## Skype for Business Audio and Video User Guide

### Document Version Control

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Using Bookmarks

This guide has been formatted with Bookmarks so you can intuitively navigate around each of the sections and easily find the content you wish to learn about. Each Bookmark goes to a different page within the guide.

To use Bookmarks in a guide that you have downloaded and opened in a PDF reader:

1. Click the **Bookmark icon** in the toolbar on the left side of the screen.

2. Click on each of the section titles to view the content you wish to open.
Using Bookmarks

To use Bookmarks in a guide that you are viewing through a PDF web viewer:

1. Click the **Bookmark icon** in the toolbar on the top right side of the screen.

2. Click on each of the section titles to view the content you wish to open.
Making a call

If your organisation has enabled your account with Audio and Video Conferencing features, you will be able to connect with your colleagues using voice and video. You will need a webcam to be able to use video to see your colleagues during a call. Refer to Using video for more information on using video. Audio and Video Conferencing is a top-up service, which is available to users in organisations who have purchased this service. If you are unsure, contact your local IT department or Local Administrator. Note: the terminology and user interface of the version of Skype for Business deployed in your organisation may vary from that depicted in this guide.

To call someone using Skype for Business:

1. Sign into Skype for Business

2. Type a name or email address in the search bar at the top of the window or look for a contact in your contact list.

   ![Search bar with Mary Margot highlighted]

   **Warning**
   Make sure you are contacting the right person. Confirm their identity by clicking See Contact Card.

3. Select the correct contact and double click their name to open the instant message window.

4. Click the phone icon at the bottom of the window and select Skype for Business Call.

   **Handy Hint**
   As a short cut, you can click the silhouette icon / contact picture and then click the phone icon.

   ![Phone icon in Skype for Business]

If the recipient accepts your phone call, the call will then begin.

![Skype for Business call interface]

Warning:
Make sure you are contacting the right person. Confirm their identity by clicking See Contact Card.

Handy Hint:
As a short cut, you can click the silhouette icon / contact picture and then click the phone icon.

If the recipient accepts your phone call, the call will then begin.
If they do not answer your call, a notification will appear in the instant message window to let you know that the recipient may be offline or unavailable.

![Notification](image.png)

If they reject the call, you will receive a notification that they did not answer your call.

![Notification](image.png)

### Receiving a call

#### Accepting a call

To accept a call via Skype for Business:

1. Click **anywhere within the notification** that appears on screen.

You will then be taken to the Skype for Business call window and the call will start.

### Ignoring a call

#### To ignore a call via Skype for Business:

1. Click **Ignore** in the notification that appears on screen.

The call will not start and the caller will be notified that you did not answer.

![Notification](image.png)

#### Handy Hint

If you use Outlook Desktop and miss a call from someone, you will receive a ‘missed conversation’ email from the person who tried to contact you.

#### Handy Hint

You can ignore calls from everyone by setting your status as Do Not Disturb.

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[Image 1](image1.png)
Audio and Video Conferencing Controls

Using video
To start your video:

1. Click the video icon at the bottom of the call window and select Start My Video

The other person will then be able to see your video

2. To turn off your video, select the video icon again and a line will appear through it

Handy Hint
As a short cut, you can click the silhouette icon / contact picture and then click the video icon

Using mute
To go on mute:

1. Click the microphone icon at the bottom of the call window

When you are on mute, the microphone will have a line through it

2. To unmute, click the microphone icon again

Handy Hint
Going on mute when not speaking helps reduce background noise on the call
Call controls allow you to put the call on hold, change the device being used for the call e.g. the speaker and microphone and the volume of the call:

1. Click the **settings icon** at the bottom of the call window
2. Select **Hold**, to put the person on hold
3. Select **Devices**, to change the devices currently being used for the call, for example speaker and microphone
4. By sliding the **volume bar** left and right, you can change the volume of the call

Adding someone to a call
To add someone else to an ongoing call:

1. Click the **plus icon** at the top of the call window, search for and select a name and click **OK** at the bottom of the window
Instant messaging
Send an instant message to a participant during a call:

1. Click the **instant message icon** at the bottom of the call window to open an instant message conversation.

You can now start sending messages from the conversation panel which opens on the left of the call window. For more information on sending messages, refer to the *Sending and receiving messages module* in the Skype for Business Learning Series.

Viewing call participants

1. You can view the participants of a group call by clicking the **open participants icon** at the top of the window.

The names will then appear at the top left of the call window.
Editing other call settings

To edit other within-call settings:

1. Click the **three dots** at the bottom right of the call window.

2. From the drop down list you can choose to set as **High Priority**, change the **IM Text Display Size**, **Change Font**, and access **Skype for Business Help**.

