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:

<table>
<thead>
<tr>
<th>Presence status</th>
<th>Status description</th>
<th>How status gets set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>Online, available to contact</td>
<td>Automatic or user-selected.</td>
</tr>
<tr>
<td>Be Right Back</td>
<td>Away from computer briefly</td>
<td>User-selected.</td>
</tr>
<tr>
<td>Away</td>
<td>Logged on but has been away from computer for specified period</td>
<td>Automatic based on inactivity or user-selected. Time interval can be adjusted.</td>
</tr>
<tr>
<td>Off Work</td>
<td>Not working, not available</td>
<td>User-selected.</td>
</tr>
<tr>
<td>Busy</td>
<td>Occupied and shouldn’t be interrupted</td>
<td>Automatic (if user is in an Outlook-scheduled conference) or user-selected.</td>
</tr>
<tr>
<td>In a call</td>
<td>In a Lync call (two-party call) and shouldn’t be interrupted</td>
<td>Automatic.</td>
</tr>
<tr>
<td>In a meeting</td>
<td>In a meeting (per Lync or per Outlook) and shouldn’t be interrupted</td>
<td>Automatic.</td>
</tr>
<tr>
<td>In a conference call</td>
<td>In a Lync conference call (Lync meeting with audio) and shouldn’t be interrupted</td>
<td>Automatic.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>Not to be disturbed; will see IM requests only if sent by Workgroup members.</td>
<td>User-selected.</td>
</tr>
<tr>
<td>Presenting</td>
<td>Giving a presentation and therefore not to be disturbed</td>
<td>Automatic when user is presenting from Lync-enabled computer. IMs are blocked.</td>
</tr>
<tr>
<td>Offline</td>
<td>Not signed in</td>
<td>Automatic. Status may appear to contacts not using Lync IM.</td>
</tr>
<tr>
<td>Unknown</td>
<td>Presence can’t be detected</td>
<td></td>
</tr>
</tbody>
</table>

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.

Find someone
The quickest way to find someone via Lync is to launch a search by typing the person’s name, phone number, 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.
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.

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.

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.

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.
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. Choose how you want to start the conference call by clicking Lync Call or one of the numbers.

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. This sends the call to voice mail, if voice mail is available for your account.
- For other actions, click Options, and then click:
  - Voice Mail to send the call to voice mail, if available.
  - Reply by IM to start an instant messaging (IM) conversation with the caller instead of an audio call.
  - Set to Do not Disturb to reject the call and other calls, until you change your status.
  - Another number to redirect the call to that number, if call forwarding is available for your account.

Lync 2013 for Office 365 Quick Reference

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.

Make a call

From your Contact list

1. Pause on a contact’s picture.
2. Click the phone button to call the contact on their computer, or click the arrow next to the phone button and select a number to call.

From the dial pad

1. In the Lync main window, click the Phone tab.
2. Click the numbers on the dial pad, or type the number in the search box, then click Call.

Lync calls the number just like a regular phone.

IMPORTANT The ability to make calls to and receive calls from standard phone numbers, use voice mail, and forward calls is available only with Lync Plan 3 and the appropriate account configurations. For details, contact your workplace technical support.
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 button, and then select Lync Call or one of the numbers listed. You can also click New Number, and type a number to call.
Join a Lync meeting

1. In the meeting request, click {Join Lync meeting} or click {Join Online} in the meeting reminder. Or, if the meeting request includes call-in information, you can call in to the meeting from a phone.
2. If you’re joining by using Lync, on the {Join Meeting Audio} window, select one of these options.

<table>
<thead>
<tr>
<th>Use Lync (full audio and video experience)</th>
<th>You can use computer audio and video with your computer’s built-in devices, or a headset and camera.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t join audio</td>
<td>Select this if you prefer to call in to the meeting audio with a phone. Use the conference numbers and ID in the invitation to dial in.</td>
</tr>
</tbody>
</table>

Set meeting options

You can customize some meeting options, including who has access, present, and share video, for an individual meeting. 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.

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](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.

Lync Meetings

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.

Don’t join audio

Select this if you prefer to call in to the meeting audio with a phone. Use the conference numbers and ID in the invitation to dial in.
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.

Record and playback the meeting

Lync recording captures audio, video, instant messaging (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 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 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.
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.

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.
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 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).

Transfer a file

Use the file transfer option to send documents to your contacts in an instant message.

1. In your Contacts list, double-click a contact’s name to open an IM conversation.
2. Drag the file from your computer onto the conversation window, or click the present (monitor) button and use the Attachment tab.

Lync sends a file transfer invitation to the recipient, 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.

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.
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.
- **Presentation 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.

**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 your 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.
**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.

**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**.

**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. This sends the call to voice mail, if voice mail is available for your account.

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

- Send the call to voice mail, if available.
- Redirect to another number, if available.
- 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.

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

**IMPORTANT** The ability to make calls to and receive calls from standard phone numbers, use voice mail, and forward calls is available only with Lync Plan 3 and the appropriate account configurations. For details, contact your workplace technical support.