

# Skype for Business



## User Guide

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*With thanks to St Andrews University, CAPOD, IT Training for sharing their Skype for Business User Guide*

## What is Skype for Business

This guide is for people who are new to Skype for Business and provides information on how to begin using it to communicate with colleagues. Skype for Business was formerly known as Lync but was re-branded under the current release name after Microsoft acquired Skype. It is a communications platform that allows you to interact with your contacts using instant messaging (IM), audio and video conversations, and Skype for Business Meetings.

It runs on Windows and Mac operating systems, and on mobile devices. **HWU Staff and Students can access Skype for Business.** For a full range of feature and training videos see [Microsoft's Discover Skype for Business](#) site.

## Accessing Skype for Business

### Starting Skype for Business for the first time

HWU managed desktop (staff and student)

The Skype for Business Windows client is installed by default on the University's standard desktops as part of the Office 2016 suite/Office 365.

1. Click the **Windows** start button at the bottom left of your screen
2. Select **All Programs > Microsoft Office 2016 > Skype for Business 2016**

When the Skype for Business window appears

3. Enter your **UserID** in the format *username@hw.ac.uk*
4. Enter your **Password** (your HWU desktop/Vision password)
5. Click the **Sign In** button

### Mac OS

To use Skype for Business (Lync) for Mac 2011 you need to download and install the client program and then manually configure the settings.

Download and all the instructions can be found in the Office 365 web portal, on the Software page:

1. Log in to the Office 365 portal <https://portal.office.com/>
  2. Click **Settings**(cog icon ) >**Office 365 settings> Software > Skype for Business**
  3. Click the **Install** button
  4. Save the **.dmg** file
  5. Open it (if your security settings won't allow it to be launched by clicking, hold down the **CTRL** button and click the file, select '**Open**' from the **Finder** menu)
  6. Follow the installation instructions.
- Follow steps 2 & 3 on the Software page to apply the update and configure the server settings.

To start after installation:

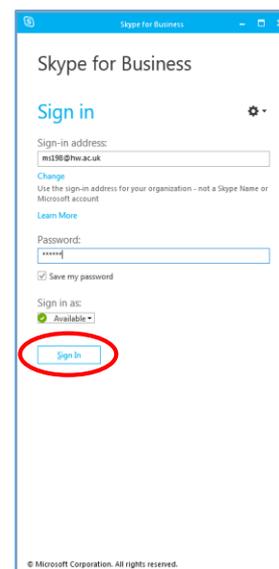
1. From the **Finder** menu bar, select **Go > Applications >Microsoft Lync**

In the Lync window

2. Enter the same data in both the Email address and User ID field in the format [abc123@hw.ac.uk](#)
3. Enter your **password** (your HWU desktop/Vision password)
4. Click the **Sign In** button

### Apple iOS

To use the Skype for Business app for iPhone/iPad and other mobile devices see [Lync 2013 for mobile clients](#)



## Personal devices

Staff and students wishing to use Skype for Business from a personal device e.g. when working at home can: -

- Download a FREE copy of Office from Office 365 onto your home PC or laptop (**Options>Office 365>Settings>Settings>Software**). See *Installing Office 365 ProPlus for Mac or PC* on the [IS Guides](#) page for more information. The Office download includes Skype for Business.

Or

- Use the App on your iPhone/iPad (see Apple iOS)

Alternatively, you can be invited to a meeting as a guest, even if you are a HWU staff member/student (see [How to join a Skype for Business meeting as a guest](#) (for use with non-HWU staff/students))

## Subsequent access to Skype for Business

Once you have installed Skype for Business on your desktop and signed into it for the first time, it will automatically log you in and open the main Skype for Business window every time you start up your computer.

If you disable this preference (see **Options** below), you can start it manually when required.

### To open Skype for Business manually

- Find it in the main Office program list: **Start >Programs>Microsoft Office 2016** or
- Search for it: enter **Skype** in the *Search programs and files* field in the **Start** menu.

**Tip** - pin it to the taskbar for easy access.

### Taskbar

When Skype for Business is running, you will see a large Skype for Business icon on the Windows taskbar

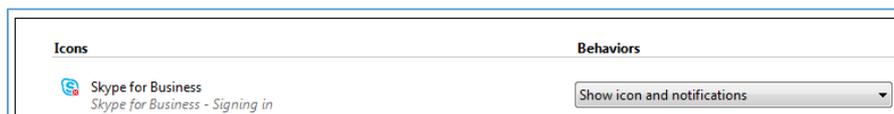


Closing the Skype for Business window does not close the application, but merely minimises the window, which can then be opened by clicking the large taskbar icon.

### System Tray

You can customise the System tray at the bottom right of the task bar to display a Skype for Business icon if you wish.

1. Click **Show Hidden Icons**, then choose **Customise**
2. Set the **Behaviour** of the Skype for Business to **Show icon and notifications**



3. Click **OK**



The small system tray icon provides access to a few select commands.

It doesn't open the Skype for Business window but you can right-click it to quickly update your status and exit Skype for Business.

