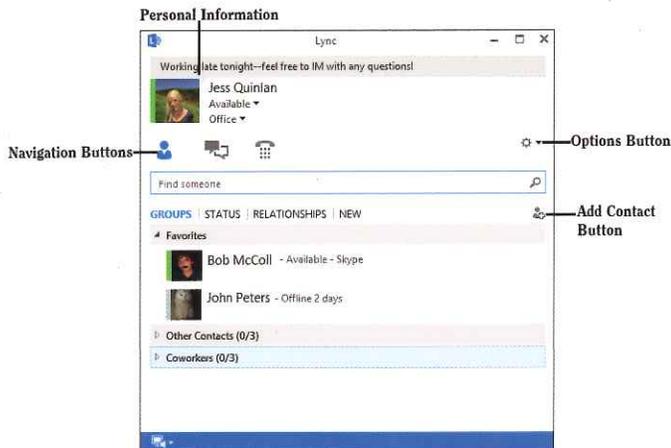


## Getting Started

### The Lync Window



**Personal Information** – access your personal note, location, and presence status.

**Navigation Buttons** – switch between views.

**Options Button** – access the File menu and other settings.

**Add Contact Button** – add contacts in or out of your organization.

### Signing In

You can sign into your Lync account directly by opening the program from your desktop or Start screen.

1. Enter your email address in the **Sign in address:** box.
2. Enter your password in the **Password:** box.
3. *Optional:* To set your status before you sign in, click the arrow at the **Sign in as:** box and select a status from the drop-down menu. You will appear online set as this status.
4. Click the **Sign in** button.

### Setting your Presence Status

If you use Outlook, your status is automatically adjusted to reflect your Outlook Calendar meetings and appointments. You can also manually set the online availability you wish to display to your contacts.

1. Click the **Status** arrow to open the status options. You can select:
  - **Available:** You are online and free to talk.
  - **Busy:** You are busy but can still receive conversation alerts.
  - **Do Not Disturb:** Only alerts from your **Workgroup** contacts will appear.
  - **Be Right Back:** You have stepped away and will return soon.
  - **Off Work:** You are not at work.
  - **Appear Away:** Your computer is set to away.
2. *Optional:* To return to your previous status, select **Reset Status**.



### Adding a Personal Note

You can add a custom note to instantly share a short message or additional details with your contacts.

1. In the **What's happening today?** conversation box, enter a short personal note you would like to share with your contacts.
2. *Optional:* To change your personal note, delete your current message and press the **Enter** key. Type a new personal note in the space.

### Exploring Lync!



**Jess Quinlan**  
Available ▾  
Office ▾

### Setting your Location

Along with your presence status and personal note, you can also display your current location to your contacts.

1. Click **Set Your Location**.
2. Enter a description of your current location into the box.
3. Click outside the text box to save the location.
4. *Optional:* To change your current location to a previously used location, click the arrow to select a custom location you have already used.

*Note: If you would rather not display your location information, you can click the arrow beside your location and uncheck the **Show Others My Location** box.*

### Adding a User Picture

Choose a picture of yourself to display to your contacts. The maximum size of a user picture is 30 KB.

1. Click the arrow beside the **Options** ⚙ button.
2. Click **Tools**.
3. Select **Options** from the drop-down menu.
4. Select **My Picture** in the left pane of the **Lync Options** screen.
5. Click **Edit or remove picture**.
6. Click **Browse** and select a photo from your files.
7. Click **Open**.
8. Click **Save**.
9. *Optional:* To hide your picture, click the button at **Hide my picture**. Click **OK** to confirm.

*Note: To quickly change your user picture, click on your user photo to open **My Picture** options.*

### Navigating in Lync <sup>NEW!</sup>

When you open the Lync main window, you can click the view buttons under your personal information to change your view. Select the view that displays the features you want to access.

- **Contacts** 👤 view: your default view, which displays your various contact groups and their current presence status and network.
- **Conversations** 💬 view: displays past chats, meetings, and calls.
- **Dial pad** ☎ view: displays a dial pad that you can use to enter in phone numbers for audio calling.



## Contacts

It's important to populate your list of contacts with the people you wish to interact with. You can add contacts using the name, email address, or phone number of another Lync user in your organization or in a different network. You can also add the email addresses or user names of Skype users.

### Adding a Contact from your Organization

1. Enter the name, email address, or phone number of a contact you wish to add in the **Find someone** space in the main Lync window.
2. When a desired contact appears, right-click on the name of the user.
3. Select **Add to Contact List** from the drop-down menu.
4. Select a group for your contact to belong to. The contact will appear in the desired list.