Note: For more information on 'Manage Recordings', refer to the SfB Recording Guide.

Checking your connectivity

During a call, you can check the quality of the audio or video to make sure participants can see and hear you clearly.

1. Click the Call Quality Icon at the top right of the meeting window.

2. A connection quality summary will pop up.

3. If your connection is poor, follow the suggestions in the pop up and speak to your local IT support. Consider connecting a different way such as via Skype for Business Mobile App.
Audio and video settings

Audio settings

Use Audio Settings to adjust a range of settings including the device you use for calls and test whether your speakers are working. You can also make a test call to check your call quality.

1. Click the settings icon at the top right of the main Skype for Business window and select Audio Device on the left side of the window.

2. Click the down arrow under Select the device you want to use for audio calls to select a device.

3. Select the down arrow to the right of Speaker and Microphone to choose what speaker and microphone you would like to use for audio calls.

4. Click the Play button to the right of Ringer to test your sound by listening to your ringtone.

You can change the volume of each of these settings by moving the slider to the left or right.

5. If you select Check Call Quality, you can make a test call where you will be asked to record a message that is played back to you.

6. Under Secondary ringer you can choose to set from the options Also rings and Unmute when my phone rings e.g. if you want both your headset and speakers to ring.

7. You can choose to allow Stereo audio playback when available by selecting the box at the bottom of the page.
Video settings

Video settings allow you to select the device you want to use for video calls, see a preview of your webcam and adjust camera settings to get a better picture.

1. Click the settings icon at the top right of the main Skype for Business window and select Video Device on the left side of the window.

2. Click the down arrow under Select the camera you want to use for video calls to select a webcam.

3. Select Camera Settings to change your video settings.
4 On the **Video Proc Amp** tab you can change settings such as camera **brightness**, **contrast** and **hue**.

5 On the **Camera Control** tab you can change settings such as **exposure** and **zoom**.
Sharing Content

Skype for Business allows you to share content during a call or in a Skype for Business meeting. This can help the meeting by allowing participants to follow along a PowerPoint presentation, content on your desktop or a specific program.

Share your desktop

To share your screen:

1. Click the screen icon at the bottom of the call window and select Share your Desktop

If you have multiple screens, select the one you want to share

2. Click OK to acknowledge the warning that all content on your screen will be visible to meeting participants

3. Click Stop Sharing in the bar at the top of your screen when you have finished presenting your desktop

Note: User interface and terminology may vary slightly depending on your version of Skype for Business. Share your desktop may be referred to as Present desktop

Warning
When you share your desktop everything that is visible to you will be visible to all participants on the call.

Considerations When Sharing Sensitive Data

• Ensure prior to sharing that you have closed any documents, clinical programmes, browsers, emails that may be of a confidential or sensitive nature and shouldn’t be shared. Tip: sharing only a specific application or a secondary monitor screen can help reduce this risk.

• Be aware that your audience can take a screenshot of any content you share and store it in an unsecure location. Inform the audience that doing this could breach local Information Governance Policy. Please make sure you only share clinical information of a highly sensitive nature with a trusted audience.

• When you have finished sharing the content with your audience, click Stop Sharing at the top of the meeting window. Your desktop will be visible to participants up to this point.
Share a window

Rather than sharing your entire desktop, you can share a specific program that is open on your computer. Participants on the call will only be able to see the content within this one window as it appears on your screen.

1. Click the **screen icon** at the bottom of the call window and select **Share a Window**

2. Click on the program you want to share and then click **Share**

3. Click **OK** to acknowledge the warning that all content within the program will be visible to meeting participants

4. Click **Stop Sharing** in the bar at the top of your screen when you have finished presenting your desktop

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**Note:** User interface and terminology may vary slightly depending on your version of Skype for Business. Share a Window may be referred to as Present Program.
Share PowerPoint file

Please note that the function Share PowerPoint Files is not available for use. If you wish to share PowerPoint, open the PowerPoint file locally and then select Share a Window. To use the function Share a Window, please follow the guidance in Share a window section of this guide.

Sharing files

Files can be transferred during meetings by using Add Attachments.

Note: The file which needs to be shared must be saved.

To share files by using Add Attachments:

1. Click the Share Content button then click the Add Attachments tab.

2. Select the file to transfer from File Explorer and click Open.
Handy Hint
If you want to determine who is able to access the attachments, please use additional controls under Manage Content.

Warning
For security reasons, some file types are blocked and you will not be able to send them. For more information on the blocked file types, please refer to the FAQs in the Skype for Business File Transfer Guide.

