

GETTING STARTED WITH LYNC

Lync operates on devices running Windows 8 and other operating systems and be purchased and installed as a standalone product or as part of an Office 365 subscription. Lync is used to connect people in the workplace and provides multiple methods for communicating, sharing and collaborating with others including instant messaging, voice calls, video calls and much more.

In this session you will:

- ✓ gain an understanding of **Lync**
- ✓ gain an understanding of **Lync** features and plans
- ✓ learn how to open **Lync** with **Windows 8.1**
- ✓ learn how to sign in to **Lync**
- ✓ gain an understanding of the **Lync** window
- ✓ learn how to personalise **Lync**
- ✓ learn how to change the profile picture
- ✓ gain an understanding of common **Lync** terms and concepts
- ✓ learn how access the **Lync Help** window.

WHAT IS LYNC

Lync was launched in 2010 as a replacement for Office Communicator. Lync is a communications program that allows people to connect with each other using an internet connection so that they

can stay in touch even when they are situated in different locations. You can also use Lync on a range of different devices for added convenience.

Lync Features

Lync has been compared to MSN, in that one of the primary methods of communication is instant messaging and it does have some of the same overall functionality. Lync provides users with a number of different ways of communicating with each other such as:

| | |
|--|---|
| Instant messaging | Instant messaging (or IM as it is known for short) is a useful tool for communicating and sharing information quickly with others. An instant message is a quick message you can type immediately into a Lync conversation window. The message is instantly received by the recipient (provided they are signed in to Lync) and will pop up in a Lync conversation window on their screen. They can then choose to type a response to you. An instant message is much faster than sending an email and is a less formal way of communicating when you may just have a simple question to ask of someone that needs a quick reply. |
| Voice over IP | Make phone calls without the use of a phone line to others in your organisation or outside of your organisation who have Lync. |
| Meetings | Lync allows you to conduct online meetings with the option of incorporating audio and/or video. |
| Presentations | You also have the ability to present a variety of different content either during or outside of a meeting. You can present content such as PowerPoint presentations and question and answer sessions. You can even share your desktop or a program with others so that they can see what is on your screen |
| Integrate with other Microsoft programs | Lync also has the ability to integrate with other Microsoft applications for increased functionality. For instance in Lync you can access your Outlook contacts, take OneNote notes and share notes with other users, share PowerPoint presentations and connect with Skype |
| Client communication | Using Lync you can conduct conference calls with clients or business associates even if they do not have Lync installed on their device |

LYNC FEATURES AND PLANS

As an organisation you have several options when purchasing Lync. Depending on what kind of Lync plan you purchase will decide which features you have access to. Therefore it's

important to have a thorough understanding of what each plan offers in order to make the right decision based on your business's requirements.

Lync Plans

There are three main Lync plans and they are **Lync Server**, **Lync Online Plan 1** and **Lync Online Plan 2**. Lync Server provides the most functionality. Lync Online Plan 1 includes Microsoft Office integration, Skype connectivity, voice and hd conferencing and Lync mobile. Lync Online Plan 2 includes everything in Lync Online Plan 1 plus the ability to share applications and whiteboard, meeting controls, multi party sharing, enhanced OneNote sharing, third party audio conferencing integration and access to the Lync web app. If you have Lync Online as part of an Office 365 subscription you will have Lync Online Plan 2.

| | Lync Server 2013 | Lync Online Plan 1 | Lync Online Plan 2 |
|--|------------------|--------------------|--------------------|
| Skype Connectivity | ✓ | ✓ | ✓ |
| Persistent Chat | ✓ | | |
| Skill Search (requires SharePoint Server) | ✓ | | |
| Lync to Lync calling (voice and HD video, 1:1) | ✓ | ✓ | ✓ |
| Desktop, Application and Whiteboard sharing | ✓ | | ✓ |
| Multiparty (3+) Audio/Video/Content Sharing (Scheduled and Ad hoc) | ✓ | | ✓ |
| Meeting Contrls (organiser, lobby experience, join from) | ✓ | | ✓ |
| OneNote sharing | ✓ | | ✓ |
| Lync audio conferencing | ✓ | | ✓ |
| Lync mobile clients | ✓ | ✓ | ✓ |
| Lync web app | ✓ | | ✓ |
| Rich presence, IM (1:1 and multiparty) | ✓ | ✓ | ✓ |
| Public Cloud IM/P federation with windows live | ✓ | ✓ | ✓ |

OPENING LYNC WITH WINDOWS 8.1

Generally when Lync is installed on your device the Lync **Sign in** window will appear automatically when you first turn your device on, or log in to your profile for that particular device.