## Customising Skype for Business start-up

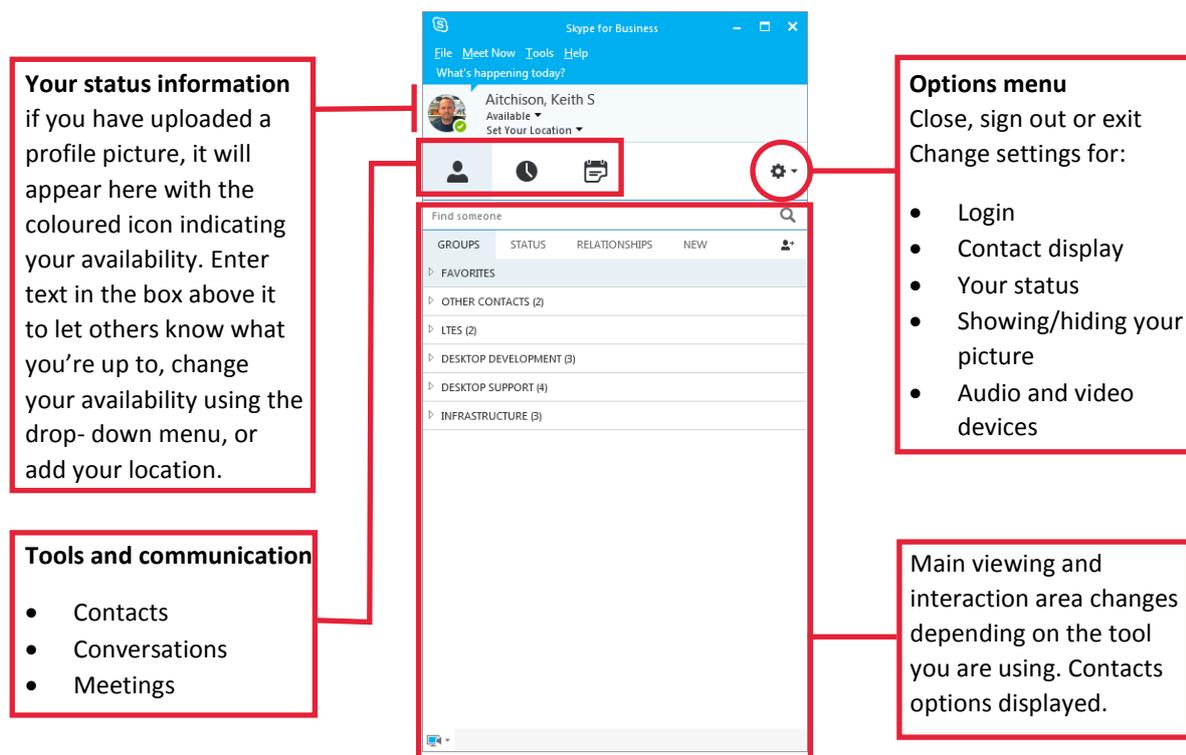
You can change your default Skype for Business start-up options using the **Options** menu (cog icon ) on the main screen, then choosing **Tools > Options**

Once the Options window opens, select **Personal** from the left-hand panel, then make the required changes, e.g. Login, Contact display, Your status, Showing/hiding your picture, Audio and video devices – see Options menu below.

## Skype for Business basics

### The main Skype for Business window

When you open Skype for Business, the main Skype for Business window will appear:



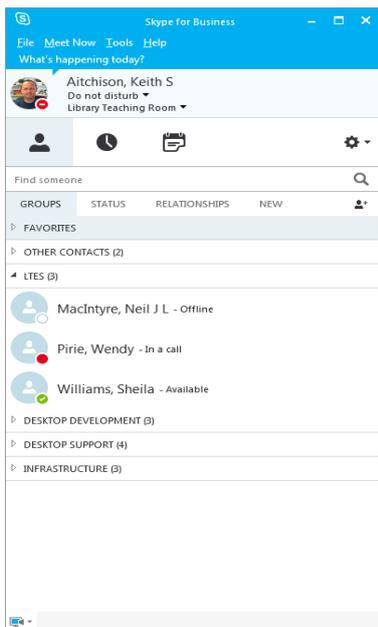
### Adding a profile picture

If you have uploaded a profile picture to Office 365 through the main portal, it will automatically carry through to Skype for Business.

To upload or edit your picture from within Skype for Business:

1. Click **Options** (cog icon ) on the Skype for Business main window
2. Choose **Tools > Options**
3. In the Skype for Business Options window, select **My Picture** from the left-hand panel
4. Click the **Edit** or **Remove Picture** button to upload an image. Office 365 will open.
5. **Browse** to select your picture file, then click **Save** at the bottom right of the screen
  - You will be returned to the Skype for Business Options window
6. Ensure that the **Show my picture** radio button is selected
7. Click **OK**

## Displaying your availability: Presence



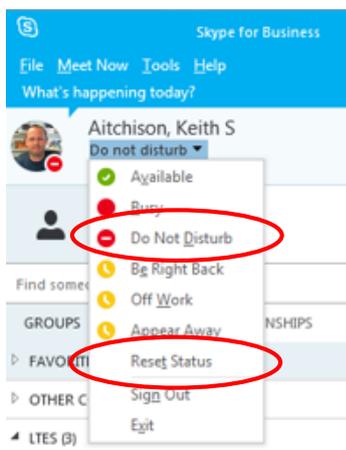
A user's availability is indicated by the coloured icon beside their profile picture. This availability status is known as your **presence** and will indicate a status such as Available, Busy, Away, Do Not Disturb, etc. Your presence indicator will effect which communication options are available.

