

Getting Started with Lync Online

By

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<http://www.ciaops.com>



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Index

What is Lync Online?	Page 4
What does this document contain?	Page 4
How can I use Lync Online?	Page 5
Installing Lync client on a PC	Page 8
Using Lync client	Page 15
Scheduling a Lync meeting	Page 37
Attending a meeting	Page 42
Instant Messaging	Page 46
Video	Page 47
Sharing	Page 48
Recordings	Page 65
Conclusion	Page 70
Where to go from here	Page 70
Glossary	Page 71
Useful Links	Page 72
Useful Videos	Page 72
About	Page 73

What is Lync Online?

Lync Online is a component of Microsoft Office 365 and is a hosted version of Lync Server 2010 in Microsoft datacenters. It is accessed across the Internet typically using software that is installed on your device. Software is available for PCs, MAC's, iPad, Windows Phone and most mobile platforms.

Lync is a Microsoft product that is available either on site or from the 'cloud'. It is an integrated solution for instant messaging, presence, conferencing and voice. It also provides direct integration into other Microsoft products like Outlook, SharePoint and Office applications such as Word and Excel which permit you to communicate with team members without leaving what you are doing. Using Lync you can share desktops, whiteboards, presentations and online polls.

With Lync's presence feature you can see the status of other members in your team; are they available, busy or away. Lync also allows you to control how your own status is presented. When you collaborate with others, you can do so using integrated video to make communication more personal.

You can use Lync with others who don't have the Lync client installed, via the web conferencing facility. This allows them to join a meeting or a presentation simply via their browser.

What does this document contain?

This document will examine the basic operation of Lync Online for Office 365. Lync Online is also available for most Office 365 plans, however, some of the features may be slightly different depending on what plan you have. For more information about the capabilities of your Lync plan visit the Office 365 web site (details in the **Links** section at the end of the document).

Basic operations for Lync Online:

1. Installing the Lync client on a PC.
2. Signing into Lync.
3. Using Lync client.
4. Making Lync calls.
5. Sharing information via Lync meetings.
6. Advanced Lync configuration.

This document will take you step by step through the above operations showing you each item in detail, including screen shots. If you have access to Lync Online with Office 365 you are encouraged to follow along with the tutorial to get a better feel for the power of Lync.

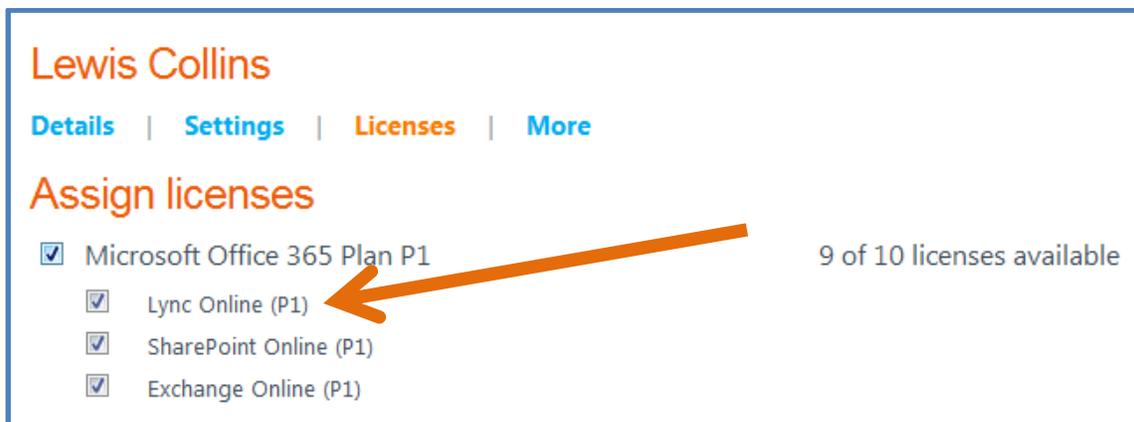
You will also find a number of common Lync terms underlined throughout the guide. A summary of these terms can be found in the Glossary at the end along with a list of resources.

Also at the end of the document you will find a list of resources to help improve and extend your understanding of Lync.

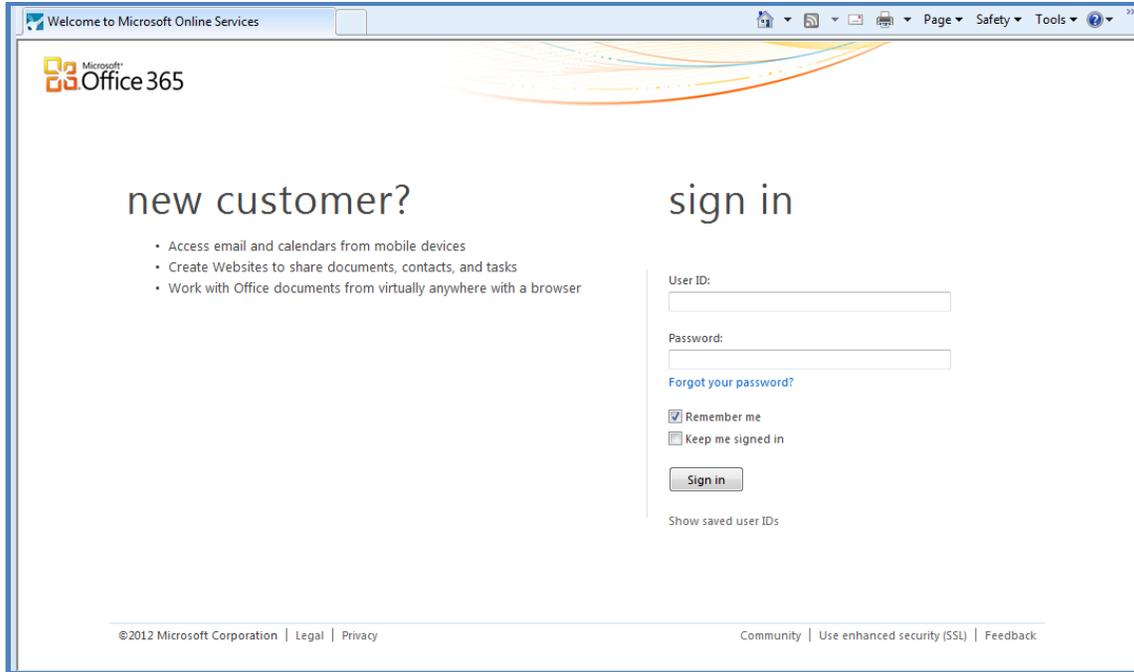
How can I use Lync Online?

Lync Online is normally accessed by firstly installing client software. This can be done on most devices; however, this guide will only show you how to do this on a Windows PC. For information about installing Lync clients on other devices please refer to the ***Where to go from here?*** section at the end.

You will need to have Lync enabled by your Office 365 administrator to be able to use it. Your Office 365 administrator will need to ensure they have checked the option for Lync in the *User Licenses* in the administration section as shown below.



Each user then simply opens a browser on any machine connected to the Internet and enters the Office 365 portal URL by typing <https://login.microsoftonline.com> into the address line. After doing so you should now see the following screen displayed:

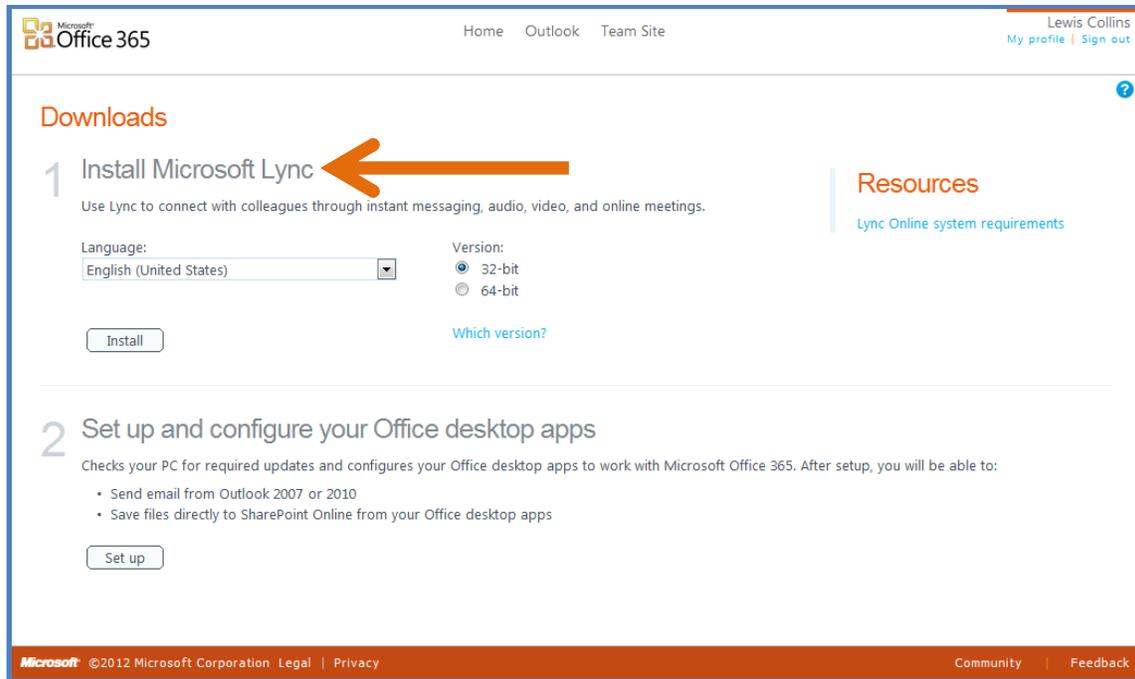


You can use just about any browser to access the Office 365 portal, however, you get the most functionality when you use Microsoft's Internet Explorer and for that reason, this is what we will consider here. If you choose another browser, some of the options and displays may be different from what is covered here.

Once you enter your Office 365 *User ID* and *Password* and press the **Sign in** button you will be taken to the Office 365 portal which should look something like:

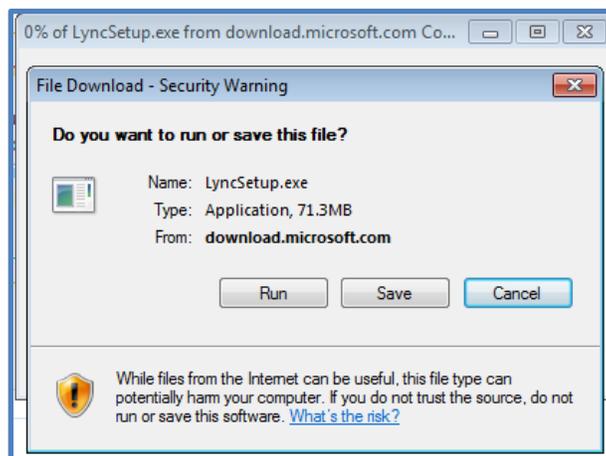
The screenshot shows the Microsoft Office 365 user interface. At the top left is the Microsoft Office 365 logo. The top navigation bar includes 'Home', 'Outlook', and 'Team Site'. The user's name 'Lewis Collins' and 'My profile | Sign out' are in the top right. The main content area is titled 'Start here' and contains a list of instructions: '1. Run the Setup Quickstart again.', '2. Get an overview of Office 365. Watch the user tour', and '3. Learn the basics. Read the Quick start guide'. Below this are sections for 'Outlook', 'Lync', 'Team site', and 'Website'. An orange arrow points to the 'Install Lync' link under the Lync section. The right sidebar shows the date 'May 9 Wednesday' and a search bar. The footer includes 'Microsoft ©2012 Microsoft Corporation' and links for 'Community' and 'Feedback'.

Click the **Install Lync** hyperlink under the Lync heading in the middle of the page. This will take you to the Office 365 Downloads page. There may be some differences in the screens here depending on which Office 365 plan you are using.

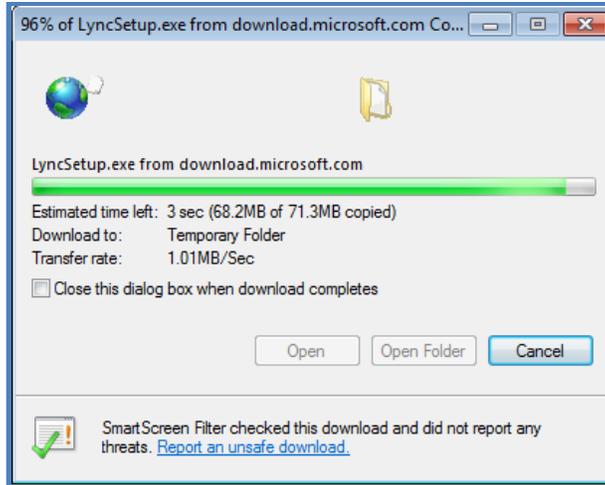


You should then see the option to install Lync as shown above. Simply select your language and version, either 32 or 64 bit and click the *Install* button.

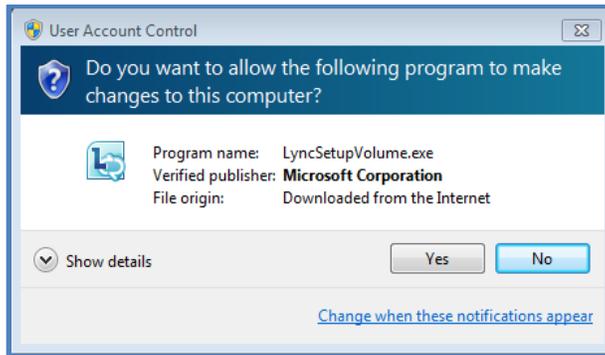
Installing Lync Client on a PC



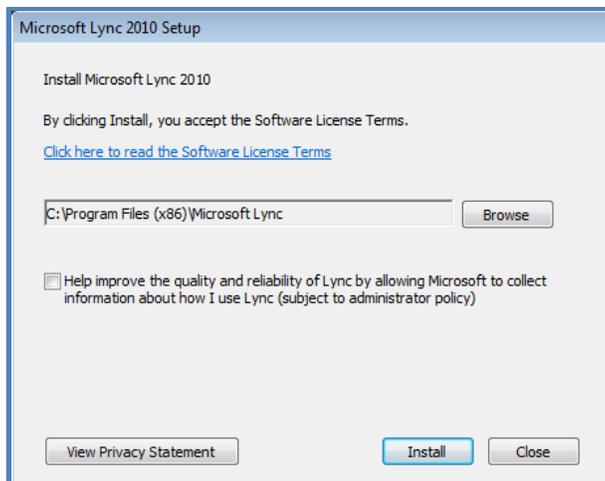
Press the **Run** button to download and install the software, approximately 72MB in size.



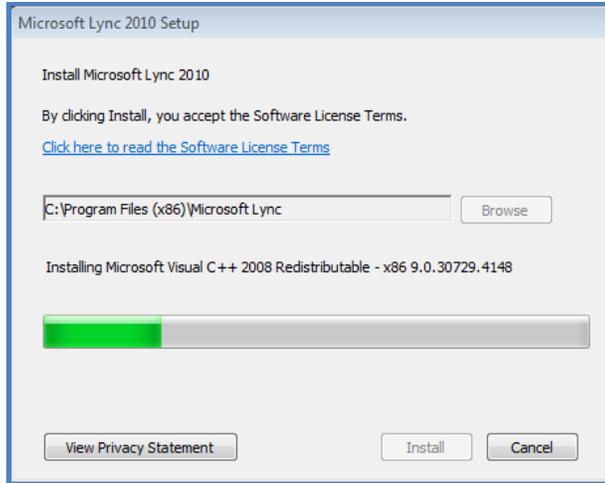
Accept the *User Access Control (UAC)* screen.



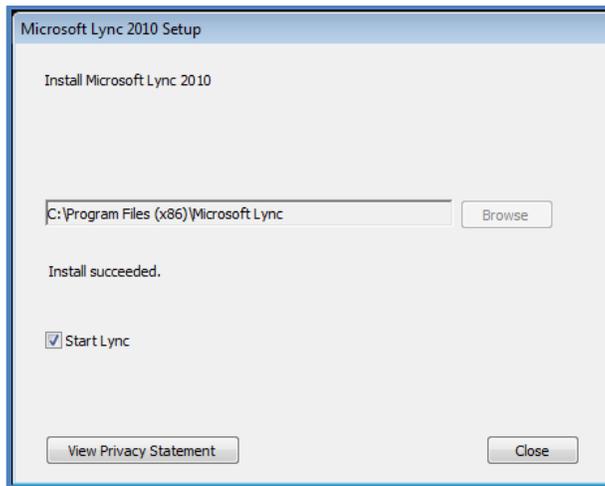
Confirm the installation location.



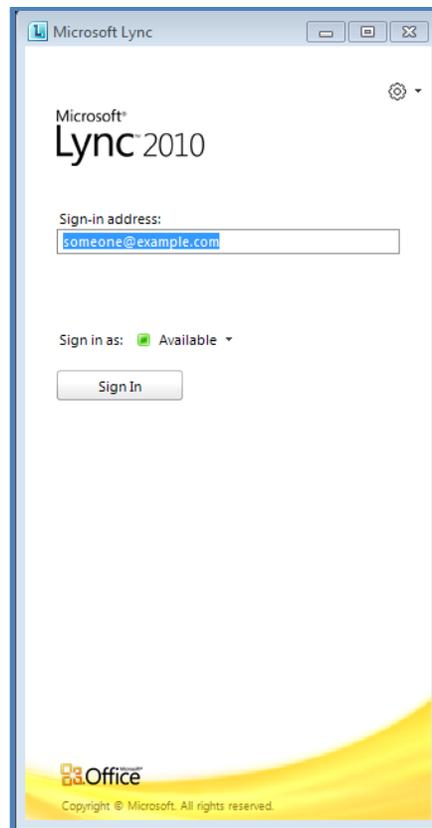
And press the **Install** button.



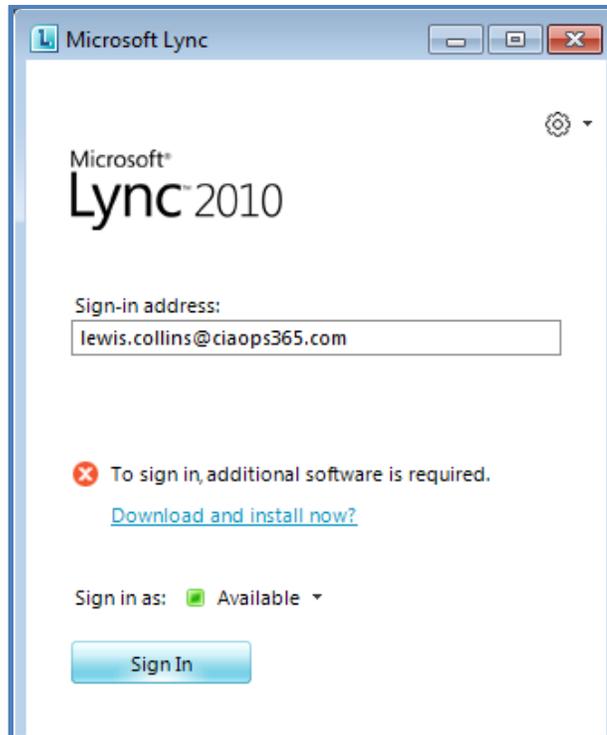
The installation will now run.



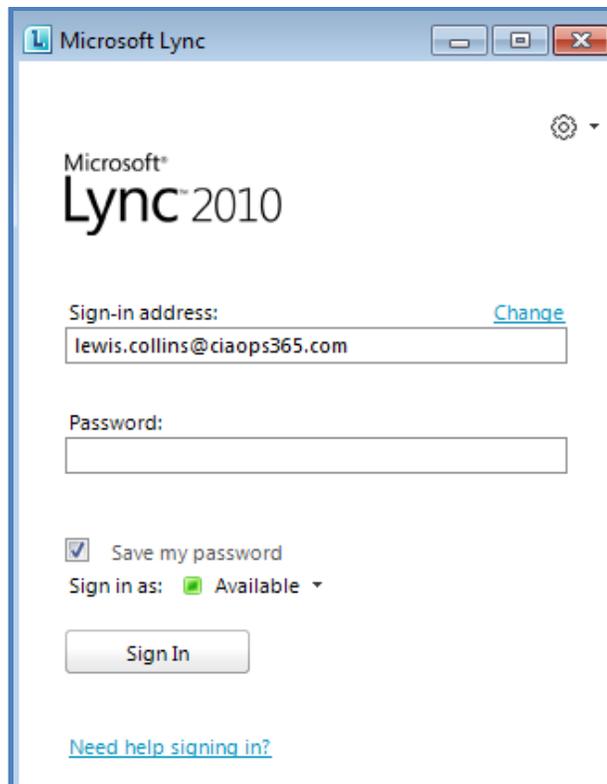
When complete, ensure the *Start Lync* option is selected and press the **Close** button.



You'll now be prompted to login to Lync. To do so, enter your Office 365 credentials and click the **Sign In** button.



You may be prompted to install additional software as shown above. Click on the hyperlink to download and install the additional software. If prompted, click the option to run any additional installation package.