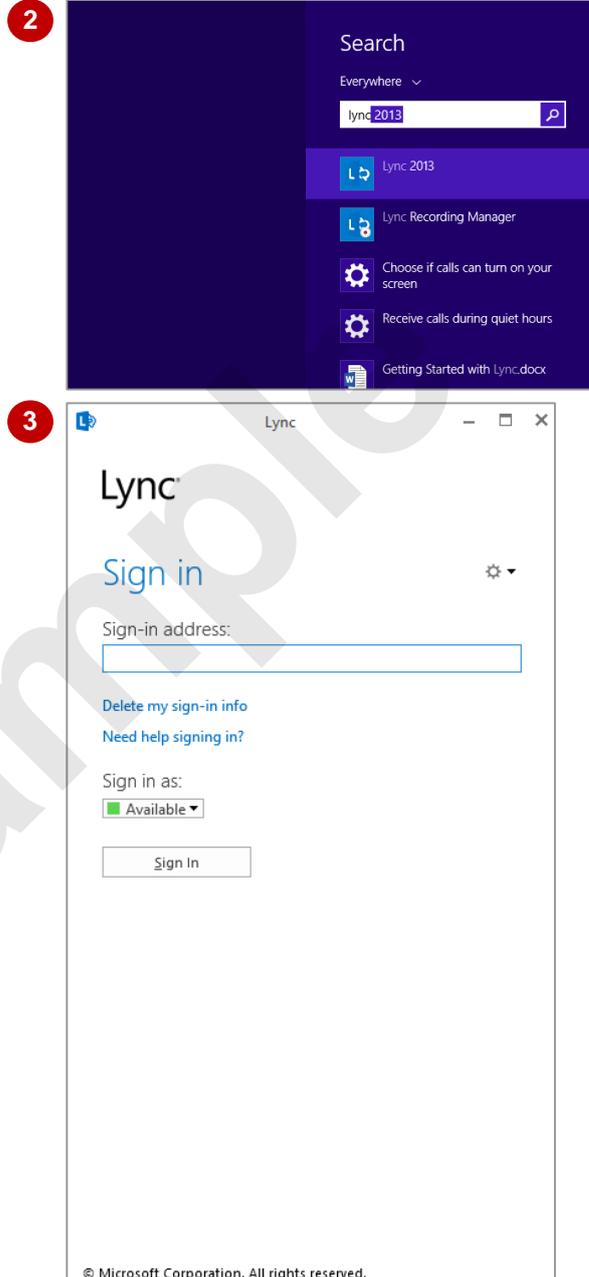
However, in Windows 8.1 you can easily search for Lync using the Start screen or open it via the Apps view.

Try This Yourself:

Before starting this exercise ensure your device is switched on and Lync is installed...

- 1 Navigate to the Windows 8.1 start screen
- 2 Type Lync to display the **Search** pane to the right of the screen
- 3 Click on **Lync 2013** in the list of results to display the Lync **Sign in** window

Leave this window open for the next exercise



For Your Reference...

To **open Lync** in **Windows 8.1**:

1. Navigate to the Windows 8 start screen
2. Type Lync
3. Click on **Lync 2013** in the results list

Handy to Know...

- You can open Lync in Windows 8 by navigating to the **Apps** view, then navigating to **Lync 2013** in the list of programs. Click once on **Lync 2013** to open the **Sign in** window.