Presence is only indicated for those with the Skype for Business client running, otherwise it will show as Offline (uncoloured). Indicators are based on your Outlook calendar information, but update according to both your calendar and your activity.

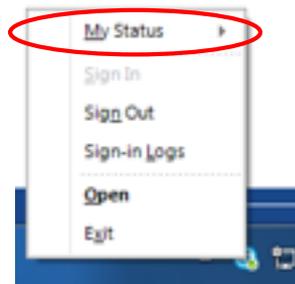
For instance, if you are available at your desk but don't use your mouse or keypad for a period of time (the default is 5 minutes, but this can be changed – **Options> Tools> Options> Status**), Skype for Business automatically changes your presence indicator from green to an inactive yellow icon. Using your keyboard or mouse returns your status to available.

You can also manually change your availability by:

Using the drop-down status menu in the Skype for Business window



Right-clicking the small icon on taskbar



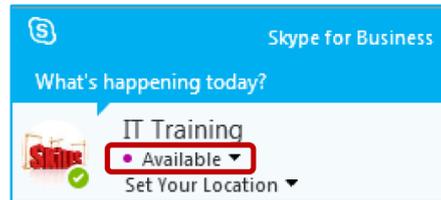
Manual status settings override all automatic changes.

- To return to automatic settings, select **Reset Status** from the Status drop-down menu.

## Guide to status icons

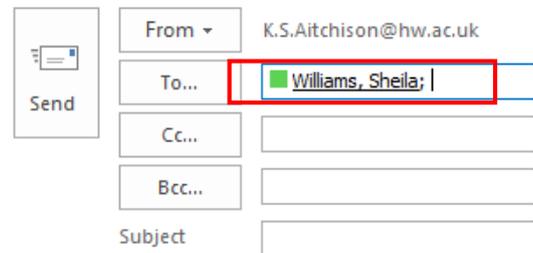
	Available *	Online and available	
	Be Right Back **	Away from your computer briefly	
	Away *, **	Logged on, but have been away from computer for a period of time.	
	Off Work **	Not working or not available	
	Busy *, **	Hard at work and shouldn't be interrupted	
	In a call *	In a Skype for Business call (two-party call)	
	In a meeting *	In a meeting (using Skype for Business or Outlook)	
	In a conference call *	In a Skype for Business conference call (Skype meeting with audio)	
	Do Not Disturb **	Do not want to be disturbed. You will see IMs, but only if you're both in the same Workgroup.	
	Presenting *	Giving a presentation	* Set automatically for you based on your keyboard activity or Outlook calendar.
	Out of the office	Set to OOF in your Outlook calendar	
	Offline *	Not signed in	** You can set your presence to this anytime you want.
	Unknown	Presence can't be detected	

If your Outlook calendar is set to Out-of-Office, but your Skype presence is set to *Available* (for instance, when you are working from home), there would be a purple dot displayed beside the status, as shown below



As Skype for Business is integrated with Outlook, you will automatically see the availability of colleagues when you communicate with them by email.

When you add a name to the address field in a new email you will also see their presence status displayed beside the name.

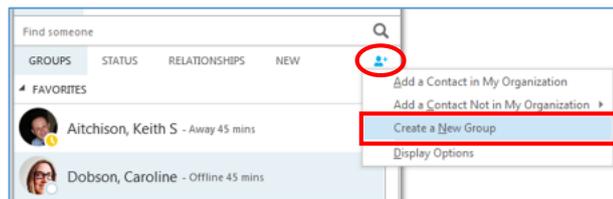


## Contacts

When you first start using Skype for Business, it is worth investing some time setting up contacts and groups so that you can easily communicate with people that you frequently interact with.

### Creating a group

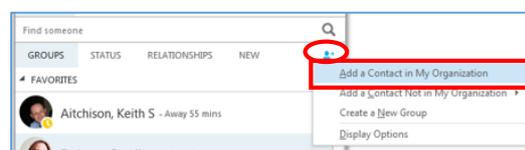
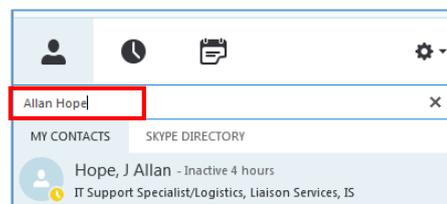
1. In the main Skype for Business window, click the **Add a Contact**
2. Choose **Create a New Group**
  - Alternatively, right-click any group name in your contacts list (e.g. Other Contacts), and then click Create New Group
3. A New Group box will appear. **Rename** it by overwriting the text so that the new name is meaningful to you
4. Your group has been created, and you can start adding contacts to it



### Finding and adding contacts

#### From the University Directory

1. In the main Skype for Business window start typing the name in the search box.
  - A list of matching people from your Contacts will appear
2. **Right-click** on the required name and select **Add to Contacts List**, which then gives options of adding to a specific group.



You can also add contacts from the **Add a Contact** icon, then choose **Add a Contact in My Organisation**

## From the Skype Directory

You can also add contacts worldwide from Skype.

