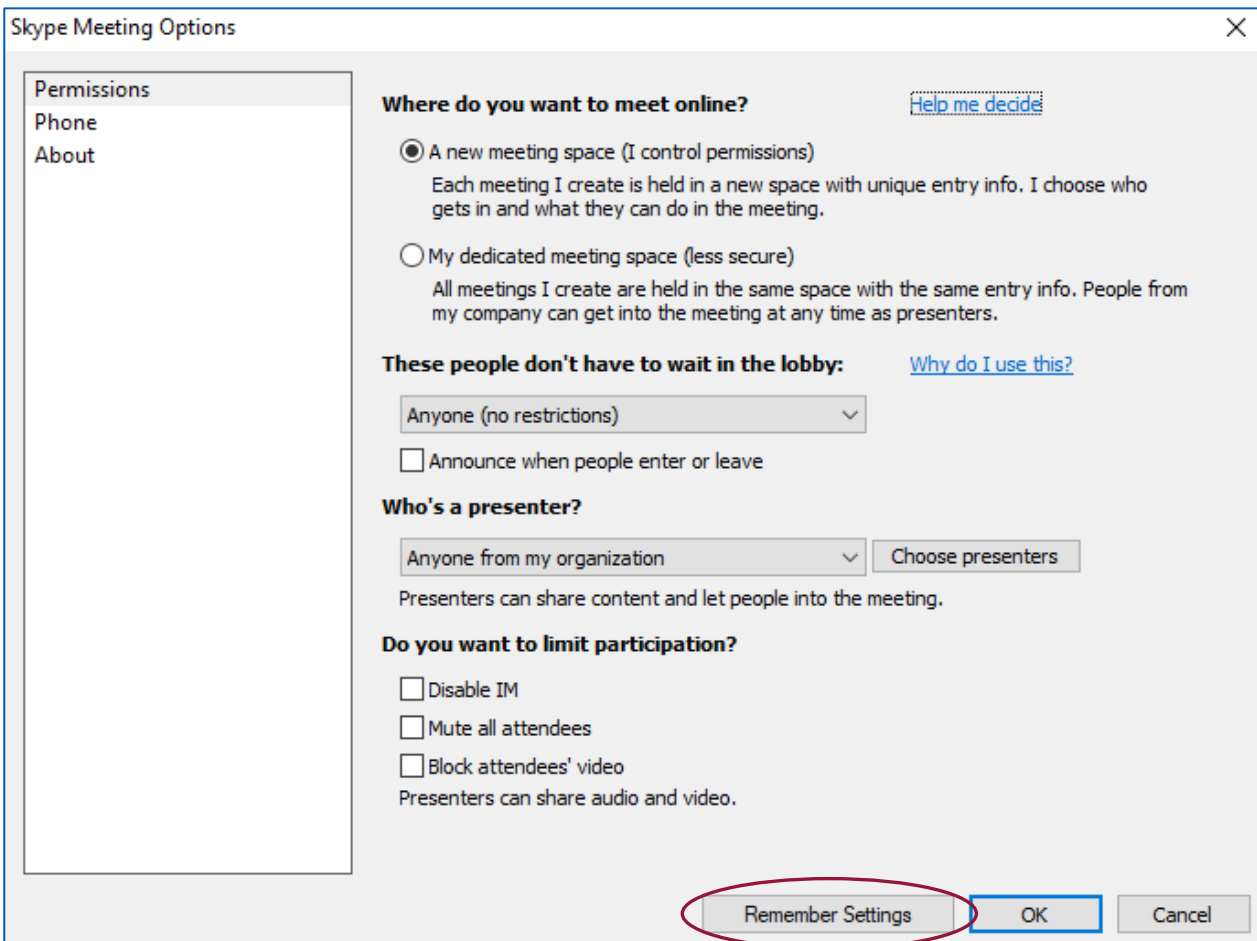


- Click the drop down arrows to change the **Lobby** and **Presenter** restrictions if needed.



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.

- Click **Remember Settings**.



- Type the details of the people being invited in the **To** field.
- Enter a **Subject**.
- The **Location** prepopulates as a **Skype Meeting** but can be edited.



Further details can be added into the invite above or below the dotted lines.

- When everything is completed, click **Send**.

