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Overview

This document introduces one of Microsoft's products called **Lync**. Lync integrates into Microsoft Outlook and allows you to connect to people via instant messaging, email, audio and video calls, as well as persistent chat rooms, online meetings and presentations.

You will learn about some of the many features Lync has to offer, such as the various ways to begin a chat and add other elements of Lync to a session, as well as the way Lync is integrated with Outlook e.g., conversations are automatically stored in Microsoft Outlook for viewing later, or as needed.

Depending on your computer configuration, Lync may automatically start when you logon to your computer. If it does not, you can manually activate it by selecting the Start menu > Microsoft Office 2013 folder > Lync 2013. Hint, if you right click on Lync 2013 from your Start Menu, you can pin it to your task tray for easier access in the future.

Objectives

Upon completion of this training document, you should be able to:

- Recognize various elements on the Lync window and how these are used.
- Access Lync Options to change default settings for a Lync conversation.
- Add contacts to your Lync contact listing and create Groups.
- Instant Message individuals or Groups.
- Setup and check audio devices for Lync Calls prior to making a call.
- Understand basic concepts relative to sharing information.
- Use Microsoft Outlook to schedule a Lync meeting.
Microsoft Lync Training

Getting Started

- To begin locate the Lync icon and click on it.
  - You may have to wait a few seconds while connections to the server are being made.

- When the Lync window opens, you’ll notice the top portion of the window contains information about you.

  - What’s happening today? This is actually a text box.
    - Click in it to enter today’s events or notices that you want others to see. This is optional.

- The next three items integrate with your Outlook Calendar and will update/change automatically.
  - A Picture or picture placeholder, with your name to the right.
    - Beneath your name, Available represents your Lync Presence. Click on the Down Arrow to select a different option such as Busy, Away, etc. The colored border on the left side of your picture helps people identify your IM Presence i.e., Green = available, Red = busy, etc.
  - Set Your Location – this option allows you to inform others where you are. Just click on the text “Set Your Location” and enter your location in the text box, e.g. Home, Work, etc. The Down Arrow is used to allow others to see your location, change or remove the location.

Quick Access Toolbar

- Below the section that’s “all about you”, there’s a Quick Access Toolbar.

  - The Person icon, which is highlighted, relates to your Contacts, the next one, your Conversations, and the third, relates to Meeting Dates and Times. On the far right is a Gear icon and Down Arrow, which provides quick access to Lync setup and options. Let’s take a look at each one of these, briefly.

Contacts Icon

- When the Contacts icon is highlighted, a Search field is available for input in locating and adding people to your contact listing, which appears on the bottom half of the Lync window.

- Below the Search field is a row of links. The Name on the Text links identifies the order in which you can view your contacts.

  - Groups is the default order for listing Contacts. When Groups is highlighted, you can view your contacts according to your Listings. You can also drag and drop to rearrange.

- If you click STATUS, you can view your contacts based on their Lync Presence. Contacts are grouped separately according to their availability e.g., Online or Busy or Away, etc.

- If you click Relationships, you can view your contacts as associated, such as Friends, Family, Colleagues, etc.

- The New link lets you know when someone adds you to their contact list. When highlighted, click New to view the contact and then add that individual(s) to your list to see their online status, converse, etc.
Conversation Icons

- When the icon with the Callouts is selected, a list of Conversations you’ve had using Lync appear on the bottom half of the window.
  - You can view All;
  - Or, click Missed to view conversations only;
  - Or, click Calls to view calls only.

IMPORTANT: A link “View more in Outlook…” appears below the contact list on your Lync window. Click this link to view entire conversations in Outlook. Conversations are stored in Outlook in a Folder called Conversation History.

Meeting Icon

- Click the Meeting icon to view your scheduled Lync meetings.

Lync Options

- To the right of these icons is another icon that resembles a Gear with a Down Arrow beside it.
- If you click the Gear, the Lync Options window opens, allowing access to all of your default settings for Lync.
  - More detail about this window will be provided later in this document.
- Alternately, you can quickly access Lync options, by selecting the Down Arrow.
- A picklist opens, as shown on the right (i.e. File, Meet Now, Tools, Help, Show Menu Bar.)
  - Note: Selecting the “Show Menu Bar” displays a Menu Bar at the top of the Lync window with drop-down menus to access the menu options.
- In our example, we pointed to the File option, following the right arrow, a submenu appeared. We can use it to quickly change settings, view files and conversation history or close/exit Lync.
Contacts

- When you begin using Lync, one of the first things you are likely to do is create a Contacts list.
- When the Contacts icon is active on the Lync window, the search field just below displays “Find someone”.
- Type the name, email address, or phone number of the person you want to add in this field.
- The matching NAME(S) will appear below the field.
- Locate the correct person and mouse over the picture area until a row of icons appears, as shown on the right.
- Then, click on the group of three dots (...) to the far right for more options.
- A picklist will appear; point to Add to Contacts List.
- The default, Other Contacts appears.
- Click Other Contacts to add the selected person’s Name to this list in Lync.

- You can also add contacts by selecting the Add a Contact icon below and to the right of the contact search field.
- Select the option Add a Contact in My Organization or Add a Contact Not in My Organization, respectively, to search, locate and add the individual you want.

Create a New Group

- The Add a Contact icon is also used to create a Group. Creating a group allows you to communicate with an entire team at once.
- To create a new Group, click the Add a Contact icon and select Create a New Group.
- Below your list of contacts on the Lync window, an area opens displaying the text “New Group”.
- Type over the text to give the new group a Name.
  - Add contacts by dragging and dropping from your contact listing, another group or add from search.
Instant Message (IM)

- Select the Contact you want to IM by either performing a search or from your Contacts list.