Type either the person's name or (if you know it) their Skype name in the search field, but this time selecting the **Skype Directory** tab.

A list of Skype users will appear. Add them to your Contacts in the same way as you add local contacts.

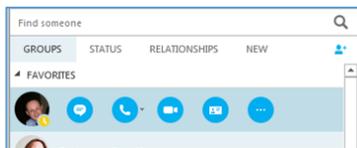
## Controlling Privacy Relationships

This setting controls the connectivity and the type of information that can be viewed by your contacts. If you want to view or change the privacy relationship with a contact, right-click the contact's listing, and then click **Change Privacy Relationship**. You may also use this setting to block a contact.

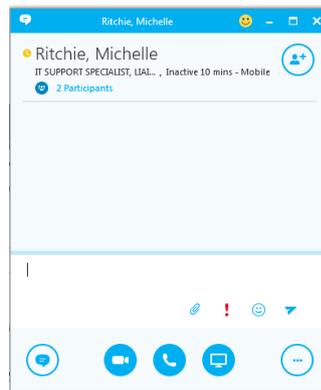
## Communicating with your contacts

To communicate with a contact, use one of the following methods to access the communication tools, then select the option you want to use (e.g. instant message, video call, etc).

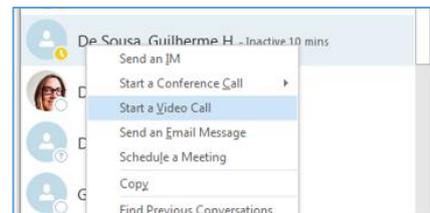
**Hover your mouse over their picture** in the contacts list:



**Double-click** anywhere on their contact listing:



**Right-click** their contact listing:

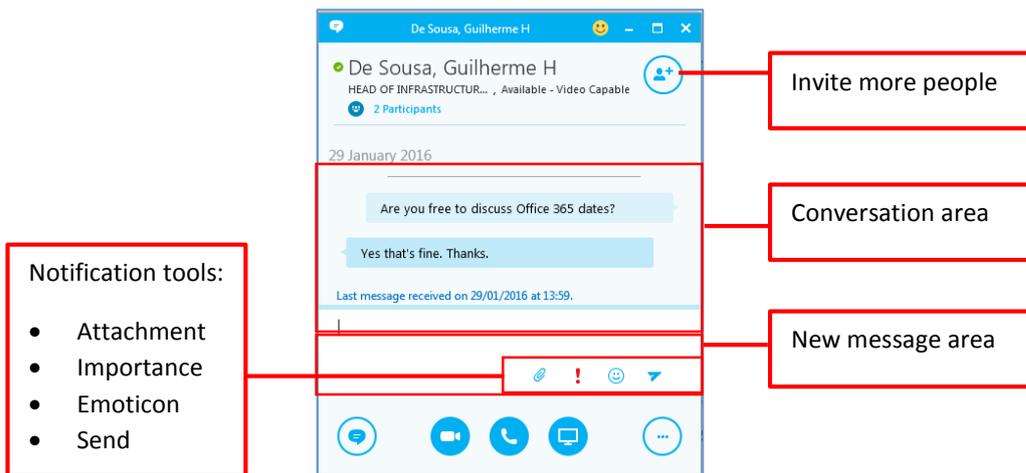


## Instant messaging (IM)

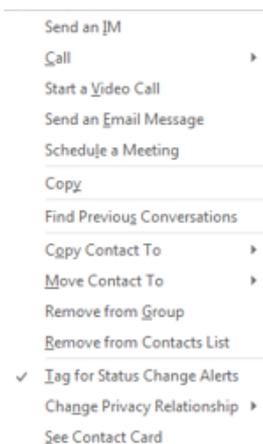
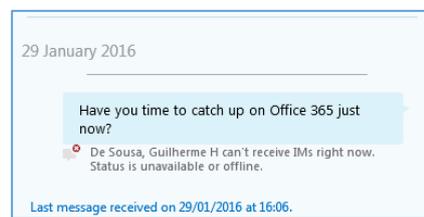
Instant messaging (IM) allows you to communicate with people in real time, and at a moment's notice. It is less formal than email, and faster than a phone call. You can have an IM conversation with one or many people, send pictures and files or add audio or video.

### Starting an IM conversation with one person

1. Locate the person you want to send an instant message to
  2. Display the communication options for that person using one of the methods above
  3. Choose the instant messaging icon 
    - A conversation window will appear
  4. Type your message at bottom of the conversation window
  5. Press the return key or click the send icon (>)
- Your conversation appears at the top of the conversation window.
  - You can use the **Notification** tools to add an attachment, emoticon, or mark the message as important.



- If a person’s status is set to **Do Not Disturb**, your message will not be sent.
- To get a notification when someone’s status returns to *Available* you can tag the contact (**Right-click** on their contact name and select **Tag for Status Change Alerts**). When they are next available you will get a pop-up notification on screen, allowing you the option to make contact and un-tag them.



#### Responding to an IM alert

When someone starts a new IM conversation with you, an alert pops up on your screen.



- To see the message, click anywhere on the photo area to accept it. The IM conversation window will open to display the message.
- To reject the message, click Ignore. The message goes to your Outlook Inbox.