### Adding a Contact from Outside your Organization

If you know the information for the contact outside your organization, you can directly add that contact to your contact list.

1. Click the **Add a Contact** button.
2. Select **Add a Contact Not in My Organization**.
3. Choose the type of contact by selecting **Lync**, **Skype**, or **Other**.
4. Enter the contact information for the new contact in the **IM Address** box.
5. *Optional:* To set a privacy level for your new contact, click the arrow in the **Set Privacy relationship** box and select a privacy relationship.
6. *Optional:* To add your contact to a group, click the arrow in the **Add to contact group** box and select a group.
7. Click **OK**.

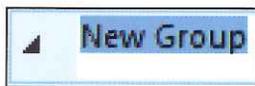
*Note:* To delete a contact, right-click on the contact and select **Remove from Contacts List**. Click **Yes** to confirm.

### Using Contact Groups

You can organize your contacts into groups according to how often you speak with them or by who you work with. The two default groups are **Favorites**, for your most commonly used contacts, and **Other Contacts**. You can also create your own custom groups. Add users to groups when you add them as contacts, or organize your existing contacts by right-clicking the contact and selecting **Move Contact To** from the drop-down menu.

### Creating a New Contact Group

1. Click the **Add a Contact** button.
2. Select **Create a New Group**.
3. The new group will appear in your groups view. Click in the blue-highlighted **New Group** space to enter in a name for your group.
4. Click and drag contacts to place them into the new group.
5. *Optional:* To delete a group, right-click on the group and select **Delete Group**.
6. *Optional:* To expand a contact group and view contacts, click the **Arrow** button.



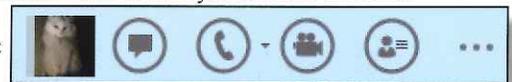
## Messaging

### Using the Quick Lync Bar **NEW!**

The Quick Lync bar gives you instant access to common tools for interacting with contacts.

1. To open the **Quick Lync** bar, hover your pointer over the user picture of the contact with whom you wish to interact.

2. Click one of the **Quick Lync** buttons to interact with the user, including:



- **Send an IM**
- **Call Contact**
- **Start Video Call**
- **See Contact Card**
- **More**

### Sending an Instant Message

1. Double-click on the contact you wish to instant message in your **Contacts List** or click the **IM** button on the **Quick Lync** menu.
2. Type your message into the text box provided and press the **Enter** key to send.
3. *Optional:* To change the font type, size, or color of your message text, click the **Font** button. Select a text color from the palette or click the arrows on the **Font** or **Font Size** boxes.
4. *Optional:* To insert an emoticon, click the **Smiley** button. Select the desired expression from the palette.
5. *Optional:* To set the importance level of the message to high, click the **Set high importance for this message** button.
6. *Optional:* To invite a contact to an ongoing conversation, hover over the **Participants** button. Select a recent contact or click **Invite More People** to choose from your contacts.
7. Click the **Close** button when you have finished the conversation.

### Using Tabbed Conversations **NEW!**

Tabbed conversations help you manage chats, calls, and other conversations going on simultaneously in one screen. When you open more than one conversation, the messages will automatically appear as tabs in the screen's sidebar.

- To switch between conversations, click the name of the contact in the sidebar.
- To close a conversation, hover your mouse pointer over the name of the contact until the **Close** button appears.
- To expand a conversation into its own separate window, click the **Pop-out** button on the upper right corner of the screen.





## Meetings

With Lync, you can schedule and participate in online meetings with other contacts in your organization. To use Lync meetings optimally, you will need to use Microsoft Outlook. To use the full features of Lync meetings, you will also need a webcam and microphone.

### Scheduling a Meeting in Lync

1. In your Lync window's **Contact** view, right-click the contact with which you wish to schedule a meeting.
2. Click **Schedule a Meeting**.
3. When the Outlook window opens, enter the details of the meeting such as **Subject**, **Location**, **Start time**, **End time**, and any agenda information in the body space.
4. *Optional:* To set a reminder for the meeting, click the arrow on the **Reminder** box and check a time to be reminded.
5. *Optional:* On the **Meeting** tab, click the **Scheduling** button in the **Show** group. Coordinate your meeting with your contacts' schedules to avoid conflicts.
6. Click the **Send** button.



