Microsoft Lync 2010
The Essentials
Training User Guide

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Overview

Microsoft® Lync™ ushers in a new connected user experience transforming every communication into an interaction that is more collaborative, engaging, and accessible from anywhere. For IT, the benefits are equally powerful, with a highly secure and reliable system that works with existing tools and systems for easier management, lower cost of ownership, smoother deployment and migration, and greater choice and flexibility.

Connected End User Experience

Users seek communications tools that make their work easier and are available anywhere, anytime—including within the context of other applications. Microsoft Lync 2010 provides a single interface that unites voice communications, IM, and audio, video, and Web conferencing into a richer, more contextual offering.

Find and communicate with the right person Rich presence including pictures, skill search, location information, and more gives users the context they need to make smart communication choices including built-in instant messaging capability. Users can add and connect with users on Public IM services such as Windows Live, AOL, and Yahoo! and communicate with them using their single work identity.

Create a more fun work environment by building social connections The rich experience of Lync 2010 helps workers make connections across time and distance with picture-enhanced presence, automatic frequent contacts lists, and activity feeds for keeping up with co-workers.

Make every interaction a near face to face meeting Transform any conversation to include high-resolution video-, application-, and desktop-sharing and be fully present in meetings without making the physical trip.

Communicate with context from Microsoft Office applications The visually compelling experience of Lync 2010 is consistent throughout Microsoft Office and other business applications, including color-coded presence icons, pictures, high-resolution video, and desktop sharing.

Stay connected from virtually anywhere A single experience across the PC, phone, or Web means that users have the choice to connect from many devices.
Customize Lync Options

Customize your Lync Online options for an optimized experience.

- **General options**  Formatting for your instant messages, language, and emoticons
- **Personal options**  Your sign-in settings, personal information, location, and picture
- **Status options**  How your availability status is viewed
- **My Picture**  If enabled by your organization, choose a picture to display
- **Video Device**  Webcam settings and configuration
- **Alerts options**  Alerts and notifications that Lync Online displays
- **File Saving**  Where you save files that you receive in Lync Online

Click here to go to the options screen
My Picture and Personal Options
Lync provides quick access to setting and updating information a user wants to share. Including a personal note, status, and location.

**Change your Personal and My Picture options**
1. Click the Options button to display Options.
2. Click Personal on the list of options.
3. Check options to show photos of your contacts and update your presence based on your Microsoft Outlook calendar information.
4. Click My Picture.
5. Select which picture you’d like to show or select the option to not show a picture. You can also show a picture from a web address.
6. Click Ok.

**Presence**
Lync 2010 automatically sets your presence based on your activity or Outlook calendar. You can also manually update your status.
**Change your Status**

Click the presence status and select one of the options.

- **Available**: You are online and available to be contacted.
- **Busy**: You are currently in a call or in a meeting.
- **Do Not Disturb**: By default, you will only see conversation alerts from Workgroup contacts.
- **Be Right Back**: You are stepping away from the computer for a few moments.
- **Off Work**: You are not working and not available to contact.
- **Appear Away**: Your computer has been idle for a while.
- **Out of Office**: You are out of the office.
- **Offline**: You are not signed in to Lync 2010.

**Location**

Lync 2010 displays a location under your presence status that is related to the network you’re connected to. You can make this location more meaningful by renaming it “Work” or “Home.” Then, every time you’re working from this location, any contacts you want to let know will have a better idea of where you are.

**Set your Location**

1. Click the Set Your Location arrow. Select a location.

**Create a Custom Location**

1. Click the Set Your Location arrow.
2. Click **Set Your Location**.
3. Type your location name in the Edit Location window.
4. Click **OK**.
Hover Experience
The Me Area presents photo, status, and other personal information to assist users in identifying a contact. A contact’s picture is a great place to start an IM.

Start an IM with Someone

1. Point to a person’s picture.
2. When the contact card opens, click the IM button.

Or

3. Double-click the contact.
4. Change Display Options
5. Click the Display Options arrow.

When the group contact card appears, click the IM button to send a message to the whole group.
Using the Contacts List

Your Contacts list is a list of contacts with whom you communicate most often. It shows the availability of your contacts and lets you view additional contact details by right-clicking the contact’s name, and then clicking Properties.