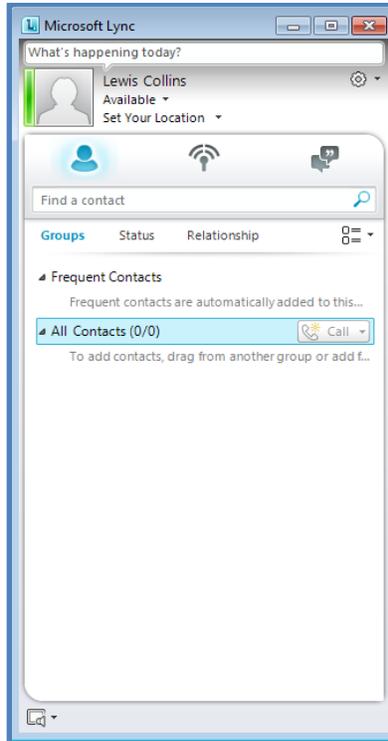


You may also be prompted for your password. Enter your details and press the **Sign In** button.

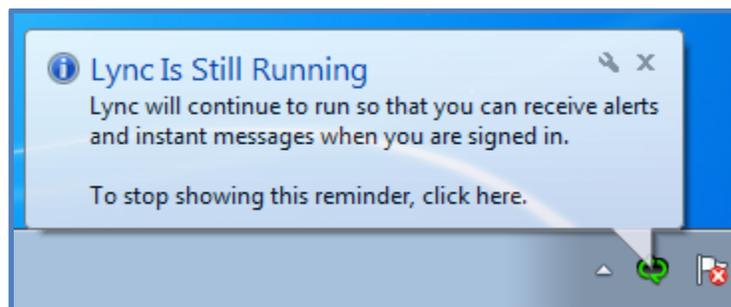


After successfully logging in you'll be presented with a brief Lync tutorial. To exit, click the cross (X) in the top right hand corner of the window.

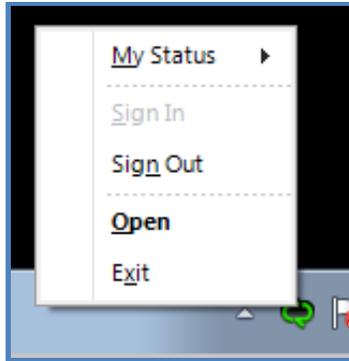
Using Lync client



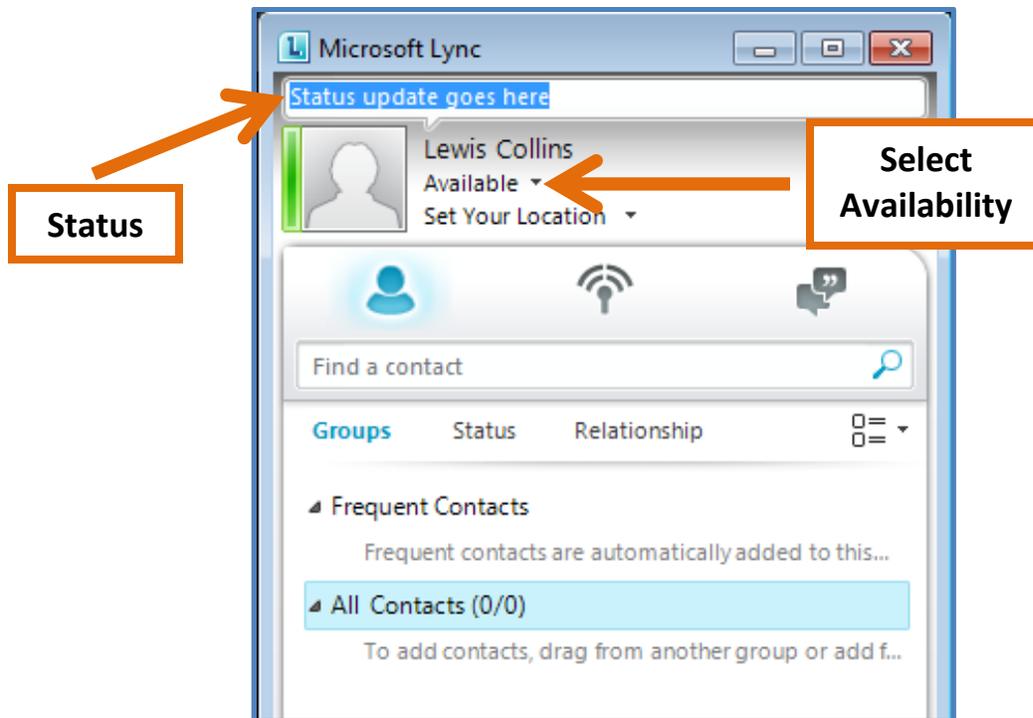
You should now see the above Lync window. If you close this window by clicking the cross (X) in the top right, Lync will be minimized to your *Windows System Tray* in the lower right of your screen.



As you can see Lync continues to run in the background. To stop the pop-up reminders click on the above reminder box.

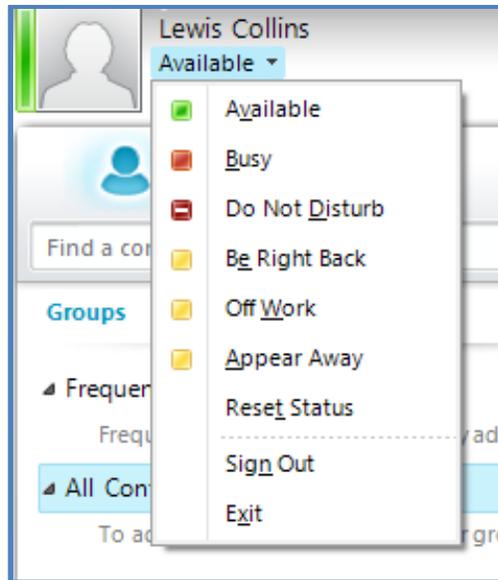


If you click on the Lync icon in the *System Tray*, a menu will open. By selecting **Open** from this menu the Lync windows will be maximized.



At the top of the Lync window is a *Status* line. You can add information you wish people to see when looking at your contact card.

Below the *Status line* you will see your name and below that you will see your availability. When you click on the down arrow to the right of *Available* you will find you have a number of different options to select.



You can select any of these to communicate your presence to others. The *Availability* field will automatically update at times to *Busy*, for example, when you are in a Lync meeting.

However, you can always set these manually if desired. You will also notice the options to *Sign Out* and *Exit* at the bottom of the list.

Below the *Available* field is the *Set Your Location* field. You can edit this to let people know where you are currently located. Click into this field and type your location in there if you wish to use this.

Directly below the *Set Your Location* field are three buttons (moving from left to right), *Contacts*, *Activity Feeds*, *Conversations*.



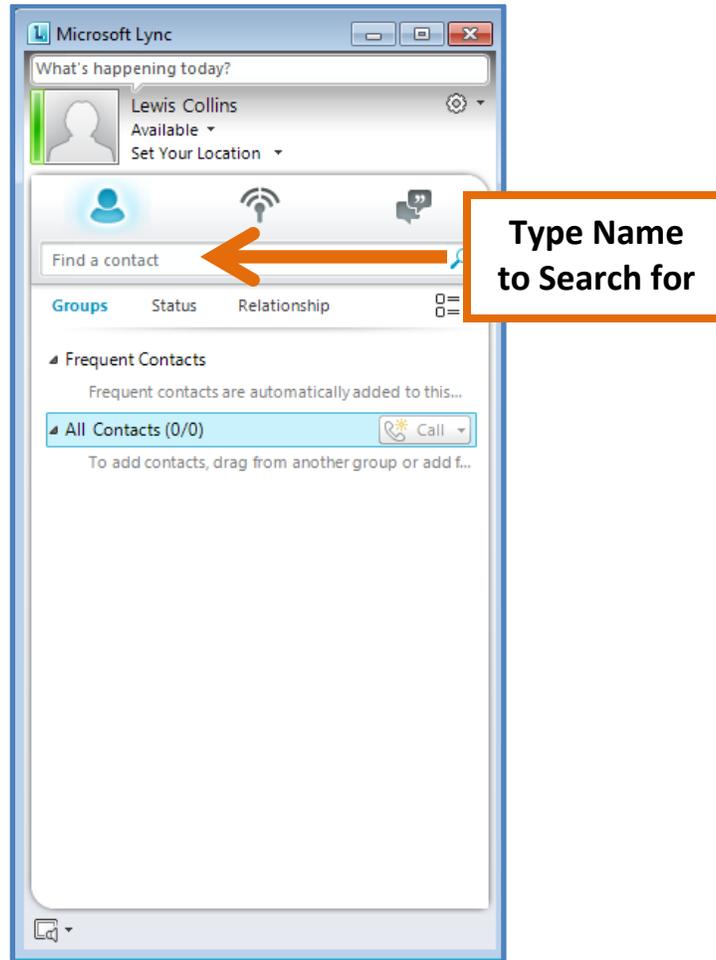
Contacts – displays the people you are linked to. You can view their status as well as launch quick conversations.

Activity Feeds – lets you know what other people in your contact list are doing, for example, when a contact changes their picture, status field and so on.

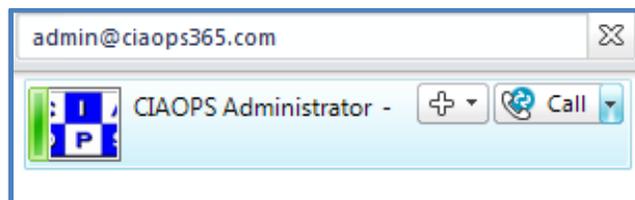
Conversations – shows you previous Lync conversations, including those you may have missed.

Directly under those buttons you'll find a *Search box* into which you can type the name or email address of a contact you wish to add to your Lync.

To add a contact, click into the *Find a contact* search box. Type either the name or the email address of the person you wish to contact.

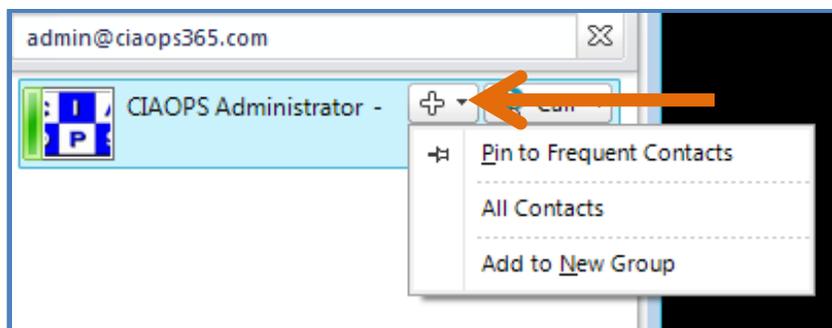


Here we have entered the email address `admin@ciaops365.com`.

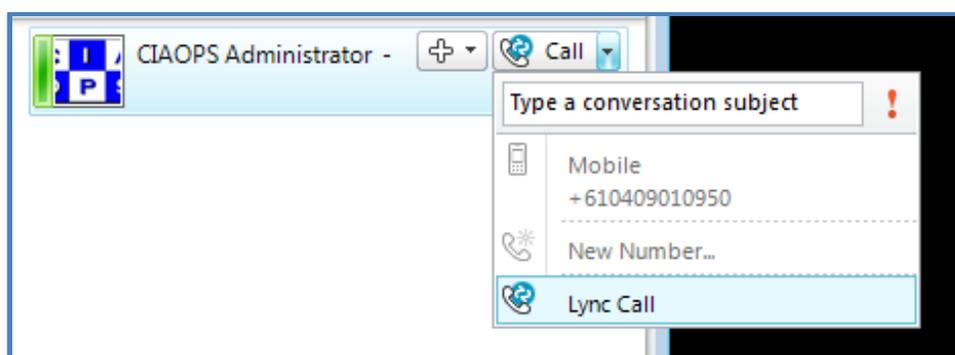


If you have the correct details for the Lync contact you should see their details appear as shown above. You can ensure that it is the correct user because their status is available and their display graphic is shown.

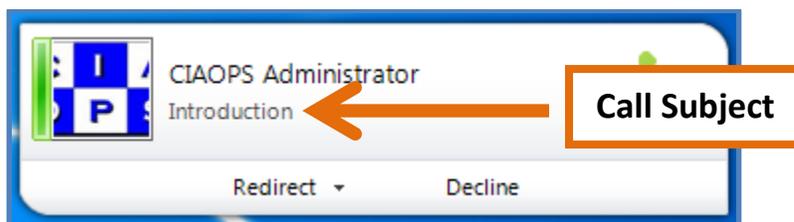
If you mouse over the right side of the contact, two buttons will appear. The first button (which appears like a plus '+') will allow you to add that contact to your Lync contact list.



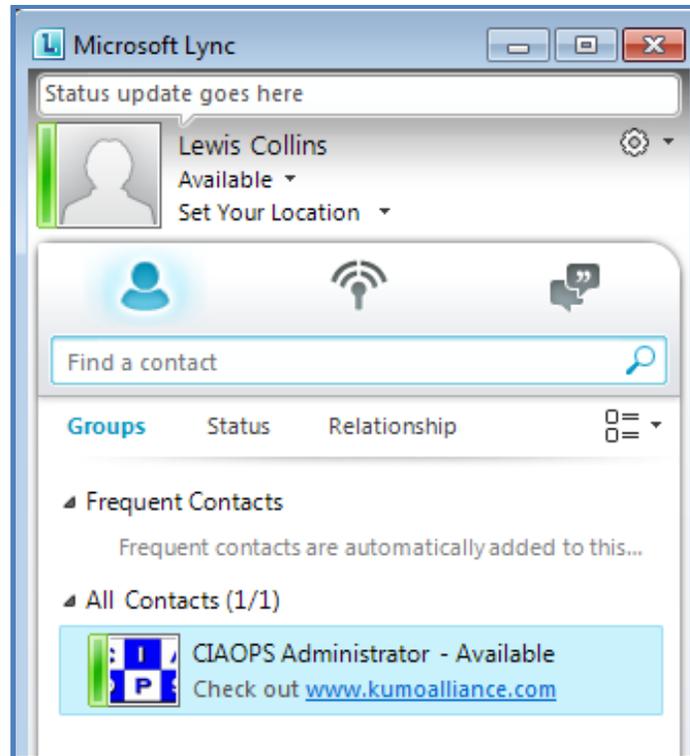
You can select to add them to any existing group you have in Lync and you can also select to create a new contact group from the menu.



The second button (looks like a handset under a globe) allows you to initiate a Lync call to that contact. You can enter the subject of the call and this will be displayed when the call is made:

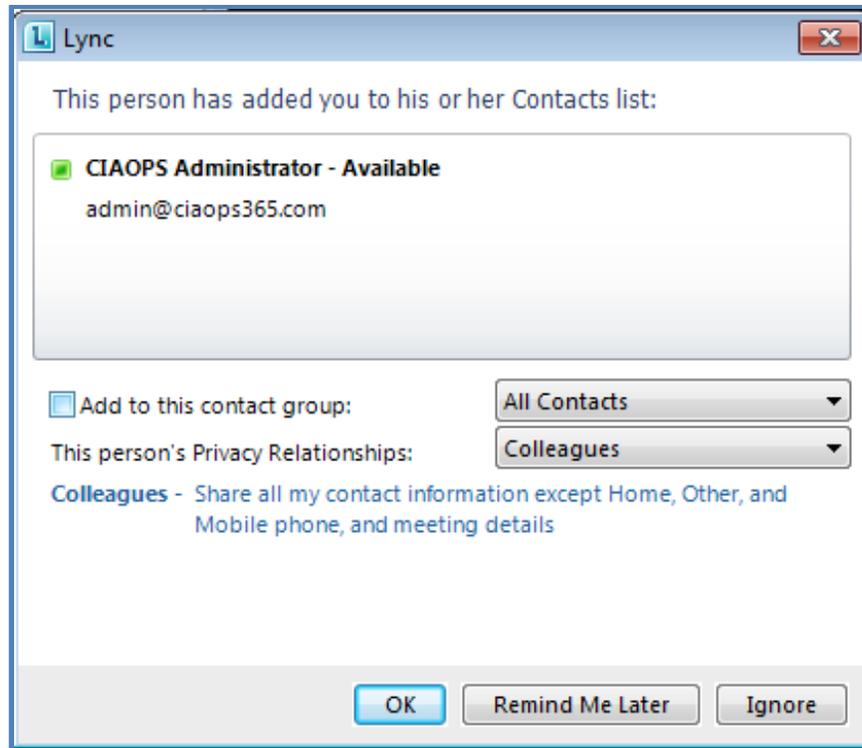


If there is connectivity to land lines and mobiles, placing a Lync call there is also possible for that contact provided you have an Office 365 plan that allows that feature. Thus, depending on the Office 365 plan you have and if Lync is configured appropriately, it is possible to make a call directly from Lync to any landline or mobile number.



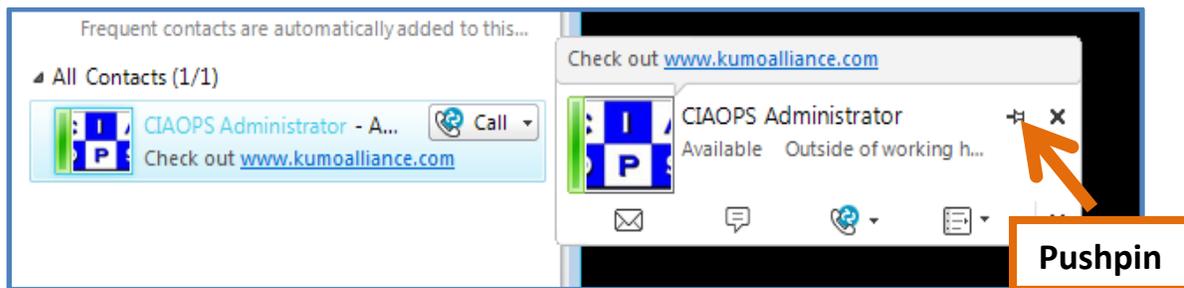
If you elect to add a contact to your Lync list they will now appear in the *Contacts* area of your Lync window like so.

From here, if you mouse over the right hand side of the contact, the *Call* button will appear again. When you add someone to your Lync contacts, that person will receive a message like:



They can elect to add your contact details to their list and also select which group they should reside in and what the relationship is.

You can also select to *Ignore* the request or be reminded later.



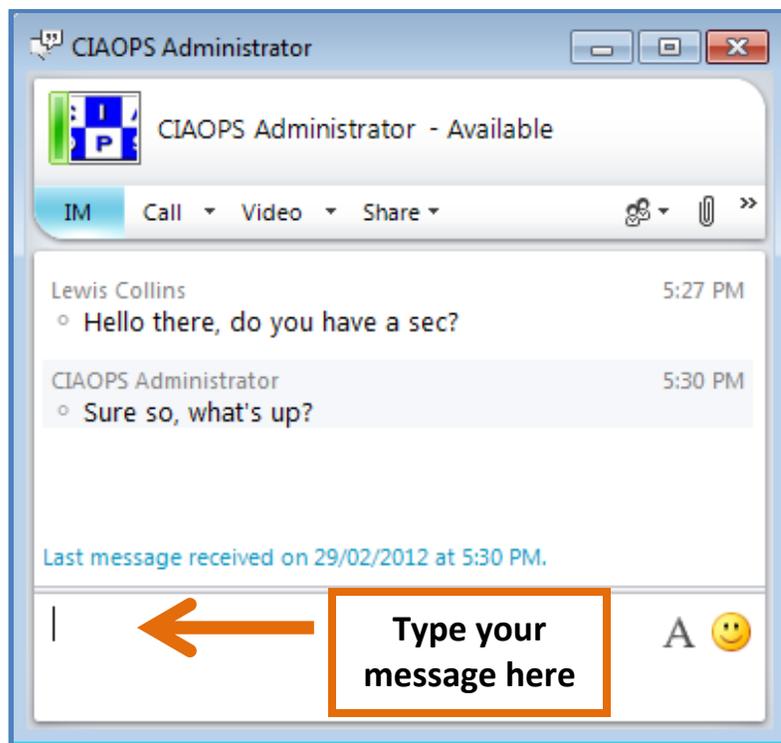
When you mouse over or click the contact you will see their contact card. If you select the pushpin in the top right corner of the contact card, the contact card will continue to display even when the mouse is moved away.

The contact card displays the name (in this case *CIAOPS Administrator*) as well as their status (in this case *Available*). Directly below this you will see a number of buttons. From left to right:

 *Send an email* – This will launch Outlook and address and email to the contact.