The file will then be sent in the form of an attachment onto the chat window.

Whiteboard
You can start a Whiteboard within a Skype for Business meeting. This allows participants on the call to draw on a virtual whiteboard. It is also possible to import an image to draw on within the virtual whiteboard.

1. Click the screen icon at the bottom of the call window and select More

2. Click on Whiteboard
3. Click on the drawing tool you wish you use from the tool bar on the right hand side of the whiteboard. Use it to draw in the white space.

4. Click **Stop Presenting** in the bar at the top of the Skype for Business window when you have finished presenting the whiteboard.

**Handy Hint**
You can save a picture of the whiteboard by clicking the three dots in the whiteboard toolbar and selecting **Save As**
Polls are a useful tool to get an answer to a question from the audience on a call. It allows you to post a question to the group with up to seven choices. You can control when the results of the poll is shared with the audience. Individual’s answers are not identifiable.

1. Click the screen icon at the bottom of the call window and select More

2. Click on Poll

3. Fill in the name of the poll, the question and choices. Click Create

4. Ask participants to select their choice.

Under poll options you can open and close the poll, share the results with everyone, clear everyone’s votes, edit the poll and save the results of the poll
Sharing content

When is the best time to meet again?

- **Monday 9 am** 100%
- **Tuesday 10 am** 0%
- **Wednesday 1 pm** 0%
- I don’t want to vote

5 Click **Stop Presenting** in the bar at the top of the Skype for Business window when you have finished using the poll

Handy Hint

If you want to set up a poll in advance of the call, you could join the meeting early and set it up. You can then choose to present it during the call via **Manage Content**
**Q&A**

Q&A can be useful for a large Skype for Business meeting as it allows the audience to ask questions on a separate tab during the meeting – you can continue to share other content simultaneously. Questions won’t be visible until you or another presenter enters a response.

1. Click the screen icon at the bottom of the call window and select More.

2. Click on Q&A.

3. Answer questions posed by the audience by clicking the “Answer” button, entering your response and pressing enter on your keyboard.

4. Click Stop Q&A to end the Q&A session.

**Handy Hint**
You can save the Q&A by clicking Save as. The Q&A will be saved as a .txt file on your computer.
Manage Content

If you are sharing multiple files on a call, you can select what content is visible to the audience from the Manage Content feature. You can also select who can download a copy of content shared and you can remove content from the call.

1. Click the **screen icon** at the bottom of the call window and select **Manage Content**

2. Click **Eye icon** to open the content

   Note: When a presenter opens the file, the file will open for every participant to view. When a participant opens the file, it will open only for that participant’s view.

3. Click on **Lock icon** to change who can download the content

4. Click on **Cross icon** to remove the content from the meeting
Sharing content

Participant control
When you are sharing contents during a Skype for Business meeting or Instant Messaging, you can allow participants to control the content being shared, for example, your desktop or a program.

Giving control to a participant
To give control to a participant during a meeting:

1. Click on Give Control and select the participant

The participant will receive a notification stating that control has been given to them

Warning
When control is given to a participant during desktop sharing, the participant can control other programs as well on the desktop which is shared.

The presenter will be able to see the name of the participant who has control

Handy Hint
The presenter will still have control over the desktop/program being shared and will see the name of the participant in control. The presenter can take back control at any time.

Note: When control is given while sharing a window, the attendee can only control the window which has been shared and not any other application or program which is not shared.
Taking back control

A presenter can take back control at any time.

To take back control:

1. Click Take Back Control

The participant will receive a notification when they no longer have control

Requesting control

Participants in the meeting can request control during the meeting when someone is sharing desktop or a window.

To request control:

1. Click Request Control

The presenter will receive the request notification and can approve or reject the request.

The presenter will be able to see the name of the participant who has control
Releasing control

A participant can release control anytime.

To release control:

1. Click Release Control

The participant will receive a notification when they no longer have control.

You no longer have control.
A Skype for Business meeting is a prescheduled Audio & Video Conference call. It contains all the same functionality as a regular A&VC call. Participants without Skype for Business installed can join the conference via the Skype for Business web application or dialling into the call on a telephone.

Note: Dial-in will only be available if your organisation has purchased this service in addition to A&VC. You can schedule a Skype for Business meeting via the Outlook Desktop Application. If you do not have the Outlook Desktop Application, use the Web Scheduler.