You can place a phone call, start an instant messaging (IM) session, start an email conversation, or start a conference with any of your contacts.

Attendant includes three standard groups: Frequent, Available, and All Contacts.

- **Frequent** lists in descending order the names of people with whom you have had recent contact through Lync Attendant.
- **Available** lists all contacts whose presence does not indicate Away, Unknown, or Offline.
- **All Contacts** lists all contacts who have been added to your Contacts list (except by way of being a member of a Distribution List).

You can also create custom groups to manage your contacts.
Create Custom Groups
To create your own custom Group simply do the following:

1. Right mouse click on an existing group
2. Select Create New Group
3. Type in the New Name for your Group
4. Press Enter
5. To add participants to the group
   a. Type the name in the search box – when the name appears
   b. Right mouse click on the name
   c. Click on add to Group
Search by Name/Keyword

Using the enhanced search functionality in Lync 2010, you can quickly identify a person and their availability, get search results that find the right person, and also search on more than just names. Expert Search uses keywords to narrow the search for finding a person or group with specific attributes.

Search for a Person
1. Type a person’s name in the search box.
2. Results appear below the box.

Search for an Expert
1. Type a keyword to narrow the search for finding someone with specific attributes. You can also just click the Skill tab to view Keyword-based results for your search.
2. Results appear with your search criteria highlighted.

Contact Card

The contact card is an ever-present tool for viewing someone’s profile and organizational information. The contact card also serves as launch point for communication with a person or group.

1. Right mouse click the person and
2. click on View Contact Card
Join a Conference Call

Lync 2010 offers multiple options for connecting to a scheduled conference call.

Using Option A or B connects using Lync Phone Edition device by default. If device is not available you will connect to conference using computer speakers and microphone.

Online Meeting Invitation

The meeting invitation contains multiple ways to connect to Lync Online Meeting.

- **Join Online Meeting** connects you to the meeting through Lync allowing you to hear conference call and see visual content such as web camera and desktop sharing.

- **Meeting Hyperlink** provides a Internet browser method of connecting in the event the Join link fails or you do not have Lync installed.

- **Join by Phone** connects you to the conference call if you are using a home or cell phone. It connects you through Lync if you are using Lync Phone Edition or the Lync Dial pad.

- **Conference ID** required when prompted. You are not prompted when using Join Online Meeting or Meeting Hyperlink.
**Video Overview**

For the closest thing to a face-to-face conversation, connect a webcam to your computer.

Using a webcam in Lync 2010 to display yourself to other participants is a seamless experience.

Certified UPnP webcams are detected automatically by Lync on Windows XP, Vista and Windows 7.

You do not need to install a webcam to view another participant’s video in an Online Meeting.

Configure webcam settings from Video Device in Lync Options.

1. Click **Tools** and then click **Options**.

2. Configure webcam settings under **Video Device**.

![Plug in a USB webcam and Windows automatically searches for driver software.](image1)

![Lync Options](image2)
Join a Video Call
If you have a webcam set up, you can choose to allow your contact to see you as you converse. If you accept someone’s incoming video call to you, they won’t see you until you add video from your side of the conversation.

Join a Video Call
1. Click Video in the conversation window to start your webcam and initiate the video conversation.

Accept a Video Call
You don’t need a webcam to accept a video call from another Office Lync 2010 user.

If you don’t have a webcam, you can view the caller’s video feed, and the caller will see a video icon placeholder for your feed. Your caller won’t see you unless you add your own video feed to the conversation.

1. Another participant in Online Meeting begins video.
2. Lync automatically displays participant video in conversation window.
3. Click Start my video to display your webcam to other participants.
4. Click View to show your preview window or change webcam settings.
Schedule an Online Meeting

The Online Meeting Add-in for Microsoft Outlook is installed automatically when you install Lync.

Use one of the following options to schedule an online meeting:

- On the **Home** tab in Outlook, click **New Items**, and then click **Online Meeting**. Go to Calendar view in Outlook and click **New Online Meeting** on the Outlook ribbon to schedule your meeting.

