

# Lync 2013 for Office 365 Quick Reference



Lync 2013 for Office 365 Quick Reference

## Lync Meetings

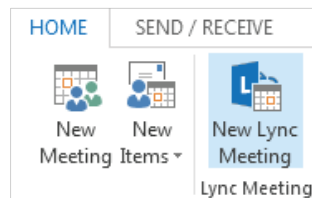
### Schedule a Lync meeting

You can schedule a Lync Meeting by using the Outlook add-in for Lync, if you use Outlook. If you don't use Outlook, set up meetings by using Lync Web Scheduler, available at <https://sched.lync.com>.

#### To schedule a meeting with Outlook:

1. Open your Outlook calendar, and on the **Home** tab, click **New Lync Meeting**.
2. In the meeting request, add recipients, a subject, agenda, and date/time.

The meeting request contains the meeting link and, if your account is configured for dial-in conferencing, audio information that the participant can use to join the meeting.



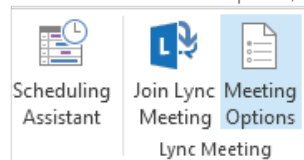
### Set meeting options

You can customize some meeting options, including who can access, present in, and share video during an individual meeting, and whether instant messaging (IM) is enabled. The options you can set vary depending on whether you use Outlook.

If you use Outlook, set meeting options from the meeting request for a meeting you set up.

- Open the meeting request, and on the **Home** tab, click **Meeting Options**, and then in Access and Presenter options and Audio and Phone options, choose the appropriate selections.

If you don't use Outlook, you can change some options for participants during a meeting you're a presenter in. For details, see *Manage participants* later in this guide.



### Join a Lync Meeting

1. Do any of the following:
  - In the Lync main window, above the search box, click the **Meetings** icon, and then, in the meeting listing, click **Join**.
  - In the meeting request, click **Join Lync meeting**.
  - In the meeting reminder, click **Join Online**.
  - If the meeting request includes call-in information, you can call in to the meeting from a phone.
2. Unless you call in, on the **Join Meeting Audio** window, select one of these options.

|  |  |
|--|--|
| Use Lync (full audio and video experience) | You can use computer audio and video with your computer's built-in devices, or a headset and camera.   |
| Call me at:                                | Lync calls you at a number you provide. (Available only if dial-in conferencing is available for your account; for details contact your workplace technical support.)  |
| Don't join audio                           | Select this if you decide you want to call into the meeting with a phone (and the meeting request includes call-in details) or join the audio portion later. Use the conference numbers and ID in the invitation to dial in. |

#### Do I need a PIN, work number or extension?

Most of the time when you call into the meeting, you get connected right away. If you're prompted for a PIN, use your phone dial pad to enter your number and PIN.

If you don't remember your PIN, click **Forgot your Dial-in PIN** in the meeting request, and the follow the instructions on the page to reset.

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### General Keyboard Shortcuts

| Description                              | Shortcut Keys    |
|--|------------------|
| One main window to search box            | Ctrl+Y           |
| Accept an incoming invitation            | Ctrl+A           |
| Decline an invitation                    | Ctrl+Esc         |
| Mute or unmute your audio                | Ctrl+4           |
| Set focus on application sharing toolbar | Ctrl+Shift+Space |
| Regain control when sharing your screen  | Ctrl+Alt+Space   |
| Stop sharing your screen                 | Ctrl+Shift+Space |

### Main Window Shortcuts

| Description                 | Shortcut Keys |
|-----------------------------|---------------|
| Go to Contacts List tab     | Ctrl+1        |
| Go to Persistent Chat tab   | Ctrl+2        |
| Go to Conversation List tab | Ctrl+3        |
| Go to Phone tab             | Ctrl+4        |
| Open the File menu          | Alt+F         |
| Start Meet Now              | Alt+M         |
| Open the Tools menu         | Alt+T         |