SIGNING IN TO LYNC

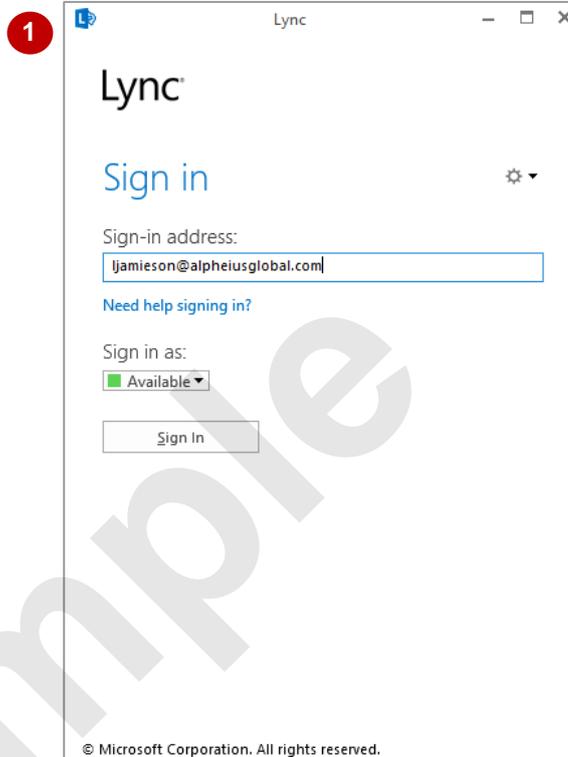
In order to access Lync, you must first sign in to Lync using the email address and password associated with your Lync subscription. From the Lync **Sign in** window you have a number of

useful options such as deleting your sign in info if others will use the device after you or setting your presence.

Try This Yourself:

Before starting this exercise ensure the Lync Sign in window is displayed...

- 1 In the Lync **Sign in** window type the email address associated with your Lync subscription in **Sign in address**:
- 2 Type the password in **Password**
If you wish for your password to be saved for next time you sign in to Lync on this device then tick Save my password, otherwise leave it unticked...
- 3 Click on the drop arrow for **Sign in as**: to display a list of options
- 4 Select **Busy** to set your presence to **Busy**
- 5 Click on **[Sign in]** to sign in to Lync and display the Lync window



For Your Reference...

To **sign in to Lync**:

1. In the Lync **Sign in** window, type your email address and password
2. Click on **[Sign in]**

Handy to Know...

- If you click on **Delete my sign-in info**, Lync will delete your account sign in and any related information. You can still sign in using the same details, it just means that if someone signs in after you, your details won't still appear in the **Sign in** window.

THE LYNC WINDOW

The Lync window may appear overwhelming to first time users as there are lots of features and functions available. However once you know how to access the features you need to use, you will

find the screen quite intuitive and easy to navigate.



- 1 You can type your **status** into the **What's happening today?** box. For instance you may wish to include what project you are currently working on or a general comment about the weather, an upcoming holiday or business trip.
- 2 Your profile picture is displayed here and is visible to anyone who views your profile. The profile picture can be changed at any time.
- 3 The views icons - **Contacts**, **Conversations** and **Calendar**. Clicking on one of these options will display features specific to that view. For instance **Contacts** displays all contacted you have added or who have added you, **Conversations** lists previous conversations you have had and **Calendar** lists any events scheduled for the current day.
- 4 Type a name in the **Find someone** search box to search for new or existing contacts.
- 5 Sort your contacts by the options along the top of the Contacts list. In **Contacts** view the sort options are **GROUPS**, **STATUS**, **RELATIONSHIPS** and **NEW**.
- 6 Click on **Audio options** to configure your audio device
- 7 Clicking on the **Options** icon displays the **Lync – Options** dialog box. If you click on the **Options** drop arrow a menu of options will display
- 8 Clicking on **Add a Contact** displays a list of options for adding contacts from within or outside of your organisation

LYNC PRESENCE AND STATUS

In Lync you can notify your contacts of your availability and what you are up to by changing your **presence** and **status**. Your status is whatever you choose to type in the **What's**

happening today? box, whereas your presence is whatever availability you choose to set. For instance **Busy**, **Available** or **Away**.

Try This Yourself:

Before starting this exercise ensure you are signed in to Lync and the Lync window is displayed...

- 1 Click in **What's happening today** and type a short note about what you are doing today

- 2 Press

This status will now appear to anyone who sees your contact card.

Let's set our presence...