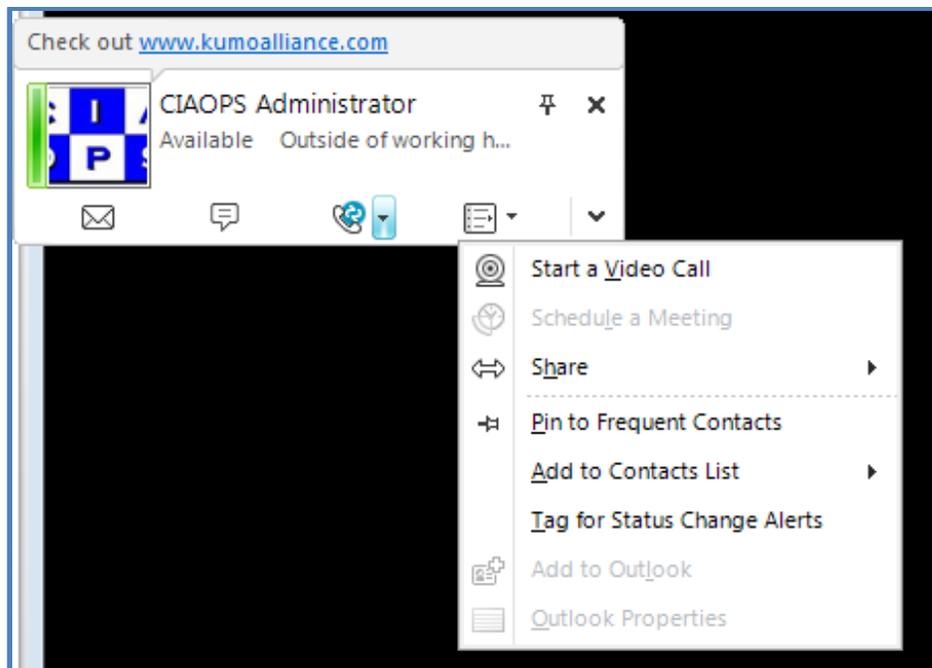
Send an instant message – This will display a chat window into which you can type your message.



Lync call – Make a Lync to Lync or Lync to phone (if available) call.

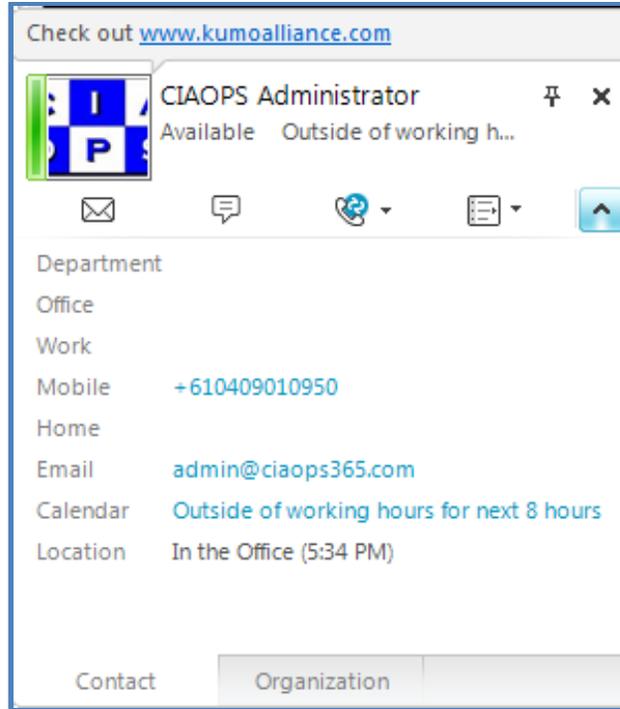


More options – Display a list of other ways to communicate including:



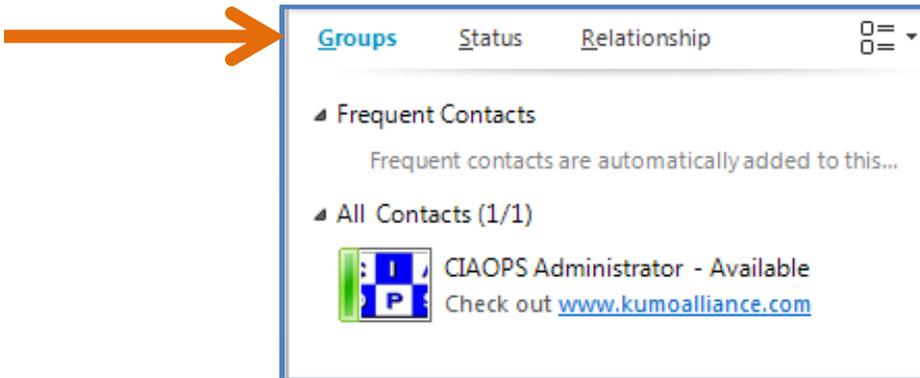
- *Start a video call*
- *Schedule a meeting*
- *Sharing desktop*
- *Pin to Frequent Contacts*
- *Tag for Status Change Alerts*

You will also notice at the extreme right at the bottom there is a down arrow you can press.

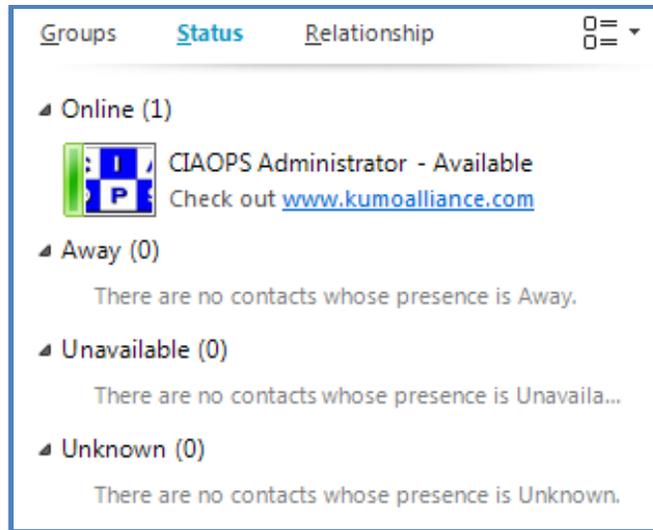


This displays an expanded contact card, which also has tabs at the bottom for *Contact* and *Organization*.

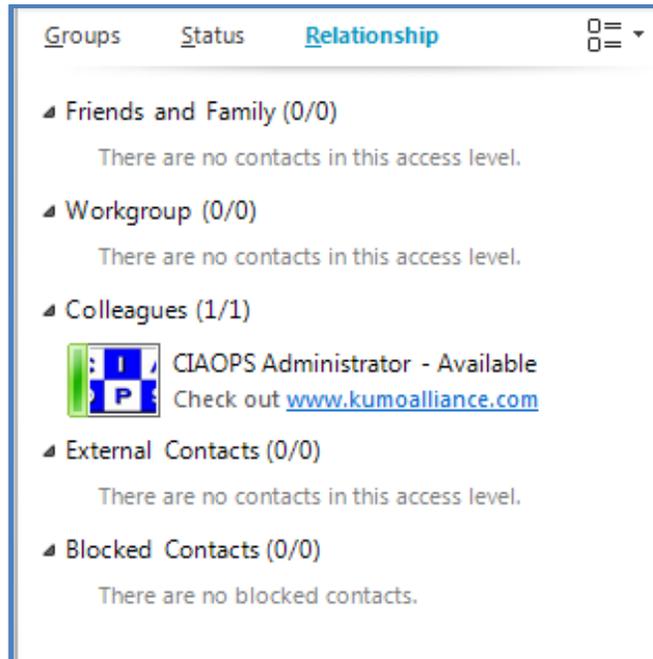
Press the arrow again to hide the contact card.



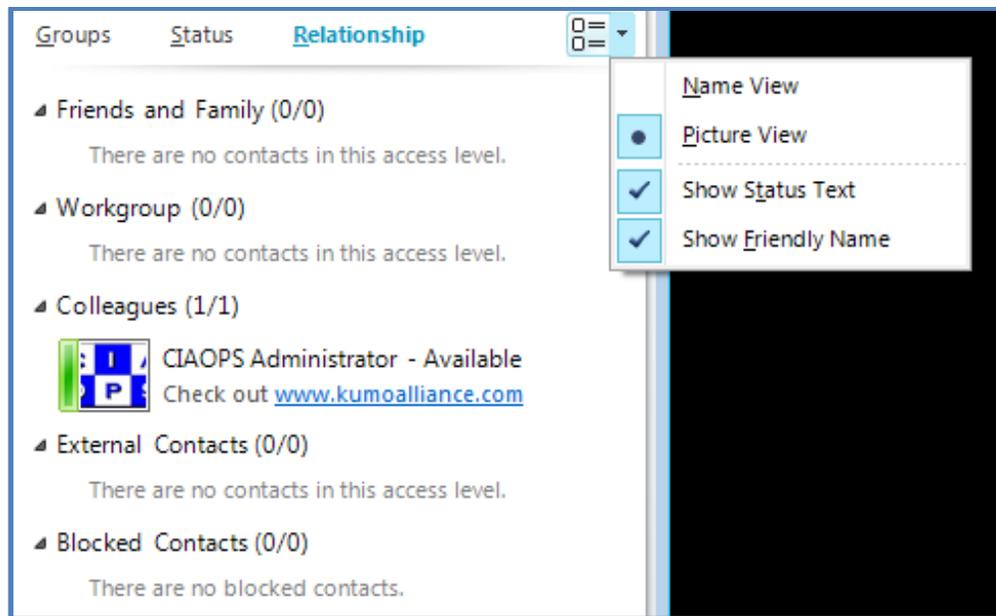
At the top of the list of contacts you will see the following hyperlinks: *Groups*, *Status* and *Relationship*. You can select to change the display of the contacts in Lync. You can display contacts by *Groups* (as shown above).



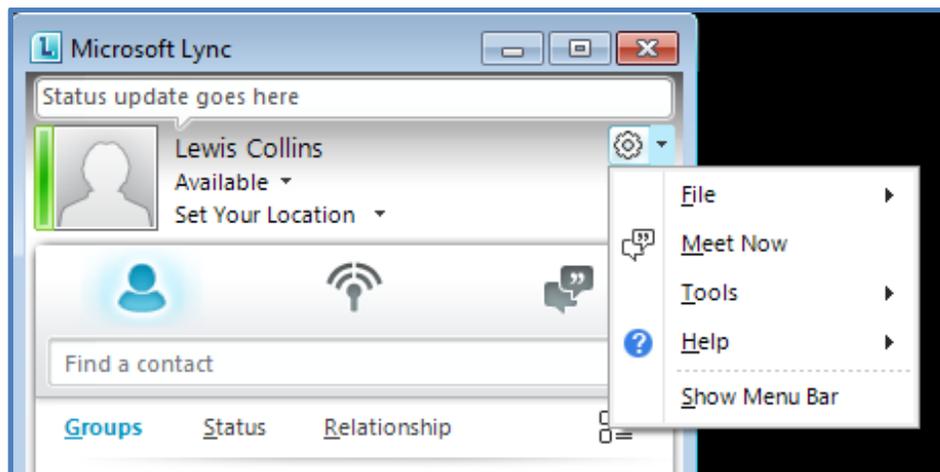
Or *Status* (shown above)



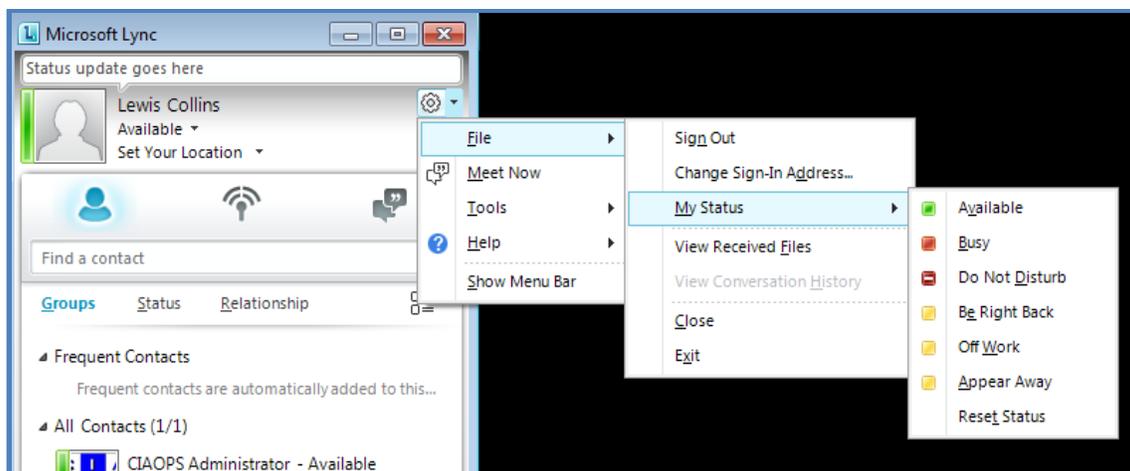
Or by *Relationship* (shown above).



Mouse over to the extreme right of the bar to find filtering options allowing you to select how information is displayed. Check and uncheck these as required.



In the top right of the Lync window you will find a *cog* icon that allows you to adjust the Lync settings.



The *File* menu allows you to do things such as:

Sign Out – Close Lync on your system.

Change Sign-In Address – Change which user automatically signs into Lync when it starts.

My Status – Change how others see your presence.

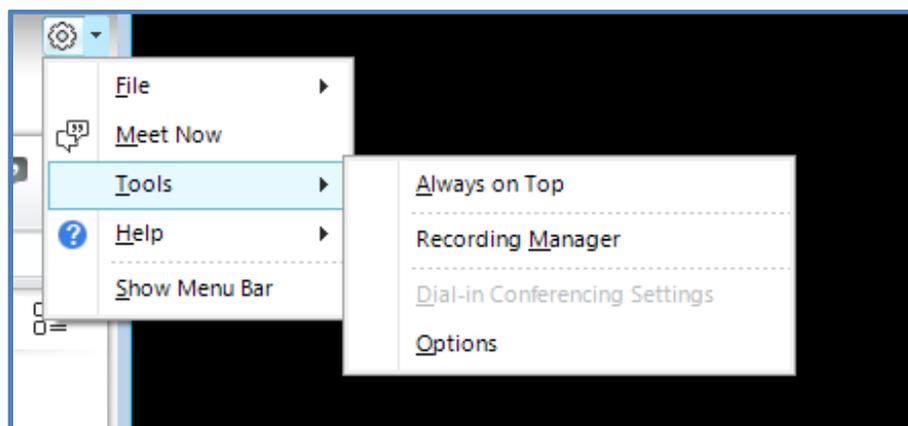
View Received Files – View files others have sent you directly via Lync.

Close – Minimize the Lync windows but keep Lync running in the background.

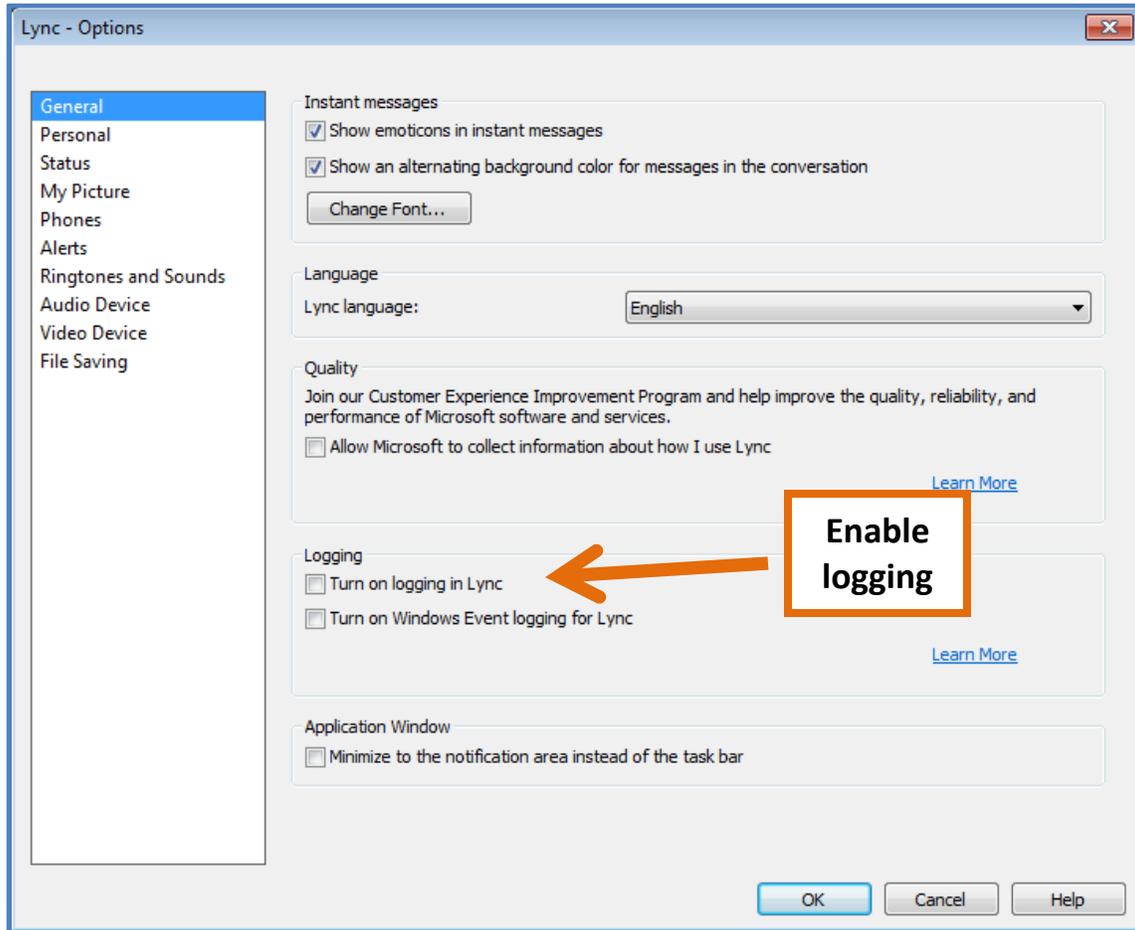
Exit – Sign out of Lync and close the program.

The *Meet Now* option will start a Lync meeting with only you in it. You can then invite others to participate in this meeting.

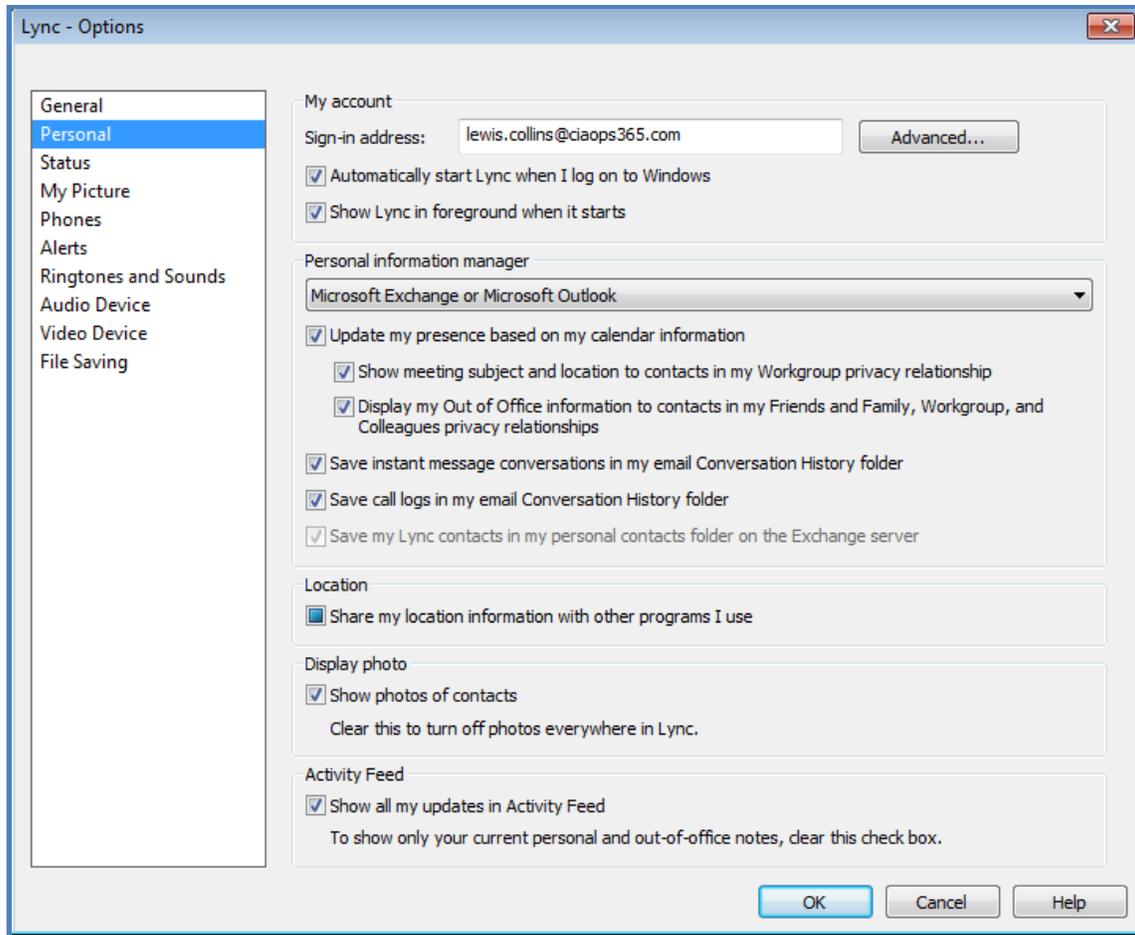
The *Tools* menu provides you access to the *Recording Manager* (detailed later) this allows you to organize recordings of your meetings as well as the Lync options settings.



