Skype for Business

Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Key Features:

- Skype for Business is a communications platform available on Windows, Mac, and mobile devices.
- Skype for Business is designed to allow user interaction between colleagues and external contacts.
- The conversation platforms within the client include: instant messaging (IM), audio and video conversations, and online meetings.

Learning Objectives:

- Navigate the Skype for Business Client Interface
- Review Key Client Settings & Capabilities
- Find, Add & Manage Your Contacts
- Send & Receive Contact Communications
- Initiate, Manage & Join an Online Meeting
- Explore Online Meeting Collaboration Tools

Table of Contents:

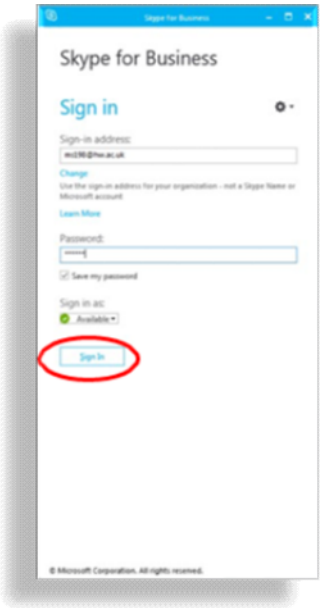
Skype for Business

Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Connecting to Skype for Business

Open & sign into the client using Windows

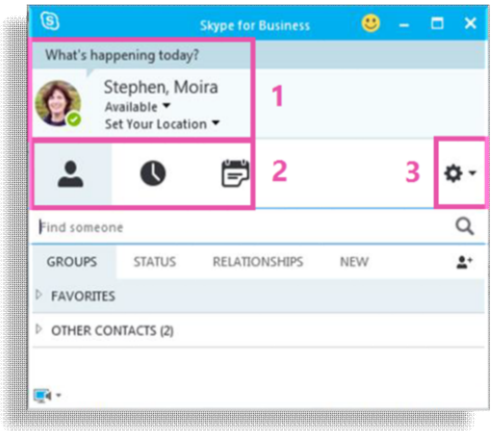


1) Click the **Windows Start** button at the bottom of your screen.
2) Select **All Programs** > **Microsoft Office 2016** > **Skype for Business 2016**.
3) Enter your Sign-in address in the format first-last@uiowa.edu.
4) Enter your Password.
5) Click the **Sign In** button.**

**Once you have installed Skype for Business on your desktop and signed into it for the first time, the default setting is to automatically log you in and open the client every time you start up your computer.

Navigating the Main Client Features

Find key areas of the Windows client



1) Your status information
   - What's happening today status.
   - Profile picture and presence icon.
   - Presence menu.
   - Location field.
2) Tools and communication
   - Contacts List.
   - Conversation Log.
   - Meeting Agenda.
3) Options menu
   - Sign-in address.
   - Contact & alert display.
   - Showing/hiding your picture.
   - Audio and video devices.

Understanding Presence Status

Review how presence status changes

- Presence is based on your Outlook calendar information, but update according to both your calendar and your activity.
- Manual status settings override all automatic changes. To return to automatic settings, select Reset Status from the Status drop-down menu.

Skype for Business

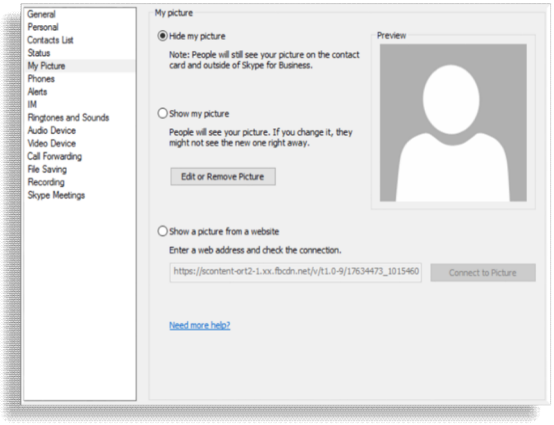
Skype for Business Essentials: Client, Contacts & Communication