### Conversation Window Shortcuts

| Description                 | Shortcut Keys |
|-----------------------------|---------------|
| Go to Contacts List tab     | Ctrl+W        |
| Go to Persistent Chat tab   | Ctrl+R        |
| Go to Conversation List tab | Alt+I         |
| Go to Phone tab             | Ctrl+F        |
| Open the File menu          | Ctrl+N        |
| Start Meet Now              | Ctrl+Shift+Y  |
| Open the Tools menu         | Ctrl+Shift+P  |

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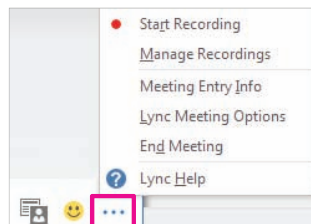


## Record and playback the meeting

Lync recording captures audio, video, IM, program sharing, PowerPoint presentations, and whiteboards.

1. In the meeting window, click **More Options**, and then click **Start Recording**.
2. Use the controls at the bottom of the meeting room to pause, resume, or stop the recording.

After the recording is stopped, Lync automatically saves it in a format that plays in **Windows Media Player** and **Zune**.

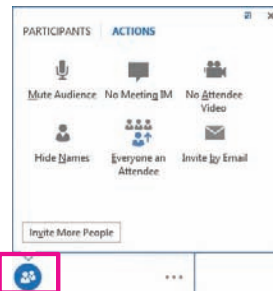


To play, rename, or delete a recording, click **Manage Recordings** on the **More Options** menu, and click your selection. You can also click **Browse** to go to the location of the recording and make a copy of the file to post on a shared location for others to view.

## Manage participants

In the meeting window, point to the people button, and do any of the following:

- To manage a participant, on the **Participants** tab, right-click the person's name, and use the options to mute, unmute, remove, and so on.
- To manage all, on the **Actions** tab, click:
  - **Invite More People** to add participants.
  - **Mute Audience** to eliminate background noise.
  - **No Meeting IM** to turn off meeting IM
  - **No Attendee Video** to block attendees from starting their video.
  - **Hide Names** to hide the names on the pictures.
  - **Everyone an Attendee** if you have too many presenters.
  - **Invite by Email** to send email invitations to additional people.



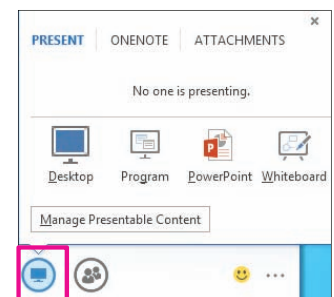
## Share your desktop or a program

During a Lync meeting, you can share your desktop or a specific program.

1. In the meeting window, point to the presentation (monitor) button.
2. On the **Present** tab, click:

- **Desktop** to show the entire content of your desktop.
- **Program**, and double-click the program you want to share.

3. (Optional) Click **Give Control** on the sharing toolbar at the top of the screen to share control of your sharing session with another participant.

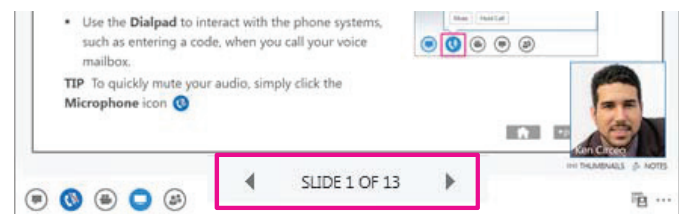


**NOTE** You can take control back at any time by clicking **Give Control**, and then **Take back control**.

4. When you have finished presenting, click **Stop Presenting** on the toolbar.

## Share a PowerPoint presentation

1. Point to the presentation (monitor) button.
2. On the **Present** tab, click **PowerPoint**, and upload the file in the meeting.
3. (Optional) Do any of the following:
  - To move the slides, click **Thumbnails**, and then click the slide you want to show, or use the arrows at the bottom of the meeting window.
  - To see your presenter notes, click **Notes**.
  - Click the **Annotations** button on the upper-right side of the slide to open the toolbar and use highlights, stamps, laser pointer, and so on.



