Skype for Business

How-to Guide

Fall 2016
Get to Know Skype for Business

Contents

Contacts ......................................................................................................................................................... 1

Searching For and Adding Contacts ............................................................................................................... 1

Creating Contact Groups .................................................................................................................................. 2

Tagging a Contact .............................................................................................................................................. 3

Instant Messaging (IM) & Presence .................................................................................................................. 4

Sending an IM to One of Your Contacts ......................................................................................................... 4

Sending an IM with High Importance ............................................................................................................... 5

Sending an IM to All or Multiple Members of a Group .................................................................................... 6

Invite Contacts to Join a Chat That is In Progress .......................................................................................... 7

Changing Your Presence and Personal Message ............................................................................................ 7

Transferring Files .............................................................................................................................................. 8

Sending and Receiving Files ........................................................................................................................... 8

Audio & Video Calls ......................................................................................................................................... 10

Making Audio and Video Calls ....................................................................................................................... 10

Receiving Audio and Video Calls .................................................................................................................... 10

Enterprise Voice Calls ..................................................................................................................................... 11

Making Enterprise Voice Calls ....................................................................................................................... 11

Making Enterprise Video Calls ....................................................................................................................... 12

Receiving Enterprise Video Calls .................................................................................................................. 12

Putting a call on hold and transferring calls .................................................................................................. 13

Call forwarding and simultaneously rings ................................................................................................... 14

Test DND and Privacy Relationships ............................................................................................................ 15

Blocking and Unblocking contacts ................................................................................................................ 15

Set Your presence Status to DND .................................................................................................................. 16

Set Privacy .......................................................................................................................................................... 17
CONTACTS

In Skype for Business (S4B), your contacts are the online identities of the people you communicate with a lot. You can add them to your Contacts list so they’ll be just a click away. The information provided in the following sections describes how to manage your Contacts. The process is slightly different depending on the type of operating system your computer has, so information is provided for both Windows and Mac.

SEARCHING FOR AND ADDING CONTACTS

WINDOWS

To search for and add a contact on a computer running the Windows operating system:

1. Locate the search box on the main window for S4B. Type in the name or email address for the person you want to add to your Contacts list. This search may also be used to find Office 365 (Outlook) users. Search results will begin to populate as you type.

2. When you see the listing for the person you want to add, right click their name. A drop-down menu will display.
3. Use your mouse to hover over the Add to Contact List option. An additional drop-down menu will display.
4. Select the Group you want add the contact to or select the Other Contacts option. You may also select the Add to Favorites option. Your Favorites will display above all other Groups in your S4B window.
MAC

To search for and add a contact on a Mac computer:

1. In the search box on the Contacts view of the S4B main window, type the name or email address of the person you want to find or add to your Contacts. This search may also be used to find Office 365 (Outlook) users. Search results will begin to populate as you type and the tabs will change to Groups, Status, Relationships, and New.

![Contact search on Mac](image)

2. When you see the listing for the person you want to add, right click on their picture or picture display area.
3. Select the **Add to Contacts List** option.
4. Select the Contact List you want to add the person to or select the **Other Contacts** option. You may also select the **Add to Favorites** option. Your **Favorites** will display above all other Groups in your S4B window.

**CREATING CONTACT GROUPS**

WINDOWS

There are two methods for creating Contact Groups on a computer running the Windows operating system:

**Method 1:**

1. Click on the **Groups** tab.
2. Click the **Add a Contact** icon to open the drop-down menu.
3. Select the **Create a New Group** icon.

![Groups tab on Windows](image)

4. Type in a name for your new Group.
Method 2:

1. Click on the **Groups** tab.
2. Right click on any group name. A drop-down menu will display.
3. Select **Create New Group** from the drop-down menu.

4. Type in a name for your new Group.

MAC

TBD

**TAGGING A CONTACT**

**WINDOWS**

To tag a contact:

1. From the **GROUPS** tab, right click on the contact that you want to start an IM conversation with. A drop-down menu will display.
2. Select the **Send an IM** option to open an IM window.
S4B instant messaging (IM) is an efficient way to connect with your contacts in real time and on a moment’s notice. Less formal than email, faster than a phone call—IM is a fast and easy way to communicate.