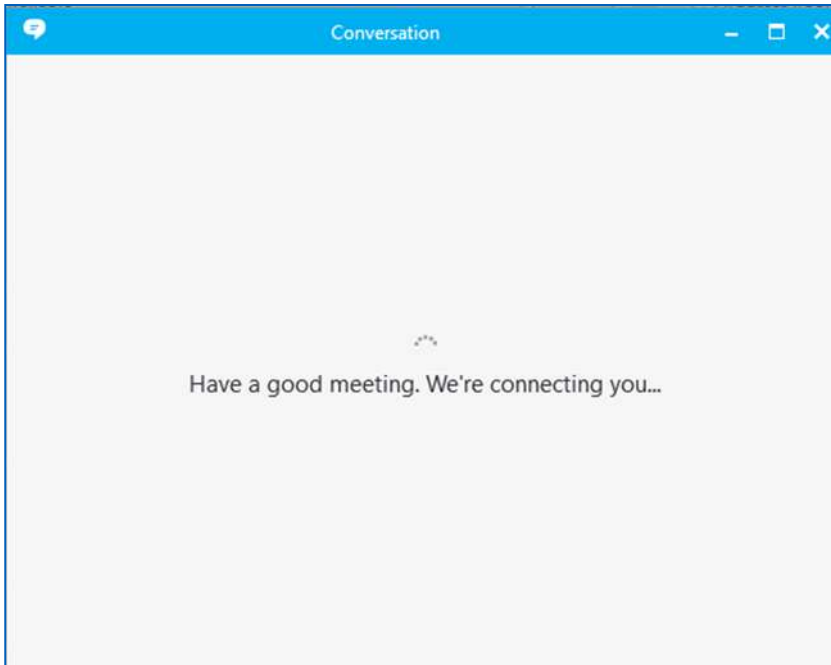
This will send an email invitation to the other users.

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

Join a Skype Meeting

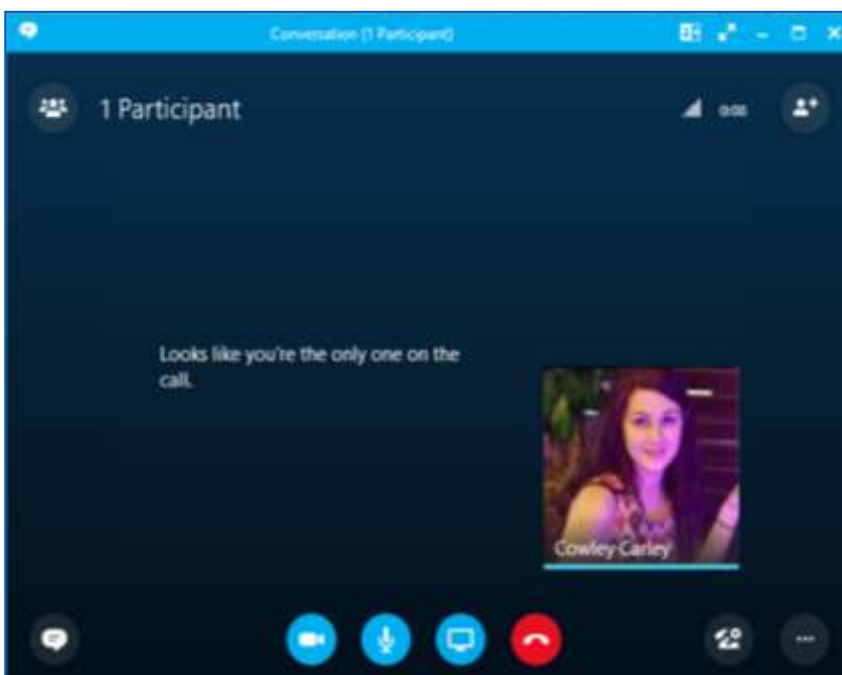
- Open the [Appointment](#) in [Outlook Calendar](#).
- Click the [Join Skype Meeting](#) link to open Skype.

The link will load Skype and open the meeting.



The Skype Meeting will load; if the internet connection is slow, it may take a few minutes.

Once 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' is empty. The 'Location' 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'. At the bottom, there is a blue link that says '→ Join Skype Meeting' which is circled in red. Below the link is the text 'Trouble Joining? Try Skype Web App'.

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

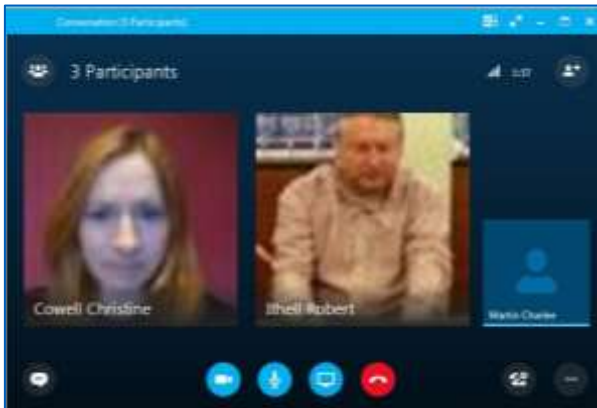
The screenshot shows the 'Skype for Business Web App' sign-in page. It has a 'User name' field and a 'Password' field. Below these is a red error message: 'Your account is not configured to join meetings.' There is a 'Remember me' checkbox. At the bottom, there are two buttons: a green 'Join the meeting' button and a white 'Sign in as a guest to the meeting' button which is circled in red.