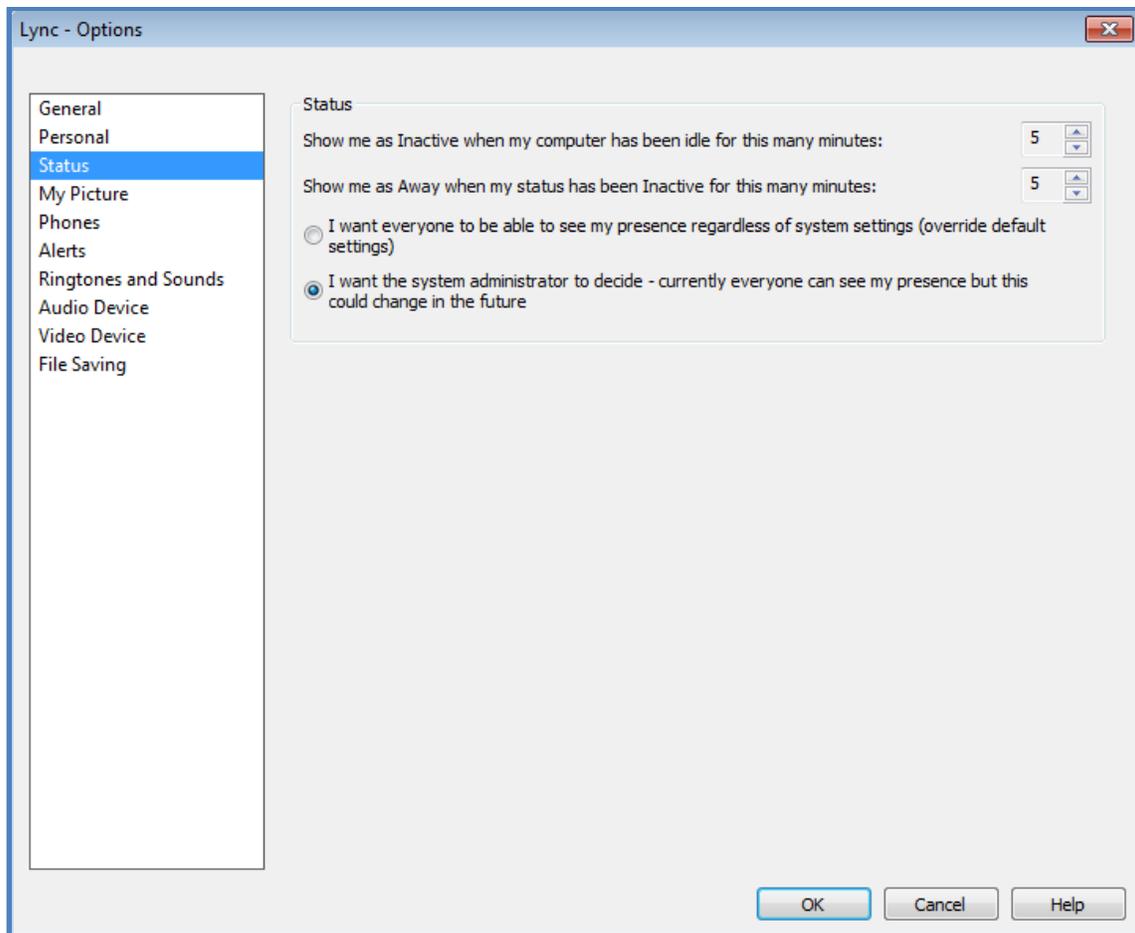
The Lync Options area provides a number of different settings for Lync as shown below:



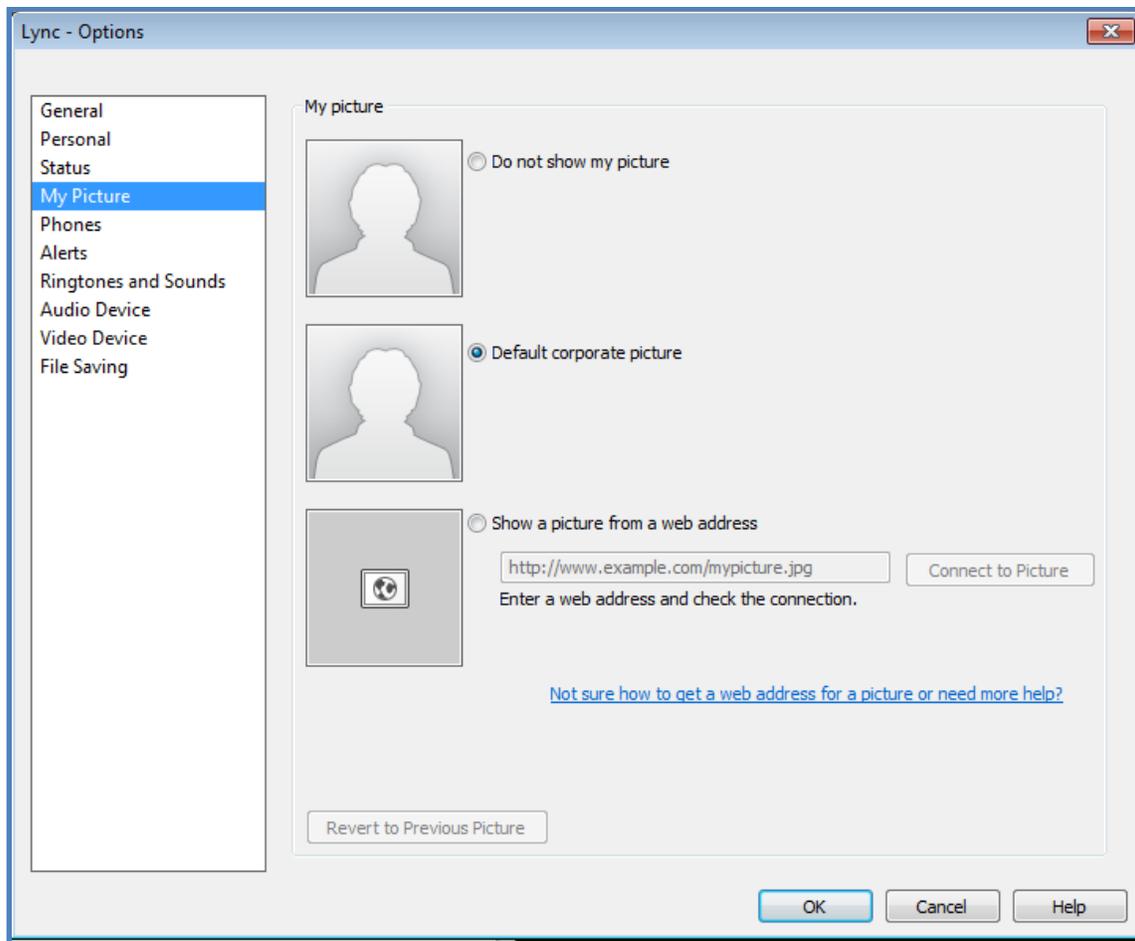
You will also notice there is an option on this front page (General) to turn on logging in Lync for troubleshooting and diagnostics.



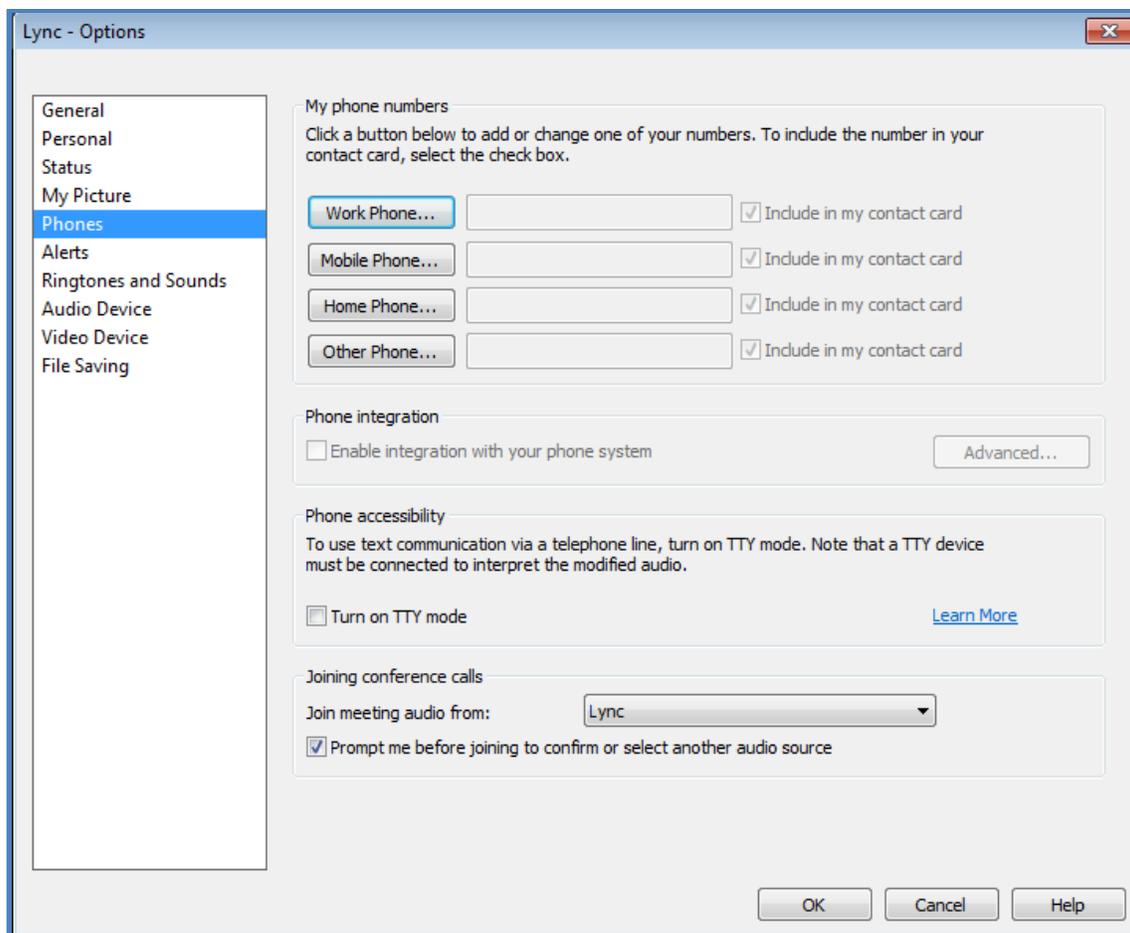
In the *Personal* tab you can set the sign-in account and whether Lync will automatically start when you log into windows (which is the default).



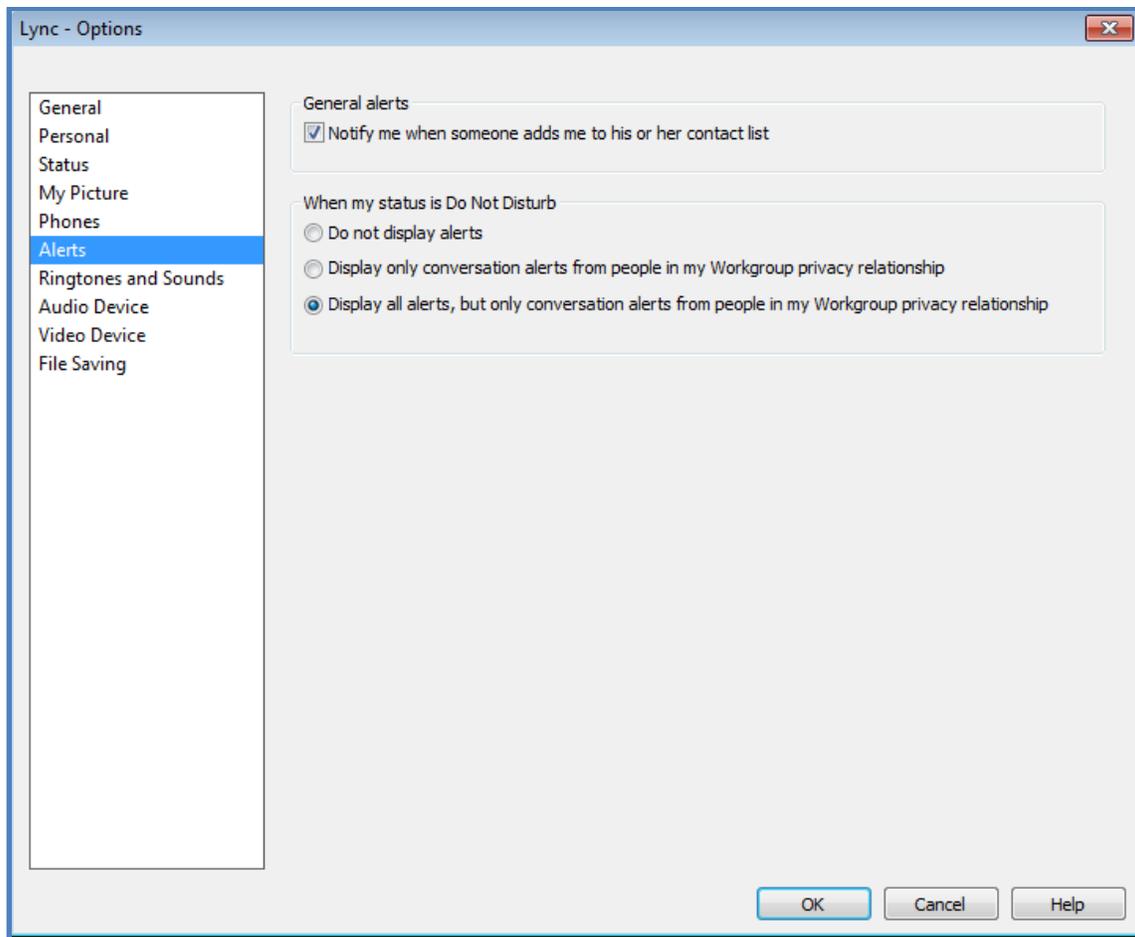
The *Status* tab allows you to determine the delay before setting your status to idle.



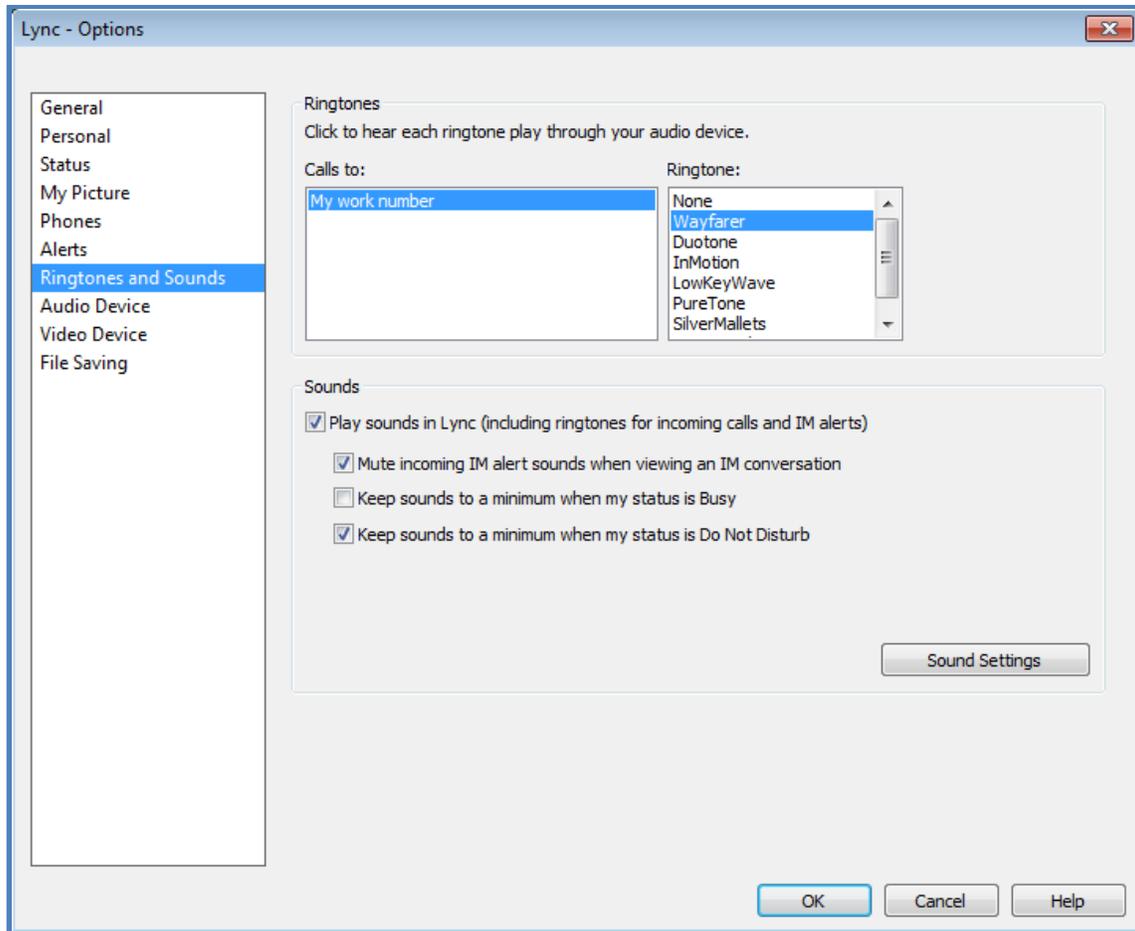
The *My Picture* tab allows you to select which image you wish Lync to display.



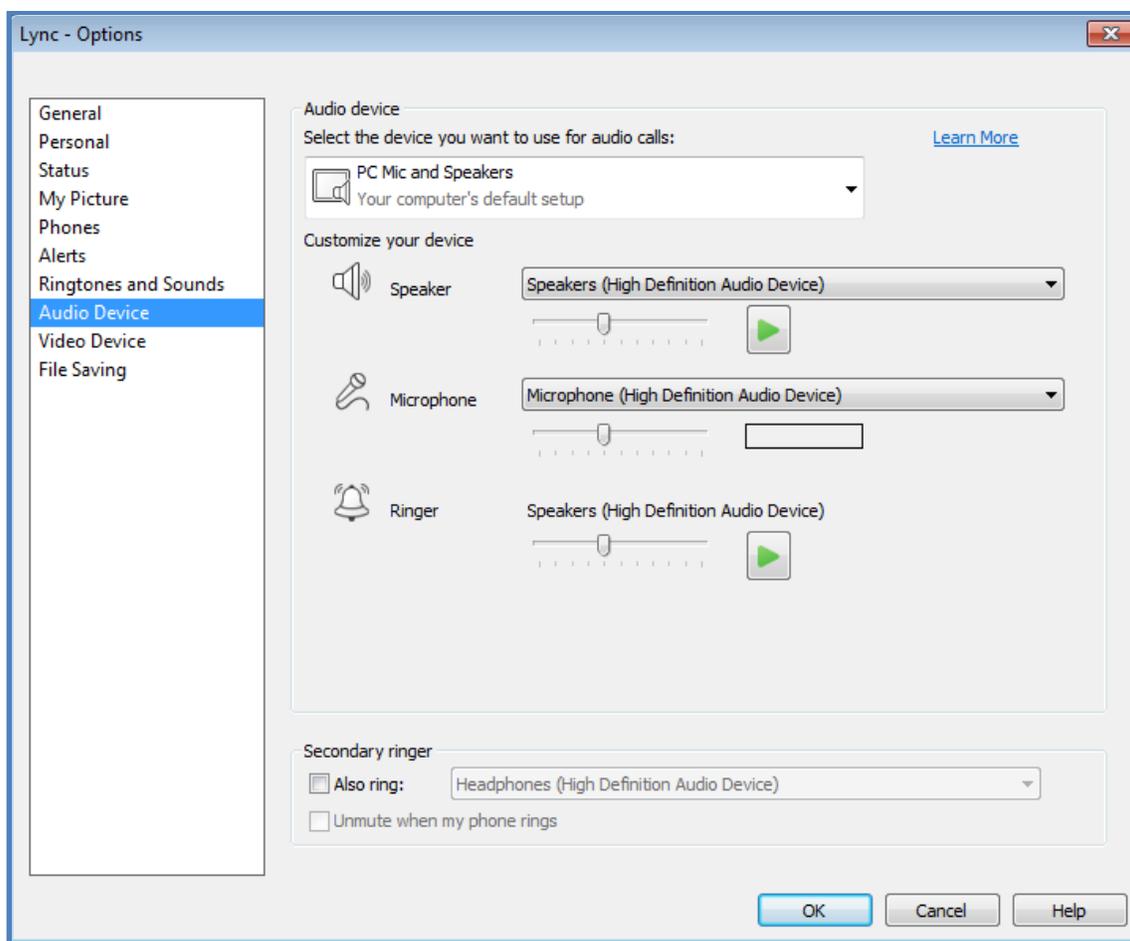
The *Phones* tab allows you to set the contact numbers you have. Depending on which Office 365 plan you have, some of these numbers may be able to be integrated with Lync.