If you do not want to receive new IM alerts, set your presence status to **Do Not Disturb**

You can do this using the **Options** menu on the alert box or see *Displaying your availability: Presence*.

#### Holding an IM conversation with more than one person

If you have already started an IM conversation, you can add others to it by

- **Dragging** their picture from your **contacts list** into the conversation window or, if they are not in your list
- Clicking the **Invite More People** button at the top of the conversation window to display the directory

If you want to start a new IM conversation with a group that you have already set up

1. **Right-click** the group name in your contacts list
2. Click **Send an Instant Message** to start the conversation.

Your message will go to all group members.

To start a new IM conversation with contacts that aren't in a group,

1. Go to your **Contacts** list
2. Hold the **Ctrl** key while you **click** each contact.  
When you have selected all the required contacts
3. Right-click and select **Send an IM** to start a multi-way conversation.

*Sending a file or image using IM*

To send a file or image from an IM conversation, you can:

- Drag-and-drop a saved file into the text input area
- Attachment it using the  notification tool in the message window
- Copy and paste a saved file or image from an Office program into the text input area

## Making an audio or video call

If you have a microphone, a headset (or speakers) and a webcam attached to your computer, you can use Skype for Business to make and receive audio and video calls.

Skype for Business automatically detects your audio and video devices, but before making an audio or video call you should check that they are set up correctly. To do this:

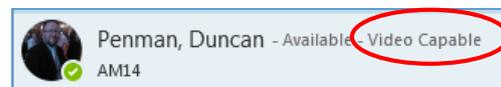
1. Click the **Options** menu (cog icon ) in the main Skype for Business window
2. Choose **Tools > Audio (or Video) Device Settings**

To make a call

1. Locate your contact in Skype for Business,
2. Click the **Audio** or **Video** icon.



Contacts who have a webcam set up, and so can accept video calls, have **Video Capable** on their contact details.



When you call a contact, an alert pops up on their screen.

To accept the call they can click anywhere in the photo area of the pop-up (or they can choose to reject the call).

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.



To end the call, close the window or click the **End call** button.

## Recording Audio and Video conversations

When you record a Skype for Business meeting, you capture audio, video, instant messaging (IM), screen sharing, PowerPoint slides, whiteboard activity, and polling. Any of the presenters can record a meeting and save it on their computer. Click the **Options** button  to start and manage recordings.

For more information on making recordings see [recording conversations](#).

For more information on scheduling Skype for Business meetings and how to present content, see [Skype for Business meetings](#)

## Conversation History

Skype for Business conversations are saved by default.

To view Conversations:

- In the main Skype for Business window click on the **Conversation** tab. All conversations will be listed with the most recent on top; double click on one to open and view a conversation.



OR

- In Outlook, Skype for Business conversations are saved in a folder labelled **Conversation History**.

Conversation History - K.S.Aitchison@hw.ac.uk - Outlook

File Home Send / Receive Folder View Add-ins Adobe PDF Tell me what you want to do...

Change View Settings Reset View Conversation Settings Message Preview

Current View Messages Arrangement

Reverse Sort Add Columns Expand/Collapse

Folder Reading To-Do People Reminders Open in New Close  
Pane Pane Bar Pane Window Window All Items  
Layout People Pane Window

Search Conversation History (Ctrl+E) Current Folder

All Unread By Date Newest

Today

- Conversation with Fury, Stuart  
Fury, Stuart; Aitchison, Keith S 16:27
- Conversation with Fury, Stuart**  
Fury, Stuart; Aitchison, Keith S 16:26
- Conversation  
Aitchison, Keith S 15:04

Two Weeks Ago

- Conversation  
Aitchison, Keith S 05/02/2019

Last Month

- Outgoing call to 330-MeetingSpace-HPILA Virtual Class Test-3e756a  
18298765@vscene.net; Aitchison, Keith S 15/01/2019
- Conversation with Fury, Stuart  
Fury, Stuart; Aitchison, Keith S 15/01/2019

Conversation with Fury, Stuart  
Fury, Stuart; Aitchison, Keith S

From: Fury, Stuart  
Sent: Tue 19/02/2019 16:26  
Modes: ☺

Fury, Stuart 16:24:  
Hi Keith  
Hi Keith

Unimportant conversations may be deleted.

You can stop saving conversations by disabling the option (**Options**  > **Tools>Options >Personal**).