- Enter your name in the box provided:

The screenshot shows the 'Skype for Business Web App' sign-in page. It has a 'User name' field and a 'Password' field. Below these is a red error message: 'Your account is not configured to join meetings.' There is a 'Remember me' checkbox. At the bottom, there are two buttons: a green 'Join the meeting' button and a white 'Sign in if you are from the organizer's company' button. The 'Guest, type your name below' input field is circled in red.

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.

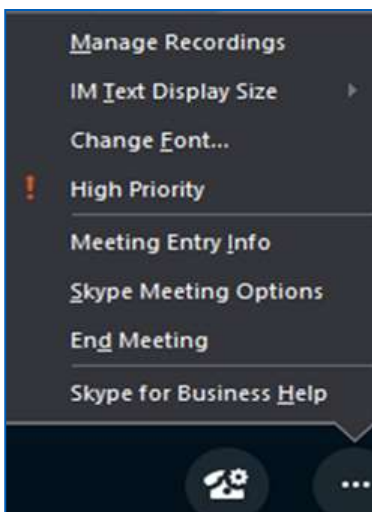


The icons at the bottom enable different aspects of call management:

- 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](#).

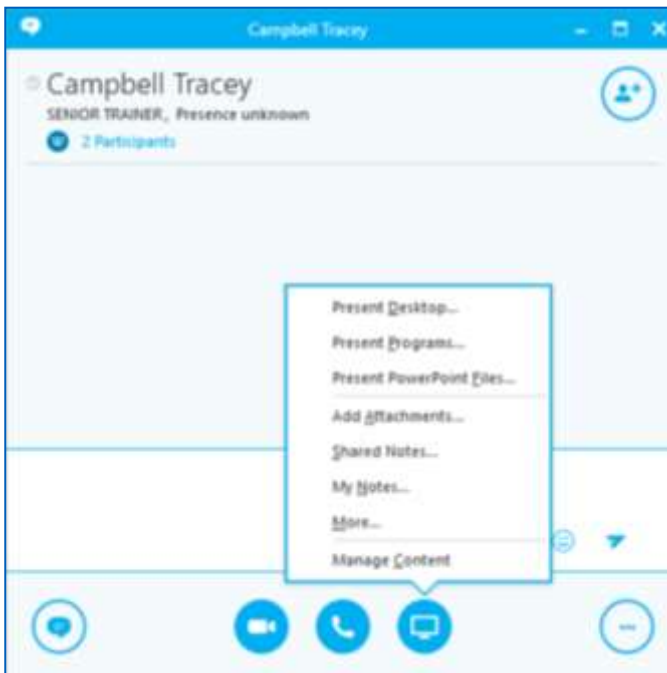
In Meeting Settings:

- 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

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.

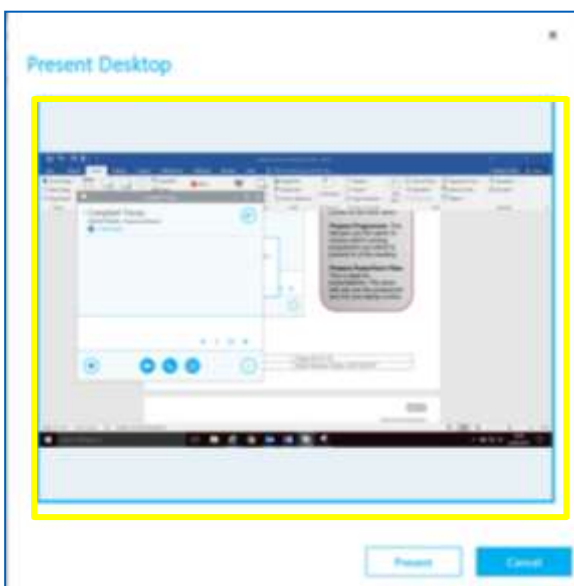
Present PowerPoint Files - ideal for presentations. Others on the call will only see the PowerPoint and not the full laptop screen.