**OR**

- In Calendar view, double-click the time you want to have the meeting. Click **Online Meeting** in the toolbar.

![Online Meeting](image)

**The Meeting Invitation**

An Online meeting invitation opens with the following information included:

- Join online meeting link
- Audio information
- Conference ID
- PIN reset option
- Help for first-time users

**Note:** You can add your meeting agenda above or below the dotted lines in the invitation. Don’t change the meeting information between the dotted lines, as it may prevent your people from joining your meeting.
Deliver a Professional Presentation

This section covers the following:

- Join Your Meeting
- Select Your Audio
- Share Content and Collaborate
- Discover Additional Presentation Tools
- Record Your Meeting

**Join the Meeting**

To join a meeting, choose one of the following methods:

- In the Outlook invitation, click **Join online meeting** or the meeting link.
- If you have Microsoft Outlook, click **Join Online** in the Outlook reminder.
- Copy and paste the meeting link into a browser window.

**The Online Meeting Environment**

The sharing environment

- The Share menu lists sharing options.
- The stage appears after sharing has begun.
Sharing Applications

With Microsoft Lync we have enabled you to share applications.

Sharing exactly what you want

The entire list of programs running on your machine will be available to you for sharing. The list of known exceptions is posted here – and can be accessed from the following dialog as well. Each program will be represented by a live thumbnail. You can pick one or multiple applications to share.

What do others see when I am sharing?

Sure I am sharing; but what exactly are others seeing? This is often the burning question that users have once they start sharing. In addition to yellow boundaries around the applications that you are sharing, we also enable you to preview what you are showing to others using the Preview feature. You can click on preview to get to the preview.
**Sharing Control**

The following workflows around control are supported; while the first two already existed in the previous release, the last one is an addition this release.

- Sharer can grant control to a specific person.
- Sharer can allow everyone in the conference
- Viewer can request control from sharer.

Once sharer has granted control, user cannot parallel process on another application – since there is only one mouse and keyboard that can be used.

**Tip:** The sharer can revoke control at any time

**Sharing Recent Content**

If you had just shared some content; and would like to share it again in the same meeting again, we make it easier for you
**Share Your Desktop**

After you log on to the meeting, you can share your desktop or a program, deliver a PowerPoint presentation, insert a Whiteboard or Poll slide, and add attachments among other options.

To share your desktop:

1. In your online meeting click **Share**.
2. On the **Share** drop-down menu, click **Desktop**.
3. A bar is displayed at the top of the screen and a glow appears around the screen.
4. Click **Stop Sharing** to stop showing your desktop.

**Share a Program**

To share a program and the associated windows:

1. Click **Share** in your online meeting.
2. On the **Share** drop-down menu, click **Program**.
3. Select the program that you want to share.
4. A bar is displayed at the top of the screen, and a glow appears around the application window indicating what is being shared.
5. To stop sharing your application at any time, click **Stop Sharing**.
**Give and Take Control of Your Sharing Session**

When you start sharing, you’re the only one in control of what is being shown on the meeting stage. You can allow others to take control of your sharing session and you can take back control at any time.

**Give Control**

1. Click **Give Control** on the sharing bar at the top of the screen.
2. Click the name of an individual to share control with, and then click **OK** on the confirmation box to proceed.
3. This person is now in control of your sharing session and can use their keyboard and mouse to control your shared content. The option to **Release Control** also becomes available on their Online Meeting toolbar.
4. To take back control, click **Take Back Control** on the **Give Control** menu.

![Give Control](image)

**Request Control of a Sharing Session**

Participants can request control of your sharing session at any time and you’ll receive a notification to **Accept** or **Decline** the request. You can allow all participants to take control of your sharing session automatically by following these steps:

1. On the sharing bar at the top of the screen, click **Give Control**, and then click **Automatically Accept Control Requests**. Click **OK**.

