

Microsoft®

Lync 2011

Basics

CITES Training Services – University of Illinois

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Getting Started

Lync for Mac 2011 is the new rich client for Lync users on the Mac platform. It offers integrated functionality for instant messaging, presence, conferencing and voice.

Voice Capabilities

Lync for Mac makes it easy for users to make calls and access features during calls that streamline workflow for everyone.

Instant Messaging & Presence

By simply looking at a contact name and the presence icon associated with that person, you can see whether a person is available, in a meeting, or out of the office so you can determine the best way to communicate with them.

Audio & Video Conferencing

Users can make computer-to-computer audio and video calls. They can also conduct conference calls by inviting multiple contacts to join the conversation or initiating a meeting from within Outlook for Mac 2011 or Lync for Mac 2011.

Starting Lync 2011

Start Lync 2011 and Sign In

First, you must log on to the network.

1. Launch **Microsoft Lync 2011**.
The first time you are prompted to sign in.
2. Complete the information in the Email Address box. The email address should be @illinois.edu rather than a department specific domain.
3. Leave the Sign in as: box at Automatic.
4. Enter your netid and Active Directory password and click Sign In.

Sign Out of Lync

You should leave Lync running in the background during your workday. Click the red close button at the top left corner of Lync to remove the window from your desktop and place it at the bottom of the screen.

To quit (sign out of) Lync, choose one of these:

- Click the Lync menu and choose Quit Lync.
- Click Status on the Lync menu and choose Sign Out.
- Click the presence menu arrow under your name in the top section of the Lync 2011 program window and choose Sign Out.

Exercise

Start the Lync 2011 program.



Figure 1-1: Signing into Lync 2011 for the first time.

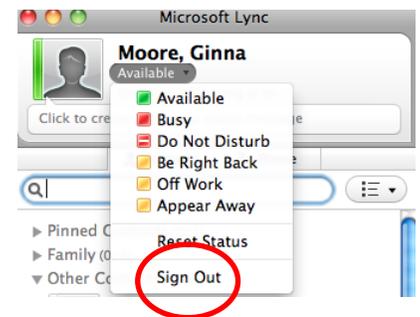


Figure 1-2: Signing out of Lync 2011.

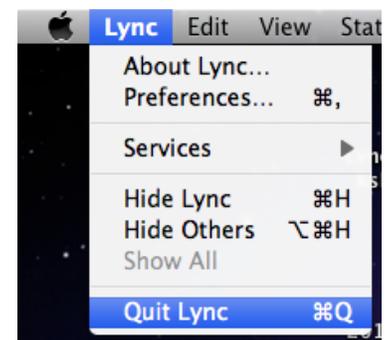


Figure 1-3: Exiting Lync 2011.

Understanding the Lync 2011 Program Screen

Me Area

At the top of the Lync window is an area where you can see and modify the information about yourself that your contacts will see. Use the “Me Area” to:

- Show your status. Lync keeps track of how available you are, whether in a meeting, a call, or away from your desk. Your contacts will be able to see your presence status at a glance with red, yellow, and green indicators, as outlined in the table below. These presence indicators will also be visible in Outlook. Click the status drop-down menu below your name to change or reset your status.
- Type a personal note. Display your status at a glance, whether business-related or just for fun.

Account Settings

You can change the default settings for availability and integration with Outlook.

To make changes to your status:

1. In the Lync menu, click Preferences.
2. In the Preferences dialog box, click the Account tab.
3. Select the *Show me as away when I am inactive for this many minutes* checkbox and set the amount of time desired.

To change Microsoft Exchange and Outlook settings deselect checkboxes as desired.

Exercise

Explore the different parts of the Microsoft Lync 2011 screen.



Figure 1-4: Section containing personal information (Me Area).

| Status | Icon | Description |
|-----------------|------|--|
| Available | | You are online and can participate in conversations. |
| Busy | | You are online but might be unable to communicate. |
| In a Conference | | |
| In a Call | | |
| Appear Away | | You are online but might be unable to communicate. |
| Be Right Back | | |
| Off Work | | |
| Do Not Disturb | | You are online, but contacts that send you a message receive an alert saying that the message was not delivered. |
| Offline | | You have signed out of your account. |
| Out of Office * | | You are displaying Out of Office information to your contacts. |

status



Figure 1-6: Description of presence status

Contacts List

The Contact tab displays a listing of contacts. You can add to the list by looking names up in the search box--search by name or phone number. After typing in the search box, the results will appear below the box. You can add the name to the contact list by clicking the plus button next to the contact.



