# Table of Contents

About Skype for Business ....................................................... 4

Skype for Business Window ................................................... 5

Audio ....................................................................................... 6
  Set up your audio device ....................................................... 6
  Make a call ........................................................................... 6
  Answer a call ........................................................................ 7
  Use audio call controls ......................................................... 7
  Check voicemail ................................................................... 8
  Invite more people to a call .................................................. 8
  Best Practices ........................................................................ 9

Instant Messaging (IM), Presence, Contacts ............................... 9
  Add a contact ......................................................................... 9
  View a contact card ............................................................. 9
  Accept an IM Request .......................................................... 9
  Send an IM ........................................................................... 9
  Set or change your presence .................................................. 10
  Add audio, video, presentation to an IM conversation .......... 10
  Have multiple IM conversations .......................................... 10
  Find previous IM conversations ........................................... 11
  Create a group ...................................................................... 11
  Add contacts to a group ....................................................... 12
  Best Practices ...................................................................... 12

Skype for Business Meetings and Conferencing ....................... 12
  About Skype for Business meetings ................................... 12
  Customize meeting options ............................................... 13
  Schedule a phone conference ............................................. 14
  Start a conference call ....................................................... 14
  Join a Skype for Business Meeting .................................... 15
  Do I need a PIN .................................................................... 15
  Change Your Dial-In PIN ..................................................... 15
  Recording and playback ..................................................... 16
  Manage participants .......................................................... 16
Group IM conversations ................................................................. 17
Transfer to a mobile phone ............................................................. 17
Best practices ............................................................................... 18

Sharing and Collaboration............................................................. 19
Share your desktop or program ..................................................... 19
Give others control to your sharing session .................................. 19
Best Practices ............................................................................... 19

Video........................................................................................... 20
Set up your audio device ............................................................... 20
Start a video call .......................................................................... 20
Manage the participants ............................................................... 20
Invite others ................................................................................ 20
Add video to an IM conversation .................................................. 21
Start a video conference ............................................................... 21
Answer a video call ...................................................................... 21
Best Practices ............................................................................... 21

Enter a Chat Room ...................................................................... 22
About chat rooms and privacy settings .......................................... 22
Find and enter a chat room ........................................................... 22
Track chat activity ........................................................................ 23
Create a chat room ...................................................................... 23
Best Practices ............................................................................... 23
About Skype for Business

Skype for Business, formerly known as Microsoft Lync, provides an instant messaging and conference calling solution for University of Utah personnel who are on the University’s secure server. All University of Utah faculty, staff and students can download Skype for Business for free.

Top features of Skype for Business:

• Chat and instant messaging
• Screen sharing and presenting
• Internal and external calling
• One solution for audio, video and web conferencing
• Video calling
• Presence and location

All University of Utah faculty, staff and students can download Microsoft Skype for Business for free.

To download Skype for Business.

• Go to [http://software.utah.edu](http://software.utah.edu).
• On the right column, select Shop for Software.
• Search for Skype for Business.
• Choose which license applies to you.
• Select Add, then Check Out.
• Enter your uNID and password.
• Under Delivery Method, choose Download or No Media.
• Select Continue with Purchase.
• Skype for Business will download onto your computer.
Skype for Business Window

- Conversations
- Phone
- Meetings
- Status/Presence
- Contacts
- Options
- Search Bar
- Add a contact
- More options
- IM
- Call
- Video Call
- Invite More People
- Sent an IM
- More Options
- Text Box
- Video Call
- Present
- Call

© 2012 Microsoft Corporation. All rights reserved.
Audio

Set up your audio device

Before using the audio feature of Skype for Business on your computer, you must have an audio device set up. Your computer can be used if it has a microphone and speaker. If not, a USB headset can be used.

To set up your audio device:

• On the lower left-hand corner of your client, hover over the phone icon and select Audio Device Settings.
• Choose which device you want to use.
• Adjust speaker, microphone, and ringer volume.
• Select OK.

Make a call

To call from your contact list:

• Hover over a contact’s picture.
• Select the Phone icon.
• The call will be in progress.

To call using the Dial Pad:

• Select the Dial Pad icon at the top portion of Skype for Business.
• Dial the phone number on the keypad.
• Select Call.
• The call will be in progress.
Answer a call

To answer a call from Skype for Business:

• An alert will pop up when you receive a call.
• Select the picture to answer the call.

To reject a call:

• Select Ignore below the picture.
• The call will go directly to voicemail.

To take other actions:

• Select Options on the alert picture.
• Choose which option to take:
  o Send the call to Voicemail.
  o Reply by IM.
  o Set to Do Not Disturb.