# Lync 2013 for Office 365 Quick Reference



## Lync 2013 for Office 365 Quick Reference IM, Presence, and Contacts

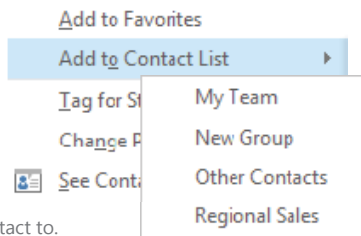
### Find someone

The quickest way to find someone via Lync is to launch a search by typing the person's name or IM address in the search box on the Lync main window. The results display automatically.

### Add a contact

Your Contacts list simplifies your communications and lets you see presence and contact information for the people most important to you. Add to it the people you expect to be interacting with regularly. If your company allows it, you can add Lync users outside your company as well as within. To add someone as a contact:

1. Use Lync search to find the person you want to add. (See *Find someone*.)
2. Right-click the person's listing in the search returns.
3. Click **Add to Contact List**.
4. Click a group to add your new contact to.



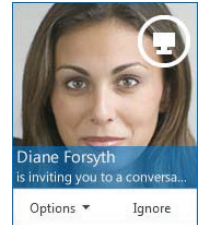
### View a contact card

The contact card contains details from a contact's company directory, such as the person's office location, phone numbers, organization, and Outlook calendar free/busy information. To see someone's card, find the person in your Contact list or via search, point to his or her picture, and then click **See Contact Card**.



### Accept an IM request

Click anywhere on the picture display area of the IM request pane.

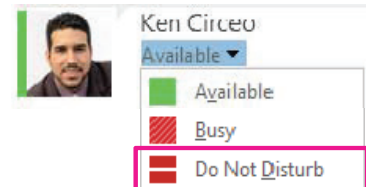


### Set or change your presence

Presence lets other people see at a glance whether you and your contacts are currently available. Here are the available presence statuses and what they mean:

| If Presence status is ... | Contact is ...  | How this status gets set   |
|---------------------------|---|--|
| Available                 | online, available to contact.   | Automatic or user-selected.  |
| Be Right Back             | away from computer briefly.   | User-selected.   |
| Away                      | logged on but has been away from computer for specified period.                   | Automatic based on inactivity or user-selected. Time interval can be adjusted. |
| Off Work                  | not working, not available.   | User-selected.   |
| Busy                      | occupied and shouldn't be interrupted.  | Automatic (if user is in an Outlook-scheduled conference) or user-selected.    |
| In a call                 | in a Lync call (two-party call) and shouldn't be interrupted.                     | Automatic.   |
| In a meeting              | in a meeting (per Lync or per Outlook)  | Automatic.   |
| In a conference call      | in a Lync conference call (Lync meeting with audio) and shouldn't be interrupted. | Automatic.   |
| Do Not Disturb            | not to be disturbed; will see IM requests only if sent by Workgroup members.      | User-selected.   |
| Presenting                | giving a presentation and therefore not to be disturbed.                          | Automatic when user is presenting from Lync-enabled computer. IMs are blocked. |
| Offline                   | not signed in.  | Automatic.   |
| Unknown                   | presence can't be detected.   | Status may appear to contacts not using Lync IM.                               |

To change your presence, in the Lync main window, click the arrow next to your status, and then select a status from the list, such as **Do Not Disturb**.




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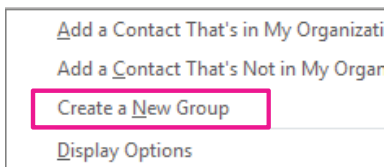
# Lync 2013 for Office 365 Quick Reference



## Create a group

You can set up a group for each team you work with so you can see at a glance who's available at any given time, or communicate with the entire team at once. To create a new group:

1. In the Lync main window, click the **Add a Contact** button 
2. In the drop-down menu, select **Create a New Group**.
3. In the space that opens up at bottom of the window, type over the phrase **New Group** to give your group a name.