### Scheduling a Meeting with your Outlook Calendar

1. Open your **Microsoft Outlook** program.
2. Click on the **Calendar**.
3. Click the **New Lync Meeting** button in the **Lync Meeting** group.
4. Enter the email addresses of the contacts you wish to invite.
5. Enter a **Subject**, **Location**, **Start time**, **End time**, and any agenda information in the body space.
6. *Optional:* On the **Meeting** tab, click the **Scheduling** button in the **Show** group. Coordinate your meeting with your contacts' schedules to avoid scheduling and location conflicts.
7. Click **Send**.

### **NEW!** Scheduling a Meeting with Lync Web Scheduler

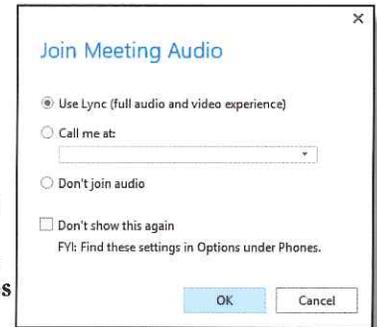
If you don't use Outlook, you can still schedule meetings by using the Lync Web Scheduler with your Internet connection. Contacts you invite to the meeting will receive a link to the Lync Web App Meeting Client.

1. Open Internet Explorer or another web browser.
2. Enter <https://sched.lync.com> into the web address bar.
3. If prompted, login to the Office 365 portal with your user name and password.
4. Enter information in the **General**, **Meeting Time**, **Access and Presenters**, **Participants** and **Audio** sections to set the details of your meeting. Required sections are denoted by a red asterisk.
5. Click **Save**.
6. Click **OK**.

*Note: To view your meetings, click the **MY MEETINGS** link. Your scheduled meetings will appear in alphabetical order according to subject.*

### Joining a Scheduled Meeting

1. Open the meeting request or reminder.
2. Click **Join Lync Meeting**.
3. Choose one of the following audio connection options from the **Join Meeting Audio** window.
  - **Use Lync:** the recommended option for Lync meetings, for use with available webcam, mic and speakers or headset.
  - **Call me at:** enter a phone number to dial-in to a conference or select a set number from your **Phones** options.
  - **Don't join audio:** use when calling into a meeting from a phone.
4. Click **OK**.



*Note: If you don't have a webcam on your computer, you'll still be able to see the videos from other users in the meeting.*

### Participating in a Meeting

1. Once you have joined a meeting, you can do one of the following options:
  - *To view information on other attendees*, view the participant list. The icons beside the names will indicate chat, audio, and video capability of each attendee.
  - *To chat in a meeting*, enter your instant message into the message space at the bottom of the screen. Enter any emoticons or adjust the font as desired.
  - *To share a video of yourself in a meeting*, click the **Video** button. Click **Start my video**.
  - *To end sharing your video*, click **Stop my video**.
  - *To exit a meeting*, click the **More** button. Select **End Meeting** from the pop-up menu. Click **OK**. (If you are not the presenter, simply close the conversation window. The meeting will go on without you.)

### Recording a Meeting

Recording a meeting in Lync is a good way to keep track of ideas or help with note-taking. Only presenters have the authority to record a meeting.

1. In the meeting window, click the **More** button.
2. Select **Start Recording**.
3. *Optional:* To pause, stop, or resume the recording, use the controls at the bottom of the meeting.
4. When you are finished recording, click **Stop Recording**. Lync **Recording Manager** will display an alert when the recording is ready to be shared.
5. *Optional:* To share the recording, click the alert or click the **Settings** button and select **Tools**. Open the **Recording Manager**. Click **Browse** and locate the MP4 file of the recording. From here you can copy or share the file through email or instant message.
6. *Optional:* To rename the recording, click the alert or click the **Settings** button and select **Tools**. Open the **Recording Manager**. Click **Rename**.
7. *Optional:* To delete the recording, click the alert or click the **Settings** button and select **Tools**. Open the **Recording Manager**. Click **Delete**.

*Note: Recordings are automatically saved in your computer's **Video/Lync Recording** file.*



## Adding Users to a Meeting

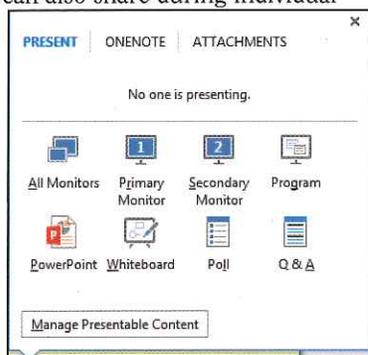
Once in a meeting, a presenter can add additional users as needed.