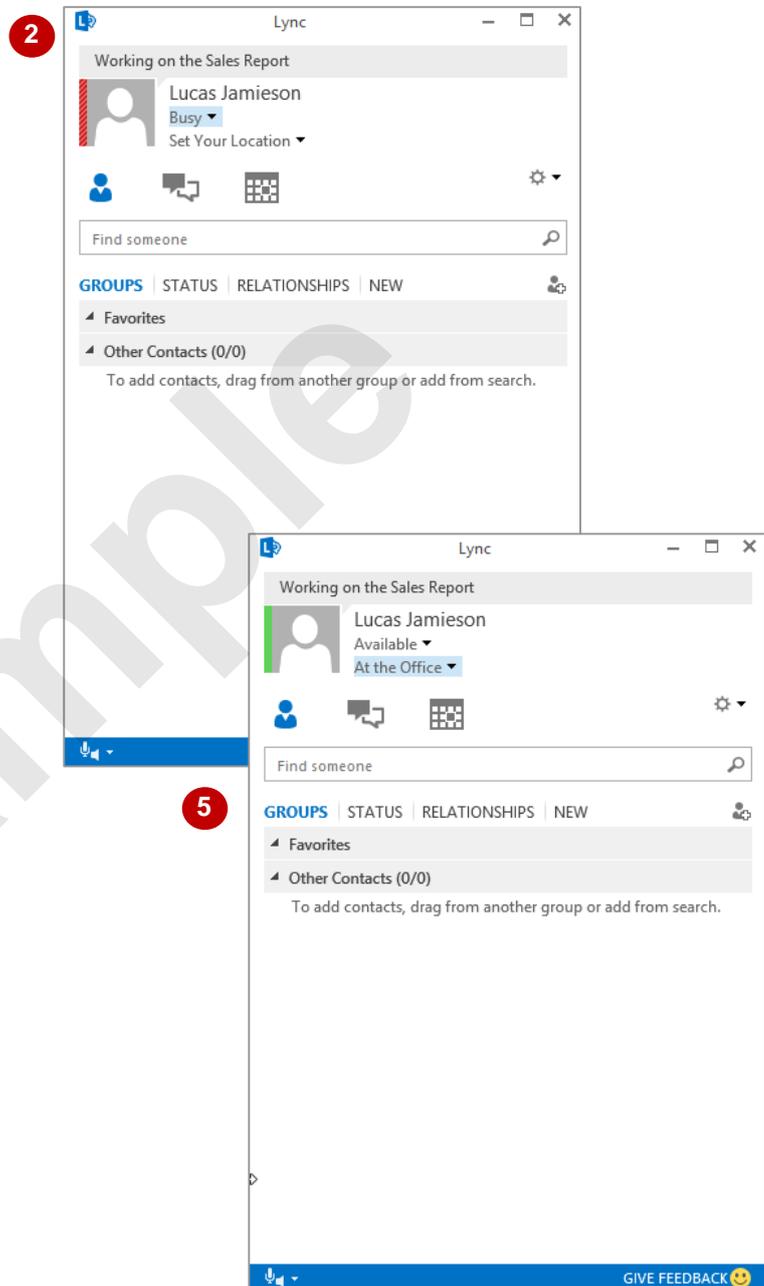
- 3 Click on the drop arrow for **Busy** and select **Available** to change our availability

Let's set the location so our contacts will know where we are working from...

- 4 Click on **Set your Location**

- 5 Type **At the Office**, then press to enter this location

Lync remembers this location and saves it as a custom location



For Your Reference...

To **set your status**:

- Click on **What's happening today** and type a note about what you are doing

To **set your presence**:

- Click on the drop arrow for **Available** and select an option

Handy to Know...

- Once you have entered in your location, Lync will save it as a **Custom Location**. You can then select this location again whenever you wish.

CHANGING THE PROFILE PICTURE

The profile picture is an important feature of Lync as it can be a useful tool in representing your professional image to colleagues and business associates. A profile picture can make the Lync

experience more personable as you can see what the person you are communicating with looks like.