Use audio call controls

During the call:

• Select the phone settings icon in the lower right-hand corner
  o From here, you can put the call on Hold, Mute the call or transfer to a different phone.
• To hang up, select the red Phone icon in the conversation window.
Check your voicemail

To check your voicemail:

• Select the **Dial Pad** icon at the top portion of the main window.
• Messages and the caller’s info will display in the lower portion of the window.
• Hover over the caller’s picture to listen to the voicemail or call back.

For more voicemail options:

• Select the **More Options** icon beside the contact’s picture.
• In **More Options**, you can:
  o Play
  o Call
  o Start a Video Call
  o Add to Contacts List
  o See Contact Card
  o Open Item in Outlook
  o Delete Item

Invite more people to call

• In the call window, select the **Invite More People** icon in the top right corner.
• Select or search the contact(s) you wish to invite.
• Select **OK**.
**Best Practices**

The following are recommended for a better audio experience:

- Set up your audio device before making a call.
- To avoid disrupting others around you, plug in a headset when using Skype for Business’ audio function.

**Instant Messaging, Presence and Contacts**

**Add a contact**

To add a contact:

- Find a contact by entering the name, phone number or IM address in the **Search Bar**.
- Right-click the person’s contact picture.
- Select **Add to Contacts List**.

**View a contact card**

A contact card displays details from the contact’s company directory.

To view a contact card:

- Find the contact.
- Hover over the picture icon.
- Select the **Contact Card** icon.

**Accept an IM request**

To accept an IM request:

- An alert will pop up.
- Select anywhere on the picture of the alert.

**Send an IM**

To send an IM:

- Hover over a contact’s picture.
- Select the **IM** icon.
• Input your message, and select enter.

Set or change your presence

You can set your presence to let others see where you are currently.

To change your presence:

• The presence icon is listed below your name at the top of the client.
• Select the down arrow.
• Choose from the list of presences.

*By default, your presence will automatically change to “In a Meeting” or “In a Call” when you have a meeting scheduled or are in a call.*

Add audio, video or presentation to an IM conversation

To add audio, video or presentation:

• Select the appropriate button(s) from the bottom of the conversation window.
  o The Video icon turns the IM message into a video call.
  o The Phone icon turns the IM message into a call.
  o The Presentation icon gives you the option to share your desktop, PowerPoint or any other programs. This icon can also add attachments and notes.

To stop presenting:

• Select Stop Presenting at the very top of your screen.

Have multiple IM conversations

Skype for Business gives users the ability to stay in multiple IM conversations at once. All current conversations will display in one conversation window.
To switch between tabbed conversations:

- Select an IM conversation.
- To the left of the window, there will be a list of all the people you are conversing.
- Select the contact you wish to IM to switch between tabbed conversations.

Find a previous IM conversation

Your IM conversation history is automatically saved by Skype for Business.

To view or continue a previous IM conversation:

- Select the **Conversations** icon in the top portion of the Skype for Business main window.
- Choose **All, Missed or Calls**.
- Double-click the conversation to view or resume.

For other options:

- Right-click the conversation.
- Select one of the following:
  - Find Previous Conversation.
  - Continue Conversation.
  - Delete Conversation.
  - Add to Favorites.
  - Add to Contacts List.
  - See Contact Card.

Create a group

You may wish to create a group to organize contacts.

To create a group:

- Select the **Add a Contact** icon on the right side of the Skype for Business main window.
• Select **Create a New Group**.
• Type in the name of your new group, and select enter.

To delete a group:

• Right-click the group.
• Select **Delete Group**.

**Add contacts to a new group**

To add contacts to a new group:

• Drag contacts from another group.
  OR
• Right-click on the contact.
• Select **Move Contact To**.
• Choose where to move the contact.

**Best practices**

The following are recommended when you use instant messaging, set your presence, and organize contacts.

• To further organize your contacts, create a group to place specific contacts.
• Tag contacts for status alerts to know when they are available or busy.
• Change your presence to inform others of your availability.
• Use instant messaging when you need to send a quick message to one of your contacts.

**Meetings and Conferencing**

**About**

Four classifications for meeting participants:

1. Organizer
   a. Person who schedules a meeting or conference call.
2. Leader
a. First person to dial-in to a conference call from a Skype for Business phone.

3. Presenter
   a. Can invite others to an active meeting or conference call.
   b. During a meeting, a presenter can change the classification of other presenters to an attendee.
   c. Only a presenter can record a meeting, distribute files and share items (desktop, program, whiteboard and conduct a poll).
   d. All faculty and staff members are presenters.
   e. Using **Meeting Options**, the meeting organizer can change the permissions level of any participant form presenter to attendee before the meeting invitation is sent.

4. Attendee
   a. Can initiate instant message (IM) conversations and view items that are shared.

Meeting participants who dial in from a non-Skype for Business phone must wait until a leader dials in. The leader is the first person to dial in from a Skype for Business phone and can give access to non-Skype for Business phone callers.