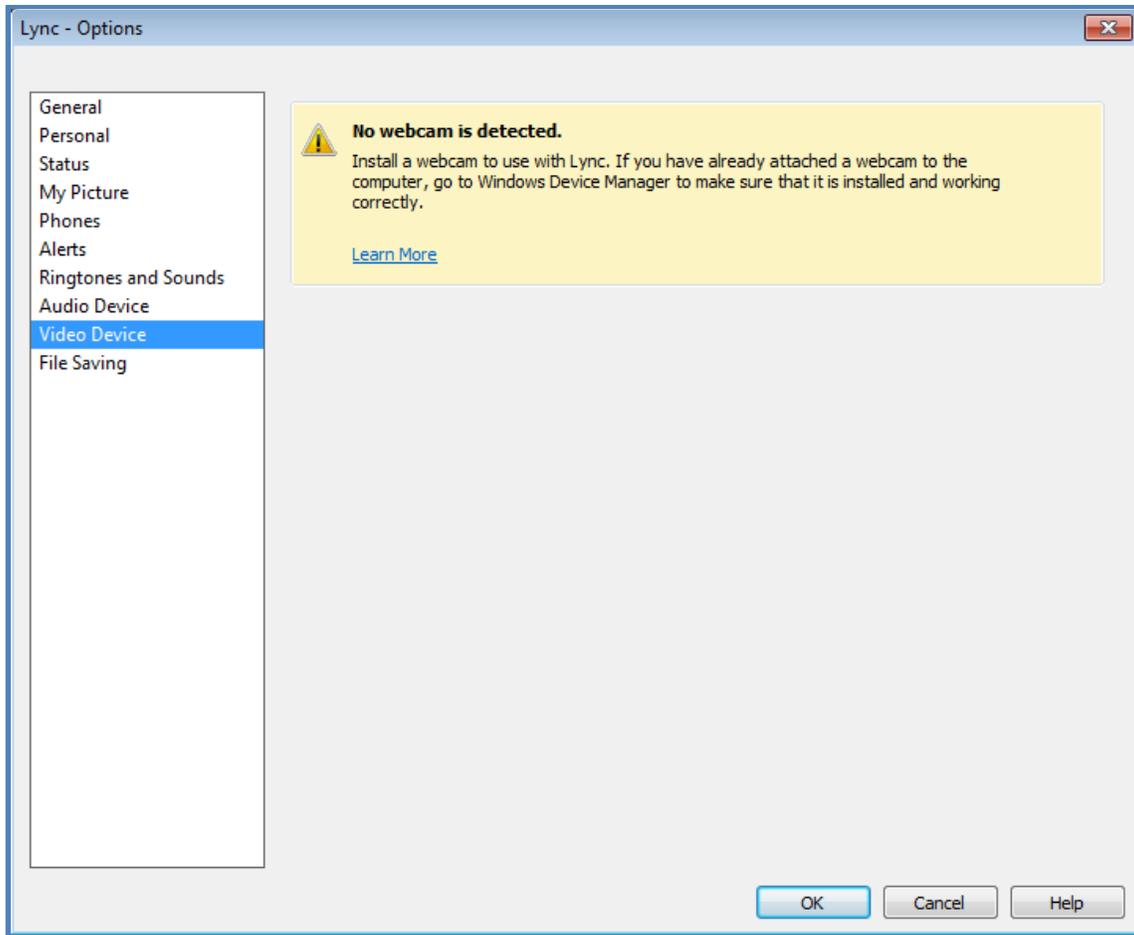
The *Alerts* tab allows you to control how general alerts are handled and what actions to take when your status is set to Do Not Disturb.



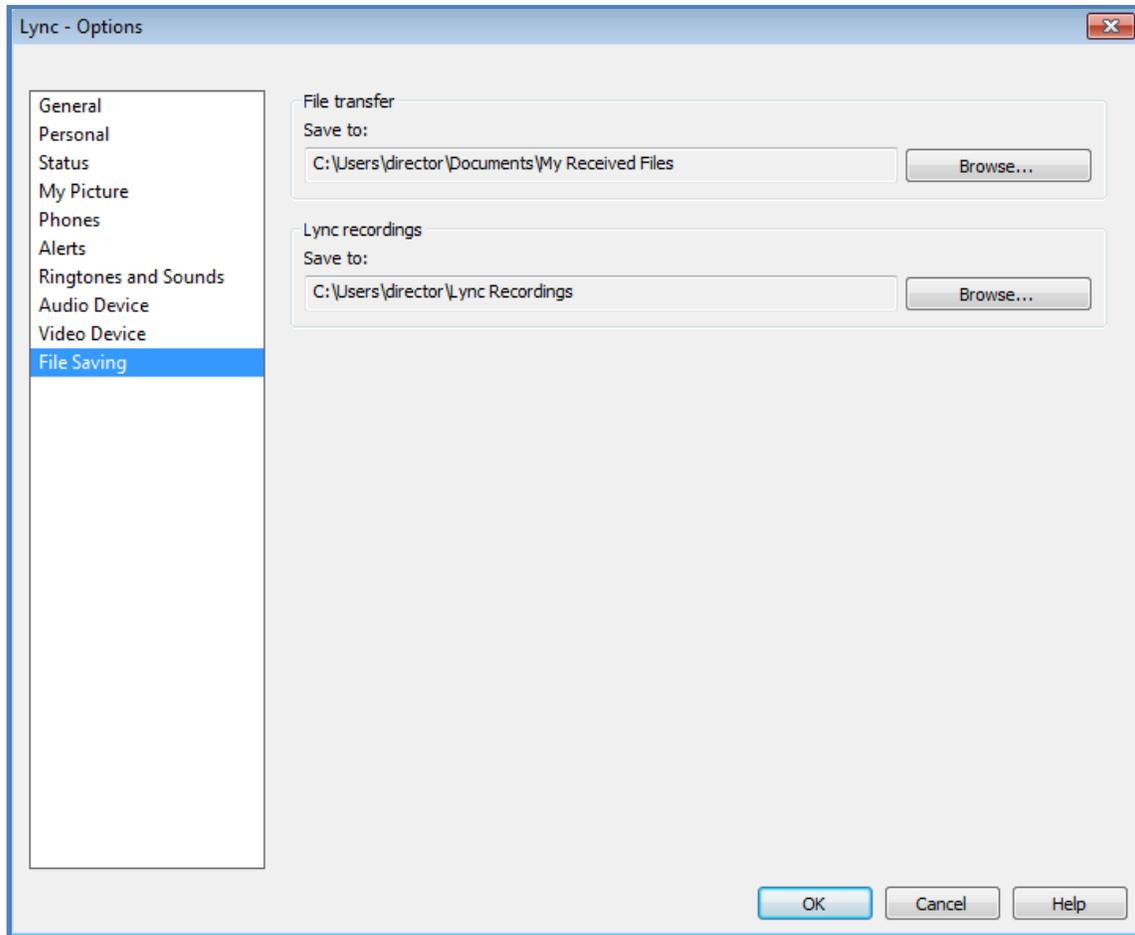
The *Ringtones and Sounds* tab allows you to control which sounds to use for call and how sounds are played in Lync.



The *Audio Device* tab allows you to configure which devices are used for audio on your desktop. You can select from the range of devices that are normally installed on your machine: this may include desktop speakers or headset devices. You can also adjust the volume on each of these devices.



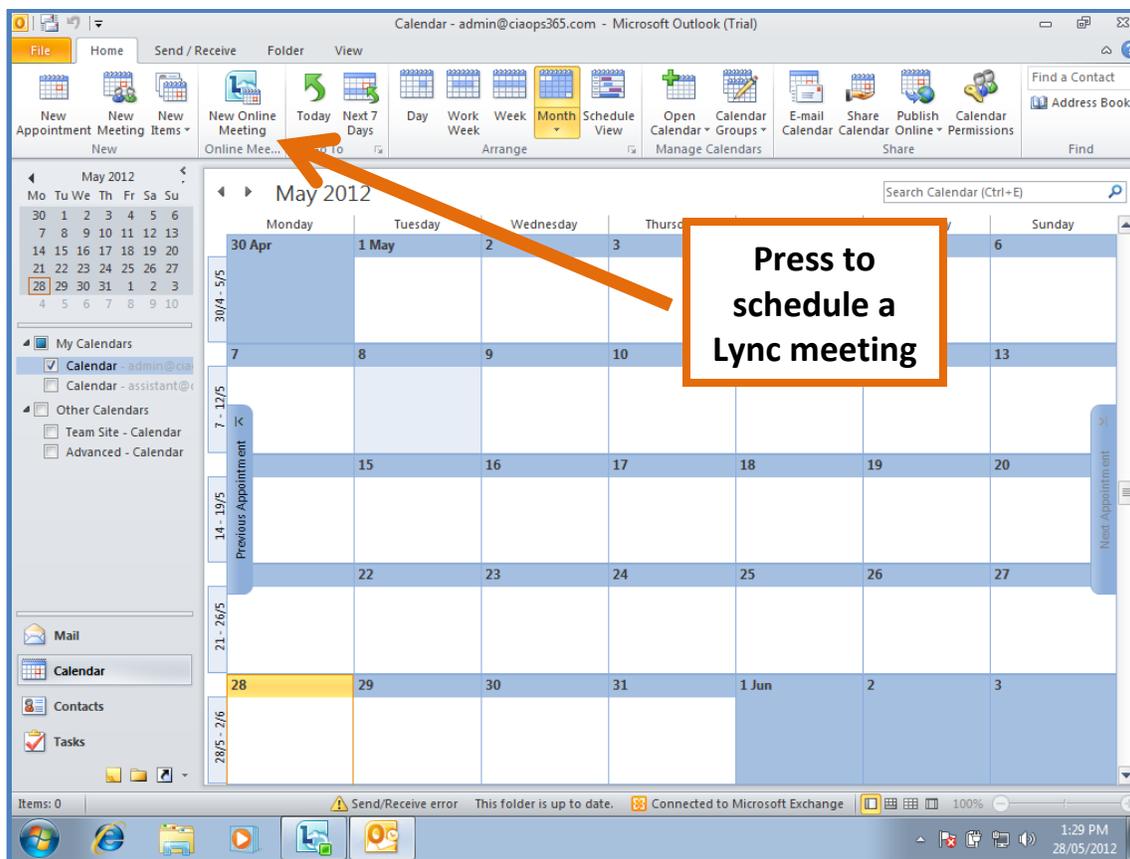
The *Video Device* tab allows you to control the settings for a webcam if it is connected to your system. If no device is connected or detected, you will see a message as shown above. Lync uses webcam devices that are available in the operating system. The recommendation is that you configure these first and then add them to Lync.



The *File Saving* tab allows you to determine where files which have been transferred to you are saved and where any recordings of meetings you make are recorded.

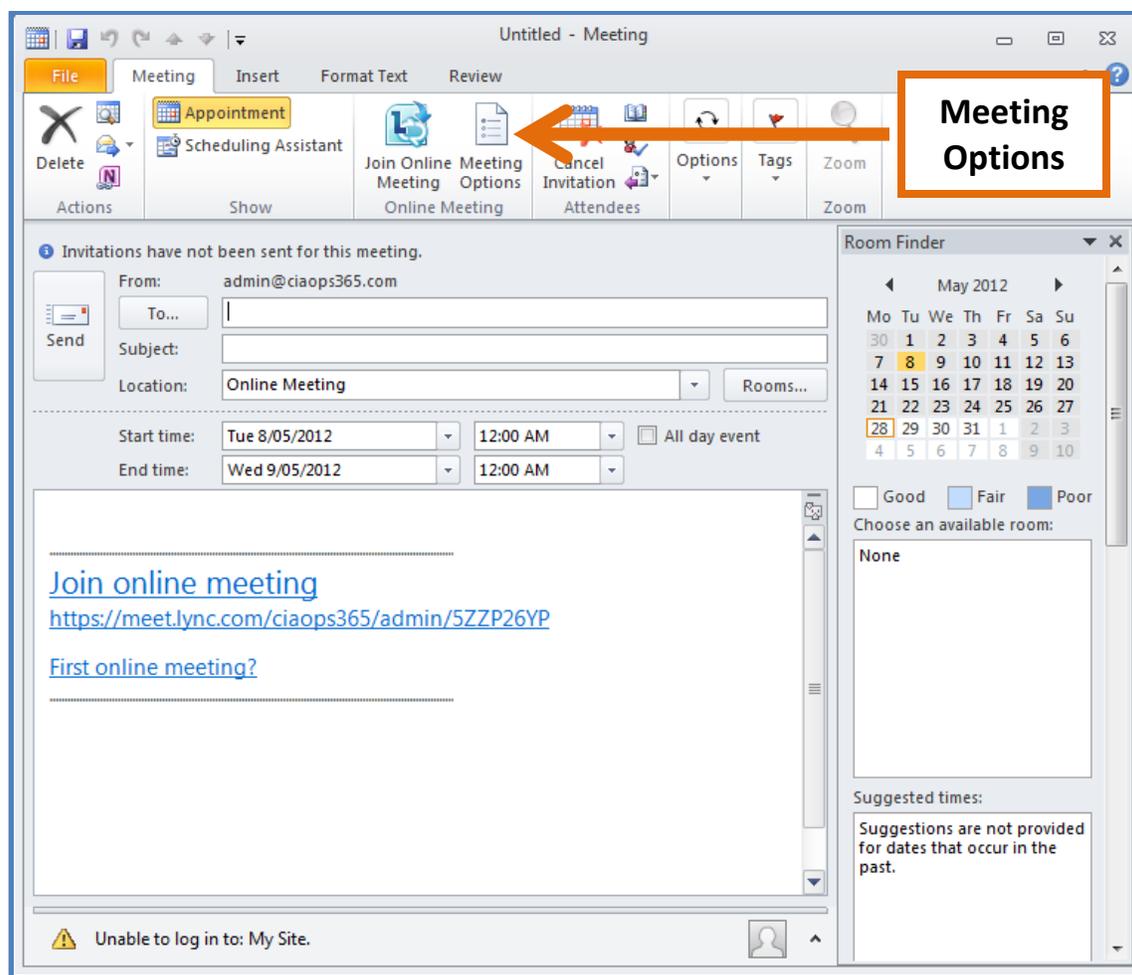
Scheduling a Lync Meeting

Once Lync has been installed on your system it will integrate with Outlook to allow you to schedule meetings directly from your calendar.

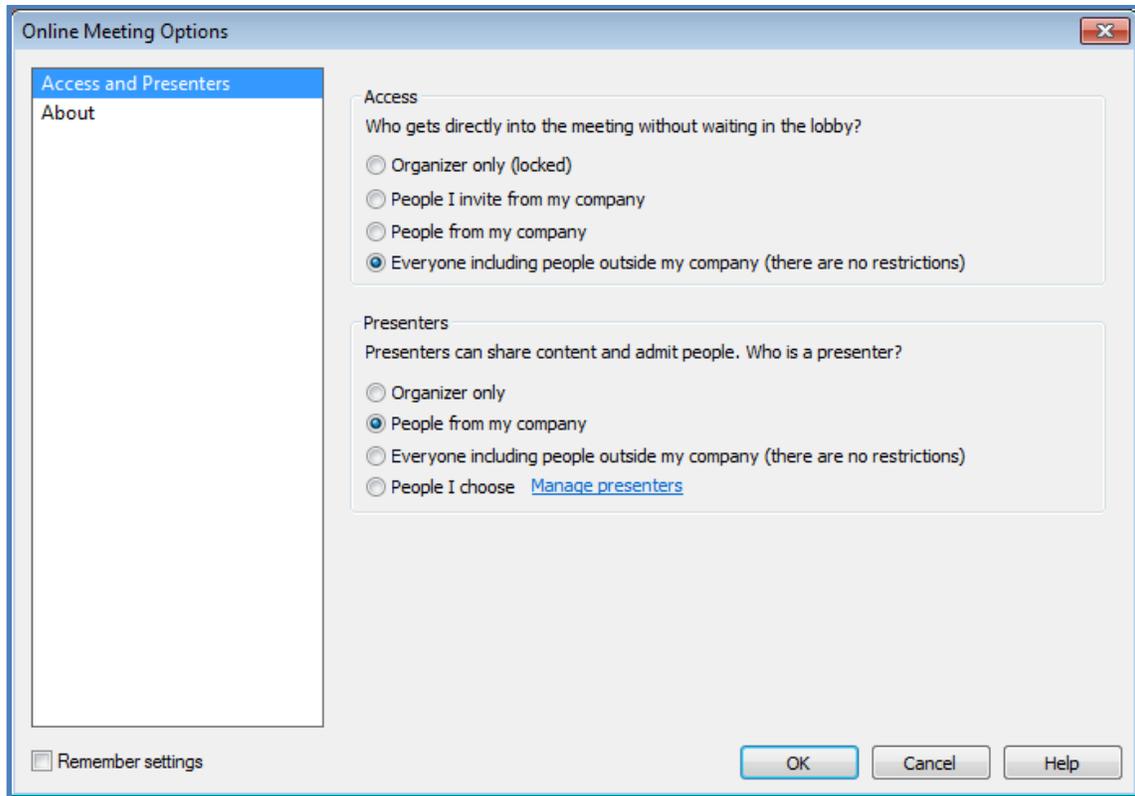


When you open your Outlook calendar you should see the Lync button on the ribbon in the *Home* tab.

Simply press this **New Online Meeting** button to schedule a meeting.

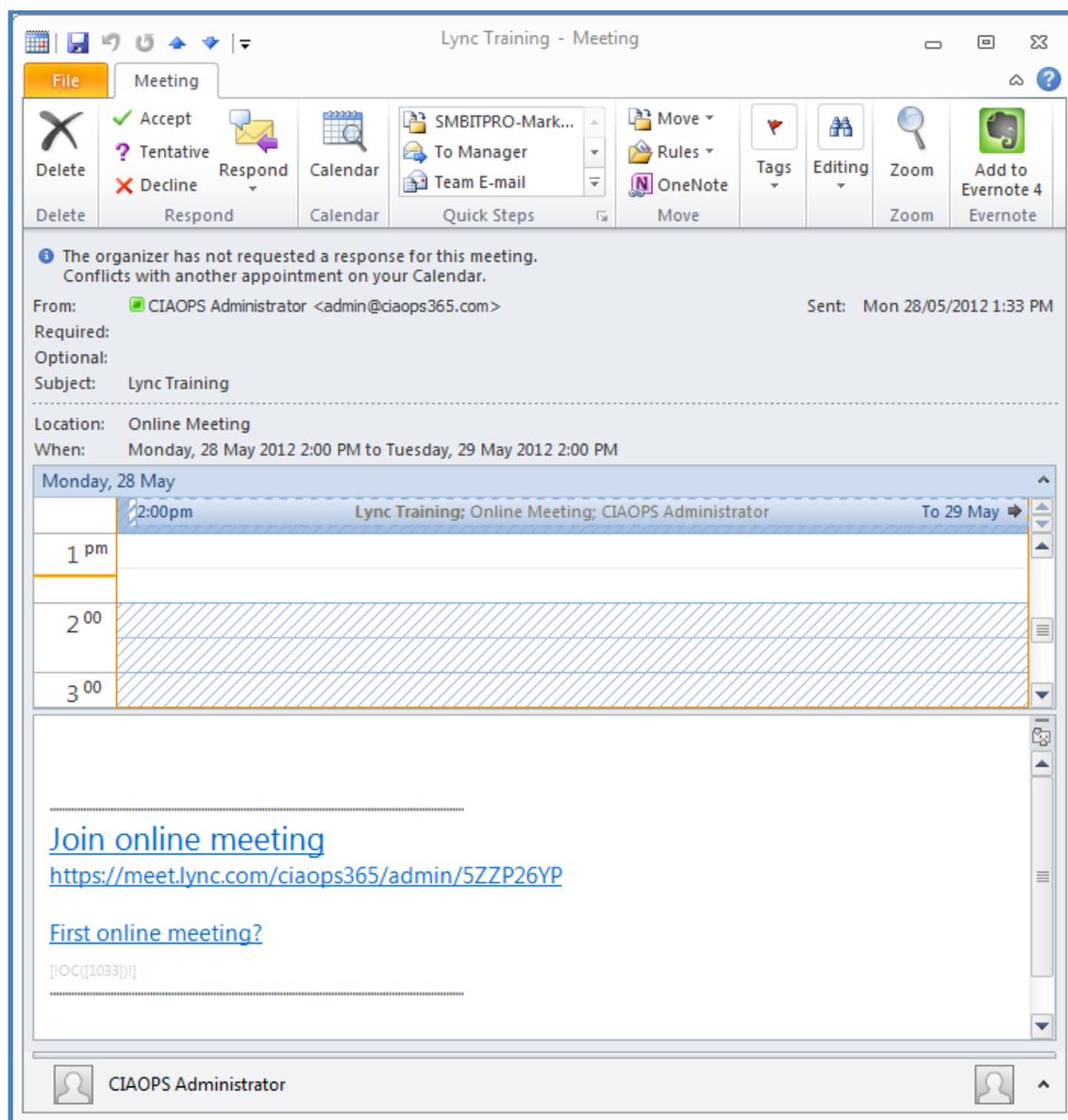


You should then see a standard calendar item open, as shown above, in which you can fill all details of your meeting, i.e. attendees, time, date, etc. You will also see that Lync has populated the body of the event with hyperlinks and information on how to join the meeting. Your attendees will receive this when you send the invitation and can click on the links to join the meeting directly from their own Outlook. You can add additional information to this invite if you want.