## Skype for Business meetings

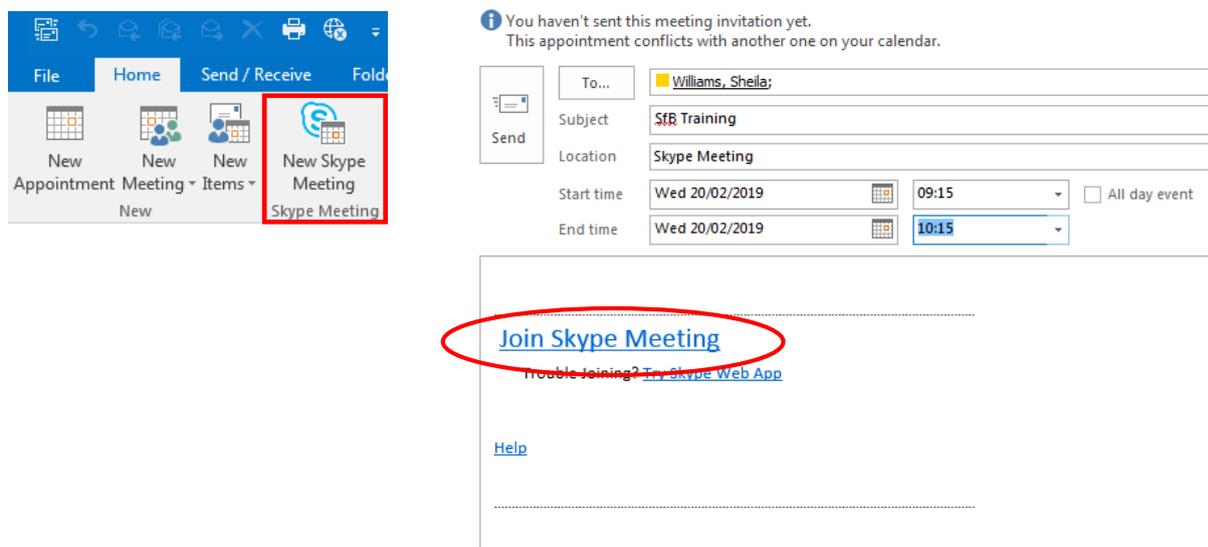
The meeting feature gives you the capability to collaborate by making presentations online and sharing desktops, programs, files and a whiteboard between meeting participants.

### Scheduling a meeting

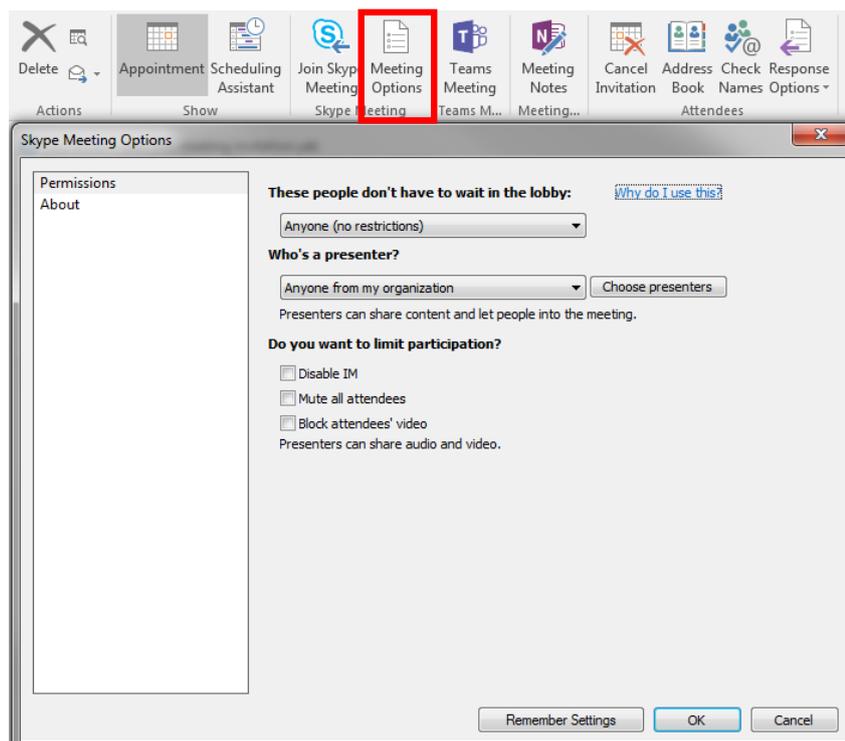
If you use the Outlook desktop client or Outlook 365 online, you can use Skype for Business Meeting to schedule a single or recurring online meeting similar to the way you use Outlook to schedule regular meetings. To initiate an online meeting request in the desktop client

1. Start as you would normally by going to your Outlook calendar
2. Click the **New Skype Meeting** button on the ribbon and in the meeting request window
3. Enter the attendee and date/time data as for a standard meeting

A link is automatically added to your meeting request that invitees can click to join the conversation.



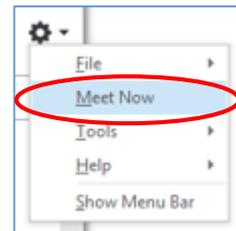
With the meeting request created, you then have access to the **Meeting Options** button on the ribbon where you can set preferences and permissions.



## Starting an unscheduled meeting

For spontaneous meetings, the **Meet Now** feature in Skype for Business allows you to hold impromptu meetings without the need to schedule in Outlook.

- In the Skype for Business window, go to the **Options** menu (cog icon ) and select **Meet Now**
- A meeting conversation window will open and you will be able to invite participants using the Invite button 



## Sharing your desktop and other content

You can share content with colleagues either from the messaging conversation window or during a meeting. This presentable content can include your computer desktop, a single program file or a PowerPoint slideshow. You can also share a virtual whiteboard, conduct polls and hold a Q&A session.