1. In the meeting window, click the **Invite More People** button.
2. Select additional contacts from the list or enter the name of a contact in the search bar.
3. Click **OK**.

## Presenting Content through Lync Meetings

One of the most powerful features in Lync is the ability to directly present content to your contacts. You train new employees in shared programs or present ideas directly with a PowerPoint presentation. You can choose to share your entire desktop display or just a specific program you're working in. You can also share during individual conversations as well as in meetings.

1. In a meeting, hover your mouse cursor over the **Present** button.
2. From here, you can share one of the following:
  - **Desktop**: displays your entire desktop screen.
  - **Program**: displays your work in a selected program.
  - **Q&A**: displays other attendees' questions for you or a presenter to answer.
  - **PowerPoint**: displays a complete PowerPoint file.
  - **Whiteboard**: displays a writing slate.
  - **Poll**: displays a poll that your contact can participate in.
3. *Optional*: To give your participants control over the screen, click the **Give Control** on the sharing toolbar at the top of the screen. Take back control of the screen by clicking **Take Back Control**.
4. Click **Stop Presenting** to end the sharing session and return to your private screen.



*Note: When you are presenting in Lync, your status will automatically change to **Presenting**. No instant messages or calls will come through while you are sharing. You should also make sure you close any sensitive or private information that may be open on your desktop before you begin sharing.*

## Taking Notes in a Meeting with OneNote

You can share and coedit notes with participants of a meeting using OneNote. The note you share must be in a location that other users can access, such as SharePoint or SkyDrive.

1. In a meeting, hover your mouse cursor over the **Present** button.
2. Click the **OneNote** tab.
3. Click the **Shared Notes** button.
4. Select a page or section to share and click **OK**. Participants will receive a notification about the note in the meeting.
5. *Optional*: To see who has access to your notebook, click **Check who has access to the selected notebook**.
6. *Optional*: To create a new notebook to share in, click **New Notebook**. Enter a name for your notebook in the **Notebook Name**: space. Opened OneNote notes that you have shared will appear in the **OneNote** tab in your meeting window.

## Sharing an Attachment

You can share folders or files with your contacts by attaching them through an instant message or in a meeting.

1. In a meeting or conversation window, hover your mouse cursor over the **Present** button.
2. Click the **Attachments** tab.
3. Click the **Add Attachment** button.
4. Select the file you wish to share in your computer's folders or SkyDrive.
5. Click **Open**.
6. The attachment file will appear in the **Attachments** window. From here, you can do one of the following options:
  - *To share the attachment in the conversation or meeting window, click **Open**.*
  - *To set who can download the attachment in a meeting, click the arrow beside the **Permissions** button. Select **Organizer** if you want to be the only one with access to the file. Select **Presenters** if you would like to give access to other presenters. Choose **Everyone** if you would like to give everyone access to the file.*
  - *To rename or save the file in a new location, click the arrow beside the **More** button. Select **Rename** or **Save as**.*
  - *To remove the file, click the **Remove** button.*

## Downloading Meeting Content

You can save content such as polls or questions and answers presented in a meeting for future reference.

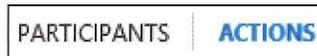
1. In a meeting conversation window, hover your mouse cursor over the **Present** button.
2. Click **Manage Presentable Content**.
3. Click **More**.
4. Select **Save As** or **Save with Annotations** to download the content to your computer's folders or SkyDrive.

## Setting Presenter Meeting Options

If you are a presenter in a meeting, you can control certain aspects of the meeting to optimize your attendees' experience.

1. In the meeting conversation window, hover your mouse cursor over the **Participants** button.
2. Click on the **Actions** tab.
3. From here, you can do one of the following options:
  - *To hide the names of participants, click the **Hide Names** button.*
  - *To mute the audience, click the **Mute Audience** button.*
  - *To turn off instant messages for participants, click the **No Meeting IM** button.*
  - *To send an email invite to additional participants, click the **Invite by Email** button.*
  - *To set all participants as attendees, click the **Everyone an Attendee** button.*
  - *To limit attendee videos, click the **No Attendee Video** button.*
  - *To dock or undock the **Participants** section in the meeting conversation window, click the **Dock** button.*

*Note: You can also add participants from the **Action** tab by clicking the **Invite More People** button and adding the contacts you wish to include.*





## Calling

You can use your Lync program to make and receive calls just as you would on a traditional phone using your computer's audio devices such as speakers and headset or microphone. To set up your audio device, click the **Select Primary Settings** button in the bottom-left corner of your screen. Click **Audio Device Settings**. Select your desired audio device and adjust the settings as necessary for your calls.

