Microsoft Lync™ How-to Guide

Microsoft Lync™ ushers in a new connected experience transforming every communication into an interaction that is more collaborative, engaging and accessible from nearly anywhere with an Internet connection. A single interface unites voice, IM, audio-, video-, and web-conferencing into a richer, more contextual offering and a single identity makes it easier and more efficient for users to find contacts, check their availability and connect with them. Lync works consistently with Microsoft Office, enriching the experience of familiar applications like Microsoft Outlook, Microsoft Word, Microsoft SharePoint, and more.
Get More Done in Less Time
The powerful collaboration tools in Microsoft Lync help you get more done in less time, so you can be present where and when you need to be most.

Contacts
Microsoft Lync makes it easy to keep all your contacts in one place, so you can communicate more easily. Contacts can be sorted by groups, presence status, and relationship.

Find a person
- To find a person, type the person’s name, e-mail address, or phone number in the Search Dialog Box. As you type, Search results will appear. Search results are shown by Name and by Skill.

Skill Search
- To search by skill, begin by entering your keywords in the Search Dialog Box. This will default to a name search, so click on skill to bring up those in your organization who meet your criteria.
View contact card
- To view the contact card, right click on the contact’s name and select View Contact Card, or click Alt+Enter for a contact you have highlighted.
- Alternatively, you can hover by holding your mouse over a contact to pull up the contact card.

Add contact
- Type a person’s name, e-mail address or phone number in the Search Dialog Box. In the search results, highlight their name, and then select the plus symbol.

Presence
Microsoft Lync helps you stay connected, but it also gives you the flexibility to choose when and how you can be contacted.

Understanding Presence
Lync provides an immediate, visual representation of a contact’s availability, or presence. By simply looking at the contact list, you can find everything you need at a glance. For example, a green icon means a contact is available, red means a contact is busy, and yellow indicates that a contact is Away from the computer. Wherever a contact’s name appears—in an e-mail message or on a team site—status and contact information also is displayed. Presence information can be set by the contact manually, or selected based on available calendar information. Presence states set by the user or Lync Server 2010:
<table>
<thead>
<tr>
<th>Status Text</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>The contact is online and is available to participate in conversations.</td>
</tr>
<tr>
<td>Busy</td>
<td>The contact is online but is engaged in another activity. Activities include:</td>
</tr>
<tr>
<td></td>
<td>- In a Call: The contact is in a voice or video conversation.</td>
</tr>
<tr>
<td></td>
<td>- In a Conference: The contact is in a multiparty conversation using phone, voice, video, and/or application sharing.</td>
</tr>
<tr>
<td></td>
<td>- In a Meeting: The Outlook calendar shows that the contact has a scheduled meeting.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>The contact is online but does not want to be interrupted. Users can specify the level of privacy in Do Not Disturb mode by choosing options that enable no display alerts to options that allow alerts from a specified workgroup. In this state, a contact can initiate IM conversations but cannot receive incoming messages unless part of a thread they began. You can reply until the contact has closed current conversation window.</td>
</tr>
<tr>
<td>Appear Away</td>
<td>The contact is online but not available for one of the following reasons:</td>
</tr>
<tr>
<td></td>
<td>- The contact’s computer has been idle for longer than a time period that is specified by the user (by default, 15 minutes).</td>
</tr>
<tr>
<td></td>
<td>- The contact’s Outlook calendar or Out of Office Assistant indicates that he or she is out of the office.</td>
</tr>
<tr>
<td></td>
<td>- The contact is temporarily unavailable.</td>
</tr>
<tr>
<td></td>
<td>- The contact has manually set his or her presence status to Away or Appear Away.</td>
</tr>
<tr>
<td>Off Work</td>
<td>The contact is not at work; however the contact can still send and receive IM conversations.</td>
</tr>
<tr>
<td>Be Right Back</td>
<td>The contact is online but not available; however the contact can still send and receive IM conversations.</td>
</tr>
<tr>
<td>Offline</td>
<td>The contact is not online. This status is displayed for the following reasons:</td>
</tr>
<tr>
<td></td>
<td>- The contact has not signed in.</td>
</tr>
<tr>
<td></td>
<td>- The contact has blocked the user from seeing his or her presence status.</td>
</tr>
<tr>
<td>Presence unknown</td>
<td>Lync Server 2010 cannot determine the status of the contact.</td>
</tr>
<tr>
<td>Blocked</td>
<td>The user has blocked the corresponding contact. To the blocked contact the user appears to be offline.</td>
</tr>
</tbody>
</table>
Changing your Presence Status
Changing your presence status helps coworkers know when you are and aren’t available. Presence is enhanced in Lync with pictures, location information, and additional states such as “Off Work” to provide more granular information about availability and communication preferences.