The Lync contact card provides details about the contact's online status and availability based on their calendar information. Icons at the bottom of the card provide a launch point for connecting with a contact (email, instant message, call, video call, schedule a meeting, and more). To view a Contact Card, click the photo next to the contact's name.

You can also connect with the selected contact by clicking one of the icons in the Contact Menu at the bottom of the Lync window. Alternately, you can control-click (right-click) the contact result and choose options such as placing a call, adding them to your contact list or to a group of contacts in your list, or pin the contact to your frequent contacts group.

To set up a new group of contacts:

1. Control-click an existing group name.
2. Choose Create New Group.

To populate the new group, drag a contact into the group or in a search result, choose Add to Contacts List, and click the new group name. Control-click to remove a contact or a group.

Phone

Above the search box is the Phone tab. When this tab is selected, a dial pad is displayed. This area of Lync will be explored more closely in the next chapter.

Search box



Figure 1-7: Contacts list section of Lync window.



Figure 1-8: Contact Card



Figure 1-9: Contact Menu



Figure 1-10: Dial Pad

Using Help

When you don't know how to do something in Lync 2011, look up your question in the Lync 2011 Help files. The Lync Help files can answer your questions, offer tips, and provide help for all of its features.

Exercise

Browse topics on Customizing Lync.

Browse for help

1. Click **Help** on the Lync menu.

- Click the category that you want to browse.

The topics within the selected category appear.

- Type in a key word search.

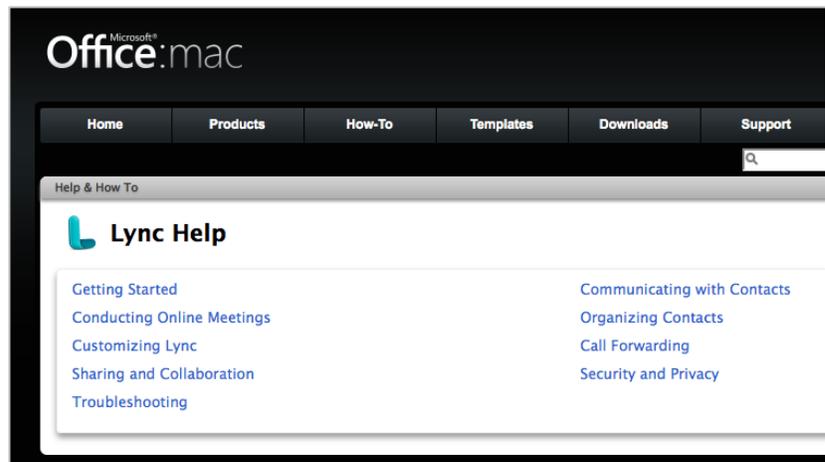


Figure 1-11: The Lync Help window.

Voice and Video



Microsoft Lync 2011 works with Microsoft Lync 2010 Server, providing a software-powered telephone.

Users can contact anyone inside or outside of their company. It is as comfortable as your old phone but a richer and more sophisticated experience.

Lync 2011 makes it easy to add video to a standard phone call in just one click. With enhanced support for audio and video devices, users can set up a video call in minutes. This is a simple way to improve collaboration among coworkers and customers.

Lync Enterprise Voice* supports the following types of calls:

- Computer to computer
- Computer to telephone
- Telephone to computer
- Computer to audio conference
- Video calls and conferencing

*Visit www.go.illinois.edu/myuc to view your account information (after logging in at the prompt).

Make a Phone Call

You can use Lync 2011 to talk to contacts. You can also conduct conference calls by inviting multiple contacts to join the conversation.

Place a call

There are several ways to place a call using Lync 2011.

1. On the Contacts tab, select a contact
2. On the Contact menu at the bottom of the Lync window, click Call
3. Click the number that you want to call.

You can also select a contact from the contact list and click Contact, Call from the Lync menu.

You can place a call from a contact card by clicking the call icon at the bottom of the card.

You can also make a call from the Phone tab, in the *Dial a phone number* box, by entering a phone number or an alphanumeric number on the keypad and then click Call.

Answer a Call

When a call notification window appears (indicating that you are receiving an incoming call):

- Click the Accept icon to answer
- Decline the call to send to voicemail
- Redirect the call to send to another number.