When you press the **Meeting Options** button in the ribbon you will see the options allowing you, as the creator of the meeting, to customize the options. By default, people you invite from your own company will be presenters in the meeting (i.e. have the ability to make changes and upload content to the meeting); others will join as attendees with view and limited interaction rights. As the creator of the meeting you will always be a presenter. You will note that you can change these default options by selecting alternate options and clicking the **Remember settings** box in the lower left of the window.

Once you have completed and configured the meeting invitation press the **Send** button.



Your invitees will receive an appointment email as above. You can see the hyperlinks for the meeting along with any additional details you have added. Once they accept the meeting it will appear in their calendar.

When the meeting occurs they click on one of the hyperlinks. What happens from here depends if they have the Lync client installed on their system.

It is possible to attend a Lync meeting without a Lync account by using the Lync Attendee software. This can be downloaded from:

<http://www.microsoft.com/en-us/download/details.aspx?id=15755>

It is recommended that the Lync Attendee software be installed prior to any meeting. Information about installing and using the Lync Attendee software is not covered in this Guide; however, it is very similar to the full Lync client covered here.

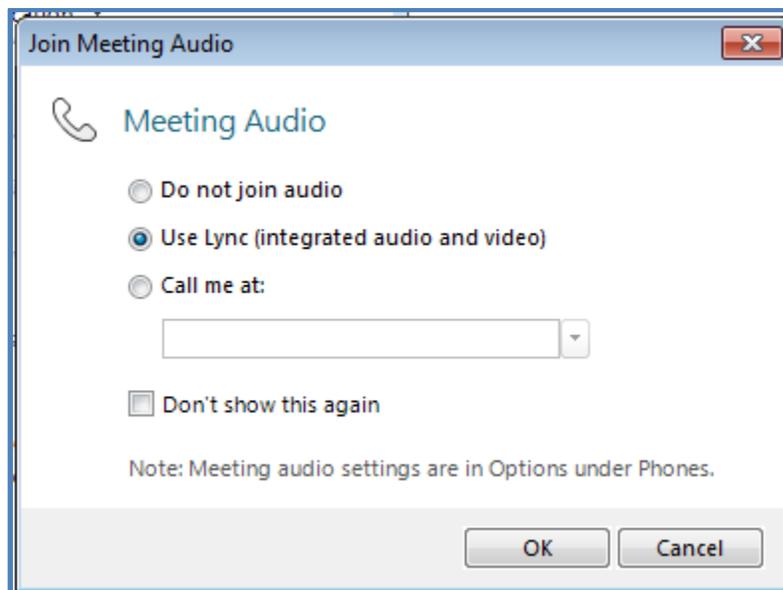
You can also elect to attend a Lync meeting using a compatible browser. Information about this is not covered specifically in this Guide. Further information about using a browser to attend Lync meetings can be found in the **Links** section at the end of this guide.

Not all of the functionality is available using the Lync Attendee software or a browser. A detailed comparison of exactly what functionality is available in each Lync client is available at:

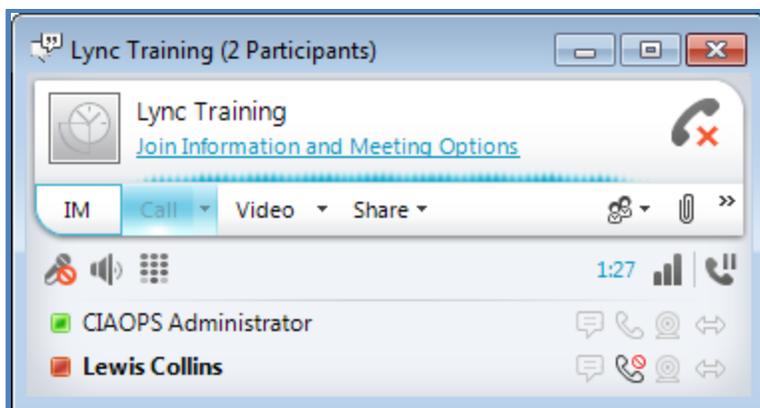
<http://technet.microsoft.com/en-us/library/gg425836.aspx>

Attending a meeting if Lync client is installed

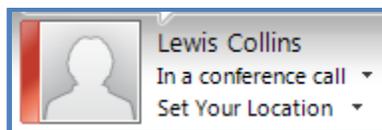
If this is the first Lync meeting you are attending, you will be asked to confirm your *Meeting Audio*.



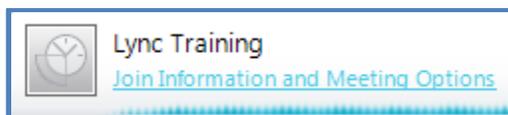
In most cases you will select the option **Use Lync (integrated audio and video)** and then select the **Don't show this again** option. Once complete press the **OK** button to continue.



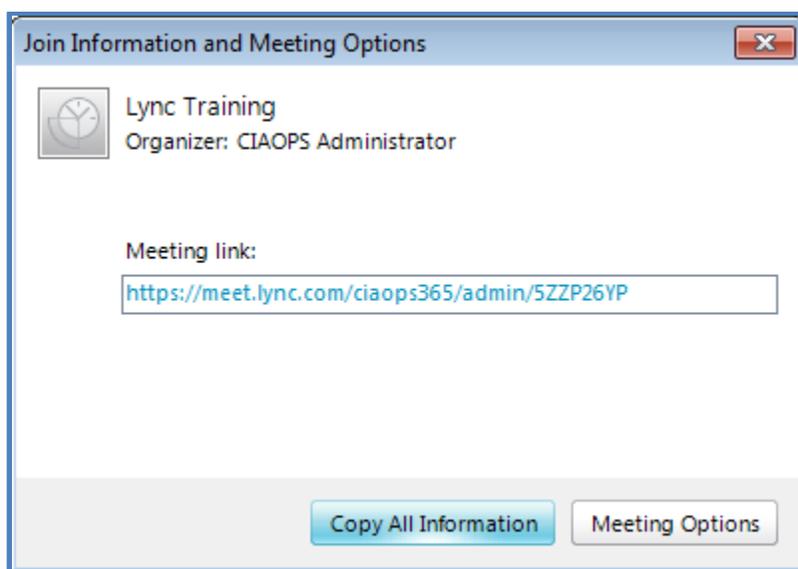
The meeting will then be launched and you should see any other meeting participants as shown above.



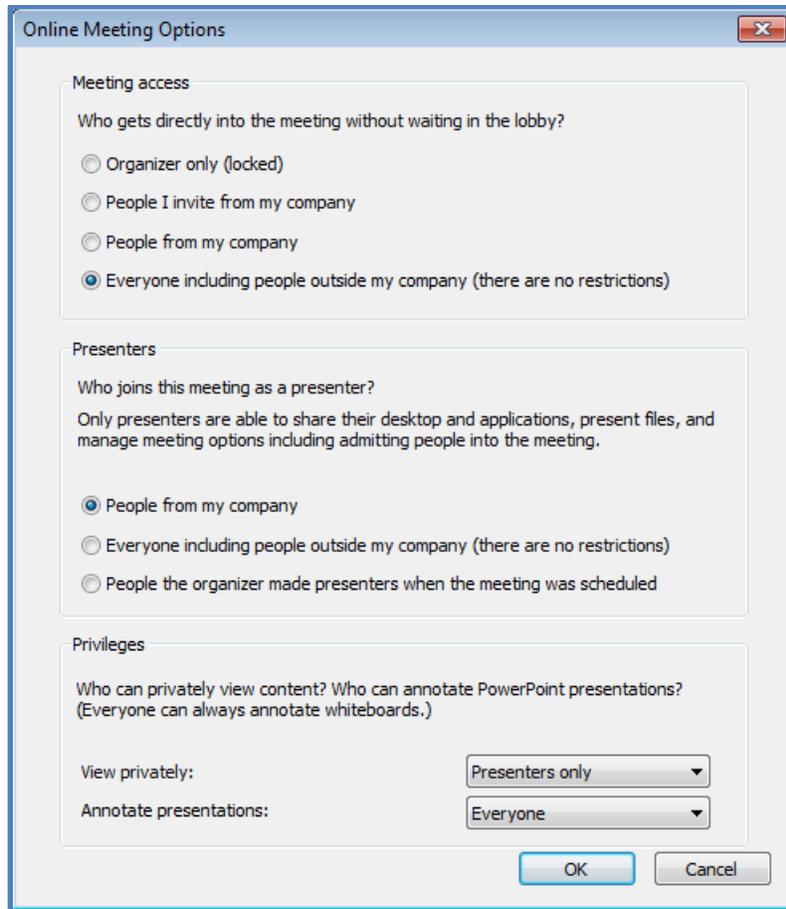
You will notice that your account will be in bold and in most cases also have a status set to busy. This is automatically done by Lync when you enter a meeting.



Once the meeting has commenced you will see the meeting heading, in this case *Lync Training*, and a hyperlink displayed at the top of your Lync window as shown above.

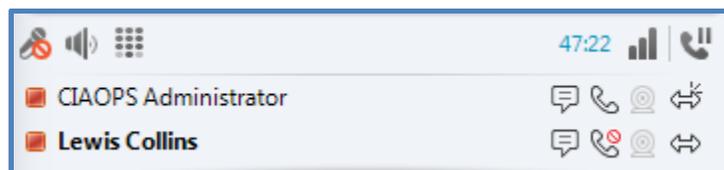


Click on the hyperlink **Join information and Meeting Options** and the above dialog box will open containing the required Meeting link. You can copy and paste the meeting link and send it to others.



Pressing the **Meeting Options** button displays the information shown above. Here you can control *Meeting access*, *Presenters* and *Privileges*.

Press the **OK** button to save and close.



Once the meeting has commenced you will see a panel as above. The top row contains a number of control buttons:



- Pressing this icon allows you to mute and unmute your audio input to the meeting. When your microphone is muted it will show with a red circle and line through as displayed here. A meeting presenter may elect to automatically mute all meeting attendees and not allow them to change that.



- Pressing this icon allows you to control audio from the meeting. To mute, press the button and a red circle and line will appear through the icon. To unmute, simply press the button again.



- This button allows you to manually dial a phone number and conference other people in. This feature may not be available in your location or on your [Office 365](#) plan.



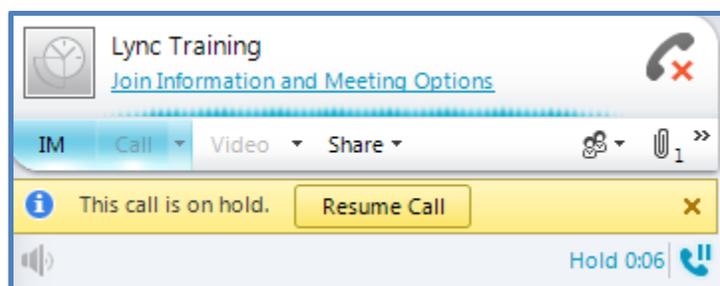
- Further to the right you will find a *meeting timer*. This provides you an indication of the elapsed time that the meeting has been running.



- The next button to the right is the *meeting quality* indicator. The more bars the better the performance. This level generally reflects the connection speed to the Internet as well as any traffic or contention of the [Lync](#) service.



- The last button is the *call control* button. Pressing this allows you to place the meeting on hold and temporarily halt all meeting content being sent to you.



When you press the button to hold the meeting you will see a control button (as above), you can press to resume the meeting. The amount of time on hold is now indicated by the meeting timer. You can also resume a call by simply pressing the call control button again.



Below the meeting control button you will see a list of meeting attendees, listed by name. To the right you will see a number of status icons, some of which may be greyed out.



- Indicates whether the attendees have chat enabled.



- Indicates whether they have the audio input (microphone) enabled for the meeting. If the attendee is muted you will see a red circle and line through this icon.

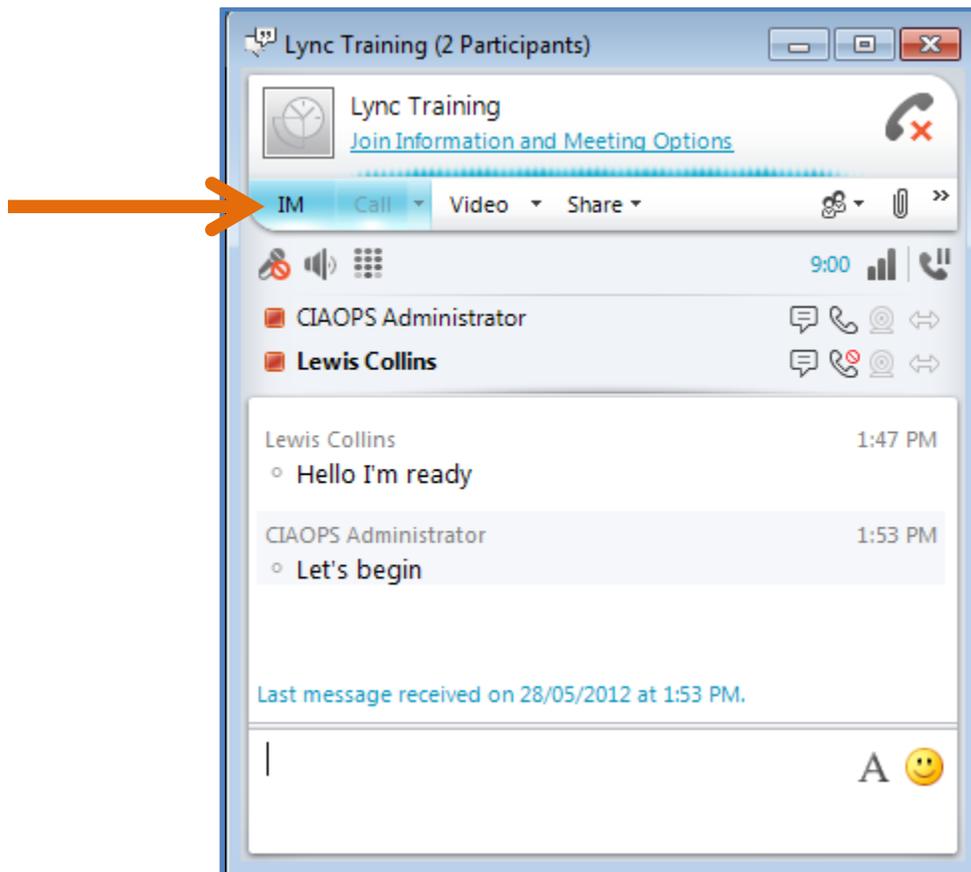


- Indicates whether the attendee has the ability to broadcast video. If this has not been enabled or configured it will appear greyed out.



- Indicates that attendee is participating in content sharing.

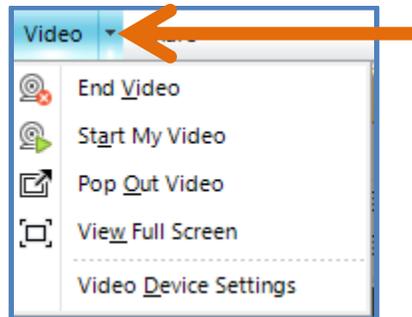
Chat (Instant Messaging)



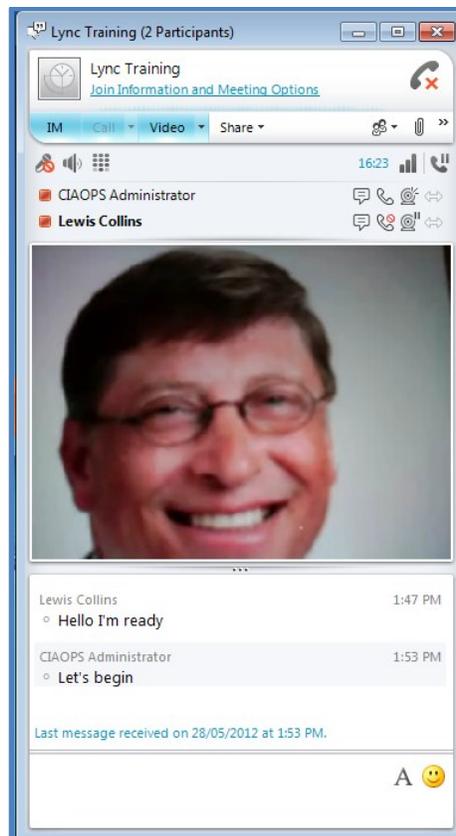
When you press the **IM** option on the menu at the top of window, you will open an Instant Message chat that all attendees can participate in.

To converse, type your message into the lower window and press **Enter**. This will then show up on the chat stream for all attendees. You will also notice over on the right of the entry box, two icons (an A and a smiley face) which allow you to change the font of your message, which can help when you have a lot of meeting attendees, as well as include emoticons (i.e. smiley face) that can be included in your messages.

Video



The next available option in the menu is *Video* which allows you to control any webcam that may be connected and configured to your system. Press on the down arrow to the right of the *Video* option and you will see the menu displayed above.



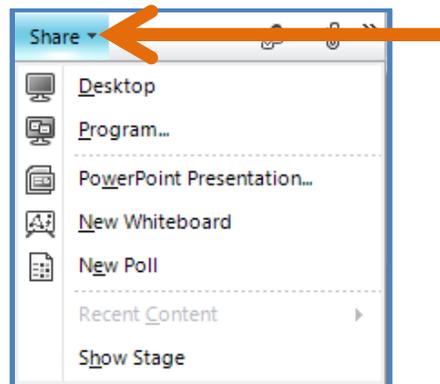
When you select the option **Start my Video**, a window above the chat text box will appear and display video from you and any other attendees who have video enabled. The video from your webcam will be broadcast to all meeting attendees. As different attendees speak, Lync will automatically swap to the video of that speaker (if they have video). If you are broadcasting video you will see a picture in picture display of your video in the lower right of the main video window as shown below.



If you no longer wish to broadcast video, select the option **End Video**. This will no longer broadcast your video; however, it will allow you to remain in the meeting.

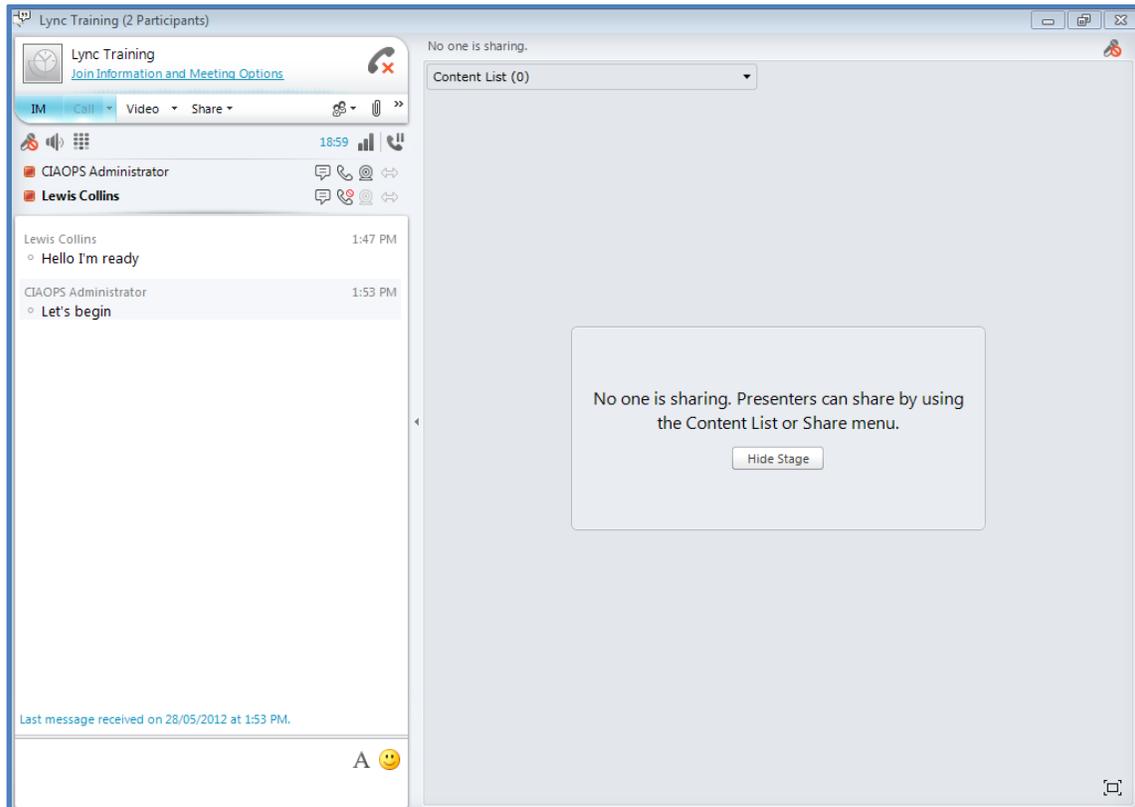
Pop Out Video allows you to 'pop' the video window as a separate floating window you can position where ever you like on your screen as well as make the video full screen.