**Outlook Desktop Application**

1. In the Home Ribbon of Outlook Desktop Application Calendar, click **New Skype Meeting**

2. Add the meeting participants in the **To** field and select **Start time** and **End time** for your meeting

3. Click **Send**

**Handy Hint**
You can also schedule a Skype for Business meeting in the Home Ribbon of the Outlook Desktop Application Inbox by clicking **New Items** and selecting **New Skype Meeting**

**Handy Hint**
You can add meeting participants from other organisations and outside the NHS

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**Clinical Consideration Guide**
Skype for Business is approved for clinical use. If you are using Skype for Business for clinical purposes, you may wish to review the **Clinical Consideration Guide** prior to scheduling/joining this meeting.
Meeting Options

When you organise a Skype for Business meeting, you should check you have applied the correct settings before sending the invitation. Use ‘Meeting Options’ to determine who will have direct access to the meeting vs. those that must wait in a virtual lobby before being admitted. Skype for Business comes with a range of different permissions and security settings. It is important to consider what options are selected in a clinical context.

To manage permissions:

1. Click **Meeting Options** in the Meeting ribbon

2. Select **A new meeting space (I control permissions)** from the list of options

   Selecting “My dedicated meeting space” is not recommended as it is less secure

3. Select who does not have to wait in the lobby from the drop down

   This option allows you to decide who can get into the meeting immediately and who will have to wait until you decide to let them in. This is option is useful when you are running meetings of a sensitive or confidential nature:
4 Select whether callers get in directly and whether Skype for Business will announce when people enter or leave

For those dialling-in to a conference, you can configure your settings so that each individual requires a personal PIN code to enter the call. Do not select ‘Callers get in directly’ if calls are clinically sensitive to reduce the risk of unauthorised callers dialling in.

Note: These options will only be available if your organisation has purchased dial-in functionality in addition to A&VC.

Selecting ‘Announce when people enter or leave’ adds a level of security throughout the duration of the call. All attendees can monitor who has joined/ left a call and ensure all on the conference are authorised.

5 Select Who’s a presenter from the drop down list

<table>
<thead>
<tr>
<th>Control Level</th>
<th>Description</th>
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<tbody>
<tr>
<td>“Only me, the meeting organizer”</td>
<td>All guests must wait in the lobby before the meeting organiser arrives and admits all attendee. This is the most secure option and should be selected for meetings of a clinical nature.</td>
</tr>
<tr>
<td>“People I invite from my company”</td>
<td>If a meeting invitation is forwarded on beyond the initial invite list, these guests must wait in the lobby for the meeting organiser to admit them.</td>
</tr>
<tr>
<td>“Anyone from my organization”</td>
<td>Guests external to your organisation must wait in the lobby for the meeting organiser to admit.</td>
</tr>
<tr>
<td>“Anyone (no restrictions)”</td>
<td>No restrictions on entry, everyone can enter before the meeting organiser. This is the least secure option.</td>
</tr>
</tbody>
</table>

Handy Hint
Regardless of meeting options set, as a meeting organiser, it is good practice to run a roll call at the beginning to check that everyone on the call is authorised to be on the call.
Presenters can share content and let people into the meeting

<table>
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</thead>
<tbody>
<tr>
<td>“Only me, the meeting organizer”</td>
<td>Only you can share content on the call and let people into the meeting</td>
</tr>
<tr>
<td>“People I choose”</td>
<td>Only individuals you have selected by clicking “Choose presenters” can share content on the call and let people into the meeting</td>
</tr>
<tr>
<td>“Anyone from my organization”</td>
<td>Only participants who are from the NHS (i.e. have an @nhs.net email address) will be able to share content on the call and let people into the meeting</td>
</tr>
<tr>
<td>“Anyone (no restrictions)”</td>
<td>No restrictions on who can share content on the call and let people into the meeting</td>
</tr>
</tbody>
</table>

**Handy Hint**

You can only select individual presenters if you have already invited them to the meeting

6 Select whether you want to **Disable IM, Mute all attendees and Block attendees’ video** by checking the appropriate boxes

You may wish to enforce these controls if you have multiple external users or large numbers on a conference call

7 To apply these setting to all subsequent meetings, click **Remember Settings** otherwise click **OK**
Web Scheduler

The Web Scheduler allows you to create a Skype for Business meeting if you do not have the Outlook Desktop Application. The Web Scheduler will create a Skype for Business meeting and provide you with a link to join it online. You can then copy this information into a meeting invite you send via the Outlook Web App.