## Send an instant message

Use instant messaging (IM) to get in touch right away with your available contacts.

1. In your Contacts list, point to the picture of the contact you want to send an instant message to. To have an IM conversation with more than one contact, hold down the Ctrl key, and click each contact you want to include.)
2. In the display bar that appears, click the **IM** button.



3. Type your message in the message input area at the bottom of the IM window, and then press the Enter key on your keyboard.

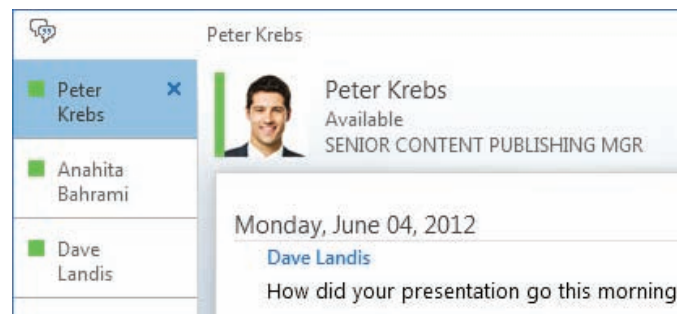
## Add audio, video, sharing, to an IM conversation

You can quickly add audio, video, or a presentation to your IM conversation, and/or invite others to join the conversation by selecting the appropriate button(s) at the bottom of the conversation window:




## Switch between tabbed conversations

If you have several conversations or meetings going on at the same time, Lync displays them all in one place, which lets you toggle between them. Click any tab to bring that activity to the foreground.



## Find a previous IM conversation

If you use Outlook and Exchange, Lync automatically saves your IM conversation history. To view or continue a previous IM conversation or see an IM request you missed:

1. Near the top of the Lync main window, click the **Conversations** tab .
2. Click **All** or **Missed**, depending on what you're looking for. If you don't see the conversation you're looking for, click **View More in Outlook**, at the bottom of the list.
3. Double-click the conversation that you want to view or resume.

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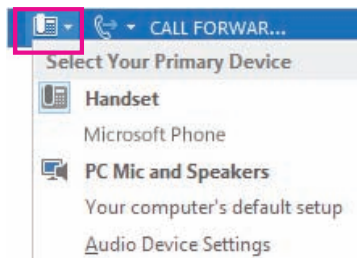
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## Audio

### Set up your audio device

Before using Lync to make a call or join a meeting, set up your audio device and check the quality. You can use your computer's mic and speakers or plug in a headset.

1. Click **Select Primary Device** in the lower-left corner of Lync, then click **Audio Device Settings**.
2. Pick your device from the **Audio Device** menu, and adjust the speaker and microphone volume, as needed.



### Start a call

- Pause on a contact's picture anywhere it appears, and click the phone icon.

### Start a conference call

1. In your Contacts list, select multiple contacts by holding the Ctrl key, and clicking the names.
2. Right-click a selected name, then click **Start a Conference Call**.
3. Click **Lync Call**.

### Answer a call

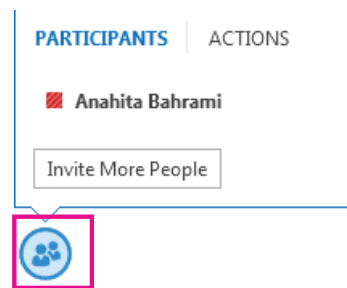
When someone calls you, an alert pops up on your screen.

- To answer the call, click anywhere on the photo area.
- To reject the call, click **Ignore**.
- To start an instant messaging (IM) conversation with the caller instead of an audio call, click **Options**, and then **Reply by IM**.
- To reject the call and other calls, until you change your status click **Options**, and then **Set to Do not Disturb**.