➢ To change your Presence status, click on the drop-down arrow next to your current status (directly below your name), and select the appropriate Presence state: Available, Busy, Do Not Disturb, Be Right Back, Off Work, or Appear Away.
Instant Messaging
Starting an instant messaging (IM) session is as simple as double-clicking a contact name from your Contact List. This opens the Conversation window where you enter your IM and view responses from others.

To start an instant messaging session with a single contact
- In the Contact List, double-click a contact name, type a message, and then press ENTER. If the contact is not in the Contact List, type the person’s name in the Search box, and then double-click the name in the Search Results box.

To start an instant messaging session with a group, do one of the following:
- To send an instant message to a distribution group or contact group, right-click a group name, click Send an Instant Message, type a message and then press ENTER.
- To send an instant message to multiple contacts, hold the CTRL key to select the contacts, right-click the last contact, and then click Send an Instant Message, type a message and then press ENTER.
- Start an Instant Message conversation with one contact, then drag and drop additional contacts directly into the chat window. This joins all contacts to the conversation.
Use Etiquette in Instant Messaging

Instant Messaging (IM) is less intrusive than a phone call and often quicker than email. Its very nature is conversational and similar to face-to-face discussions. There are a few general etiquette rules you should keep in mind when communicating via IM.

- Before sending an IM, check the person’s presence status. This will help you decide if and when it’s appropriate to connect:
  - **Available**: go ahead and initiate a conversation as you your contact is willing and available.
  - **Busy**: refrain from sending a message unless it’s urgent.
  - **In a Call**: your contact may be slow to respond or may not respond at all. This will vary by person and by the nature of the call.
  - **Do Not Disturb**: messages cannot be sent and are blocked by the system.

- When initiating an IM, it’s a good practice to ask if the other person if they have time to chat with you (e.g., “Got a moment to discuss the Contoso account?”). This isn’t always necessary with someone you know well, but use your judgment.

- Sometimes a person may or may not respond immediately. Avoid sending multiple messages and wait for a response to your initial IM unless it is urgent.

- If you receive a terse response (e.g., “in a meeting - talk later”), don’t be offended. They’re just letting you know they’re unavailable at the time.

- Depending on your company’s policy IM conversations may be monitored or saved. Always consider the tone and content of your messages.

- If you’re in a meeting, call, or Web conference, turn off the sound on your IM to ensure you won’t be disturbing to others in the meeting. To turn off sound for incoming alerts, from the menu bar click **Options > Alerts** and then under **Ringtones and Sounds**, select **Suspend Sounds** when my status is Busy.

- Don’t invite someone to join a multiparty IM session in progress without first asking everyone in the session if it’s OK.

- Avoid having too many “goodbyes” as you and your colleague attempt to end the conversation.

- Ask before elevating an IM conversation to a call, video chat, or conference. They may only have time for a quick note and not for a full conversation.
Be at the Center of Your Network

Microsoft Lync helps connect with your network of friends, colleagues and partners so you can stay in touch. It enables you to communicate with contacts from federated networks, including Windows Live, AOL, and Yahoo! And picture-enhanced presence information, automatic contacts lists, and activity feeds let you add your personal touch.

Add contacts from federated networks

- Type the email address of your contact into the search bar. In the search results, highlight your contact then select Add to Contacts.

Use Etiquette in Managing Contacts

- You don’t need permission to add someone to your Contact List; however, by default, the person you add to your Contact List receives an alert that you have added them. To add a contact, type the person’s name in the Search box, and then drag the name from Search results into a group (other than Recent Contacts) in your Contact List.

- If someone adds you to their Contact List, you are not obliged to add them to your contact list. You can gently decline by checking the button and clicking OK.

Use Status Message

Status messages give you an opportunity to quickly share more information with your contacts beyond your Presence.

- Lync displays a status message automatically for you based on your Out of Office message. Keeping this updated will help coworkers know where you are and how to reach you.