### NOTE:

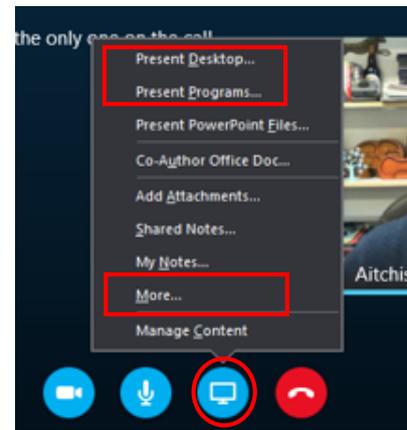
When you share your desktop, everyone participating can see your entire desktop including notifications. If you have confidential information or documents that you don't want people to see, close them or use program sharing instead.

### Start sharing

1. Start sharing by first **establishing a connection** to your contacts by starting an IM conversation, audio/video call or a meeting
2. To share your screen, click the **Present** icon from within a conversation or meeting window 

From the content options menu:

- Click **Present Desktop** to show the entire contents of your desktop (if, for instance you are working with multiple programs). If you have a dual-monitor setup, you can choose to select all monitors, the primary monitor only, or the secondary monitor.  
or
- Click **Present Programs** and double-click the program window you want to share (the program for sharing must already be open)
- Click **More...** to access other presentable content items such as *Whiteboard* and *Polling*



When you share a program file or desktop, the window will have a yellow border and a **Now Presenting** tab will display on your desktop.

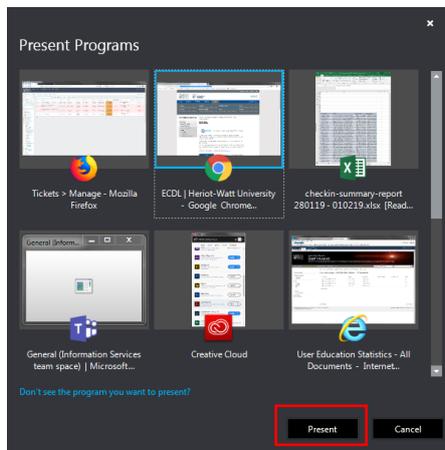
Your presence status will also automatically change to *Presentation*, and will thus restrict other Skype for Business alerts appearing.

Your participants will receive an alert to notify them that you are sharing content. Once they click *Accept*, the shared content will appear in a window on their screen.

Initially, only the person who started presenting can control the content. You can however allow any participant to share control. You can take back full control at any time. See [Allowing participants to control content](#)

What the presenter sees:

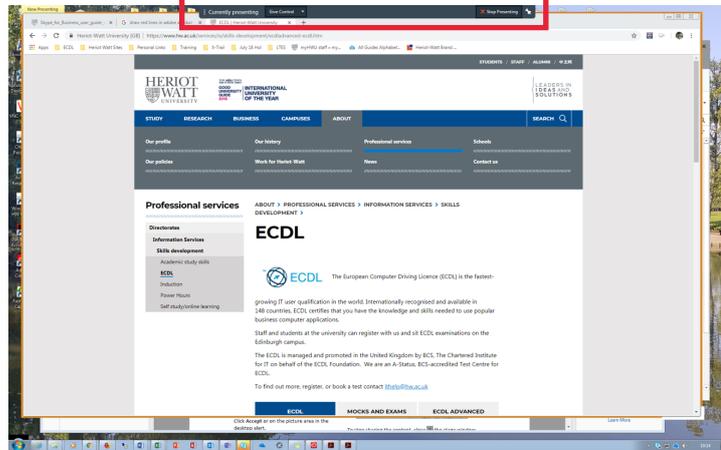
### Initiating the content share



Click the **Present** button to send a sharing request to your participants.

### Sharing Toolbar

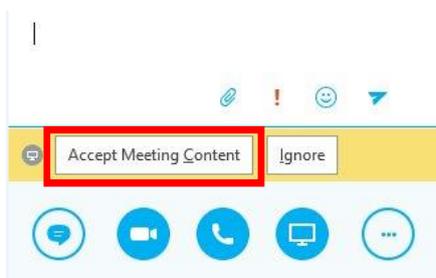
### With sharing established



The **Sharing toolbar** for sharing control with other participants appears at the top. The yellow border around the desktop indicates the extent of what other participants can see.

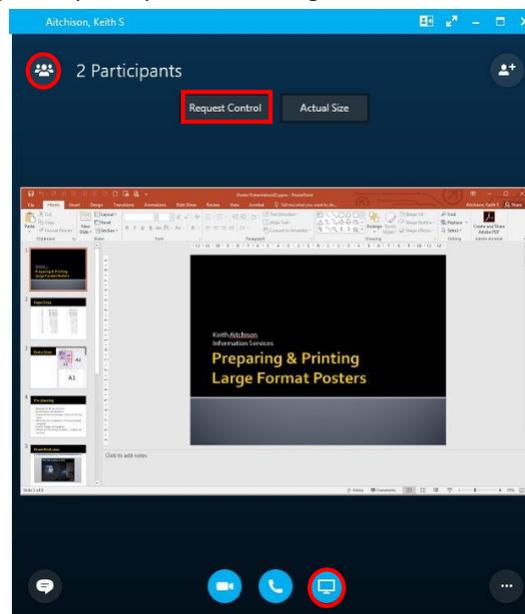
What the participant sees:

An invite to share alert appears either on the desktop or, if open, in the message window.



Click **Accept** or on the picture area in the desktop alert.