Sharing



One of the most powerful components of Lync is the ability to share a number of local resources with meetings attendees. You can see all the available options by pressing the down arrow to the right of the **Share** option on the menu to reveal the menu shown above.

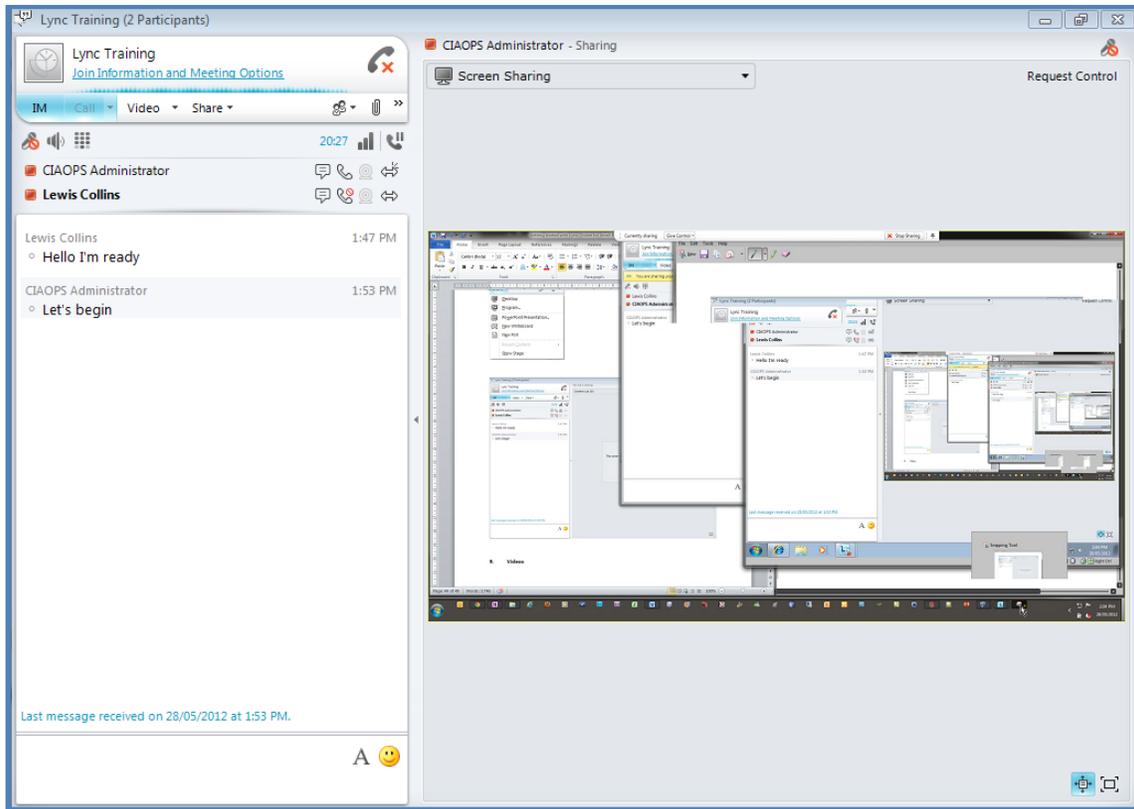
Show Stage



The *Show Stage* option at the bottom of the menu will display the sharing area to the right of the chat window. At this stage nothing has been shared, however, when it is, it will appear on the right hand side as shown.

Desktop

The option to *Share desktop* will broadcast everything appearing on the local workstation to all meeting attendees. If you wish to have information on your desktop to remain private then you should not use this option.



However, sharing your desktop is the simplest way to let others see what is happening as shown above.



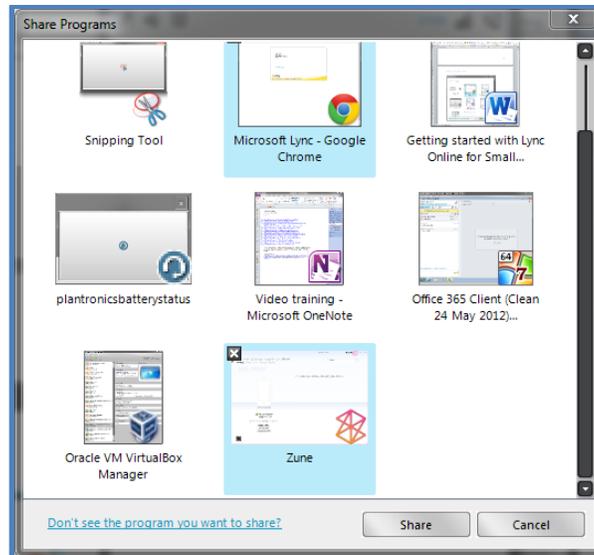
When you do share your desktop you will notice a banner appear at the top of screen. In this bar you will see you have the option to **Give Control** to another presenter. This makes Lync an excellent tool for performing remote support.

On the banner you will also find the option to **Stop Sharing** and Pin the banner to a location on the screen.

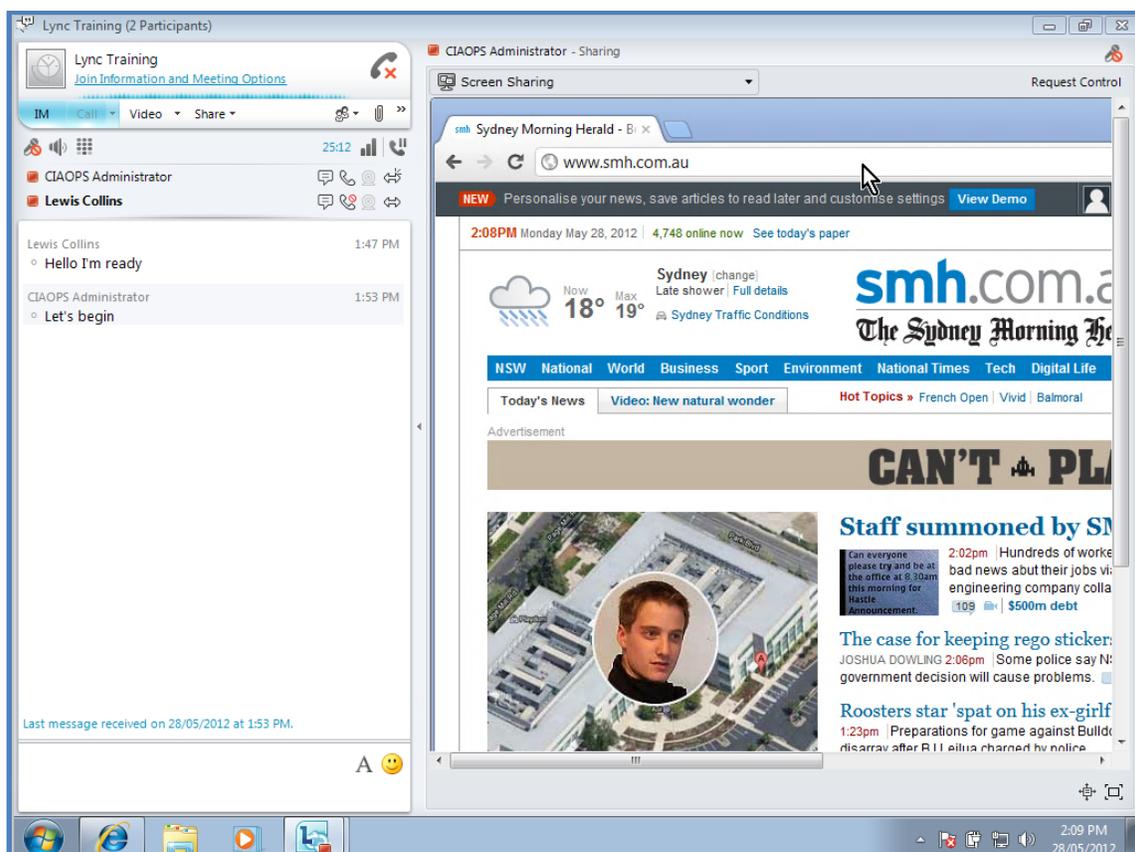
To stop broadcasting your desktop to meeting attendees, press the **Stop Sharing** button on the banner.

Program

Rather than sharing your whole screen you can select to share one or more running programs via the **Program** menu option.



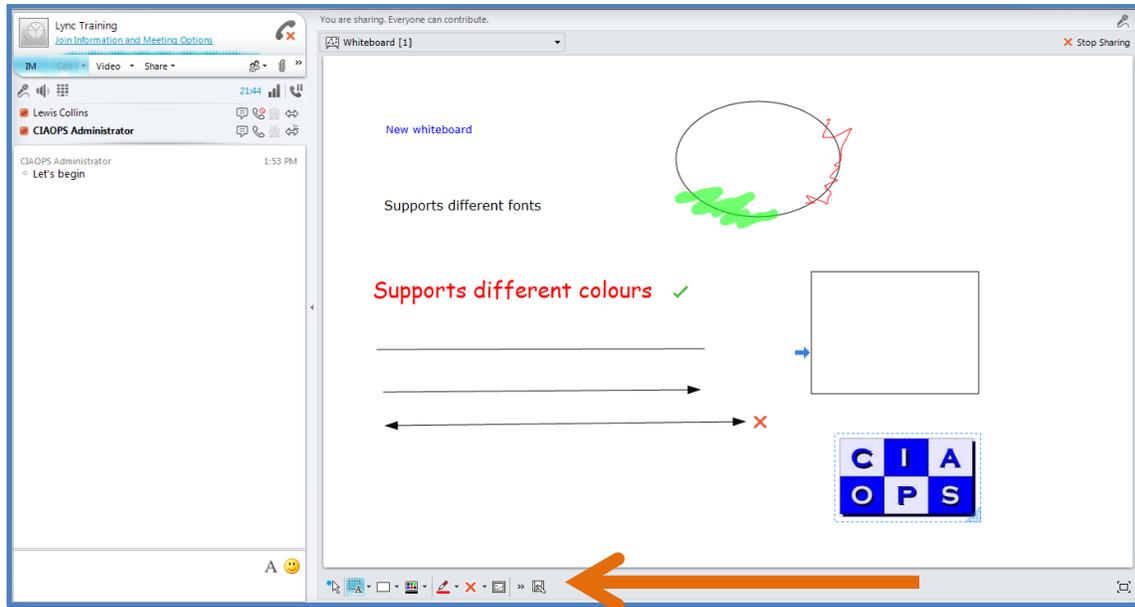
When you select this you will see a window (as above), asking you to nominate which of the running programs on your machine you wish to share. To select a program, place a check in the upper left of the program window as shown and press the **Share** button.



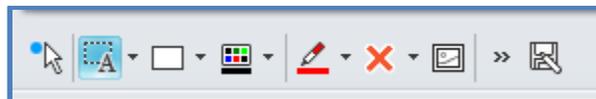
Once you share your program(s) other attendees will be able to see this in the Stage part of Lync as shown above.

Whiteboard

You can also share a whiteboard. A whiteboard is an area that all presenters can add a variety of information to.



To add text, click on an area on the whiteboard and start typing. You can grab and relocate that block of text if desired.



The menu bar at the bottom of the whiteboard area provides a number of additional options.



- Provides you with a 'virtual' laser pointer. This allows you to click on information on the whiteboard and for your name to be highlighted next to a coloured dot like so:



To display the laser pointer press and hold the left mouse button in the whiteboard area.



- Allows you to type text on the whiteboard. Press the button, click an area on the whiteboard and start typing. To adjust the font and size of the text that you type, press the down arrow to the right of this button and set the default options you desire.



- Allows you to draw shapes on the whiteboard including lines, single arrow lines, double arrow lines, ovals and rectangles. Press this button and draw the object on the whiteboard which appears in the button, in this case a rectangle. To change the default object use the down arrow to the right of the button to display all the options.



- Allows you to change the colour you are using, whether for drawings or text. To change the default colour press the down arrow to the right of the button to bring up a selection.



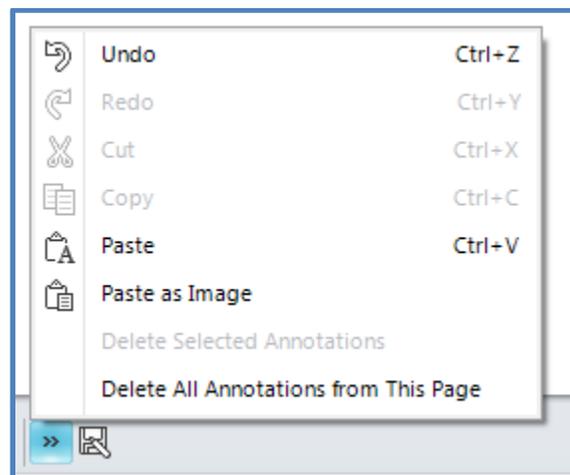
- Allows you to select from a range of pens and highlighters. Click on the button to start using the pen displayed in the button. To change the default pen, select the arrow to the right of the button and select from the options that are available.



- This is the stamping tool that allows you to place an arrow, check or X stamp on the whiteboard. Click on this button and then click anywhere on the whiteboard to place the stamp. If you wish to change the default stamp, click on the arrow button to the right of the button and select a new default option.



- Allows you to insert an image from your local machine onto the whiteboard. Press this button and a browse window will appear prompting you for the location of the image on your local machine. Select the desired file and press **OK** to upload.

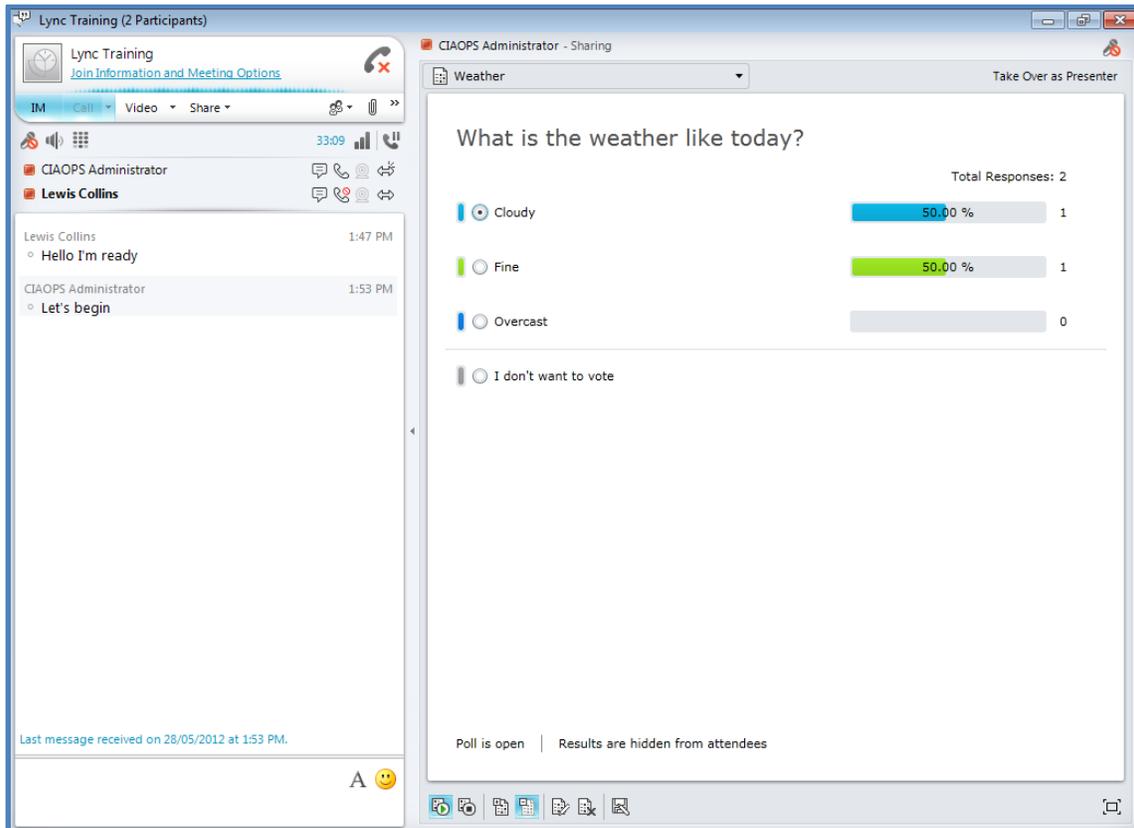


When you press the double arrows a menu with additional options appears as shown above. You can see you are able to *Cut*, *Copy* and *Paste* to and from the whiteboard as well as undo and redo changes. You can also delete all or selected annotations from the page.

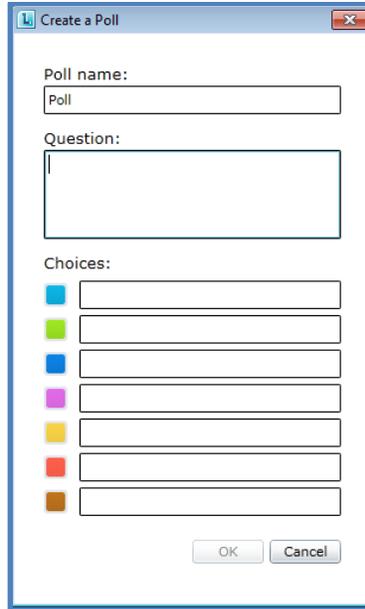


- Allows you save the whiteboard, including the annotation to either a XPS or PNG file. Press the button and specify the file type and where you would like to save the file.

Poll



Polls allow you to ask a question and have attendees respond to the answers you propose.



Create a Poll

Poll name:
Poll

Question:
|

Choices:

- |
- |
- |
- |
- |
- |
- |

OK Cancel

When you select **New Poll** you will see the *Create a Poll* window as shown above.



Create a Poll

Poll name:
Weather

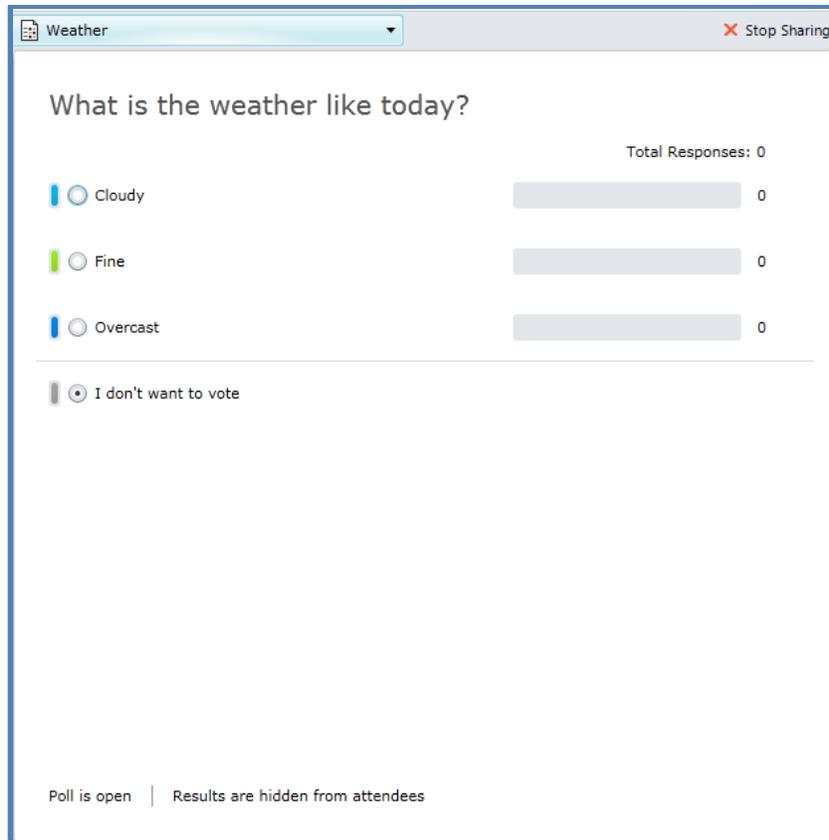
Question:
What is the weather like today?

Choices:

- Cloudy
- Fine
- Overcast
- |
- |
- |
- |

OK Cancel

Give the poll a name, enter the question and up to seven responses. When complete press the **OK** button.



If you are already sharing something on the **Stage**, you will be prompted that this sharing will be switched to the poll. Attendees will now see the poll and be able to enter their responses to the question. By default, attendees will not see all the results of the poll. This can be revealed by presenters using the control buttons at the bottom of the poll window.



- This opens the poll so attendees can vote.



- This closes the poll so no more voting can take place.



- This shows the results of the poll to all attendees.



- This hides the results from attendees (the default).



- This allows the editing of the poll including the question and responses.



- This clears all the results from the poll.