Present Desktop

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:

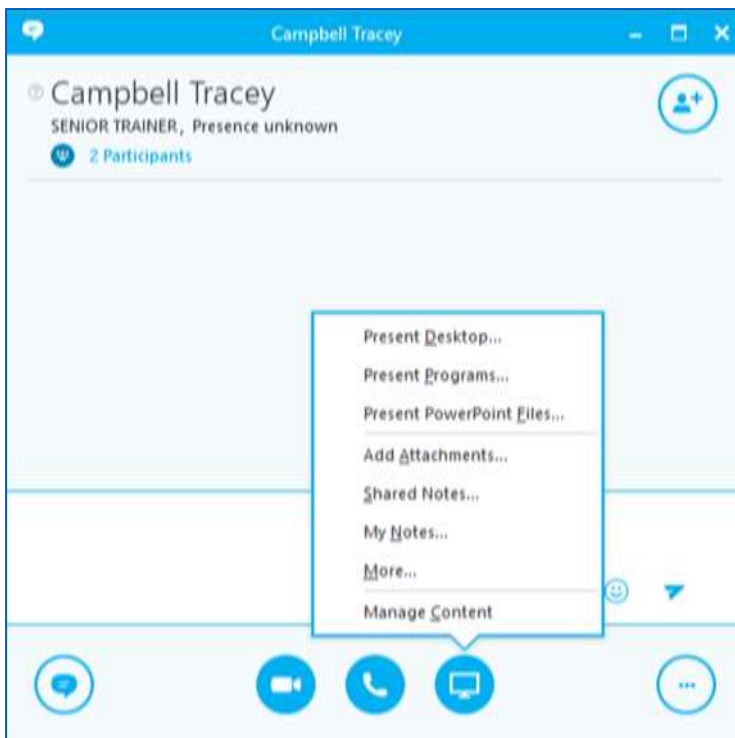
- Select **Cancel**.



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

Present PowerPoint Presentation

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.

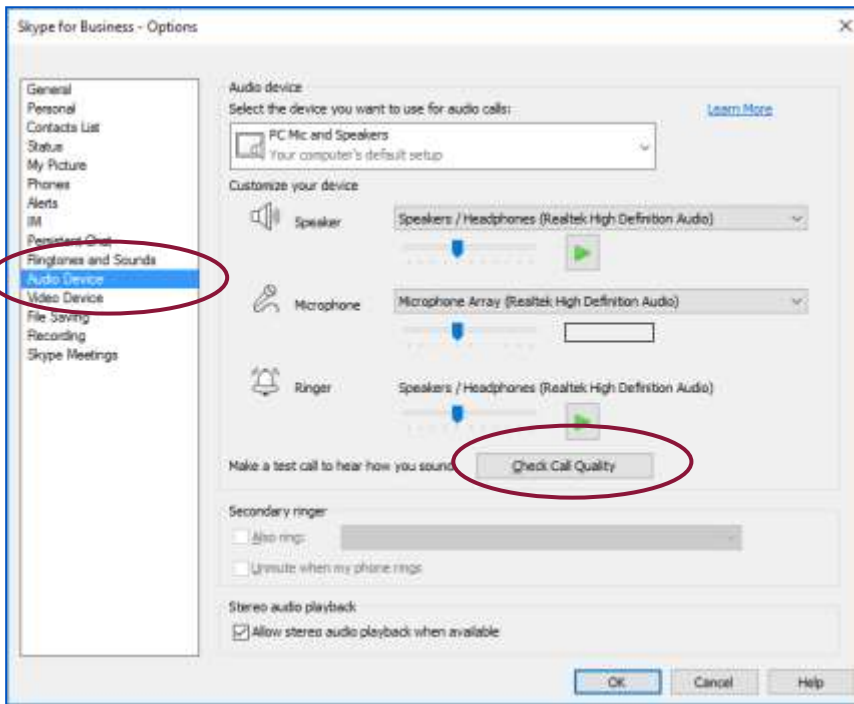


Test Audio and Video Settings

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

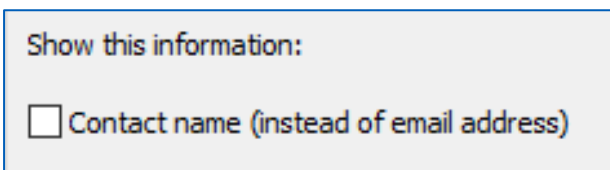
A Skype [Test Call](#) will commence.

- 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](#).



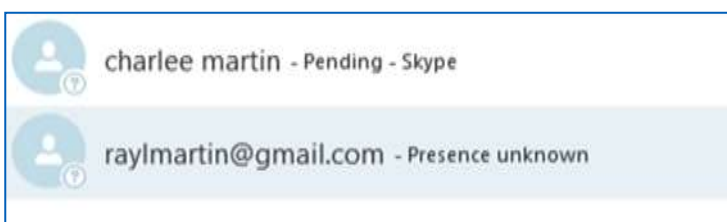
Add External or Private Skype Contacts

- 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	training@imerseyside.nhs.uk 0151 317 8408