### Invite more people to a call

1. In the conversation window, point to the people button, and then click the **Invite More People** button.
2. Type the name(s) of or select the person or people you want to invite, and then click **OK**.

Your new invitees receive a request to join your call.



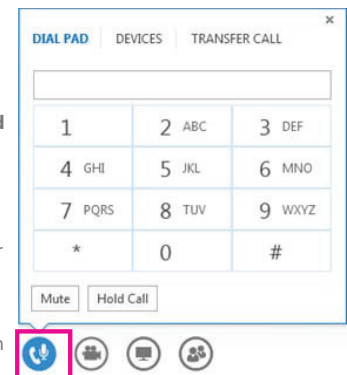
### Add audio to an IM conversation

In the conversation window, point to the phone icon, and then select **Lync Call**.

### Use audio call controls

During a call, point to the phone/mic button to access the controls.

- To put the call on hold, click the **Hold Call** button.
- To mute your audio, click the **Mute** button.
- If call transferring is available for your account, click the **Transfer Call** tab, and select the number you want.
- To hang up, click the phone button in the conversation window.



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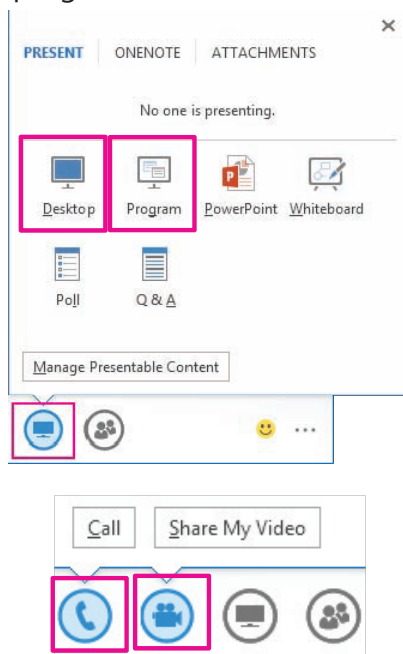
## Sharing and Collaboration

With Lync you can start collaborating without having to schedule a meeting. You can start an impromptu meeting, share something on your computer (a file, a website, and so on), take and share notes, brainstorm together on a whiteboard, give or work on a PowerPoint presentation, or send a file.

Or you can schedule a Lync Meeting and share and collaborate from there. For details about setting up and joining Lync Meetings, see either <http://office.microsoft.com/HA102827058> and <http://office.microsoft.com/HA102828887> or, if you use Office 365 operated by 21Vianet, <http://office.microsoft.com/HA104042994> and <http://office.microsoft.com/HA104042985>.

### Share your desktop or a program

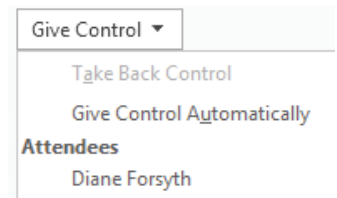
1. In your Contacts list, double-click a contact to start an IM conversation, and add people or groups by dragging them into the window from your Contacts list. **Or**, join a scheduled Lync Meeting.
2. Point to the present (monitor) button, and, on the **Present** tab, either:
  - Click **Desktop** to show the entire content of your desktop.
  - Click **Program** if you want to share just an open program, and then double-click the program you want.
3. (Optional) To add audio, click the phone button.
4. (Optional) To add video, click the camera button.



### Give control of your sharing session to others

Allow others to flip through slides, contribute information and make changes to a whiteboard or OneNote, PowerPoint or other kind of file, or demonstrate a program with just a couple of clicks. Take back control at any time.

1. On the sharing bar at the top of the screen, click **Give Control**.
2. Click the name of a person under Attendees to give them access, or click **Give Control Automatically** to automatically give access to anyone who asks for control of your desktop.



