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Signin In

Launch the Lync client from the Dock or the Applications Folder. Upon first launch, you will be presented with the sign on screen and prompted for your e-mail address and Massey credentials. Enter your password and check the “Remember my password” box.

Click Sign In.

You are now signed-in.
Quick Overview

When you sign into Lync, you will immediately see the main Lync window with your contact list displayed. We will cover all of the options available in the user interface as we proceed through this guide. Right now we will cover where the options are located.

Starting from the top you will see your user ID (and Full Name if Outlook 2011 is installed), below the user ID you will find the presence menu (presence will be covered shortly). Below the presence menu you will see the personal status message entry box. Below the personal status entry box, you will see the Contact Search box. To the right of the Contact Search box you will find the View Menu. Just below that you will find your contact lists.

Just below the Contact List you will see a row of buttons:

IM – This will initiate an IM conversation with the currently selected contact.

Call – This will initiate an audio call with the currently selected contact.

Video – This will initiate a video call with the currently selected contact.

Mail – This will send an e-mail to the currently selected contact if Outlook is installed.

Calendar – This will schedule a meeting with the currently selected contact if Outlook is installed.
Setting Display Options

If you click on the View Menu, you can change how your contacts are displayed.

![View Options Menu]

- View by Name
- View by Group
- Use Compact View
- Show Status Text
- Show Friendly Name
- Show Offline Contacts
- Collapse all Groups
Setting Lync Preferences

You can set Lync options by opening the Lync menu and selecting “Preferences”.

When the preferences window first comes up, it will display “Appearance preferences” these options are pretty self-explanatory. Click the light switch icon labelled “General”. You will now see the General preference settings.

Here you can select which applications you wish to have handle Presence, Telephone and Conference services. **All should be configured to use Microsoft Lync.** Below Services settings, you will see Logging. You can turn on logging if you are having issues signing-in to Lync. When this box is checked, the Lync client will create and store log files which can be used by support staff to troubleshoot any issues. Below Logging you will see Downloads, here you can specify where you would like Lync to store any files sent to you by your contacts.
The Phone Calls preferences screen allows setting of call forwarding to other numbers, or the ability to ring two numbers simultaneously. Unanswered calls are by default redirected to your Voice Mail. The length of time before calls are redirected can be adjusted from 5 to 60 seconds.

Click Account. You will now see the Account Preferences screen. On this screen you can configure personal options, such as how or if you would like Lync to change your status to “away” after you are inactive for X number of minutes. You can also configure Lync to use Microsoft Exchange and Outlook for managing personal information, use calendar information and whether or not to display your Out of Office information to any contacts.
Voice Mail Setup

You should have received an E-Mail entitled Welcome to Exchange Unified Messaging. This E-Mail contains your PIN for accessing your Voice Mailbox. **Dial 83030**, and when prompted, **enter your PIN**. From here you can listen to any messages you have and change your settings.

Voice Mail messages will also automatically arrive in your Outlook mailbox, which can be accessed via the Outlook web (OWA) or desktop client. From here you can listen to the attached audio message, reply via E-Mail, or click the relevant number to call the person directly in Lync.
Setting Lync Alert Options

If you click Alerts you will be able to set Notification and Alert sound preferences. These settings are fairly self explanatory.

![Alerts settings](image)

Setting History Options

If you click History you will see the History preferences page. If you check the “Save Conversations” box, Lync will keep a record of all instant messages sent to and from you. These messages are stored in your Conversation History folder in Outlook and by Lync. You can set “Delete all Conversation” expiration dates as well.

![History settings](image)
Instant Messaging and Presence

Presence information enables users to approach colleagues at the right time with the right form of communication, to lead to a more productive work environment. A user’s presence is a collection of information that includes availability, willingness to communicate, additional notes (such as location and status), and how the user can be contacted.

Presence is enhanced in Lync 2011 with pictures*, and a default set of presence states that includes “Off Work,” “Do Not Disturb,” “Be Right Back,” “Available,” “Busy,” and “In a Conference.”

Users can set different levels of contacts, each of which can view different levels of presence information.

By simply looking at a Contacts list, users can find everything they need to know at a glance. Simple colored icons indicate other users’ presence status, and picture and location are also shown.

With the Instant Messaging in Lync, users can quickly message each other with timely information.

Conversation history enables users to keep track of old IM conversations, and retrieve information that may have been communicated by IM months ago.

On the following page, you will find a brief summary describing the different presence states available to you and how they are set.

* Currently user pictures can only be set via the Windows client. Once a picture is set, it will show on all clients.
As indicated in the table, some presence states can be set by the Lync user, some are set automatically by Lync, and some can be set either way.