To mute or unmute your microphone, click .

To adjust the volume, drag the volume slider .

To end the call, click .

Exercise

Make a Lync call (search for name). Use the Dial Pad to call a different phone number (i.e., cell phone). Answer an incoming call.



Figure 2-1: Make a call using the Contact Menu

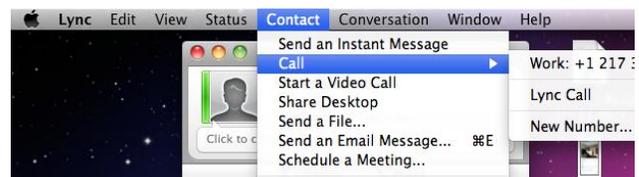


Figure 2-2: Make a call from the Lync Menu



Figure 2-3: Options at bottom of Contact Card



Figure 2-4: Call notification window

Manage Calls

While in an active conversation window, you can use many call features as well as set controls for your calls.

Conference Calls

You can conduct conference calls by inviting multiple contacts to join a conversation. To invite other contacts to a call:

1. In the conversation window, click  and then choose Invite by Name or Phone Number.
2. Next, select a contact from the contact list, or in the search box enter a phone number or email address.

To show (or hide) all participants or yourself during a conversation, click .

Put calls on hold

During a conversation you can put the call on hold by clicking the  button near the lower left corner of the conversation window. To resume the call, click the Resume button in the lower right corner of the conversation window.

Transfer a call

To transfer a call to another contact or number,

1. Click the  button
2. Click Other Person or Number
3. Select a contact from the contact list, or in the search box enter a phone number or email address.

The call will be transferred.

Exercise

Initiate a conference call. Call someone in class and put the call on hold. Remove the hold. Transfer a call to another number.



Figure 2-5: Invite another caller to an existing conversation.

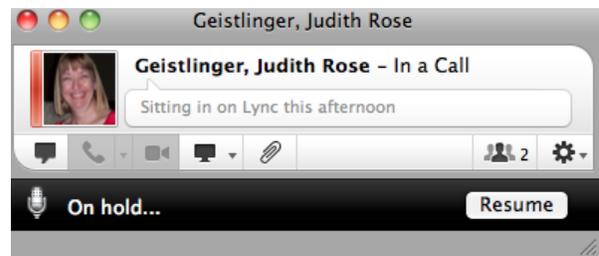


Figure 2-6: Call placed on hold.

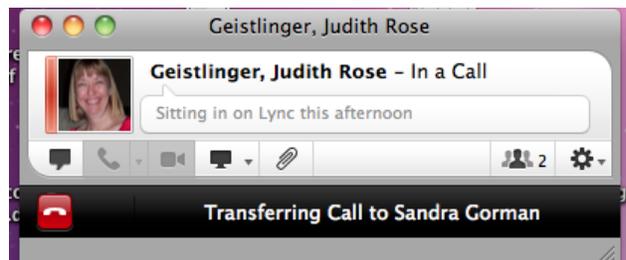


Figure 2-7: Call being transferred.

Forward a call

You can set up call forwarding and simultaneous ring so your calls don't get missed.

Do any of the following:

1. On the Lync menu, click Preferences.
2. On the Phone Calls tab, under Call Forwarding, do one of the following:



| | |
|--|---|
| Forward calls without ringing your office phone | Select <i>Forward my calls to</i> , and then choose an option from the pop-up menu. |
| Simultaneously ring another phone when your office phone receives a call | Select <i>Simultaneously ring</i> , and then choose a number from the pop-up menu. |
| Only apply call forwarding options during working hours | Select the <i>Only forward or simultaneously ring during work hours</i> check box. |
| Handle unanswered calls | Select <i>Redirect unanswered calls</i> to a phone number of your choice. |
| Determine how long to allow call to ring before redirection. | Select the number of seconds in <i>Redirect calls after how many seconds</i> . |