SENDING AN IM TO ONE OF YOUR CONTACTS

WINDOWS
To send an IM to one of your contacts:

1. From the GROUPS tab, right click on the contact that you want to start an IM conversation with. A drop-down menu will display.
2. Select the Send an IM option to open an IM window.

   ![IM Window Preview]

   Note: Alternately, you can double-click on the contact to open an IM window.

3. Type your message in the text box.
4. To send your message, press the Enter key on your keyboard or click the send icon located in the lower-right corner of the IM window.

MAC

1. From the Chats list or the Contacts list, click on the contact you want to start a conversation with.
2. Click the IM button to open an IM window.
3. Type your message in the text box.
4. Press the return key on your keyboard or the send icon to send the message.
5. If your S4B administrator has enabled communication with external contacts, type their name or email into the search bar and select their contact card from the drop-down bar.
6. Click the IM button.
SENDING AN IM WITH HIGH IMPORTANCE

WINDOWS

To indicate that a message is very important:

1. Open an IM window (as described in Step 1 of the ‘Sending an IM Message to One of Your Contacts’ section above).
2. Click the red exclamation point in the text box to select **High Importance**.
3. Type in a message in the text box.
4. Press the Enter key on your keyboard or click the send icon located in the lower-right corner of the IM window.
5. To turn off High Importance, simply click the **High Importance** icon again to toggle it into the off position.

MAC

TBD
SENDING AN IM TO ALL OR MULTIPLE MEMBERS OF A GROUP

WINDOWS

To send an IM to all members of a Group:

1. From the GROUPS tab, right click on the name of the group you want to send the message to. A drop-down menu will display.
2. Select the Send an IM option.
3. A text box should appear allowing you to send a message to that entire group.

To send an IM to selected members of a Group:

1. From the GROUPS tab, hold the Ctrl key on your keyboard and select all of the users you want to send a message to.
2. Right click on any of the selected users. A drop-down menu will display.
3. Select the Send an IM option.
4. A text box should appear enabling you to send a message to all of the contacts you selected.

MAC

To include multiple contacts in the same IM conversation:

1. Click on the information for the first contact that you want to include in the conversation. Then, select additional contacts by either holding the Shift key on your keyboard to select contacts that are adjacent to the first contact or the Control key for non-adjacent contacts.
2. Once you have all contacts selected, right-click and select the Send Instant Message option from the drop-down menu.
INVITE CONTACTS TO JOIN A CHAT THAT IS IN PROGRESS

WINDOWS

To invite a contact to join an in progress chat session:

1. Select the chat session that is in progress.
2. Click the Invite More People icon.
3. Select the contacts you want to invite into the current chat session.

MAC

1. Select the chat in progress that you want to add a contact to and click the invite icon to open a search bar that will allow you to search for and add additional Attendees to the chat.

CHANGING YOUR PRESENCE AND PERSONAL MESSAGE

You can change your presence status to indicate your availability for a chat. For example, you can indicate if you are Available, Away, Do Not Disturb, or Offline.

WINDOWS

To change your presence:

1. To change your presence, click the drop-down arrow below your name to open the Presence drop-down menu.
2. Select the availability status that you want to display to your contacts.
3. To add a status message, click the message bubble above your name and type a new message.

MAC

1. Click on your picture (or the icon with your initials).
2. To change your presence, click the drop-down arrow below your name to open the Presence drop-down menu.
3. Select the availability status that you want to display to your contacts.
4. To add a status message, click on your picture, Click to add status message, and then type a message.

TRANSFERRING FILES

In S4B, users can send files to their contacts, if the file isn’t restricted. In the event that a restricted file is sent, S4B will return an error or failure message. Note that files may only be transferred if the file transfer option is enabled by an administrator.