If you need/want to be the Leader and are calling from a non-Skype for Business phone, you must enter your dial-in PIN to become the leader. The dial-in PIN is automatically set as **123456**. If you would like to change it, see **Change Your Dial-In PIN** on page 15.

Before sending a meeting invitation, the organizer can change the meeting options. **Note: Meeting organizers should change the meeting options before sending the meeting invitation.** The Conference ID is assigned by Skype for Business and appears in an Outlook Meeting Invitation.

To set meeting options:

**Note: Changing the meeting options can potentially change the Conference ID for the current meeting. Make sure any changes to meeting options are made before you send the meeting invitation.**

**Customize meeting options**

To customize your meeting options:
In the meeting invitation, select **Meeting Options** on the toolbar.
Set preferred meeting options, which include:
  - Designating who waits in the “lobby” until the organizer is present.
  - Designating who is an attendee or presenter.
  - Turning on entry and exit announcement.
Select **OK**.

**Schedule a phone conference or Skype for Business meeting from Outlook Calendar**

To schedule a Skype for Business meeting:
- Open your Outlook Calendar.
- Select **New Skype Meeting**.
- Add recipients, subject, agenda, and date/time.
- Select **Send**.

**Start a conference call from Skype for Business**

To start a conference call from the client:
- Hold down the **Ctrl** key on your keyboard.
- Select the contacts you wish to include in the call.
- Right-click, then select **Start a Conference Call**.
- Choose **Skype for Business Call** or one of the numbers.
Join a Skype for Business meeting

There are a few ways you can join a Skype for Business meeting.

To join a meeting through Skype for Business:

- Right-click on the meeting in your calendar.
- Select Join Skype Meeting.
- OR
- Go to the sent meeting email.
- Select Join Skype Meeting.
- OR
- Select Join Online in the Outlook Meeting Reminder.

To join a Skype for Business meeting by phone:

- Dial the number found in the meeting email.
- Enter in the Conference ID number also found in the meeting email.
- Enter the dial-in PIN: 123456.

Do I need a PIN?

By default, the University of Utah Skype for Business dial-in PIN is **123456**. You need a PIN if:

- You are the organizer of the meeting and are calling from a phone not connected to your account.
- You are an attendee of a secured meeting and you need to be identified.

Change your dial-in PIN

If preferred, you can change your dial-in PIN.

To change your dial-in PIN:

- Go to [https://dialin.umail.utah.edu](https://dialin.umail.utah.edu).
- Under Personal Identification Number (PIN), select Sign In.
- Select Sign in with a different account.
- Enter in your username and password.
Username: uNID@umail.utah.edu
Password: uNID password

- Select **Sign In**.
- Select **Reset your PIN** under Personal Identification Number (PIN).
- Enter in your new PIN.
- Select **OK**.
- Your new PIN is set.

**Recording and play back**

- In the Skype for Business meeting window, select the **More Options** icon.
- Click **Start Recording**.
- Use the recording, pause, and stop icons to pause, resume or stop the recording.
- The recording is automatically saved in a format that plays Windows Media Player.

To manage recordings:

- Select the **More Options** icon in the IM window.
- Select **Manage Recordings**.
- Select **Browse** to go to the location of the recording.

**Manage participants**

To manage participants in a Skype for Business meeting:

- Hover over the **People** icon in the Skype for Business meeting window.
- Select the **Participants** tab.
- Right-click a person’s name to mute, unmute or remove.
- Select the **Actions** tab to perform the action you want to take.
Group IM Conversation

In Skype for Business, you are able to start a group IM conversation and turn a single IM conversation into a group conversation.

To start a group conversation:

- Click the Ctrl key on your keyboard, and select each contact you want to invite.
- When each selected contact is highlighted, right-click and select Send an IM.
- You can then begin to enter the contents of your message in the message box.
- Select Enter.

To turn a single IM conversation into a group conversation:

- In the IM window, select the Invite More People icon in the top right corner.
- Select or search the contact(s) you wish to invite.
- Select OK.

Transfer to your mobile phone

You are able to continue a Skype for Business meeting through your mobile phone. Before transferring to your mobile phone, your mobile phone number must be entered in Skype for Business.

To add your mobile number to Skype for Business:

- Open the client.
- Select the Gear icon in the top portion of Skype for Business.
- Select Phones on the left of the options dialog box.
- Select Mobile Phone.
- Enter in your mobile phone number.
- Select OK.
If you want the number to remain private:

- Uncheck **Include in my contact card**.
- Select **OK**.

To transfer the audio of a group conversation to your mobile phone:

- In the group conversation window, select the **Call Options** button.
- Select **Transfer Call**.
- Select your mobile number.