### Take back control of a sharing session

1. To take back control of your desktop or program, click **Give Control** again.
2. If **Give Control Automatically** is selected, click it to clear it. To take back control from a person, click **Take Back Control**.

### Select who can download shared files

In a scheduled meeting, while you're presenting, you can restrict who can download a copy of the file you're sharing, if, for example, the information isn't final or is confidential.

1. During a sharing session, point to the present (monitor) button, and then click the **Manage Presentable Content** button. **TIP:** You know you're sharing when you see the Sharing bar at the top of your screen.
2. Click the **Permissions** menu, and then select one of the following:
  - **Organizer**, to allow only the person who set up the meeting to download the file.
  - **Presenter**, to allow only the people who the organizer set up as presenters to download the file.
  - **Anyone**, to allow all participants to download the file.

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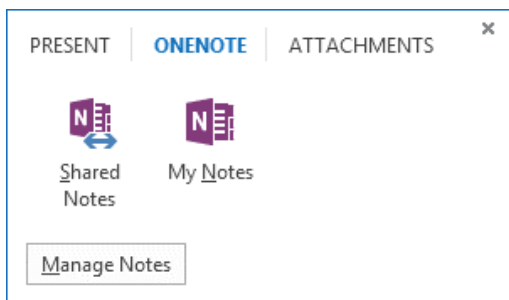


## Share notes

Often, you want to take notes during a meeting. If you use OneNote, you can take notes that everyone can see, work collaboratively on those notes, and/or, share notes you've already taken.

1. In a conversation window, point to the present (monitor) button, and click the **OneNote** tab.
2. Click **Shared Notes**, and then, in the note picker, select a notebook or note page, or click **New Notebook** to create a new one.

The page you select docks on your desktop, and the other participants receive a notification about the shared notebook. Let them add notes, if you want (see the section "Give control" for details).



## Share a whiteboard

A whiteboard is a blank area where you can type notes, draw, or import images that meeting participants can work on together. It's great for brainstorming.

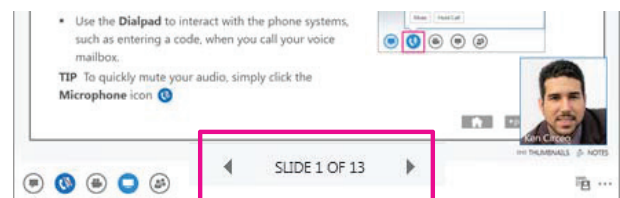
- In a conversation window, point to the present (monitor) button, and, on the **Present** tab, click **Whiteboard**.

Use the annotation toolset on the right side of the whiteboard for highlight, stamps, laser pointer, writing, drawing, and other tools.



## Share a PowerPoint presentation

1. Point to the present (monitor) button, and, on the **Present** tab, click **PowerPoint**.
2. Do any of the following:
  - To move the slides, click **Thumbnails**, then click the slide you want to show, or use the arrows at the bottom of the meeting window.



- To see your presenter notes, click **Notes**.
- To use highlights, the laser pointer, and other annotation tools, click the **Annotations** button on the upper-right side of the slide. Annotating doesn't change the actual file, although, you can save an annotated copy, if you want.
- To prevent someone from skipping ahead or using annotations, in the meeting window, click **More Options**, click **Lync Meeting Options**, and then select the permissions level for the participant(s)

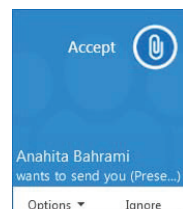
## Share a file or a picture

Simply drag and paste saved files, including images, or copy and paste a file or any image into the text input area of a conversation window. A small version of the picture or file type will appear that the user can save or open to view in detail.

Or, you can use the file transfer option.

- In a conversation window, click the present (monitor) button, and then use the **Attachment** tab.
- Lync sends a file transfer invitation to the participants, and the file is sent if the invitation is accepted.