- You can manually enter a status message into the Note Box to augment your Out of Office message or provide more details when you are in the office. To do so, simply type your message into the dialog box above your name in the Lync client.

- To view status messages from your contacts, click on the Activity Feeds icon. This brings up a list of recent status messages.
Use Emoticons in social messages
Using emoticons—graphical representations of facial expressions—in your messages can help provide context around the meaning behind the written words.

- To add an emoticon to an IM: in the Conversation window of the message area, place the cursor where you want to insert the emoticon. Click the Emoticon button, and then select an emoticon.

Work from anywhere*, virtually
With Microsoft Lync, you can be connected to the office from the road, home, your favorite coffee shop, or nearly anywhere with an Internet connection.

Setting Your Location
Microsoft Lync makes it easy to let others know where you are and how to reach you. Microsoft Lync can automatically determine your location when you login again from places you frequent. To set your location:

- From the main Microsoft Lync interface, click on the Set Your Location text. This will enable you to enter a custom location. If you’ve already added your location, you can select it from the drop-down menu next to Set Your Location.
Conferencing Options
Microsoft Lync offers robust conferencing options, including IM, audio-, video-, and web-conferences giving you many collaboration tools to be more successful. Lync is all you need for all types of meetings, both scheduled and spontaneous. And simple “water-cooler” IM conversations can be escalated to an audio conference with desktop sharing among members instantly, easily, and without interrupting the conversation flow.

Meet Now Conferences: you can start Meet Now conferences using IM, audio, video, or desktop-sharing capabilities.
- To start a non-scheduled conference, click the Menu button, and then click Meet Now to open a new conference. To invite others, do one or both of the following:
  - To invite someone inside your organization, click the Invite button, and then select a contact from the list.
  - To invite someone outside your organization by e-mail, in the new conversation window, click the arrow next to the Invite button, and then click Invite by E-mail. An e-mail message opens in Microsoft Outlook. (If you do not have Outlook, you can copy the invitation text to the e-mail program of your choice.) Send the e-mail to the invitee, who can join the conversation by using either Communicator or Communicator Web Access.

IM conferences: you can start IM conferences by inviting additional users to an existing IM conversation or by starting an IM conversation with multiple users.
- In the Contact List, hold the CTRL key, and then select the contacts that you want to invite. Right-click the last contact, and then click Send an Instant Message. Type your message in the Message Entry box, and then press ENTER.
- To invite someone within your organization to an existing IM conference, simply drag and drop a contact from your contact list directly to the chat window. This adds them to the conversation.

Unscheduled audio conference calls: an ad-hoc conference call can be started by adding additional users to an existing call or by starting a call by selecting multiple contacts in the contact list.
- From the contact list select multiple contacts, hold the CTRL key, and then select the contacts that you want to call. Right-click the last contact, and then select Start a Conference Call.

Schedule audio conference calls: audio conference calls can be scheduled in advance either by using the Outlook Conferencing Add-in or directly from Lync.
- To schedule an audio conference from Outlook, open a new meeting request and click on the Lync Online Meeting add-in in the top ribbon. You are all set with call in details and a url link to join directly from meeting request.
Join any Lync Meeting

- To join from Outlook calendar, open the calendar invite and click on “Join Online Meeting”
- To join from Outlook reminder, simply click on “Join Online” button on reminder pop-up

Video conferencing: with Lync you can integrate video into your conferences by using a webcam.

- To start a video conference, with multiple contacts: In the Contact List, hold the CTRL key, and then select the contacts that you want to invite. Right-click the last contact, and then click Start a Video Call.

Application & Document Sharing
Application and document sharing allows you to broadcast any visuals, applications, Web pages, documents, software, or part of your desktop to remote participants in real time, right from Lync.

Share your desktop or applications

- From an IM, or conference you are attending, select the Share drop-down menu. Then select the option that best fits your needs: desktop, program, or PowerPoint presentation. Once selected your attendees will need to accept the sharing request in order to see your shared content. You can also grant control to any attendee.
Start Whiteboard application

- From the menu bar of an open contact card, click on the **share** drop-down and select **whiteboard**. This will open a shared whiteboard session with all participants.
Unify Your Communications
Microsoft Lync brings together all of your communications needs into one place, simplifying communication.