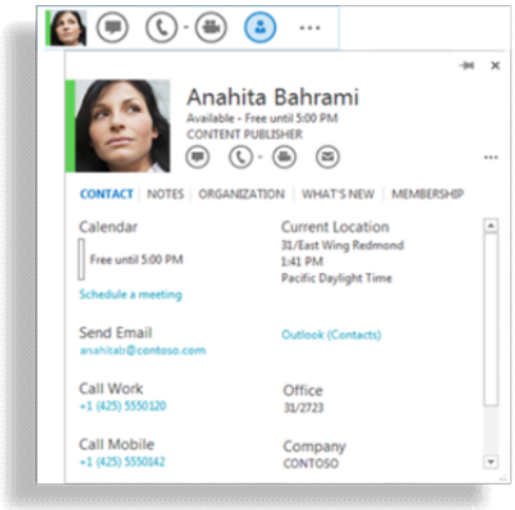
Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

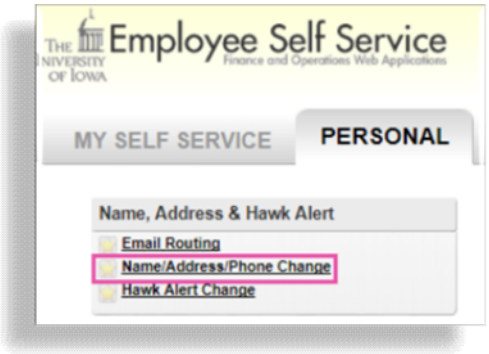
Adding a Profile Picture

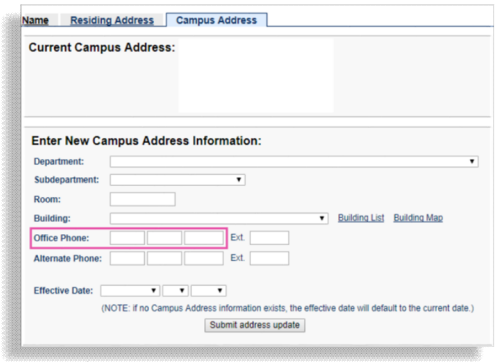
Help others recognize you

1) Navigate to the main client window.
2) Select **Tools** > **Options.**
3) From the **Options** window, select **My Picture** from the left-hand panel.
4) Click the **Edit or Remove Picture** button to upload an image.
5) Office 365 will open in your browser.
6) Select your picture file, then click **Save** at the bottom right of the screen.
7) Ensure that the **Show my picture** radio button is selected > **OK.**









Updating your Contact Card

Revise your HRIS information

1) Open Employee Self Service by navigating to **HRIS.uiowa.edu**.
2) Log in using your HawkID and password.
3) Next, select the tab marked **Personal**.
4) Click on the link labeled **Name/Address/Phone Change**.
5) Enter your personal office number in the field marked **Office Phone**.
6) Select **Submit Address Update**.
7) This change will be reflected in the University Global Address List as well as your Skype for Business contact card.
8) The change may not be immediate and can take up to 24 hours to appear within your client.

Skype for Business

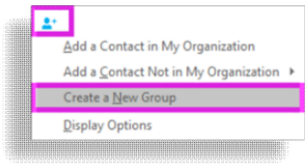
Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Creating a Contact Group

Organize your contacts

1) From the main client window, click the **Add a Contact** button.
2) Choose **Create a New Group**.
3) Right-click on the New Group to rename it.

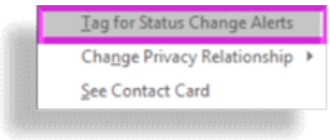


4) Your group has been created, and you can start adding contacts to it.

Tagging for Status Changes

Enable contact presence alerts

1) Right-click on the **Contact**.
2) Select **Tag for Status Change Alerts**.



3) An alert will now pop-up on your screen detailing contact presence changes.