1. Access the Web Scheduler at [webscheduler.nhs.net](http://webscheduler.nhs.net)

2. Complete the fields on the meeting scheduling form and click **Save**
3. Copy the details of the Skype for Business meeting

4. In the Outlook Web App, schedule a meeting and paste the details of Skype for Business meeting in the body of invitation

For details on how to schedule a meeting in Outlook Web App, refer to the OWA User Guide
Joining a Skype for Business meeting

You can join a Skype for Business meeting that you have scheduled or that you have been invited to via the Outlook Desktop Application or directly in Skype for Business. It is also possible to dial into a Skype for Business meeting. If you dial in, you will not be able to view content being shared on the call and you may experience lower audio quality.

Joining a meeting via the Skype for Business Desktop Application

1. Click on the meeting icon in the Skype for Business toolbar

2. Double click the meeting you want to join

The Skype for Business meeting will open in a new window

If the meeting organiser has set up a lobby:

3. Wait until the presenter lets you in

Joining a meeting via Outlook

1. Open a Skype for Business meeting in your Outlook calendar
Open a Skype for Business meeting in your Outlook Desktop Application calendar

2 Locate the phone number and Conference ID at the bottom of the invitation

3 Dial the number and enter the conference ID when prompted

Joining via Skype for Business Web App

1 Open a Skype for Business meeting in your Outlook calendar

2 Click **Skype for Business Web App**, located beneath the **Join Skype Meeting** link
3. If it is your first time using the Web App, click to download the Skype for Business Web App plug-in.

To join the meeting using the Skype for Business Web App:

1. Download and install the Skype for Business Web App plug-in
2. After installation, click on Join the meeting
3. Skype for Business Web App will open in a new window

By joining the meeting, I agree to the plug-in Terms and Conditions.

4. If the Web App does not launch automatically, click Join the meeting.

Looks like you're the only one in the meeting.
Admitting participants in the lobby

1. In the Skype for Business meeting, wait for the yellow banner at the bottom of your screen to appear indicating that there are participants waiting in the lobby.

2. Click **See Lobby**

   The list of participants in the lobby will appear above the list of people on the call in the top left hand corner of the window.

3. Click **Admit** next to the name of the individual you want to admit. If you want to admit all the individuals on the list, click **Admit All**

   If you deny access to someone in the lobby, they will be informed they’ve been denied access.

Participant Actions

If you are on a prescheduled Skype for Business meeting, use Participant Actions to apply certain actions to a large group of participants.

1. Click the **Participant Actions** button below the list of participants on the meeting.

2. Click **Mute Audience** to put all participants on mute and minimise background noise.

3. Click **No Meeting IM** to disable participants from sending instant messages.

   Note: this happens automatically if you set up a Q&A.
Click **No Attendee Video** to disable participant’s webcams

Click **Hide Names** to make the list of participants hidden from people who are not presenters

Click **Everyone an Attendee** to make everyone except yourself an attendee. This restricts everyone but you to share content and admit participants to the meeting

Click **Invite by Email** to invite a participant to the meeting via email

**Ending a meeting**

When your Skype for Business meeting is complete you should end the meeting:

1. Click the **three dots** at the bottom right of the meeting window
2. From the drop down select **End Meeting**
3. Click **OK** when warned that this action will end the meeting

**Warning**

If you hang up by pressing the red phone button, the meeting will continue without you. If you are sharing your screen, this will continue until you click **Stop Sharing**
Meet Now

Skype for Business allows you to start an impromptu meeting via the Meet Now feature without having to schedule it in Outlook. Meet now allows you share your desktop to a user who is connecting via the mobile app. Unlike a scheduled meeting, participants are added directly by you rather than joining via an invitation.

To meet now:

1. Click the drop down arrow next to the cogwheel and select **Meet Now**

2. Add people to the meeting by clicking **Invite More People**

3. Type the name or email address of the person you want to add in the box. Select them from the list and click **OK**
Using the Skype for Business Mobile App

If you’re on the go, the Skype for Business mobile app is a great way to communicate with colleagues. The app is available for iOS, Android and Windows Phone – refer to the Microsoft Support Site for instructions on how to download it. For assistance on getting started, you can refer to the Mobile Application Quick Start guide.

Calling a contact via Skype for Business Mobile App

1. Enter the name or email address of the individual you want to contact

2. Click the name or email address of the individual you want to contact

3. Click the Camera or Phone icon to start the Audio or Video call
Joining a meeting

1. Click on the meeting icon in the toolbar.

2. Click Join next to the meeting you want to join.

The meeting will now open on your phone and you will be able to view video and PowerPoints. You can navigate to other applications or lock your phone while continuing to hear the call.

View meeting participants

1. Click on the name of the meeting after you have joined.
Adding meeting participants

1. Click on the name of the meeting after you have joined

2. Click Add participants

3. Enter the name or email address of the individual you want to contact

4. Click the name or email address of the individual you want to contact