A red asterisk next to a contact’s status indicates that he or she has set an Out of Office notification in Outlook/Exchange.

<table>
<thead>
<tr>
<th>PRESENCE STATUS</th>
<th>DESCRIPTION</th>
<th>HOW THIS STATUS GETS SET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>You're online and available to contact.</td>
<td>Lync sets this status when it detects you are using your computer. You can also set this status when you want others to know you’re in your office even though your computer is idle.</td>
</tr>
<tr>
<td>Busy</td>
<td>You're busy and don’t want to be interrupted.</td>
<td>Lync sets this status when, according to your Outlook Calendar, you have an appointment. You can also select this status by clicking the drop-down arrow beside the current status.</td>
</tr>
<tr>
<td>In a call</td>
<td>You’re in a Lync call (a two-party audio call) and don’t want to be disturbed.</td>
<td>Lync sets this status when it detects that you’re participating in a Lync call.</td>
</tr>
<tr>
<td>In a meeting</td>
<td>You’re in a meeting and don’t want to be disturbed.</td>
<td>Lync sets this status when it detects that you’re participating in a Lync meeting or when, according to your Outlook Calendar, you are scheduled to be in a meeting.</td>
</tr>
<tr>
<td>In a conference call</td>
<td>You’re in a Lync conference call (a Lync meeting with audio) and don’t want to be disturbed.</td>
<td>Lync sets this status when it detects that you’re participating in a Lync conference call.</td>
</tr>
<tr>
<td>Do not disturb</td>
<td>You don’t want to be disturbed and will see conversation notifications only if they are sent by someone in your Workgroup.</td>
<td>You select this status by clicking the drop-down arrow.</td>
</tr>
<tr>
<td>Be Right! Back</td>
<td>You’re stepping away from the computer for a few moments.</td>
<td>You select this status by clicking the drop-down arrow.</td>
</tr>
<tr>
<td>Inactive/Away</td>
<td>You’re logged on but your computer has been idle, or you’ve been away from your computer for a specified period of time.</td>
<td>Lync sets your status to “inactive” when your computer has been idle for five minutes, and “away” status when your status has been inactive for five minutes. (To change these default values, click the Options button , click Status, and then click the arrows next to Show me as Inactive when my status has been idle or this many minutes and Show me as Away when my status has been inactive or this many minutes.) You can also select this status by clicking the drop-down arrow.</td>
</tr>
<tr>
<td>Off Work</td>
<td>You’re not working and aren’t available to contact.</td>
<td>You select this status by clicking the drop-down arrow.</td>
</tr>
<tr>
<td>Offline</td>
<td>You’re not signed in. You’ll appear as Offline to people whom you’ve blocked from seeing your presence.</td>
<td>Lync sets this status when you log off your computer.</td>
</tr>
<tr>
<td>Unknown</td>
<td>Your presence is not known.</td>
<td>This status might appear to contacts who aren’t using Lync as their instant messaging program.</td>
</tr>
</tbody>
</table>
Once signed onto Lync, simply click the presence menu under your user name/Email address and select the desired presence state. 

**Setting a personal note**

The presence states in Lync cannot be customized or added to. However, you may want to provide additional details about where you are or what you are doing. This is accomplished by setting a “personal note”.

To set a personal note, click the note display area. Once you click on the text you can type over anything that is currently displayed.
Managing Contacts

Adding a Contact

In order to communicate with someone in Lync, you will need to add him or her to your contact list. Once you have signed in to Lync, you will need to enter either the user’s name or email address in the “Find a Contact” field.

In this case, we will use part of a name to perform the search. You can enter first/last names, Massey username or e-mail address. As soon as you start typing the search results appear below. Once the contact appears, you have the option to add the user to your contact list, or add the user to a contact group. Once you click the plus sign the contact will appear in your contact list.

Note: Add contacts to the Pinned Contacts group to quickly access the contacts you most frequently converse with.
Removing a Contact
Removing a contact is just as simple as adding one. It is important to note that there are two ways to “remove” a contact. You can remove a contact from a contact group (such as frequent contacts), and you can also remove a contact from the contact list, which will remove the contact from all groups and the main contact list.

To remove a contact from the contact list and any associated groups. Control-Click the contact you wish to remove. You will be presented with the contacts option menu, select Remove from Contacts List. The contact will be removed.
Viewing Contact information and Checking Availability

It is possible to view expanded information of your Lync contacts. When you click on a Lync contact, you will see the users contact card appear on the left, in addition to communication options: E-Mail, IM, Audio or Video call.

Initiating Conversations and Calls

You can initiate an Instant Messaging Conversation with any contact simply by double-clicking on the contact.