![Currently sharing](image)

2. The option to **Request Control** is available to all meeting participants and requests are automatically accepted.

You can clear the option at any time using the commands on the Give Control menu. Participants also have the option to release control.
Deliver a PowerPoint Presentation
To deliver a PowerPoint presentation:

1. Click Share in your meeting.
2. Click Share, and then click PowerPoint Presentation.
3. Double-click the PPT file that you want to share.
4. The slides will be shown in the Stage area.
5. To move the slides, use the arrows at the lower-right corner of the meeting window.
6. Click Show Presenter Notes to see your notes.
7. To show the thumbnails, click the Show Thumbnails icon.
8. Use the controls at the bottom of your meeting to annotate on the slides, use a laser pointer, insert an image, and so on.
9. To stop showing the PowerPoint presentation, click Stop Presenting.

Insert a Whiteboard
Use the whiteboard to post a note to everyone in the meeting or use as a fresh page on which to brainstorm. Everyone in the meeting can write and draw on the whiteboard.

1. Click Share in your meeting.
2. On the Share drop-down menu, click New Whiteboard.
3. A whiteboards page is inserted in the Stage area.
4. To start writing or drawing on the whiteboard, use the tools on the bottom of the meeting.
5. Click Stop Sharing when you’re done.

A whiteboard is a blank screen that can be used for collaborating with the help of tools such as text, ink, shapes, and images. Annotations made on whiteboards will be seen by all participants. The whiteboard feature enhances collaboration by allowing meeting participants to discuss ideas, brainstorm, take notes, and so on.
**Insert a Polling Slide**

The polling feature enhances collaboration by allowing presenters to quickly determine participants’ preferences. During online meetings and conversations, presenters can use polls to gather anonymous responses from participants. All presenters can see the results and can either hide the results or show them to all participants.

To create a Poll slide in your meeting:

1. Click **Share** in your meeting.
2. On the **Share** drop down menu, click **New Poll**.
3. Type a name for the poll page, a question and the choices.
4. Click **OK** when you are done.
5. A Poll page is inserted in the **Stage** area of your meeting, and the participants can click the options to answer your question.
6. Use the control buttons at the bottom of the poll page to mange the poll page, such as open, close, show or hide results.
**Take Meeting Notes with OneNote**

Use Microsoft OneNote to take notes in your meeting. The names of the meeting participants will be automatically pulled from the meeting and saved in OneNote.

1. On the Online Meeting toolbar, click **Actions**.

   **Note:** If you don’t see the toolbar, press the **Alt** key on your keyboard to activate the toolbar.

2. Click **Take Notes Using OneNote**.

3. OneNote opens and you can type your meeting notes.

4. A list of the meeting participants is also automatically inserted in **OneNote**.

![OneNote Meeting Notes](image)

**Add Video to Your Meeting**

Add video to your meeting:

1. Set up your webcam using the device instructions.

2. Click the **Video menu** arrow, and then click **Video Device Settings**.

3. Configure your webcam settings as appropriate, and then click **OK**.

4. Click the **Video menu** arrow, and then click **Add Video**. Your video will be shown to all participants in the meeting.

5. Right-click the video and use the menu to perform the following commands as appropriate: **Pause My Video, Hide My Preview, Expand My Preview, Pop Out Video, View Full Screen,** and **Video Device Settings**.

   **Note:** After performing any of the tasks above, you can right-click the video again to undo the command. For example, after pausing your video, right click the video again and click **Start my video** to show your video.

   You can also use the controls at the top of the video to pause your video, go to full screen, pop out your video, etc.
Add or View Attachments
To add a file to your meeting, such as a hand out or your presentation for the participants to download:

1. Click the Add or view attachments button.
2. In the Attachments dialog, click Add Attachments.
3. Select the file that you want to upload and then click Open.
4. By default everyone in the meeting can save the attachment locally. To control access, click the arrow next to the file, point to Make Available to and choose one of the following: Meeting Organizer, Presenters, Everyone. You can change the access level anytime during the meeting.

**Tip:** To keep your participants focused on your presentation and to avoid distraction, you can restrict access to Organizer or Presenters at the beginning of the meeting and make the file available to Everyone after your presentation ends.