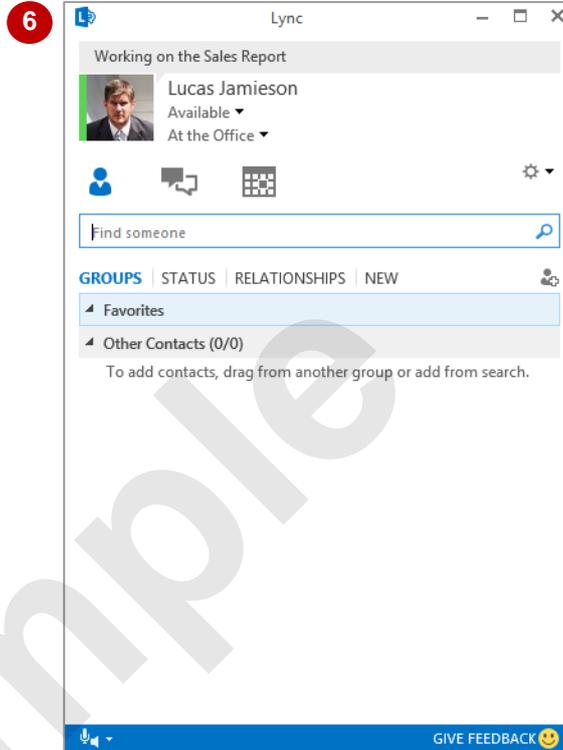
Try This Yourself:

Before starting this exercise ensure you are signed in to Lync and the Lync window is displayed...

- 1 Point to the profile picture placeholder so that the cursor appears as a pointing hand, as shown
- 2 Click once to display the **Lync – Options** dialog box with the **My Picture** section displayed
- 3 Ensure **Show my picture is selected** so that others can see your profile picture
- 4 Click on **[Edit or Remove Picture]**

If you are signed in to your Office 365 account a browser window will open with a Change Photo page displayed...

- 5 Click on **[Browse]**
- 6 Select a picture, click on **[Open]**, then click on **[OK]**



For Your Reference...

To **change the profile picture**

1. Click once on the profile picture
2. Click on **[Edit or Remove Picture]**
3. Click on **[Browse]**, select a picture
4. Click on **[Open]**, then click on **[Save]**

Handy to Know...

- If you have Lync as part of Office 365, the image that you choose for your Lync profile picture will also become your Office 365 profile picture.

GLOSSARY OF LYNC TERMS

In Lync you will come across many different terms and concepts that you may not have heard before or you may feel as if you don't have a thorough understanding of. Below is a list of

some of the more common terms and concepts in Lync and an explanation of what they mean.

| TERM | DEFINITION |
|-----------------------------|--|
| Chat room | A specific area on the internet or other network that is designated to a particular topic where individuals can communicate with each other – usually via instant messages. |
| Conference call | A conference call is also sometimes known as a meeting. It is an audio conversation that takes place between two or more people. It may or may not include video and/or instant messaging. |
| Contact | Someone from inside or outside your organisation that you have added as your contact. |
| Contact group | A contact group can be created in the Contacts list in order to organise your contacts into different categories. |
| Contacts list | The list of contacts in the main part of the Lync window. |
| Conversation history | Past instant messages conversations are stored by default in a folder called Conversation history in your Outlook account. |
| Conversation window | The window that is displayed when you start a meeting or instant messaging conversation with someone, or when you accept and join a meeting or instant messaging conversation with someone else. |
| Emoticon | A visual representation of an emotion used to express the writers tone and meaning. For instance you may want to include a smiley face to convey that the tone of your message is light hearted. |
| Group message | An instant messaging conversation between more than two people. |
| Instant Message/IM | IM is an abbreviation for instant message. An instant message is a message you type in the conversation window and send to one or more people. |
| Lync call | A call conducted using Lync. |
| Lync window | The main desktop window that includes you profile picture, status, presence and Contacts list. |
| Online meeting | A meeting that is not necessarily held in a physical location but is conducted via the internet. Online meetings usually include video and audio so that participants can see and speak to each other. |
| Persistent chat | Persistent chat is a feature of Lync that allows users to create and participate in chat rooms that are formed in Lync. |
| Quick Lync bar | The Quick Lync bar is appears beside the contact profile picture in the Contacts list. |
| Skype | Skype is a communications service similar to Lync in that it allows two or more people to talk to each other over the internet using a variety of a communication methods. |