Instant Message Conversation window:

You can elevate any in-progress IM conversation to an Audio or Video call simply by clicking the Phone (1) or Video (2) Camera buttons. You can also add additional participants by clicking the “people” (5) icon on the right (which is showing the current participant count=2) or dragging a contact into an in progress IM/Audio/Video session or clicking the Gear icon (6).
There are multiple ways to call a contact, this section will cover the most common methods. Control-Click the contact and select **Call**. A sub menu appears - note, there may be multiple numbers listed (cell, work, home numbers). Click **Lync Call** to initiate the call.

A call window will appear, indicating the contact and call status:

Once the recipient answers, the call window will change:

- **Hang up**
- **Hold** - put call on hold, can be resumed
- **Show keypad**
- **Transfer call**
- **Mute**
- **Microphone level**
- **Elapsed call time**
To make calls to people not in your contacts list, you can use the Phone tab:
Collaboration and Sharing

Clicking the Monitor button displays desktop sharing options:

**Desktop**: This will share your entire desktop to any participant(s) of the current conversation. This feature is useful for support or demonstration purposes.

If you click on the Paperclip icon, you can send a file attachment to any contact.

You can also initiate all Calling and Collaboration/Sharing events via the “Contact” menu. Simply click on any contact and then open the Contact menu:
Creating and Managing Contact Groups

You can use groups to organise your contacts. A contact can be placed into more than one group.

To create a group simply Sign into Lync. Once you are signed on, control-click **Pinned Contacts** or any other pre-existing group. You will now see the contact list menu. Select **Create New Group**.

The new group will appear:

Type in a name for the group and hit “Enter”. Group creation is now complete.
Deleting a Group

Removing a group is a fairly simple process. It is important to remind the users that there is a chance of completely removing a contact if it only exists in the group being deleted. If there are copies of the contact in other groups, the copies will not be affected.

To delete a group, simply control-click on the group and select Delete Group.

You will see a confirmation window, click OK. Please note that if the group contains the only copy of a contact, you will need to re-add the contact or move it out of the group before you delete it. If you have a copy of the contact in another group, it will not be affected.
Adding a Contact to a Group

There are a couple of ways to populate groups. The simplest would be to just drag a contact into a group. This method moves a contact from one group to another. You can also control click a contact, select Copy Contact To, then select the group you wish to copy the contact to. The benefit of this method is that you can have a contact in multiple groups, and the deletion of one copy will not affect others.
Conferencing

One major Lync feature is Conferencing (Online Meetings). With Online Meetings, you can collaborate, share information and coordinate efforts with your peers in real-time. Voice and Video conferencing capabilities can be used from any location with an Internet connection. Meeting tools integrated into Outlook 2011 enable you to schedule a meeting or start an impromptu conference with a single click.

Joining an Online Meeting

Once you have the Lync client installed and configured, joining and participating in a meeting is as simple as clicking the “Join online meeting” link/url in the meeting message body.

Note: You can still join an online meeting by clicking the Join link even if you do not have the Lync client installed, however, you will be prompted to run the Lync Web Attendee. However for the Mac, audio and video is currently not supported via the Lync Web Attendee (you will have to call in for audio), because of this limitation we recommend that you have the full Lync client installed on your Mac.

In addition to clicking the Join Online url in the calendar item, you may also join the Online meeting by clicking the “Join Online” button from the Office reminders:
Scheduling Online Meetings

First select Calendar View in Outlook. Once it is open Click on the New Meeting button, then in the new meeting window you will see an “Online Meeting” option in the toolbar*. Click this and select Create Online Meeting to convert the meeting. You will see the “Join online meeting” link/url appear in the message body.

It is also possible to schedule an Online meeting from the Lync client itself. Simply click on the Calendar button at the bottom right of the Lync client window:

* If you don’t see the “Online Meeting” icon or option in the Meeting menu, you may need to apply the latest Office update(s).
Note: When clicking the Calendar button, the selected contact or contact group will be automatically added to the recipients field in the newly scheduled meeting.

Once you have a meeting scheduled, you can change the meeting properties by opening up the calendar item in Outlook and clicking the Online Meeting button. This will present you with a menu, listing three options. The option we are interested in is **Set Access and Permissions**.

The first screen describes Access levels. If you check the “customise” box, you can change who gets directly into the meeting without waiting in the lobby. The “lobby”, is sort of a “waiting room” for a conference. By default everyone is immediately joined into a conference. If you wish to control how users can join a conference you can change the setting here. (It is not common to change this setting from the default)
If you click “Presenter” you are shown Presenter options. A presenter can control the meeting and mute participants, if audio is being used.