Microsoft
Lync 2010
Basics
Microsoft Lync 2010 Basics
1 hour

Microsoft Lync is an instant messaging tool. Computer basics or equivalent experience suggested. Not all aspects of Lync are available to everyone.

Table of Contents
Getting Started with Lync 2010............................................................................................................................ 1
  Setting Up and Signing In................................................................................................................................. 1
Lync 2010 Application Window .......................................................................................................................... 1
  Me Area ............................................................................................................................................................ 1
  Lync Ribbon ..................................................................................................................................................... 1
    Contacts ......................................................................................................................................................... 2
    Activity Feed ............................................................................................................................................... 2
    Conversations ............................................................................................................................................. 2
Create and Send Instant Messages .................................................................................................................... 2
  Send an Instant Message ................................................................................................................................ 2
    Format an Instant Message ......................................................................................................................... 3
    End a Conversation .................................................................................................................................... 3
  Receive an Instant Message ........................................................................................................................... 3
  Find a previous Instant Message conversation ............................................................................................... 3
Online Meetings .................................................................................................................................................... 3
  Schedule an Online Meeting .......................................................................................................................... 3
    Meeting Options .......................................................................................................................................... 3
  Join an Online Meeting .................................................................................................................................. 4
  Initiate An Unscheduled Meeting .................................................................................................................. 4
Sharing Within A Meeting .................................................................................................................................. 5
  Share Your ..................................................................................................................................................... 5
Start Video Call .................................................................................................................................................. 5

Scott Young
Training Specialist, Educational Technologies
Information Technology Training

training.health.ufl.edu
352.273.5051 (O)
352.273.5053 (F)
scott.young@ufl.edu
P.O. Box 100152
Gainesville, FL, 32610-0152

UFHealth
UNIVERSITY OF FLORIDA HEALTH

Rev. 08/27/2014
Getting Started with Lync 2010

Setting Up and Signing In
If you have signed in to the computer with your username and password Lync should automatically configure itself. If it did, then skip to the next section. If it does not then you will have to enter just a few pieces of information to get started.

1. Enter your Exchange email address (ex. Username@ufl.edu or Username@shands.ufl.edu)
2. Click Sign In.

Lync 2010 Application Window
The top portion of the application window is where you can see and adjust your status. You can add a personal note, see your avatar picture, your availability status, and your location.

Me Area
The top portion of the application window is where you see and edit your information that other Lync users can see. In this area you can manually set your status, add avatar picture, set your location, and type a personal note.

Availability
By default your availability is automatically set by Lync based on your Outlook Calendar. However, you have the option to set your availability manually by selecting from the dropdown list.

Location
By default your location is automatically set by Lync based on the address in the global address book. You have the option to set your location manually by typing it in or by selecting a recent custom location from the dropdown list.

Lync Ribbon
The Lync ribbon is made up of three icons, Contacts, Activity Feed, and Conversations.
Contacts
The search box can be used to find people. People can also be found in the Contact list if you added them or have contacted them, on Lync, recently. Lync automatically adds the ten people you contact most the Frequent Contacts.

Set Up A New Contact Group
1. Right-Click on Frequent Contact (or any other group name)
2. Choose Create New Group

Add a Contact
1. Start typing the name of the person
2. When you find the contact click on the Plus sign that appears to the right of the name
3. Choose a group or to Add to a New Group

Activity Feed
Activity Feed lets you display recent personal notes, changes your picture, to your title, or office location.

Conversations
Your 100 most recent incoming and outgoing messages will show up in chronological order. For a complete list open Outlook > Inbox > Conversation History.

Create and Send Instant Messages
You can have instant messaging (IM) conversations with one or more contacts in Lync. You can also carry one more than one conversation at a time. You can also paste text and tables that you copied from other Microsoft Office programs, such as Word and Excel. You can escalate the conversation quickly into a Video call by clicking the Video button. You can attach a file by clicking the paper clip icon.

Send an Instant Message
To send an instant message to one person:

1. In the Lync program window, in your Contacts list or search results, double-click the person you want to get in touch with.
2. In the message input area, type a message, and then press Enter. You can tell when the other person is responding when an icon appears above the message input area showing that the person is typing a message.

To send separate instant messages to different people (at the same time):

1. Start an instant message conversation using steps 1-2 above.
2. Without closing the existing conversation, start a completely new conversation with another contact, number, or group.
Format an Instant Message
You can bold, italicize, underline, or change the font type, color, or size of a selection of text in the message input area of a current IM. You can also set options for all future instant messages.