Managing voice calls
You can use Lync to make one-click phone calls to contacts in your Contact List. Using the Calling Options arrow to the right of the call button gives you additional ways to communicate with a contact.

Making Phone Calls
- To make a one-click phone call click the contact’s Call button in the contact list
- To call an alternate phone number, click the arrow to the right of the Call button, and then click the number you want to call for that contact.
- To enter a phone number to call, type the number into the search box and then click the call button. You also can open the dial pad and type the number directly into it.
- You also can dial phone numbers directly by clicking on the Phone icon and using the on-screen dial pad.

Changing Conferencing Pin:
- To change your conferencing pin, click on pin below the dial pad. You will be directed to a webpage where you can enter your new pin

Test Call
- To check on your audio quality issue, you can perform a test call by clicking on check below the dial pad. Lync will make a test call your number
Video Calls
You can easily make video calls to contacts in your Contact List, but you must have a webcam. You can receive and participate in a video call without a webcam. In this case, you see the caller’s video stream, but no video is transmitted from you.

- To make a video call, right-click on a contact in your contact list, then click **Start a Video Call**.
- You can convert any IM conversation into a video call by clicking on **Video** in your IM window.
Managing Voice Mail
With Lync, previews of your Voice Mail messages appear in your Office Outlook Inbox. You also can listen to your messages directly from Lync.

Call Voice Mail
- If you want to call your Voice Mail number to check messages, click on the setting button as seen below and then click on Call Voicemail. Lync will automatically take you to your voicemail inbox without you having to dial user name and password. You can similarly Set up Voicemail from here.

Change Your Voice Mail Greeting
- If you want to change your Voice Mail greeting, click the settings button and then click on Change Voicemail.

Managing Devices
Lync lets you switch, forward or transfer calls to other devices while on the call without disruption to the conversation.

To switch devices (e.g.: between PC audio and headset) while a call is in progress:
- Select the drop-down menu next to the primary device in use icon. Then change the device for this call and select which device you would like to switch to.

To transfer to another device (e.g.: from PC to mobile phone) while a call is in progress:
- From the menu bar of an open contact card, click on the call drop-down and select which device you want to transfer the call to.
Forwarding Calls
Lync offers several options for automatically forwarding incoming calls. For example, you can forward calls to your Voice Mail, one of your other phone numbers, or another person.

To Forward calls to Voice Mail, another phone, or a contact:
- Select Call Forwarding Settings from the Tools menu. Then, select a phone number, Voice Mail, New Number, or Contact
- Alternately you can select Call Forwarding from the bottom of the Lync console.

To simultaneously ring another number at the same time your number rings
- Select Call Forwarding Settings from the Tools menu, then check Simultaneously Ring. Once you have done this, select a number, or click New Number and enter a number.
- Alternately you can select the Call Forwarding button from the bottom of the Lync console and then pick Simultaneously Ring from the drop-down menu.

To Redirect unanswered calls to Voice Mail, another number, or a contact:
- Select Call Forwarding Settings from the Tools menu, then Check Forward my calls to, and select Voice Mail.
- Alternately you can select the Call Forwarding button from the bottom of the Lync console and then pick Forward Calls to Voice Mail.
**Integration with Microsoft Office**
Users can communicate with context from Microsoft Office applications. Lync Server 2010 works with Exchange, SharePoint, and Office applications for a richer collaborative experience with consistent presence, click-to-call options, and a new shared contact card.

**Presence in Office applications**
Presence is integrated throughout Office 2010, including Outlook, SharePoint, Word, PowerPoint, Excel®, and Outlook. Hovering over presence icon displays the contact card with photo, presence information, and one-click connect options. Word SmartTags also have presence capability.

**Co-authoring**
In Word and PowerPoint, users can see presence information and click to communicate from within the document to initiate a co-authoring session. Other users can be brought into the session just as easily.

**Office Backstage™ integration**
The new Office Backstage view integrates various communication options so users can share documents and presentations via IM, share the application itself, or click to call directly from the application. Streamlined communication from within applications simplifies collaboration and boosts productivity. Users can respond to e-mail messages with a phone call or they can contact the author of a document—all from within Microsoft Office applications.

- See presence for people associated with a document
- Find contacts to share documents with
- Send documents via IM with the “Send Now” button
- Initiate ad hoc application sharing from within the document with the “Share Now” button

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