The participant will see this **sharing stage**, where they can click buttons to **request/release** control or other options such as inviting more participants or sharing their own content.

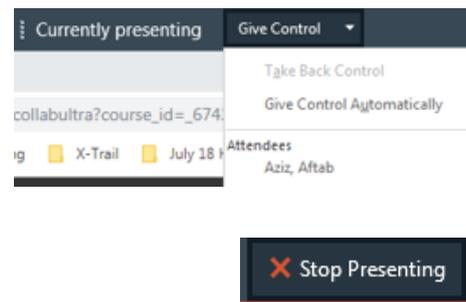


To stop sharing the content, close  the stage window.

## Allowing participants to control content

On the Sharing toolbar at the top of the presenter's screen, use any of these options:

- Click **Give Control** to share control of your desktop or programs with the specific participants. (**Control Automatically** gives access to anyone automatically who requests control of your desktop; recommended only for small meetings)
  - To revoke control rights, select **Take Back Control**.  
Alternatively, hit the **Ctrl + Alt + Space**
- Click **Stop Presenting** when you are done sharing your screen.
- Click the **pin** to hide the toolbar and have more space.  
To unhide the toolbar, move the mouse to the top of the screen.



If the attendee *requests* control the presenter will see the following prompt in the Sharing toolbar.



## Exiting Skype for Business

When you have finished using Skype for Business, you can

- **Close** the Skype for Business window
- **Sign out** of your session
- **Exit** from the program

The differences are summarised here:

Option	Is Skype for Business running?	Can others see your status?
Close	Yes	Yes
Sign out	Yes	No
Exit	No	No

### Closing the Skype for Business window

You can close the Skype for Business window by clicking the X in its upper-right corner. Although the window closes, your session continues to run, so others can still see your availability status and you still receive alerts.



The Skype for Business icons on your taskbar will appear as they do when you have the Skype for Business window open, indicating your presence status. Re-open the Skype for Business window at any time by clicking the large icon in the program section of the taskbar.



### Sign out

**Sign out** closes your Skype for Business session, but continues to run Skype for Business in the background, making it easier to sign in again when you're ready. The Sign out option is available from your status drop-down in the main Skype for Business window or by right-clicking the small icon in the system tray at the end of the taskbar. Once you have signed out in this way, others cannot see your status or interact with you.

- When signed out, the Skype for Business presence indicator displayed on the taskbar/system tray is a red cross



### Exit

Exit closes your Skype for Business session and stops Skype for Business running on your computer.

Both icons will disappear from the taskbar/system status tray at the bottom of your screen.

## How to join a Skype for Business meeting as a guest (for use with non-HWU staff/students)

This page describes how to use the Skype for Business Web App to join a meeting you have been invited to.

The Skype for Business Web App allows guest users (non-HWU staff/students) who don't have a full version of Skype for Business to participate in Skype for Business meetings.

A **scheduled meeting** is required - guests cannot join without an invitation.

### Instructions for guests

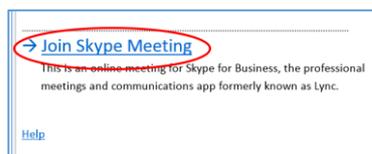
HWU staff – you could send/direct your guest to these instructions

#### 1. Open your Skype for Business invitation

In order to use the Skype for Business Web App, you must be invited to a Skype for Business meeting (usually by someone with a full version of Skype for Business).

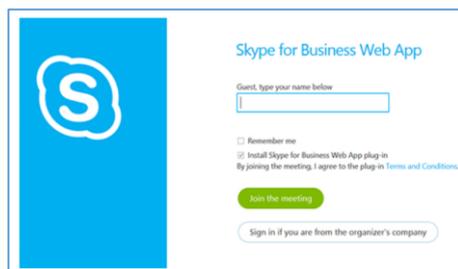
Look for your invitation in your Outlook calendar or your email inbox.

#### 2. In your invitation, click on **Join Skype Meeting**



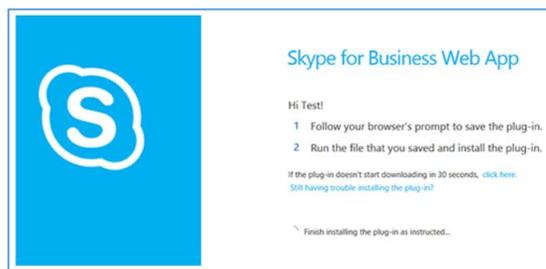
#### 3. **Sign in** as a guest

Enter a guest name and click **Join the meeting**



#### 4. Install Skype for Business guest app plug-in

If you have not yet downloaded the Skype for Business Web App, you will be prompted to do so.



Follow your web browser's instructions for downloading and installing the Skype for Business Web App plug-in.

## Online videos and guides

- [Skype for Business: A quick introduction](#)
- [Microsoft Office: Skype for Business How-to](#)
- [Skype for Business: Step-by-step guide for new users](#)
- [Help topics about Skype for Business](#)
- [Lync 2013 for Mobile Clients](#)
- [Record and play back a Skype for Business meeting](#)

## Feedback or queries

If you have any feedback or queries please contact [ithelp@hw.ac.uk](mailto:ithelp@hw.ac.uk)