End a Conversation
When you are done with an IM conversation, click the Close button (X) in the upper-right corner of the conversation window.

Receive an Instant Message
When someone sends you an IM, an alert window appears in the lower-right corner of your computer screen. Do one of the following:

- Accept the invitation: click the alert
- Redirect the invitation: click Redirect
- Decline the invitation: click Ignore

Find a previous Instant Message conversation
Find a previous conversation with a specific contact by doing the following.

1. In your Contacts list, right-click the contact whose previous conversation you want to View.
2. Click Find Previous Conversations.

Outlook opens and displays that contact's conversations in the Conversation History folder.

Online Meetings
Meetings can be setup ahead of time or initiated unscheduled.

Schedule an Online Meeting
1. Open MS Outlook and navigate to the Calendar
2. On the Home tab click New Online Meeting
3. Click on Meeting Options

Meeting Options

Meeting Access Settings

Access and Presenters
Audio and Phone
About

- Customize access and presenters for this meeting

Access
Who gets directly into the meeting without waiting in the lobby?
- Organizer only (locked)
- People I invite from my company
- People from my company
- Everyone including people outside my company (there are no restrictions)
- People dialing in by phone bypass the lobby
Access options control which participants must wait in the lobby before being admitted by a presenter.

<table>
<thead>
<tr>
<th>ACCESS OPTION</th>
<th>WHO WAITS IN THE LOBBY</th>
<th>WHEN TO CHOOSE THIS OPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizer only (locked)</td>
<td>Everyone</td>
<td>You don’t want people viewing your handouts or Microsoft PowerPoint slides before the meeting</td>
</tr>
<tr>
<td>People I invite from my company</td>
<td>People who don’t have an account on your network, and people who weren’t invited</td>
<td>You are discussing something sensitive or confidential</td>
</tr>
<tr>
<td>People from my company</td>
<td>People who don’t have an account on your network</td>
<td>All the participants have an account on your organization’s network</td>
</tr>
<tr>
<td>Everyone including people outside my company (there are no restrictions)</td>
<td>No one</td>
<td>You are inviting outside participants</td>
</tr>
</tbody>
</table>

**Table 2: Access Options**

**Presenter Settings**

Presenter options control which participants are automatically given presenter privileges when you schedule the meeting. The following table describes each of these options in detail.

<table>
<thead>
<tr>
<th>PRESENTER OPTION</th>
<th>WHO IS A PRESENTER</th>
<th>WHEN TO CHOOSE THIS OPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizer only</td>
<td>Only the person who schedules the meetings</td>
<td>For presentations where the participants don’t have to interact with the meeting content. (You can designate additional presenters during the meeting.)</td>
</tr>
<tr>
<td>People from my company</td>
<td>Everyone you invite who has an account on your network</td>
<td>For group work sessions, where all participants work at your organization and can share and modify meeting content</td>
</tr>
<tr>
<td>Everyone including people outside my company (there are no restrictions)</td>
<td>Everyone you invite</td>
<td>For group work sessions with people who don’t have an account on your network</td>
</tr>
<tr>
<td>People I choose</td>
<td>You and the participants you choose</td>
<td>For presentations with more than one presenter</td>
</tr>
</tbody>
</table>

**Table 3: Presenter Control**

**Join an Online Meeting**

The recipients will receive an email, and it will be placed on their calendar, with a link that will connect them to the meeting.

1. Open your appointment in Outlook Calendar or the associated email
2. Click on the **Join online meeting** link or
3. Call the **Join By Phone** number

**Initiate An Unscheduled Meeting**

1. In Lync, click on the gear icon
2. Click on Meet Now
3. Choose Audio Options
(If you have a web cam and a microphone you can
Use Lync integrated audio and video otherwise
choose Do not join audio)

4. Choose one or more of the following methods for
inviting people to participate

- Invite by Name – people in your
  organization
- Invite by Email – people outside of your
  organization
- If you already have the people you want
to add in your contact list you can drag
their contacts and drop them into the
Group Conversation window

Sharing Within A Meeting
Within Lync you have the option to share and even give control to:

- Any or all monitors connected to your computer
- Any application you are currently running
- A PowerPoint presentation
- A whiteboard
- An interactive audience poll
  \( \text{The participants do not need to have the shared application installed} \)

Share Your...
1. Start a conversation in Lync
2. Click the Share drop down menu
3. Choose what to share such as a screen or an application

Start Video Call
To start a video call to one person:

1. In the Lync program window, in your Contacts list or search results,
double-click the person you want to get in touch with.
2. Click the Video drop down menu
3. Choose Start a Video Call