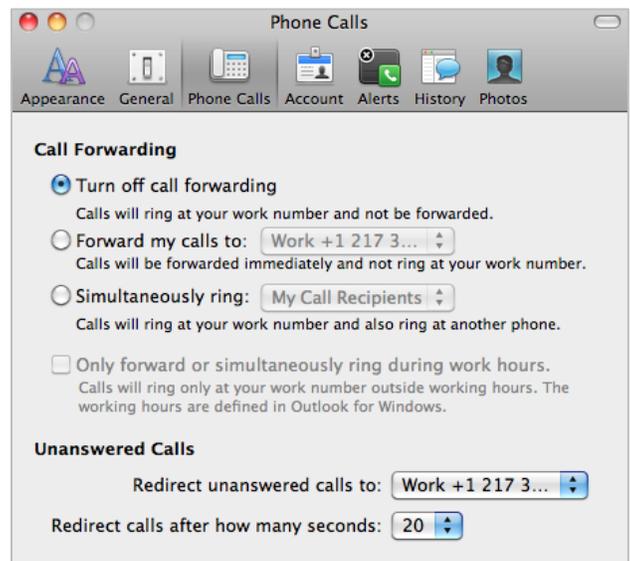


Figure 2-8: Call forwarding settings.

Voice Mail and Missed Calls

Missed Calls

A missed call is created when someone calls and does not leave a voicemail message.

You will be notified of a missed call or if someone leaves a voice mail message for you as an email in Outlook 2011.

NOTE: Voicemail messages are emailed to your Outlook 2011 email inbox as an mp3 attachment

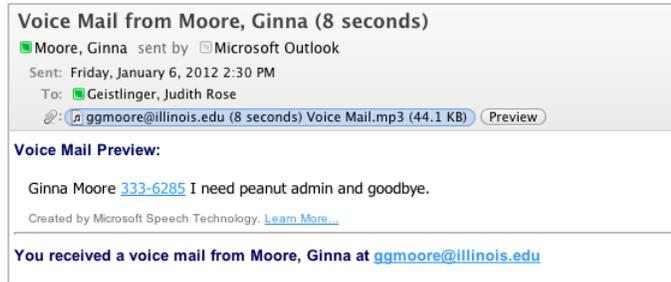


Figure 2-9: Email notification of a voice mail message in Outlook 2011.

Listen to Voicemail

From another phone device you can call 217-333-MAIL (6245) followed by your 10-digit campus number and PIN.

Voice Options

Notifications and Alerts

To make changes to your alerts:

4. In the Lync menu, click Preferences.
5. In the Preferences dialog box, click the Alerts tab.
6. Select the notifications and alerts desired for new alerts, new instant messages and incoming and outgoing calls.

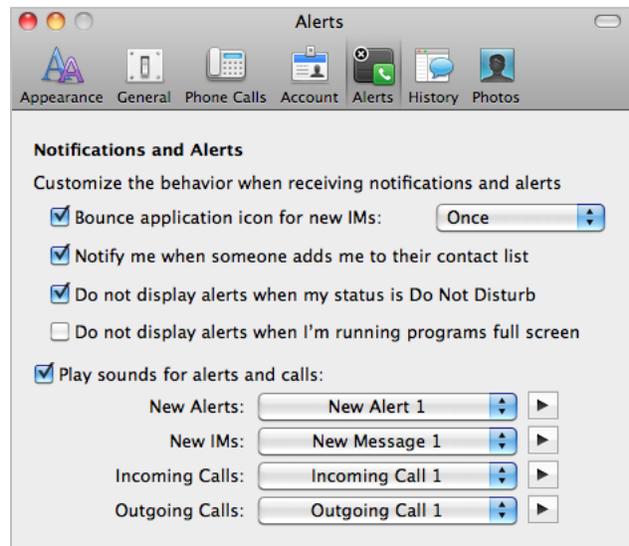


Figure 2-10: Alerts options.

Video Calls

You can use Lync 2011 to make video calls to contacts in your network. You can also conduct video conference calls by inviting multiple contacts to join the conversation. During the video call, you can use Lync to send files and text messages.

To use video calling for a face to face conversation, both you and your contact must have a webcam, a microphone, and either speakers or headphones.

1. On the Contacts tab, select a contact, and on the Contact menu, click Start a Video Call.
2. After your contact accepts the call, begin speaking to start your video conversation.

To invite other contacts to join the video call

On the  pop-up menu, click *Invite by Name or Phone Number*, and then either select the contact you want, or in the search box, enter a phone number or e-mail address.

To change the video to full-screen mode or back to regular size, click .

To change to an audio-only call, click .

Exercise

Check video device settings. Initiate a conversation with someone in class and then start a video call. End conversation.