ACCESSING HELP

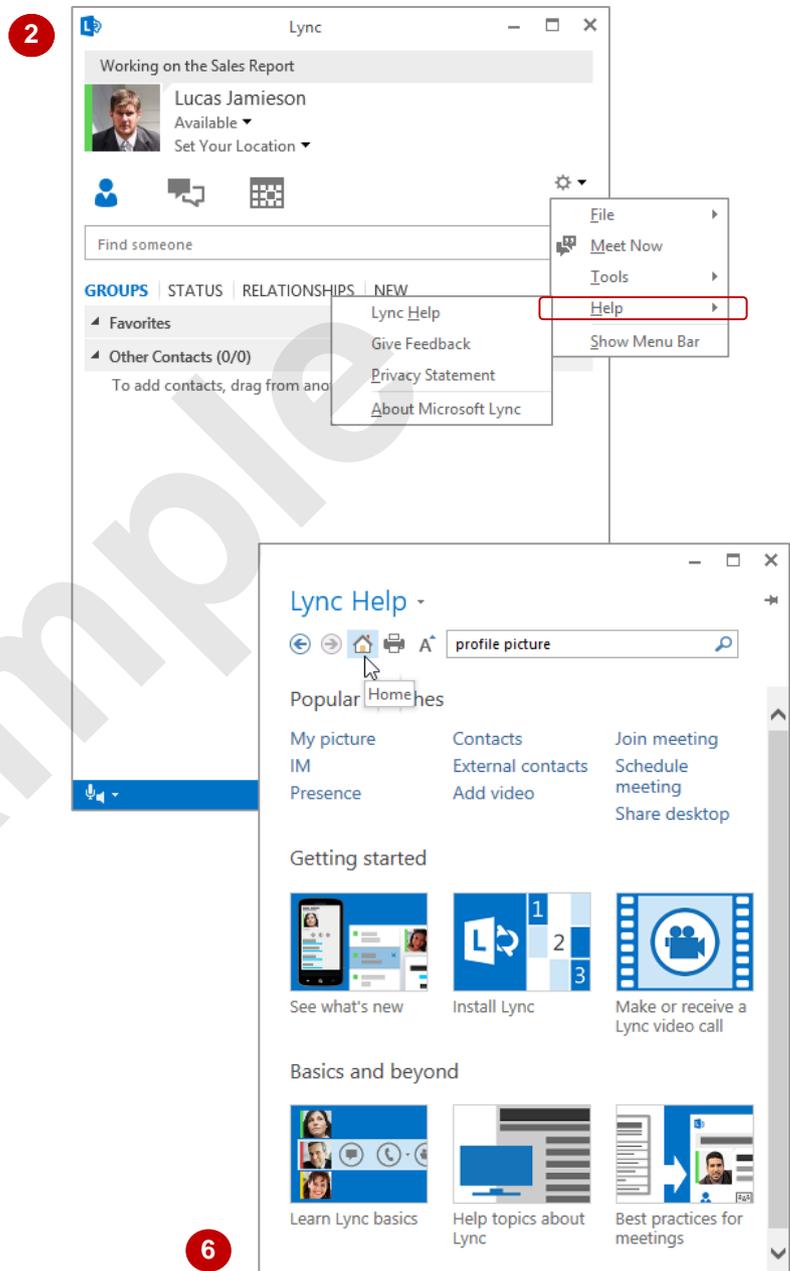
There may be times when you are working in Lync and you are not sure of how to do something or how to access certain features. This is where the Lync Help window can come in

handy. You can use it to search for all kinds of terms or topics to do with Lync.

Try This Yourself:

Before starting this exercise ensure the Lync window is displayed...

- 1 In the Lync window click on the **Options** drop arrow to display a menu of options
- 2 Point to **Help** to display further options
- 3 Select **Lync Help** to display the **Lync Help** window
- 4 Type **profile picture** into the search box, then press to display the results
- 5 Click on **Change your Lync picture** to view the article
- 6 Click on **Home** to return to the **Lync Help** home screen



For Your Reference...

To **access** the **Lync Help window**:

1. Click on the **Options** drop arrow
2. Point to **Help**
3. Select **Lync Help**

Handy to Know...

- To navigate backwards and forwards between pages in the **Lync Help** window simply click on the **Forward** and **back** arrows next to the search box at the top of the window.

CHAPTER 2 LYNC CONTACTS

INFOCUS

In order to use Lync you must have contacts. You can add contacts from within or outside of your organisation. Once you have added contacts you can also sort them into groups depending on what category they fall into. For instance you can add contacts to the **favourites** group which is designed for those that you contact the most frequently so that they are easily accessible. You can also set different privacy levels for each contact so that the people only see what you want them to see.