SENDING AND RECEIVING FILES

WINDOWS

To send a file to one of your contacts:

1. Open a chat session with the contact you would like to send a file to (as described in the ‘Sending an IM to One of Your Contacts’ section above).
2. Click the Choose File to Send icon.
3. A file selection window will open showing the files stored on your computer or network drives.
4. Select file you want to send.
5. Click the Open button to send the file.
6. A dialog box will display letting you know if the file was transferred successfully.

MAC

TBD

WINDOWS

To receive a file from one of your contacts:

1. A popup message will appear on the bottom right of your screen when someone sends you a file.
2. Hover your mouse cursor over the message and select View.
3. A chat box will appear. Click Download All or click on the down arrow icon to download individual files.
In S4B, users may make audio calls and face-to-face video calls to contacts from their address book.

**MAKING AUDIO AND VIDEO CALLS**

**WINDOWS**

1. From the **GROUPS** tab, right click on the contact that you want to start a voice call with. A drop-down menu will display.
2. Hover your mouse cursor over the **Call** option and select the **Skype Call** option to start a voice call.

   *Note: Alternately, you can double-click on the contact to open an IM window and selecting the **Call** icon.*

**MAC**

1. To make an audio or video call to a contact, select a contact card from the Contacts tab in the main S4B window.
2. Click the audio or video call icon.
3. You can also make calls to a contact that you already have a chat open with by clicking the audio or video call icon at the top of the chat window.

**RECEIVING AUDIO AND VIDEO CALLS**

**WINDOWS**

To receive a **Voice** or **Video Call** from one of your contacts:

1. A popup message will appear on the bottom right of your screen when someone requests a video call with you.
2. Select **Accept** to join the video call.
Note: Voice Calls notification.

Note: Video Calls notification.

MAC

1. When a contact calls you, a notification will display on your screen. To answer the call, select notification.
2. If you don’t want to accept the call, select Decline to dismiss the call.

ENTERPRISE VOICE CALLS

In S4B, you can use the dial pad to call a phone number if Enterprise Voice is enabled.

MAKING ENTERPRISE VOICE CALLS

WINDOWS

1. From the GROUPS tab, right click on the contact that you want to start a voice call with. A drop-down menu will display.
2. Hover your mouse cursor over the Call option and select the Skype Call option to start a voice call.

Note: Alternately, you can double-click on the contact to open an IM window and selecting the Call icon.

MAC

1. From the main S4B screen, click the Dial Pad tab.
2. Enter a phone number in one of the following ways:
   - Select the number buttons on the Dial pad.
- Type the number on your keyboard.
- Paste the number if it is already copied to the clipboard.

3. Select Call

**MAKING ENTERPRISE VIDEO CALLS**

**WINDOWS**

1. From the **GROUPS** tab, right click on the contact that you want to start a video call with. A drop-down menu will display.
2. Select the **Start a Video Call** option to start a video call.

![](image)

*Note: Alternately, you can double-click on the contact to open an IM window and selecting the Video Call icon.*

**MAC**

**TBD**

**RECEIVING ENTERPRISE VIDEO CALLS**

**WINDOWS**

To receive a **Video Call** from one of your contacts:

1. A popup message will appear on the bottom right of your screen when someone requests a video call with you.
2. Select **Accept** to join the video call.

![](image)
1. When a contact calls you, a notification will display on your screen. To answer the call, select **Decline** to dismiss the call and send it to voice mail, if available.

## PUTTING A CALL ON HOLD AND TRANSFERRING CALLS

### WINDOWS

To put a **Call** on **Hold** or **Transfer**:

1. Select **Call Controls**.
2. A menu will appear where you can select to put a call on **Hold** or **Transfer**.

### MAC

TBD
CALL FORWARDING AND SIMULTANEOUSLY RINGS

WINDOWS

To setup Call Forwarding and Simultaneously Ring:

Method 1:

1. Select the gear icon. A drop-down menu with display.
2. Hover over Tools then select Options.

![Gear Icon and Options Menu]

3. Select Call Forwarding.
4. You can now set up your call forwarding and simultaneously rings in this menu option.

![Call Forwarding Options]

Please follow the steps above to setup call forwarding and simultaneously rings in your Windows environment.
Method 2:

1. Select the telephone icon on the bottom of your Skype for Business window.
2. A drop-down menu with display. You can now set up your call forwarding and simultaneously rings in this menu option.