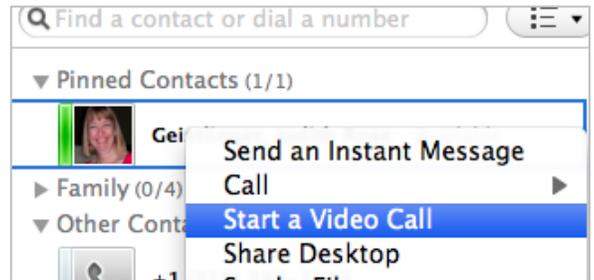


Figure 2-11: Initiating video call in from contacts list by control-clicking.



Figure 2-12: Video call

Instant Messaging

The Internet has revolutionized the way we communicate. E-mail has been the most rapidly adopted form of communication ever known. Less than two decades ago, not many people had heard of it. Now, many of us e-mail instead of writing letters or even calling people on the phone. People around the world send out billions of e-mail messages every day.

But sometimes even e-mail isn't fast enough. You might not know if a person you want to e-mail is online at that moment. Also, if you're e-mailing back and forth with someone, you usually have to click through a few steps. This is why instant messaging (IM) has become so popular.

Create and Send Instant Messages

Send an Instant Message

1. On the Contacts tab double-click the contact.
2. In the bottom of the conversation window, type your message, and then RETURN.

Note: You can add contacts to a conversation. However, you must start the conversation with a single contact.

Each message can be up to 8,000 characters in length.

To add more people to the conversation:

1. On the  pop-up menu, click Invite by Name or Phone Number.
2. Select the contact who you want to invite, and then click OK.

A total of 100 people, including you, can take part in an instant message conversation.

Receive an Instant Message

When someone sends you an instant message, an instant message alert appears in the bottom-right corner of your computer screen.

1. Click Accept in the invitation alert.
2. In the conversation window, type response in the message area, and then RETURN.

End a Conversation

Click the Close button (X) in the upper-right corner of the Conversation window.

Exercise

Practice sending an instant message to someone in class. Make some format changes to your instant messages. Try out some emoticons.

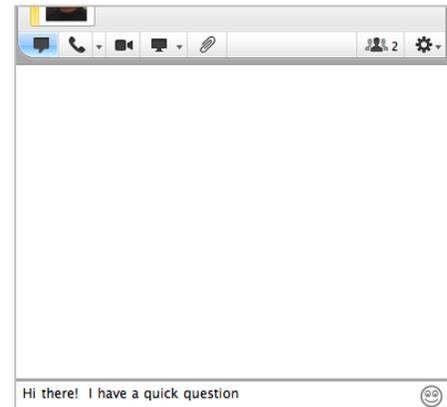


Figure 3-1: Message typed in the message area



Figure 3-2: Notification of incoming instant message.

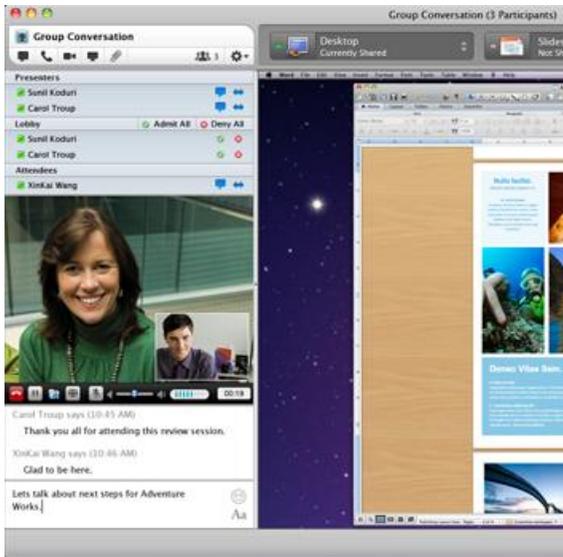
Escalate to an Audio or Video Call

If you are in a text conversation with a contact, you can easily add audio and video to the conversation.

- In the conversation window, click  for an audio call, or
- click  for a video call.

Note: When you save a conversation in Conversation History, only the text portion is saved. Audio and video are not saved.

Desktop and File Sharing



Bring work and people together

With Lync 2011, you can connect and share your work directly from within Microsoft Office applications – send your document through Lync or share your desktop from Save & Send in the File Menu.

Share your desktop

Let everyone in a conversation view what is on your desktop.

In the conversation window, click , and then click Desktop.