Controlling Privacy Settings

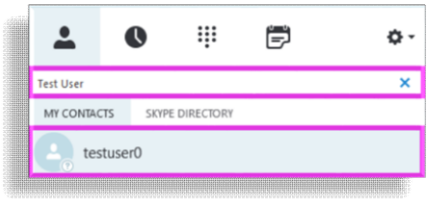
Limit contact shared details

1) View or change a contact privacy relationship by right-clicking on the **Contact** > **Change Privacy Relationship**.
2) Select which privacy relationship to assign your contact: **Family & Friends, Workgroup, Colleagues, External,** or **Blocked**.
3) To reset a privacy relationship to the default setting, select **Auto-assign Relationship**.

Finding & Adding Contacts

Add university contacts

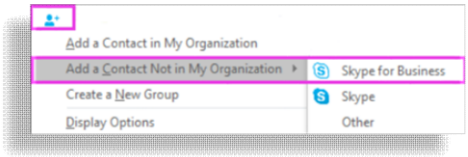
1) In the main client window, enter a name in the **Search Box** for a user you wish to add to your Contacts List.
2) Entries matching people from your **Contacts & Directory** list will appear.



3) Right-click on the correct entry and select **Add to Contacts List**.
4) You will be given the option to add this user to a specific group within your list.

Add non university contacts

1) In the main client window, click the **Add a Contact** icon.
2) Choose **Add a Contact (not) in My Organization**.



3) Select **Skype for Business**, **Skype**, or **Other** depending upon the contact type.
4) A window will open for you to detail information regarding your newly added contact.
5) Fill in their **IM Address**, the **Contact Group** you wish to file them under, and what **Privacy Relationship** you would like to have with them.

Skype for Business

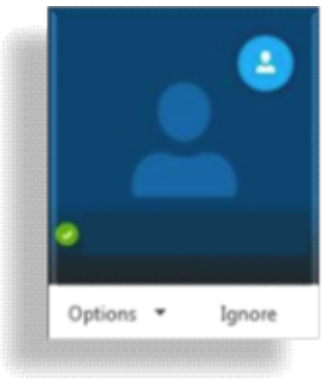
Skype for Business Essentials: Client, Contacts & Communication

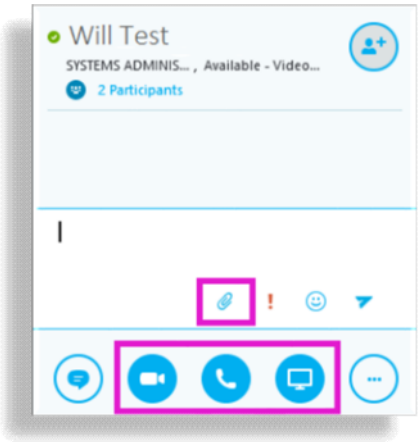
Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Responding to an IM Chat

Accept or ignore an incoming chat

1) Choose to **Accept or Ignore** a new IM conversation from the pop-up alert.
2) To accept and see the message, click on the **Photo Area**. The IM conversation window will open to display the message and allow you to respond.
3) To reject the message, click **Ignore**. The message will go to your Outlook Inbox where you can find it within your conversation history.





Sending an IM Chat

Begin chatting with a contact

1) To start, double-click a listed **Contact**.
2) A conversation window will open where you can begin typing your message.
3) Options along the bottom of the conversation window allow you to add **Audio**, **Video**, **Present Desktop or Program**, and **Attach Files** for the participants in your conversation to download and view.
4) Options along the top of the conversation window allow you to **View** and **Add Participants**.

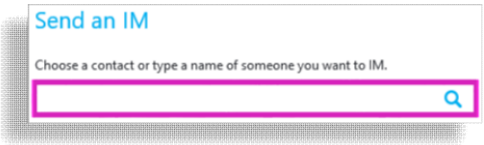
Starting an IM Group Chat

Add people to a conversation

1) Begin with an ongoing conversation.
2) Click the **Invite More People** button at the top of the conversation window to display the directory.
3) Within the directory, enter the **Contact Name** of who you would like to add to the conversation.
4) Click **OK** to add the user as a conversation participant.

Start a new contact group chat

1) Right-click the **Group Name** in your contacts list.
2) Click **Send an Instant Message** to start the conversation.
3) A conversation window will open for you to begin communication.