In this session you will:

- ✓ learn how to add contacts from within your organisation
- ✓ learn how to add an outside contact
- ✓ gain an understanding of navigating contacts
- ✓ learn how to change the privacy status of contacts
- ✓ learn how to use the quick lync menu
- ✓ gain an understanding of the contact card
- ✓ learn how to create a new group
- ✓ learn how to work with groups
- ✓ learn how to delete groups and contacts
- ✓ learn how to tag for status change updates.

ADDING CONTACTS FROM WITHIN YOUR ORGANISATION

Most of the people you communicate with regularly will probably be people from within your organisation. In order to see people you wish to communicate with listed in your **Contacts** list you

must first add these people as **Contacts**. You can still use Lync to communicate with those in your organisation who are not your contact but it is much easier if you have added them.

Try This Yourself:

Before starting this exercise ensure you are signed in to Lync and the Lync window is displayed...

- 1 Click on **Add a Contact** to display a menu of options, as shown

- 2 Select **Add a contact in My Organisation**

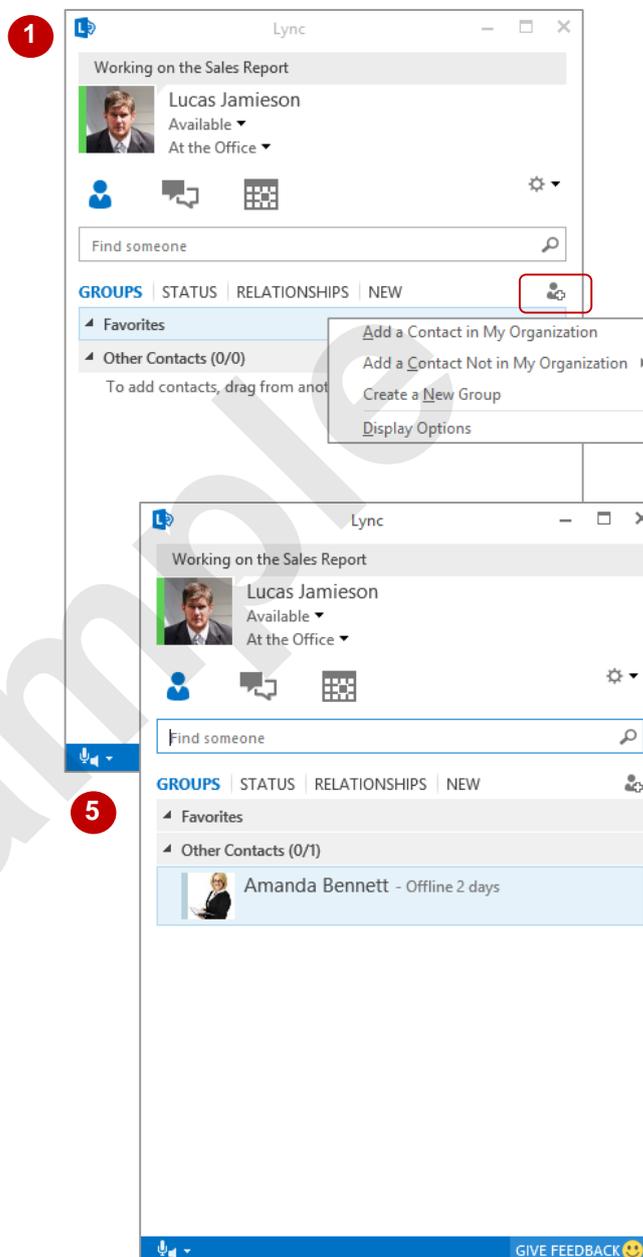
A note appears beneath the Find someone box instructing you to find people and right-click to add as contacts...

- 3 Begin typing a name into the **Find someone** box

A list of results will appear beneath the box...

- 4 Right-click on the required name in the results list to display a menu of options

- 5 Point to **Add to Contacts List**, then select **Other Contacts**



For Your Reference...

To **add a contact from within your organisation**:

1. Click on **Add a Contact**
2. Select **Add a contact in my organisation**, then type a name in the **Find someone** box
3. Right-click on the person's name then select **Add to Contacts**

Handy to Know...

- When you select to add a contact to the **Contacts** list, **Other Contacts** will be the only option unless you have created other contacts groups. You cannot add a contact to the **Favourites** group until the contact has been added to the **Contacts** list.