MAC

TBD

TEST DND AND PRIVACY RELATIONSHIPS

BLOCKING AND UNBLOCKING CONTACTS

WINDOWS

1. From the GROUPS tab, right click on the contact that you want to Block.
2. Hover your mouse cursor over Change Privacy Relationship.
3. A drop-down will appear. Select Blocked Contacts to block the contact.
SET YOUR PRESENCE STATUS TO DND

1. To set your presence status to Do Not Disturb, click the drop down arrow below your name.
2. Choose Do Not Disturb.
1. To set your presence status to **Do Not Disturb**, click your photo (or the icon with your initials).
2. Click the drop-down arrow below your name. A drop-down menu will display.
3. Select the **Do Not Disturb** option from the drop-down menu.

### SET PRIVACY

### WINDOWS

1. From the **GROUPS** tab, right click on the contact that you want to **Change Privacy Relationship**.
2. Hover your mouse cursor over **Change Privacy Relationship**.
3. A drop-down will appear. Select which privacy setting you would like for the contact.
## OUTLOOK/EXCHANGE/OFFICE 365 INTEGRATION

### CALL VOICEMAIL AND RECORD GREETING

**WINDOWS**

TBD

**MAC**

TBD

### RECEIVING CALLS AND VOICEMAIL

**WINDOWS**

TBD

**MAC**

TBD

### USE EXCHANGE UNIFIED MESSAGING

**[SUB-HEADING]**

**WINDOWS**

TBD

**MAC**

TBD
CONFERENCING

You can quickly start a group call to work on a subject that requires immediate attention. Add sharing to make it an impromptu meeting that provides all the features of a scheduled meeting, including shared PowerPoint slides, whiteboard collaboration, and desktop sharing.

STARTING A CONFERENCE CALL

WINDOWS

To start a conference call with selected contacts:

1. From the GROUPS tab, hold the Ctrl key on your keyboard and select all of the users you want to start a conference call with.
2. Right click on any of the selected users. A drop-down menu will display.
3. Select the Start a Conference Call.
4. Select Skype Call.

MAC

1. In the S4B main window, in your Contacts list, hold down the cmd key and click the names of your contacts to select the m for your meeting.
2. Right-click the selection, and click Start a Conference Call.
3. Click Skype Call.
ADD MORE PEOPLE TO THE CONFERENCE CALL

WINDOWS

To invite a contact to join an in progress conference session:

1. Select the conference session that is in progress.
2. Click the Invite More People icon.
3. Select the contacts you want to invite into the current chat session.

![Invite More People icon](image)

MAC

1. In the conversation window, in the Participants pane, click Invite More People.
2. Select someone from the list, and then click OK. S4B calls the person for you and adds them to the meeting.

MEET NOW

WINDOWS

To start a conference call using Meet Now:

1. Select the gear icon. A drop-down menu with display.
2. Select the Meet Not option.
3. You can now select the options you would like for the meeting.

![Join Meeting Audio]

### SET UP AN S4B MEETING IN OUTLOOK

#### WINDOWS

1. Open Outlook and go to your Calendar.
2. On the Meeting tab, select Skype Meeting.
3. Set up the meeting as you normally would.
4. Click Send.

#### MAC

5. Open Outlook, and go to your calendar.
6. On the Home tab ribbon, in the Skype Meeting section, click New Skype Meeting.
7. Set up the meeting as you normally would.
8. In the meeting area, type an agenda. Be careful not to change any of the meeting information.
9. Click Send.
With Skype for Business (S4B), you can receive alerts about incoming and missed instant messages. When push notifications are on, individual users can turn them off by choosing the appropriate S4B option on their mobile device.

**CHANGING PUSH NOTIFICATIONS**

**IOS**

1. You can choose your notification settings the first time you open the S4B app after installing it.
2. If you need to change the S4B notification settings on your Apple Device, the changes can be applied from your mobile device.
3. Go to **Settings > Notifications > Business (S4B)**

**ANDROID**

TBD