### Placing a Call

1. Enter the name of the contact you wish to call in the search bar.
2. Hover your mouse pointer over the user picture of the contact you wish to call to open the **Quick Lync** bar.
3. Click the **Call** button or click the arrow to select **Lync Call** or a specific listed phone number. The call will open in a new Lync window.
4. *Optional:* To mute a call, hover your mouse cursor over the **Call** button to open call options. Click the **Mute** button at the bottom of the call window.
5. *Optional:* To put a call on hold, hover your mouse cursor over the **Call** button to open call options. Click the **Hold Call** button at the bottom of the call window.
6. *Optional:* To transfer a call, click the **Transfer Call** tab. Select a number to transfer the call.



*Note: You can also place an audio call by clicking the **Dial pad** button on the main Lync window. Enter the phone number and click **Call**.*

### Answering an Incoming Call

1. When a contact calls you, a new Lync call alert will appear on your screen.
2. From here, you can do one of the following:
  - To *accept a call*, click in the photo area of the call alert screen.
  - To *reply by instant message*, click the arrow beside **Options**. Select **Reply by IM**.
  - To *accept a call but not share your own video*, click the arrow beside **Options**. Select **Answer with Audio Only**.
  - To *reject a call and set your status to reject future calls*, click the arrow beside **Options**. Select **Set to Do Not Disturb**.
  - To *reject a call*, click **Ignore**.

### Starting a Conference Call

1. In the **Contacts** view of your Lync main window, click and hold the **Ctrl** key to select contacts to include in your conference call.
2. Right-click on any part of the blue area in the selected contact space.
3. Select **Start a Conference Call** from the drop-down menu.
4. Click **Lync Call**. Your contacts will receive a notification. They can accept or decline the call.
5. *Optional:* To add more contacts once you're in the conference call, click **Invite More People** to select an additional participant. The call will be automatically added to the on-going conversation.

### Using Video Calling

To use video calling, you will need to have a working webcam available on your computer.

1. Enter the name of the contact you wish to call in the search bar.
2. Hover your mouse pointer over the user picture of the contact you wish to call to open the **Quick Lync** bar.
3. Click the **Start a Video Call** button or click the arrow to select **Lync Call** or a specific number. The call will open in a new Lync window.
4. *Optional:* To change the layout of the video call, click **Pick a Layout** and select one of the layout views:
  - **Gallery View:** see all participant videos.
  - **Presenter View:** see presenter's video prominently as well as any shared content.
  - **Content View:** see only shared content instead of video streams of participants or presenters.
  - **Compact View:** see a compacted version of all videos in a tile format.
5. Hover your mouse cursor over the **Start a Video Call** button to open the video conversation options. From here, you can do one of the following:
  - To *not share your own video stream in the call*, click **Stop My Video**. Your contact's video stream will still appear.
  - To *end all video streaming and return the call to just audio*, click **End Video**.

### Adding a Phone

1. Click the arrow beside the **Options** button.
2. Select **Tools** from the drop-down menu.
3. Select **Options**.
4. In the left pane, click **Phones**.
5. In the **My phone numbers** section, click **Work Phone**, **Mobile Phone**, **Home Phone**, or **Other Phone** to add a phone number.
6. When the **Edit Phone Number** window opens, enter the phone number in the **Phone number:** space.
7. *Optional:* To include the number on your contact card for your contacts to view, check the box beside **Include in my contact card**.
8. When you are finished, click **OK**.

### Adjusting Audio and Visual Settings

To use audio and visual elements of Lync, you will need to make sure your devices are configured correctly.

1. Click the arrow beside the **Options** button.
2. Select **Tools** from the drop-down menu.
3. Click **Audio** or **Visual Device Settings**.
4. Test your settings to verify that your devices are working properly.



To order call toll-free 1-800-296-5750.

Lync 2013 Quick Source Guide copyright © 2013 by Quick Source Learning. All rights reserved. No portion of this material may be saved in any retrieval system without the express written permission of the copyright owner. Quick Source Learning is not responsible for errors or omissions in this guide or damages resulting from the use of this material.

Microsoft® Lync® is a registered trademark of Microsoft® Corporation, Inc. Printed in USA.

Visit our website: [www.quicksourcelearning.com](http://www.quicksourcelearning.com)



## Extras

### NEW! Organizing your Contacts

By default, Lync will load in your Contacts view. You can further navigate your Lync features by clicking on one of the specific views available to display your contact's recent activity.