- Next, mouse over the picture and then click the **IM button** to activate. You can also:
  - Double-click on the Contact listing.
  - Right-click on the Contact listing and select **Send an IM** from the picklist.

- The IM window appears. Type your message in the lower section of the window and press enter when complete.
  - Use the "A" on the right to change font type, size and color of text if desired.
  - As the conversation progresses, you can view it in the space above.

- To send a picture or file, place it in the message text area using one of the following methods.
  - Drag and drop files or pictures.
  - Copy and Paste MS Office files or pictures.
  - Press **PrtScn** and then paste to the input area.

**Note:** The received file is represented by a small icon. To open the file, the receiver will have to select **Save** or **Copy** to place the file or picture in a location on their machine.

- If you're in a single IM session, more people can be added by pointing to the People icon and selecting "Invite more people". You can then use search or select people from your listed contacts on the Lync window.

- You can also add Audio and Video using the respective icons at the bottom of the IM window.

- You can start a Group IM by placing your cursor on the group name and then right-clicking your mouse.

- A drop-down menu gives you several options.

- Select "Send an IM" to contact all listed contacts in the Group.
  - You can also start other Calls or Email the group using the appropriate option on this picklist.
  - Or, manage the group using the options at the bottom of this picklist.
Lync Calls

Test Audio Devices

- To make a phone call or join a conference, you will need to setup and check to make sure your audio devices are working.

- Begin by clicking the Gear icon to open the **Lync Options** window.
  - Notice the left panel of available options.

- From the left panel, select **Audio device**.

- On the right side of the window begin checking your audio devices: "Select the device you want to use for audio calls", if more than one option is available.

- **Customize your device:**
  - **Speaker** - Drag the slider to adjust settings for the Speaker and then click the Green Arrow to test. If a headset is used, speak into the headset.
  - **Microphone** – adjust and test. The box to the right of the slider displays a blue indicator as you speak into the microphone.
  - **Ringer** – Drag the slider to adjust settings for the Ringer and click the Green Arrow to test.

- Click **OK** when finished.

Make the Call

- Locate and pause on the contact listing for the person you wish to call.

- Click the **Phone** icon to call that person.
  - The Down Arrow to the right of the Phone icon is used to select other numbers, if available.

**NOTE:** If the person does not answer the call, a **Missed** call will show up in their Conversation list on the Lync window, as well as an email notification in Outlook, listing the caller, the time and phone numbers to follow up on the call.

Answer a Call

- To answer a call using Lync, click anywhere on the photo area of the person calling. Also, note:
  - Unanswered calls will go to voice mail.
  - You can opt to Reply by IM instead of Audio or Video.
  - Setting Presence to **Do not Disturb** blocks the calls.
Sharing Information

- Lync allows you to share your desktop or a program from within an IM conversation.
- **Desktop sharing** – is advantageous because it allows you to switch between programs or work on documents from different programs.
- **Program sharing** – allows you to be selective and only share a specific program or document preventing others from seeing anything else on your desktop.
- To begin start an IM by double-clicking a contact's name.

- Pause on the Present button to display the window that allows you to **Manage Presentable Content**.

- Click Desktop or select Monitors to show content on your desktop.

- Or, click Program or another option on the window.
  - For instance, to share a PowerPoint, click Powerpoint and then locate and select the Powerpoint to upload.
  - When presenting, click the Thumbnails to move slides or use the arrows at the bottom of the window.

- A Toolbar will appear at the top of the screen allowing you to share control of the presentation. You can choose to “Give Control” or “Take Back Control”, respectively, when necessary.

- You can also click the Phone icon to add audio to the IM or click the Camera icon to add video, if these features are available on your computer.

- To end a sharing session, click Stop Sharing on the Toolbar.

**Lync Help**

- If you decide to present using IM or using audio and video, more detail relative to how to perform these actions is provided through the **Lync Help** option.

- To access Help, click the Gear icon Down Arrow near the top of the Lync window.

- Point to Help and then select **Lync Help** from the picklist, as shown on the right.

- The Lync Help window will open.

- You can perform a search for specific information.

- Or, access the links provided under Popular searches.
Scheduling Lync Meetings

- Lync meetings can be scheduled in Outlook.
- To begin open your Outlook calendar and on the Home tab, click New Lync Meeting.

**NOTE:** If you are setting up a Lync meeting for someone else, you must first be setup as a Delegate on their calendar.

- When this approach is used to setup a link meeting, call-in numbers are automatically added to the meeting.
- Populate the To field, enter a Subject, Date/Time and Agenda.

- To make sure those listed for the Lync meeting are available, click Scheduling Assistant on the Ribbon.
- The Scheduling Assistant window opens showing the availability of all attendees (see below). In our example, the selected time (10:00 am, outlined in blue) is not good for everyone. Looking at the availability, 2pm is better.
- You can change the Start Time and End Time using the respective fields or drag the blue rectangle to the new location on the timeline, changing the time to meet all schedules.
• To enter specific setup options for the meeting, click **Meeting Options** under Lync Meeting on the Ribbon

• The Lync Meeting Options window will open.

• You can set options for each scheduled meeting or customize options to fit your requirements, meeting type, and the participants, e.g. customize access, presenters, video sharing permissions, limit participation, etc.

• When finished, click **Remember Settings** or **OK**, as desired.

• From the Scheduling Assistant window, click **Send** to finalize and notify attendees of the Lync meeting.

• The meeting will appear on your Outlook Calendar, as other appointments do; defined as a Lync Meeting.

• Attendees will receive notification and respond as they would for any other meeting.

• If you return to your Lync window, and click the Meetings icon, any Lync meetings scheduled in Outlook will appear on the list.

• To end a Lync session, close the window using the X in the top, right corner of the window.