Skype for Business

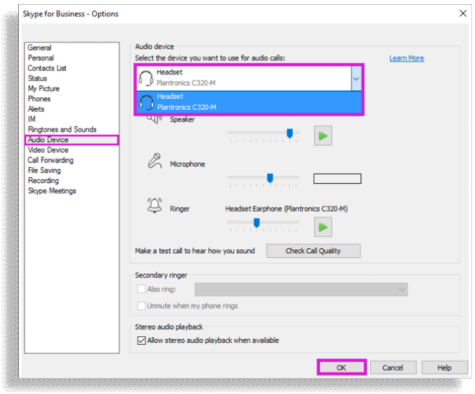
Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Selecting an Audio Device

Choose a default audio device

1) Click the **Gear** icon to open the **Options** menu.
2) In the left column, click **Audio Device**.
3) Use the drop-down list to select your **Preferred Device** > **OK**.
4) If you do not hear anything when testing your speakers, make sure that your system volume is turned on.
5) You can also change devices before a session by clicking the **Audio Device** icon at the bottom left of the Skype for Business window, then selecting the desired device.



Starting a Conference Call

Add people to an ongoing call

1) Begin with an ongoing call.
2) Click the **Invite More People** button at the top of the call window to display the directory.
3) Within the directory, enter the **Contact Name** of who you would like to add to the call > **OK**.

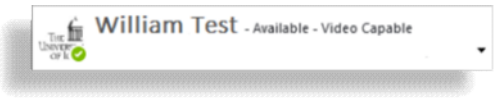
Start a call with a contact group

1) Right-click the **Group Name** in your contacts list > select **Call**.
2) A conversation window will open for you to begin communication.

Making an Audio/Video Call

Call using connected devices

1) Use the audio and video devices attached to your computer to make and receive client based audio and/or video calls.
2) Contacts who have a webcam set up have **Video Capable** on their contact details.
3) Right-click on the listed **Contact**.
4) Select **Call** or **Start Video Call**.
5) When you call a contact, an alert pops up on their screen similar to that of an IM message toast.



Responding to a Call

Accept or ignore an incoming call

1) To accept an audio or video call, click anywhere in the **Photo Area** of the pop-up.
2) To reject the call, click **Ignore** or **Set to Do not Disturb**.
3) Once in progress, you can control the call by putting it on hold, muting your audio, switching between audio devices, and changing the way the video appears on screen.

Skype for Business

Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Scheduling an Online Meeting

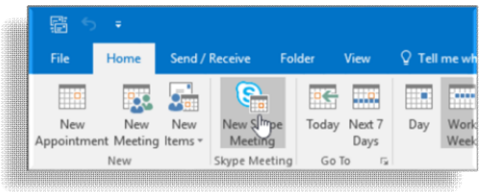
Create a meeting request in Outlook

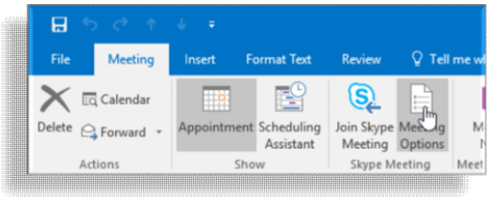
1) To initiate an online meeting request, open the **Outlook** desktop client.
2) Navigate to the **Home Tab** of your Outlook calendar.
3) Click the **New Skype Meeting** button on the toolbar ribbon.
4) In the meeting request window enter the attendees, date/time data, and any necessary agenda items as if it were for a standard meeting.
5) A link is automatically added to your meeting request that invitees can click to join the conversation.
6) When you are finished creating the meeting request, set your **Meeting Options** and **Send the Request** to the intended attendees.