**GROUPS** | STATUS | RELATIONSHIPS | NEW

- **Groups:** View your contacts by group.
- **Status:** View your contacts by their availability status.
- **Relationships:** View your contacts by your relationship access to them, such as family or workgroup.
- **New:** View your contacts list by who has added you most recently.

### Adjusting your Display Options

1. Click the **Add a Contact** button.
2. Click **Display options**.
3. Click the buttons to toggle the display and order options to suit your preferences.
4. *Optional:* Check options in the **Show this information:** section to show or hide details.
5. Click **OK**.

### Displaying the Menu Bar

For easier access to Lync's tools and options, you can choose to display the Menu bar in your Lync window.

1. Click the arrow beside the **Options** button.
2. Click **Show Menu Bar** from the drop-down menu.
3. *Optional:* To remove the menu bar, uncheck the mark beside **Show Menu Bar**.

## Privacy

### Signing Out

1. Click the arrow beside the **Options** button.
2. Click **File**.
3. Select **Sign Out** from the drop-down menu.
4. *Optional:* To clear your sign-in information on a computer used by multiple users, click the **Delete my sign-in info** link.

*Note:* To sign into a different account, select **Change Sign In Account**.

### Setting a Privacy Relationship

You may wish to organize your contacts by who can see what content. For instance, you might not want your coworkers to be able to see your home phone number, but you might want to keep this information visible to family members.

1. In your **Contacts** view, right-click the name of the contact to which you wish to set a privacy relationship.
2. Click **Change Privacy Relationship** and select a privacy setting.
  - **External Contacts:** the default privacy setting, displays only your title, company, picture and email address.
  - **Friends and Family:** shares all content except meeting details.
  - **Workgroup:** shares all content except for Home and Other phone numbers.
  - **Colleagues:** shares your note and location, but not Home and Other phone numbers or your meeting details.
  - **Blocked Contacts:** displays only name and email address. Contacts set to **Blocked** cannot use Lync to contact you.

## Shortcuts

### Conversation Shortcuts

Help .....	<b>F1</b>
View in Full Screen.....	<b>F5</b>
Exit Full Screen .....	<b>Esc</b>
Close Conversation Window.....	<b>Alt + F4</b>
Mute .....	<b>Windows Key + F4</b>
Camera On/Off .....	<b>Windows Key + F5</b>
Accept Invite .....	<b>Windows Key + A</b>
Decline Invite .....	<b>Windows Key+ Esc</b>
Save Conversation .....	<b>Ctrl+ S</b>
End a Call .....	<b>Alt + Q</b>
Put a Call on Hold .....	<b>Ctrl + Shift + H</b>
Select All .....	<b>Ctrl + A</b>
Cut .....	<b>Ctrl + X</b>
Paste .....	<b>Ctrl + V</b>
Copy .....	<b>Ctrl + C</b>
Undo .....	<b>Ctrl + Z</b>
Redo .....	<b>Ctrl + Y</b>

### Navigating Shortcuts

Move to Contact List .....	<b>Ctrl + 1</b>
Move to Conversation List .....	<b>Ctrl + 2</b>
Move to Phone tab .....	<b>Ctrl + 4</b>
Start Meet Now .....	<b>Alt + M</b>
Open File Menu .....	<b>Alt + F</b>
Open Tools Menu .....	<b>Alt + T</b>
Switch Tabs .....	<b>Ctrl + Tab</b>
Expand Group .....	<b>Spacebar</b>
Move Group Up .....	<b>Alt + Up Arrow</b>
Move Group Down .....	<b>Alt + Down Arrow</b>
Delete Group .....	<b>Delete</b>

## Getting Help

### Accessing Lync Help

1. Click the arrow beside the **Options** button.
2. Select **Help** from the drop-down menu.
3. Click **Lync Help**.
4. From here you can do one of the following:
  - To view the **Lync Help** home page, containing links to common help topics, click the **Home** button.
  - To print a **Help** article, click the **Print** button. Adjust any printing settings in the **Print** window and click **Print**.
  - To navigate between articles, click the **Back** or **Forward** buttons.
  - To increase the font size in **Help** articles, click the **Use Large Text** button.
5. When you are finished using **Lync Help**, click the **Close** button to exit the **Help** window.

*Note:* If you are having trouble with certain Lync functions, you may need to contact your system administrator. Your version of Office 365 may not have access to all available Lync features, or these features may not be enabled on your account.

ISBN 978-1-935518-48-8