**TIP** You can also drag the file onto a contact's name, which sends a notification to the recipient to accept or decline the file transfer.



# Lync 2013 for Office 365 Quick Reference



## Lync 2013 for Office 365 Quick Reference Video

### Set up your video device

You need a camera to share your video, but you don't need one to see someone else's video.

To set up your camera:

- Click **Options** in the Lync main window, then click **Video Device**.
- If you don't see your video preview, make sure the camera is working correctly.
- To adjust settings, click **Camera Settings**.



### Start a video call

In your Contacts list, point to a contact's photo and click the camera icon.

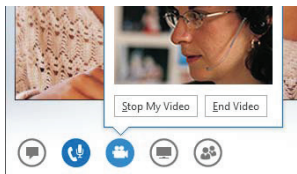


A message pops up on your contact's screen to accept your call.

To end the video portion of the call, point to the camera icon, and then click one of the following:

- **Stop My Video** to stop your video stream. You'll still see others' video.
- **End Video** to stop seeing all video. You'll still have audio.

**TIP** During an instant messaging or audio call, click the camera icon to make it a video call.



### Choose the layout

In the video conversation window, click **Pick a Layout**, and choose one of the following:

- **Gallery View** to show all the participants' videos.
- **Speaker View** to show only the presenters' videos.
- **Content View** to show only the meeting content.
- **Compact View** to show the tiles of the participants in a compact window.

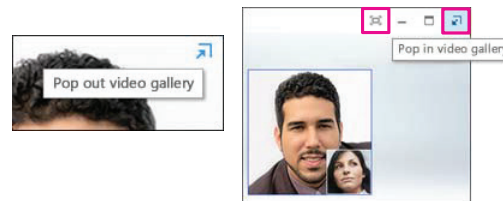
### Manage the participants

To manage the participants, right-click a person's video or photo, and click:

- **Mute, Unmute, or Remove** to mute, unmute, or remove that person from the call.
- **Lock the Video Spotlight** to make that person's video the spotlighted video.
- **Pin to Gallery** to keep that person in the Gallery View.

### Choose the view

In the video conversation window, click **Pop out video gallery** to see the videos in a separate window, **Full Screen View** for a large view of the videos, and click **Pop in video gallery** to go back to normal view.

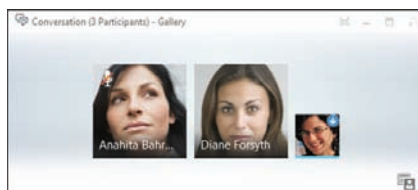


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### Start a video meeting

Start an ad-hoc video meeting to discuss a subject that needs immediate attention.

1. In your Contacts list, select multiple contacts by holding down the Ctrl key and clicking the names.
2. Right-click one of the selected names, and click **Start a Video Call**. When you start a video call, you automatically use Lync computer audio.
3. Use the video controls to manage the meeting.



### Answer a video call

When someone calls you, an alert pops up on your screen.

To answer the call, click anywhere on the photo area.

Click **Ignore** to reject the call.

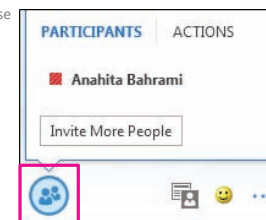
Click **Options** and the appropriate selection to do any of the following:

- Reply by IM instead of by video.
- Answer with audio only if you don't want to share your video.
- Change your status to Do Not Disturb to ignore this call and others, until you change your status.

### Invite other people to a video call

1. In the conversation window, pause on the people icon, and click **Invite More People**.
2. Type or select the new invitee(s), and then click **OK**.

Your new invitees receive an request message to join your call.



### Add video to an IM conversation

1. In the conversation window, point to the camera icon, and check your preview.
2. Adjust your camera if needed, and click **Start My Video**.
3. To end sharing your video, click **Stop My Video**.

**TIP** Click **End Video** to stop sharing your video with others AND to end their video feeds to you.