The desktop sharing window opens, and a highlighted frame appears around your entire desktop to indicate that the desktop is currently visible to other participants.

To invite other contacts to the desktop sharing session, click , click Invite by Name or Phone Number, and then select a contact.

 In the participant's conversation window, the Desktop sharing invitation message appears.

The participant clicks either Accept to join the desktop sharing session or Decline to decline the desktop sharing invitation.

To stop sharing, in the desktop sharing window, click the pop-up menu, point to the desktop that you want to stop sharing, and then click Stop Sharing.

Exercise

Practice sharing your desktop and an open program (ex. Word 2011) with someone in class.



Figure 4-1: Control bar for desktop sharing.

Share Files

There are a couple of ways in which to share files using Lync.

Send a file

In the conversation window, click , locate the file that you want, and then click Send.

or

Drag a file into the conversation window.

From within a Microsoft application:

1. With a document open in the application, click on the File tab on the Ribbon and choose Save and Send.
2. Select Instant Message and complete the information in the Send by Instant Message dialog box.
3. Click Send IM.

Receive a file

1. Click on alert window for new instant message.
2. Double-click the long rectangular button to start the file transfer.
3. After a few seconds the conversation window will display a message notifying you of the successful transfer of the file being shared. It will also suggest that you scan the file with an anti-virus program before opening it.



Figure 4-2: Sending a file as part of an instant message

Integration with Microsoft Outlook 2011

With richer integration of Lync 2011 than was available in earlier versions, you can start live conversations from Outlook 2011. Hover over a name, see a person's availability and then easily start a conversation directly through instant messaging, voice call, or video.

Outlook 2011 interoperability

We spend a lot of time in e-mail. With the integration between Outlook 2011 and Lync 2011 the first thing you should notice is presence indicators next to addressee names in Outlook contact lists, received emails and calendar entries.

Presence indicators

Whether you are inviting someone to a meeting using Outlook or receiving an email in your Inbox, the presence indicators that we first noticed in the Lync program window and contacts list are displayed.

To take advantage of Lync 2011 features while in Outlook:

1. Hover over the contact name to view the contact card.
2. Launch a communication method from the icons at the bottom of the contact card (including calling the contact).

Respond Area in Outlook 2011 Contact Window

Another way to make use of Lync's features is on the contact card (when hovering) by clicking the Open Outlook Contacts option. This will display additional tools for communicating from the Outlook 2011 contact window (even if the contact is not in your Outlook 2011 contact list).

Exercise:

Call a contact from the icons on the contact card displayed when hovering in an email message in Outlook 2011. Send an instant message.

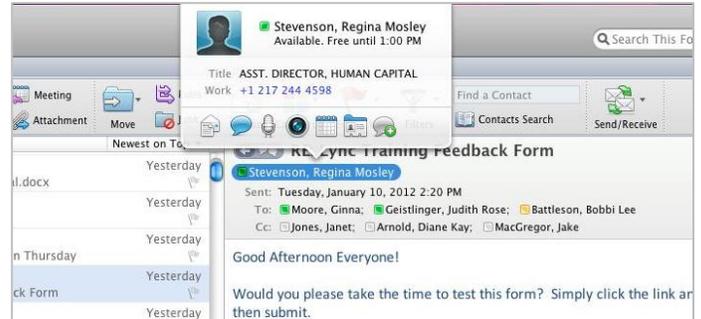


Figure 5-1: Email message displaying contact card.

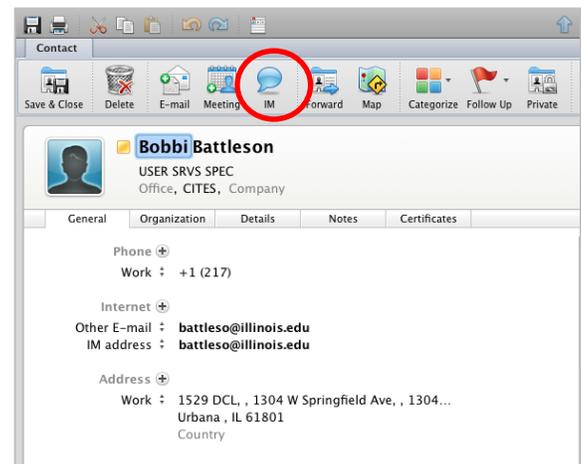


Figure 5-2: Outlook 2011 Contact window.