Participants in the meeting can click the Add or View Attachment button, and then click the file to download it locally.
Record a Meeting

Record a meeting:

1. Click the More Options button in your meeting, and then click Start Recording.
2. The Pause and Stop commands become available at the bottom of the meeting window.
3. Click the Stop button and customize the options on the Stop Recording window if needed.
4. By default, Lync saves your recordings in Lync recording format in the location: 
   C:\Users\username\LyncRecordings. Click Browse to save your recording to a different location.
5. By default, the option to save the recording in (.wmv) format is also enabled. If not, select Also create a version that you can publish to others (.wmv) check box. This option saves your recording in a single .wmv video format, which you can send to others.

View Your Recording

View your recording:

1. Click Start, All Programs, Microsoft Lync, and then click Microsoft Lync Recording Manager.

Tip: You can also access the Recording Manager from Lync. Click Tools on the menu bar, and then click Recording Manager.

2. In the Recording Manager window, select if you want to view the recording in Lync Recording format or Windows Media Recordings format. Click the appropriate tab at the top of the Recording Manager window.
3. Select a recording, and then click Play.
4. If you have selected the Windows Media Recordings format, the recording will play in Windows Media Player. If you have selected the Lync format, the recording will play in Lync Recording Playback.
Share Your Recording

Share your recording with others:

1. Open the Recording Manager, and click the Windows Media Recordings tab.
2. Select your recording, and then click **Browse** to the location where your recording was saved.
3. Copy the file and post it where others can access it.

If you have saved your recording only in the Lync Recording format and want to have a WMV version as well, follow these steps:

1. Click the Lync Recording tab.
2. Select your recording, and then click **Publish**.
3. In the **Save and Publish** window, change the name and path of the recording if you want, and then click **OK**.
4. In the **Save and Publish** window, change the name and path of the recording if you want, and then click **OK**.

**TIP:** You can also publish the recording directly to a location accessible to others, such as a team SharePoint.
Microsoft Office Integration

Outlook Inbox and Calendar

- Presence linked to Outlook Calendar availability
- Conversation History
- Voice-mail transcripts

Lync Web App

- Contacts that aren’t in your organization or don’t have Lync can still join your meeting.
- Microsoft Lync Web App requires Microsoft Silverlight and a phone for audio.
Perform as someone’s delegate

You’ll see a notification if you are delegated the responsibility to answer and make calls on behalf of someone else. Incoming calls for that person will ring you. The incoming call alert specifies that the call is for the other person. Delegates are set up in the Call Forwarding options in the Lync - Options dialog box. You can be set up as a delegate either by the Forward my calls to or Simultaneously ring options.

Only delegates that your support team has enabled for unified communications (UC) can make and answer calls on behalf of someone else. Non UC-enabled delegates can only schedule online meetings on behalf of someone else.

Add or Remove a delegate

You can assign one or more delegates to make or receive calls on your behalf. To add or remove a delegate, do the following:

1. Open Microsoft Lync 2010, click the Options button, and then click Call Forwarding. Or, click the down arrow beside the Phone icon at the bottom of the Lync window, and then click Call Forwarding Settings.

2. In the Lync – Options dialog box, select either Forward my calls to or Simultaneously ring, and then choose My Delegates from the drop-down list in the selection that you chose.

3. Click Edit my delegate members.

4. In the Delegates dialog box, type the name of the person that you want to be your delegate, click Add, and then click OK.

To remove a delegate, again in the Delegates dialog box, check the box beside the listed delegate, click Remove, and then click OK. no longer want to be a delegate, contact the person who delegated you and ask to be removed.

Redirect a call as a delegate

As a delegate, you can redirect the call to a published mobile number, or redirect the call to voice mail. To redirect the call, click Redirect in the incoming call alert, and then click Voice Mail or the desired number.

Answer a call on behalf of someone and then transfer

Do either of the following to answer a call for someone and then transfer the call:

- Click the incoming call alert to answer the call, click the Transfer button, and then click the name or number of the person to whom you want to transfer the call.
- Answer the call, and then transfer it to the work phone of the person who you answered the call for, by pressing CTRL + 1.

Make a call as a delegate

To make a call on behalf of someone else, do the following:

1. Open Microsoft Lync 2010, find the contact you want to call, and, in your Contacts list or search results, point to the contact, and then click the arrow next to the Call menu.
2. In the drop-down list at the top of the menu that appears, click the person for whom you’re making the call.
3. Click the number you want to call, or click New Number to enter a new number.