Understanding Client Capabilities

Review client based meeting features

	Join Meetings	Share Desktop	Share Program	Presenter Controls
Skype for Business Mobile	✔	✘	✘	✘
Skype for Business Windows	✔	✔	✔	✔
Skype for Business Mac	✔	✔	✘	✘
Skype for Business Web App	✔	✔	✔	✔

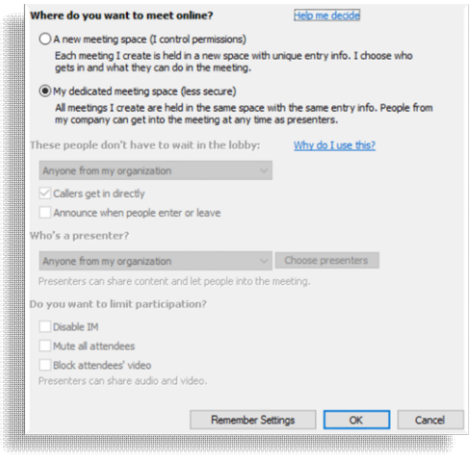




Setting Meeting Options

Select participant permissions

1) With the meeting request created, access to the **Meeting Options** button on the ribbon appears where you can **Set Permissions for Participants**.
2) Select the desired **Meeting Space** choosing from your own dedicated meeting space and a new meeting space with unique entry info.
3) Choose whether you want to certain participation methods limited from the people in your meeting like **Audio**, **Video**, and **Chat**.
4) Decide whether participants will wait in the lobby or be admitted to the meeting directly and whether or not their presence will be announced upon entry and exit.



Skype for Business

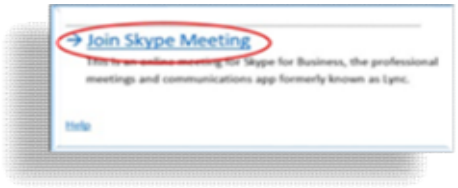
Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Joining an Online Meeting

Participate directly from the client

1) Open the Skype for Business **Meeting Invitation** from your Outlook calendar or email inbox.
2) In your invitation, click on **Join Skype Meeting.**



3) By default, your mic will be muted upon entering the meeting space. To unmute your mic, find the mic button and click it.

Exiting an Online Meeting

Disconnect from a meeting

1) While in an ongoing meeting, simply navigate to the banner at the top meeting window.
2) Select the button marked **Close** > **OK**.
3) The window will close ending your meeting participation while allowing other participants to continue with the session.

Ending an Online Meeting

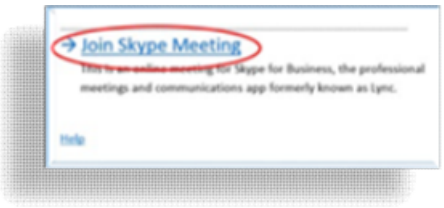
Disconnect everyone from a meeting

1) While in an ongoing meeting, navigate to the options menu in the bottom right corner of the meeting window.
2) Select **More Options** > **End Meeting** > **OK**.
3) The meeting window will close, and everyone will be disconnected from the session including any participants that have called.

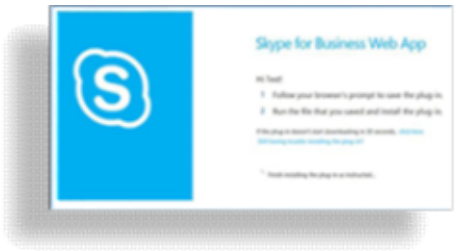
Joining an Online Meeting (Guest)

Participate using the Web App

1) Users without the full version of Skype for Business can still join online meetings as a **Guest**.
2) Open the Skype for Business **Meeting Invitation** from your Outlook calendar or email inbox.
3) In your invitation, click on **Join Skype Meeting.**



4) Install the Skype for Business **Web App Plug-in**, if you have not done so already, by following your browser's instructions.



5) Sign in by entering a **Guest Name** and clicking **Join the Meeting**.

6) By default, you will be muted upon entering the meeting space. To unmute yourself, click the **Microphone** button.