**Best practices**

The following are recommended to make your audio/video conferencing on Skype for Business more efficient:

- When sending your meeting request, attach notes or files to the request so the attendees can review selected information before the meeting.
- Know your PIN before the meeting begins.
- Before you join a meeting, select what audio device you want to use
  - Use a headset for higher quality audio.
- If you are the presenter, designate a backup presenter in the event of running late or other issues.
- Mute your audio when you are not speaking.
- Use one active audio device when there are several people in the same room.
- Open files you are planning on sharing before the meeting begins
- If running your meeting in a conference room, connect your laptop to the projector before the meeting begins.
Sharing and Collaboration

Share your desktop or a program

To share your computer desktop screen or a specific program during your Skype for Business meeting:

• In the meeting window, hover over the Presentation icon.
• Select how you wish to present.
  o Select Desktop to show the entire content of your screen.
  o Select Program, then double-click your preferred program.
  o Select PowerPoint to share a PowerPoint presentation.
  o Select Whiteboard to share Whiteboard.
• Select Stop Presenting when you are finished presenting.

Give others control to your sharing session

In your sharing session, you can transfer control to other participants in the session.

To give control:

• Select Give Control at the top of the sharing screen.
• Under Attendees, select the name of the person you want to give access.
• Select Take Back Control in the Give Control menu to take back control of the sharing session.

Best practices

The following are recommended for the best sharing experience:

• Use desktop sharing if you plan to switch between programs.
• Close anything you do not wish to share when sharing your desktop.
Video

Set up your video device

To set up your video device:

- In the Skype for Business main window, select the Gear icon.
- Select Video Device.
- Select Camera Settings to adjust settings.
- Select OK.

Start a video call

To start a video call:

- In the Skype for Business main window, hover over a contact’s picture.
- Select the Camera icon.
- Your contact can decide to accept or ignore the call.

To end a video call:

- Select Stop My Video to end your video but see others’ videos.
- Select End Video to end all videos but still have audio.
- Select the Red Phone icon to end the call.

Manage the participants

- Right-click a participant’s video or picture.
  - Mute, Unmute or Remove participant.
  - Lock the Video Spotlight which locks video on the participant.
  - Pin to Gallery keeps the participant in Gallery View.

Invite other people to a video call

- During the call, select the Invite More People icon in the top right corner.
- Select or search the contact(s) you wish to invite.
• Select OK.

**Add video to an IM conversation**

• During an IM conversation, select the **Camera** icon.
• Select **Start My Video**.
• Select **Stop My Video** to end the video.

**Start a video conference**

• Hold down the **Ctrl** key on your keyboard.
• Select the contacts you wish to include in the call.
• Right-click and select **Start a Video Call**.
• Use the video controls to manage the conference.

**Answer a video call**

When someone requests a video call with you, you should receive an alert on your screen.

To answer the call:

• Select anywhere on the picture.

To ignore or reject the call:

• Select **Ignore**.
 OR
• Select the down arrow on **Options**.
  o Send the call to **Voicemail**.
  o Redirect the call to your **Mobile** or **Home** phone.
  o **Reply by IM**.
  o **Answer with Audio Only**.
  o **Set to Do Not Disturb**.

**Best practices**

The following are recommended when making a video call:

• Make sure your video device is set up before making a video call.
• Create a conference call by inviting others to a personal video call.

**Enter a Chat Room**

Skype for Business chat rooms allow participants to share messages about a specific topic in real-time and saved over time. You can create chat rooms, participate in chat room conversations, view and search history, and monitor conversations.

**Chat room privacy settings**

• **Open Rooms**: Anyone can find and follow.
• **Closed Rooms**: Non-members can find and see members. Only members can follow.
• **Secret Rooms**: Non-members cannot find.

To customize alerts for a specific room:

• Right-click the room listing.
• Select Change Notification Settings.
• Select Customize Settings.
• Choose the options you want.
• Select OK.

**Find and enter a chat room**

To enter a chat room:

• Select the Chat Rooms icon in the main Skype for Business window.
• Enter the room name or keywords in the search box.
• Find the Chat Room icon.
• Select Open.
• If you have authorization, you should be a member of the chat room.

To follow a room:

• Select the Chat Rooms icon in the main window.
• Type in the name of the room in the search box.
• Right-click the room listing.
• Select **Follow this Room**.

**Track chat activity**

To set up topic feeds:

• Select the **Chat Rooms** icon in the Skype for Business main window.
• Select the **Add a Room** icon.
• Select **Create a New Topic Feed** icon.
• Enter in a name.
• Decide what posts you want to follow.
• Select **OK**.

**Create a chat room**

• To create a chat room, you will need to submit a ticket to the help desk by email: [helpdesk@utah.edu](mailto:helpdesk@utah.edu) or phone: 801-581-4000.

**Best practices**

The following is recommended when entering a chat room:

• Set up topic feeds to alert you when new messages are posted in the chat room.