Skype for Business

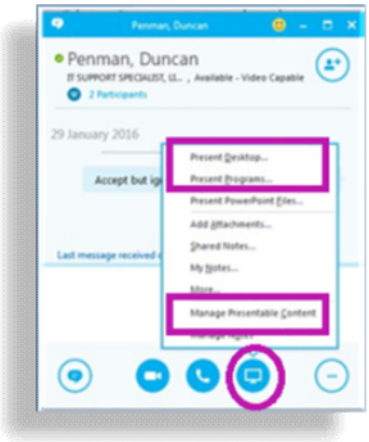
Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Presenting your Desktop

Share your desktop or program

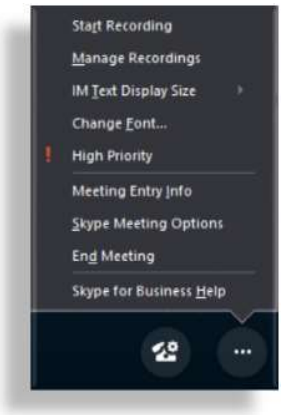
1) To share your screen, click the **Present** icon from within a conversation or meeting window.
2) Next, choose to either **Present Desktop** or a **Current Program** already open on your desktop.
3) When you share your desktop, everyone participating can see your entire desktop including notifications.
4) If you have confidential information or documents you don't want people to see while presenting, close them or use **Program Sharing** instead.
5) To view and manage content that you have made available during a conversation or meeting, select **Manage Presentable Content**.



Recording an Online Meeting

Presenters can record meetings

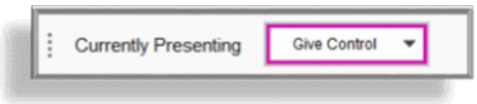
1) While in an ongoing meeting, navigate to the conversation window.
2) Click the **Options** button to start and manage recordings.
3) Meeting recordings are saved to the recorder's computer.
4) Recording a Skype for Business meeting captures **Audio**, **Video**, **IM**, **Screen Sharing** & **Collaboration**.



Controlling a Presentation

Give participants desktop control

1) From the **Sharing Toolbar**, a participant can **Request Control** of the desktop or program from the presenter.
2) The presenter will see a prompt within the sharing toolbar to **Give Control** to the requesting user.
3) Click **Give Control** to share control of your desktop or programs with the participants you choose.
4) To revoke control rights, select **Take Back Control**, or hit **Ctrl + Alt + Space**.
5) You can allow people to automatically take control of your sharing session at any time by clicking **Give Control Automatically** on the sharing toolbar.
6) To take back automatic permission, click **Give Control** and clear the **Give Control Automatically** check box.
7) Click **Stop Presenting** when you are done sharing your screen.



Skype for Business

Skype for Business Essentials: Client, Contacts & Communication

Collaborate with Colleagues Across Devices Using Microsoft's Unified Communications Platform

Closing Out of the Client

Remain active in the client

1) Close the Skype for Business window by clicking the **X** in its upper-right corner of the main client window.
2) Although the window closes, your session continues to run.
3) Others can still see your availability status and you still receive alerts.

	IS SKYPE FOR BUSINESS STILL RUNNING	CAN OTHERS SEE MY STATUS
Closing Out of Skype for Business	✓	✓
Signing Out of Skype for Business	✓	✗
Exiting Out of Skype for Business	✗	✗

Launching Client Automatically

Windows client starts by default

1) By default, Skype for Business will launch automatically when Windows is started, but this setting can be changed.
2) While Skype for Business is running, navigate to the main client window.
3) Click the **Gear** icon near the top of the main window to open the **Options** menu.
4) Within the **Options** menu select **Personal**.
5) Under **My Account**, locate the checkbox marked **Automatically Start the App When I Log on to Windows**.
6) **Uncheck** this option to prevent the client from starting automatically > **OK**.

Signing Out of the Client

Run client in the background

1) Sign out of the current Skype for Business session by navigating to the main client window > **File** > **Sign Out**.
2) Although signing out closes your current session, Skype for Business continues to run in the background making it easier to sign in again for your next session.
3) Once you have signed out in this way, others cannot see your status or interact with you.

Exiting Out of the Client

Leave the client completely

1) Exit out of the Skype for Business client by navigating to the main client window > **File** > **Exit**.
2) Exiting closes your Skype for Business session and both icons will disappear from the taskbar/system status tray at the bottom of your screen.
3) Once you have exited, the Skype for Business client stops running on your computer and others cannot see your status or interact with you.

NOTE

- Click **Delete My Sign-in Information** when you sign out to remove the record of your login ID and password.
- Doing this helps to ensure your sign-in information is more secure by making it difficult for unauthorized users to log on with your credentials.