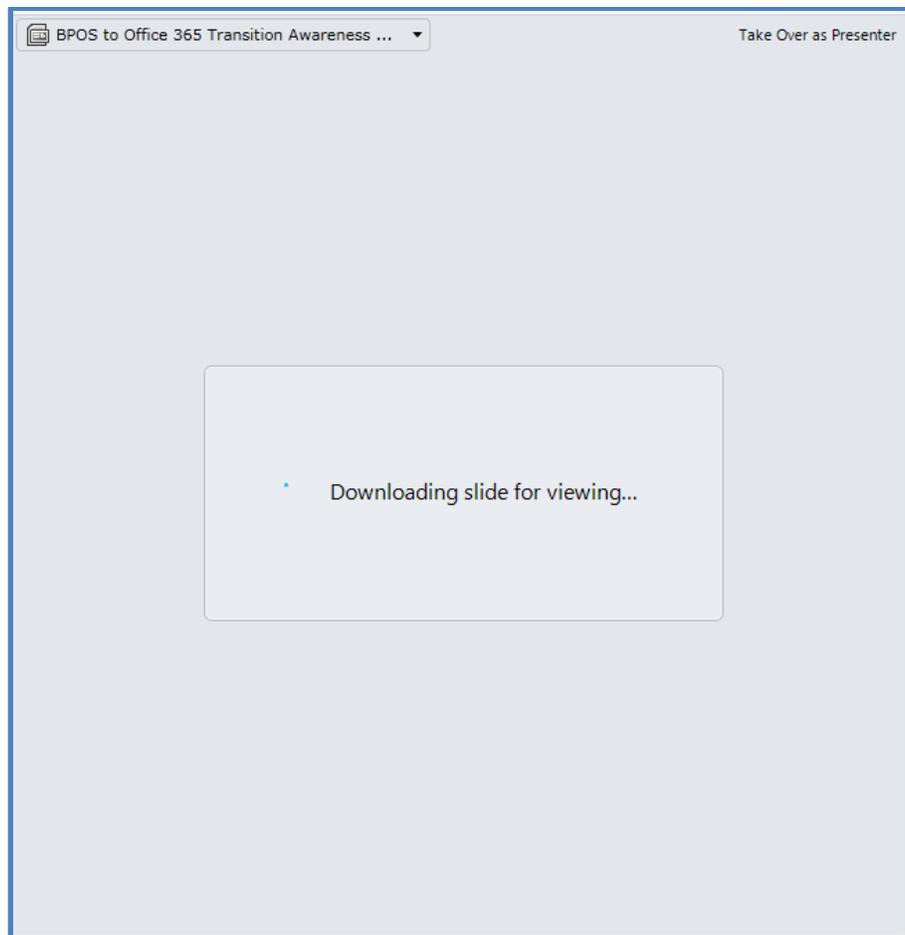
- This allows you to save the results from the poll to either a PNG (image) or CSV file.

PowerPoint Presentation

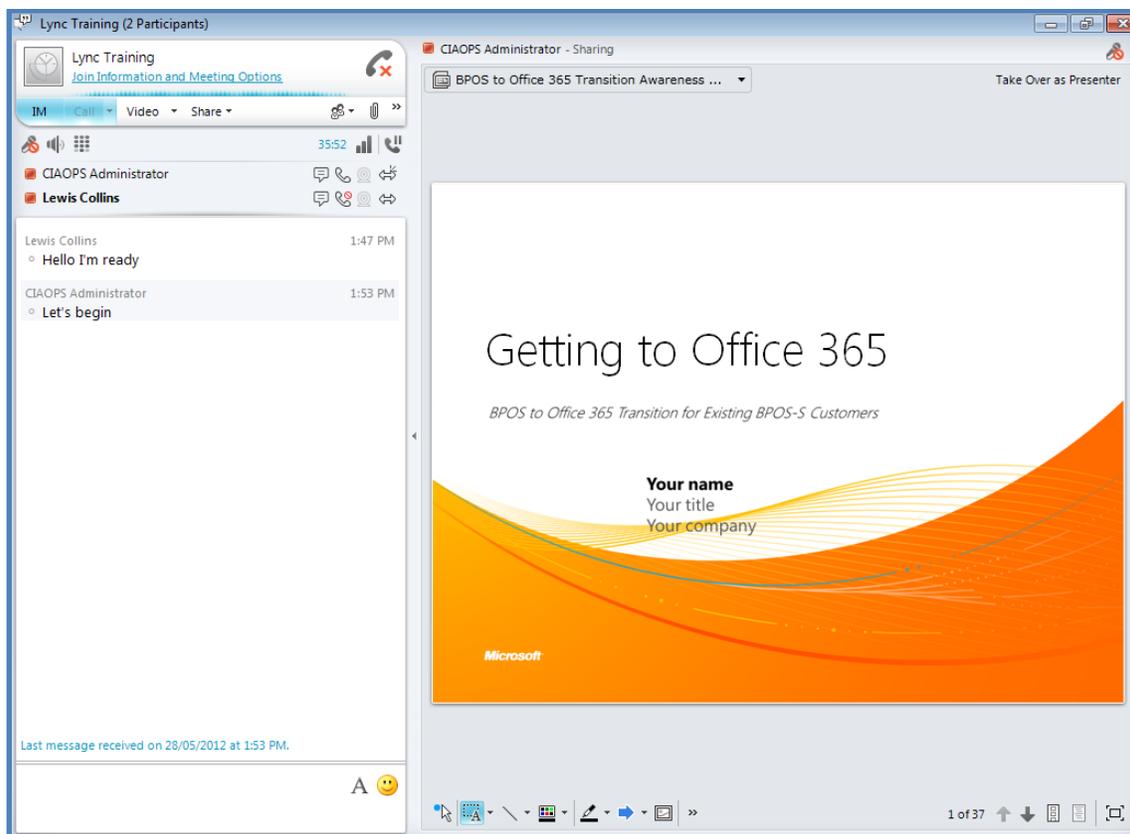
One way you can display a PowerPoint slideshow is to share your desktop or program as illustrated previously. The issue with this way is potentially how the PowerPoint displays on each attendees screen; it can vary widely and lead to a suboptimal result. The recommendation is to upload the PowerPoint presentation to Lync beforehand as this ensures PowerPoint is displayed as optimally as possible for each attendee. It also offers a greater range of annotation tools.

Once you elect to share a PowerPoint Presentation you will be prompted to select a file from your local machine. The select file will now be uploaded to the Lync meeting. If you are already sharing content you maybe prompted as to whether you wish to make the uploaded PowerPoint presentation current and cease the current sharing.

As the file uploads you will typically be able to view the initial slide before the complete presentation has completely uploaded.



Once the PowerPoint file has been uploaded, attendees will be able to view it once an optimized version is downloaded to their screens. During this process they will see the message as shown above.



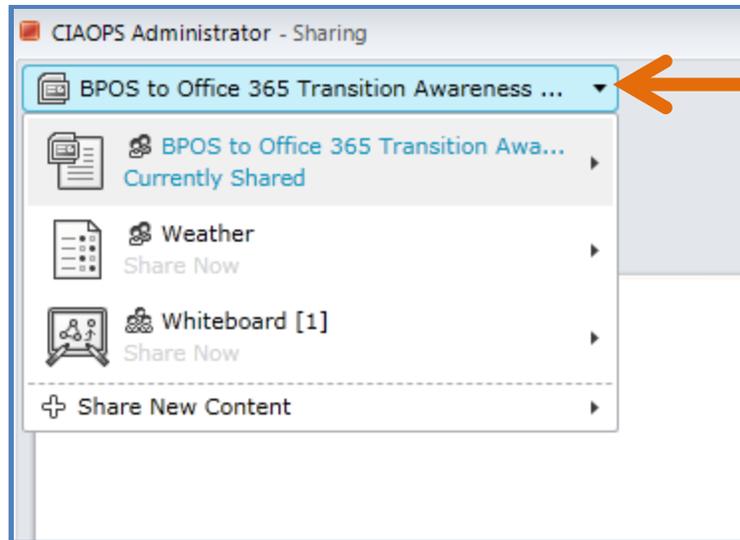
Once downloaded, all attendees will see the PowerPoint presentation in the Stage area on the right.

Presenters will also see a toolbar at the bottom of the screen containing many of the same commands from whiteboard sharing (as previously covered).

On the far right at the bottom are the controls for the PowerPoint slideshow that allow you to view and move through the presentation.

Switching between content

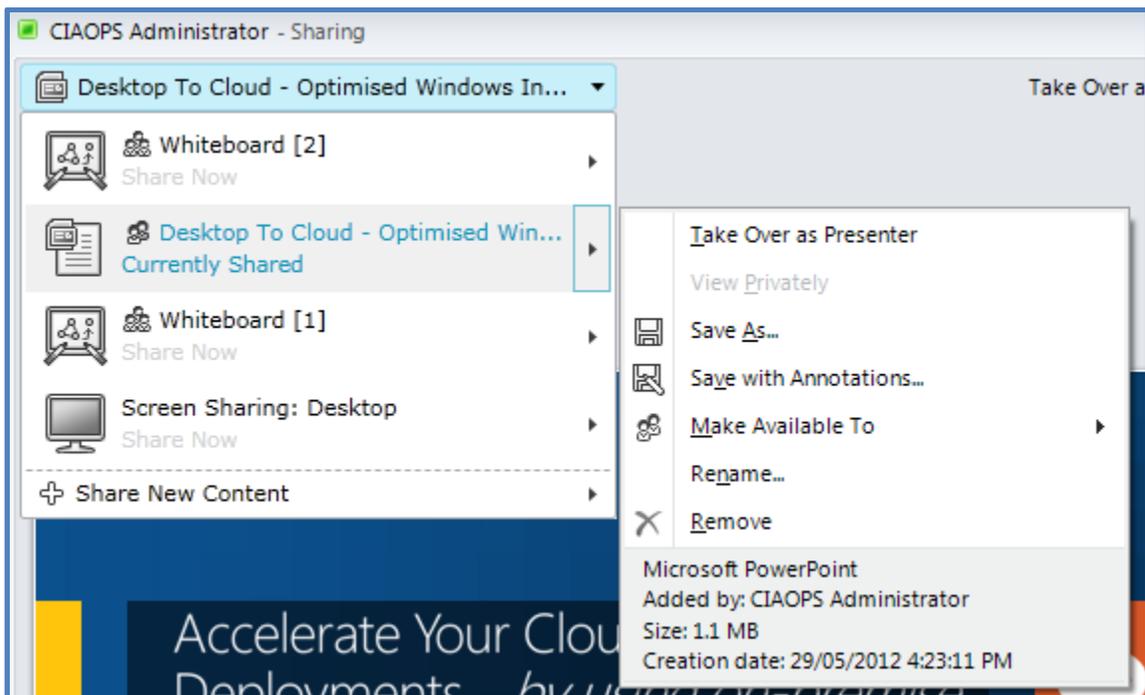
Once you have begun using one sharing option you can include as many additional items as you wish. For example, you could share a PowerPoint presentation, a poll and a whiteboard all at the same time.



You can switch between any of these items via the selection menu at the top left of the Stage area as shown.

Press the down arrow to the right of the selection to see which items are already being shared. To move to an item simply select it. Doing so will temporarily halt sharing of the current item and switch to the new item.

You will also notice an arrow to the right of each shared content item. Select this arrow to reveal an additional menu of options for that item, e.g.:

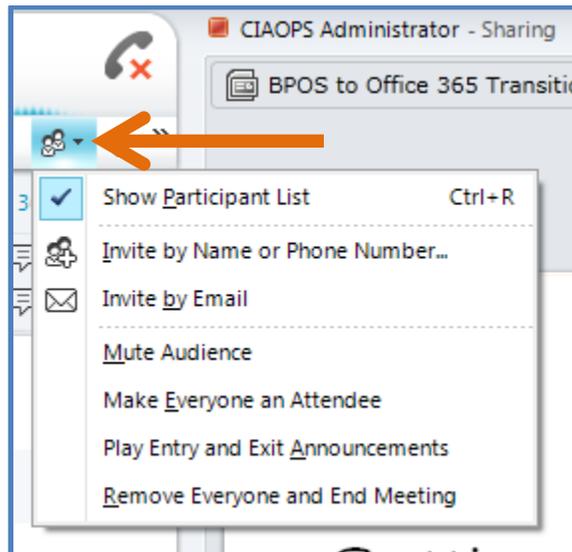


The options available on this menu vary depending on the rights you have in the meeting, however, as you can see from the above screen shot they include:

- Ability to *Take Over as Presenter* of the content (typically something shared via Lync such as an uploaded PowerPoint presentation or whiteboard).
- *View Privately* allows you to view other content which is being shared but not allow other attendees to see this. You can also update the content if you have the rights.
- You can *Save As* the content to an output file to your local system. This saves only the shared content and not any annotations.
- You can *Save with Annotations*, which includes the content item and any annotations made by attendees.
- *Rename* the shared content in the meeting.
- *Remove* the content from being shared and as part of the meeting.

Attendees

The menu option allows you to manage attendees for the meeting. Pressing the down arrow to the right of the icon reveals all the available options:

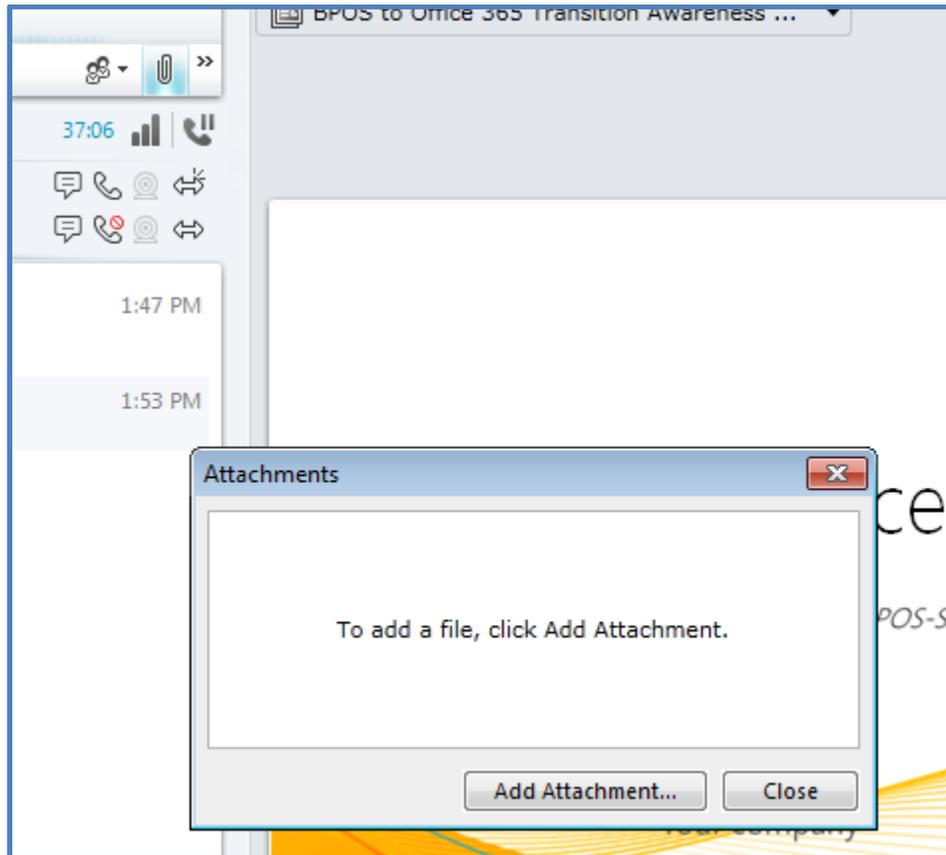


You can elect whether you wish to display a list of attendees in the panel on the left. You can invite additional attendees to the meeting via Name, Phone number (if supported) or email. You can elect to mute the audience as well as make everyone an attendee (with view rights only).

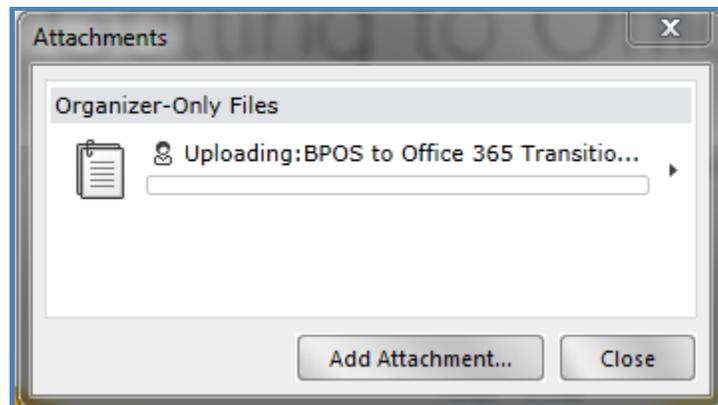
Finally, you can elect to play entry and edit announcements as well as end the meeting.

Upload files

The next icon on the menu bar appears as a paperclip. Pressing this allows you to upload files as attachments to the meeting that can then be downloaded by attendees. Attachments are not able to be displayed as part of the meeting; they are simply additional files that can be downloaded by attendees to their local system if desired.

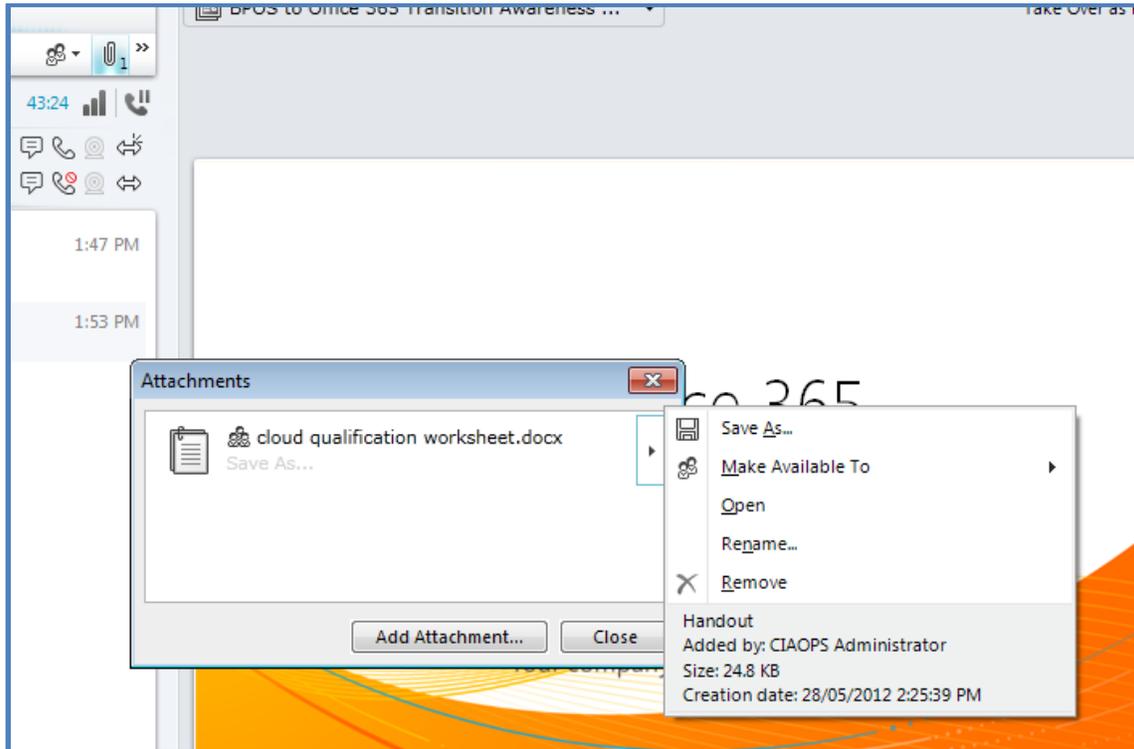


To add an attachment to the meeting simply press the paperclip icon. You will then be prompted to upload files by clicking the **Add Attachment** button as shown above.



Once you have selected a file on your system you will see it being uploaded to the Lync meeting. If required, you can add additional file attachments during this process.

The time required to upload attachments to the meeting will vary depending on the speed of your Internet connection. It is recommended that you upload any attachments prior to the commencement of the meeting.



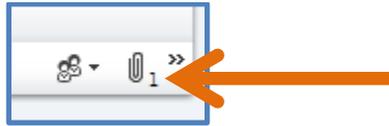
Once the attachments are uploaded you will see a familiar arrow to the right of the file name. Clicking this will reveal a menu allowing you to take actions with the uploaded attachment including:

- *Saving As* a file on your local system.
- *Making Available To*, will the uploaded attachment be available to:
 - o Presenters or
 - o Everyone

Everyone is the default.

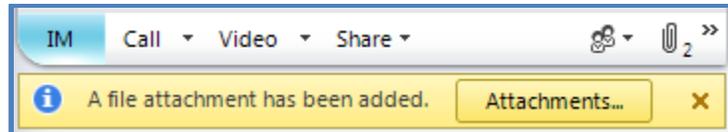
- *Open* the attachment on your local system.
- *Rename* the uploaded attachment in the meeting.
- *Remove* the attachment from the meeting.

At the bottom of these options you will see a banner containing information about the attachment, including when the file was uploaded and who uploaded it.



When an attachment has been uploaded, the machine on which it was uploaded to, will display the attached file count next to the paperclip icon as above.

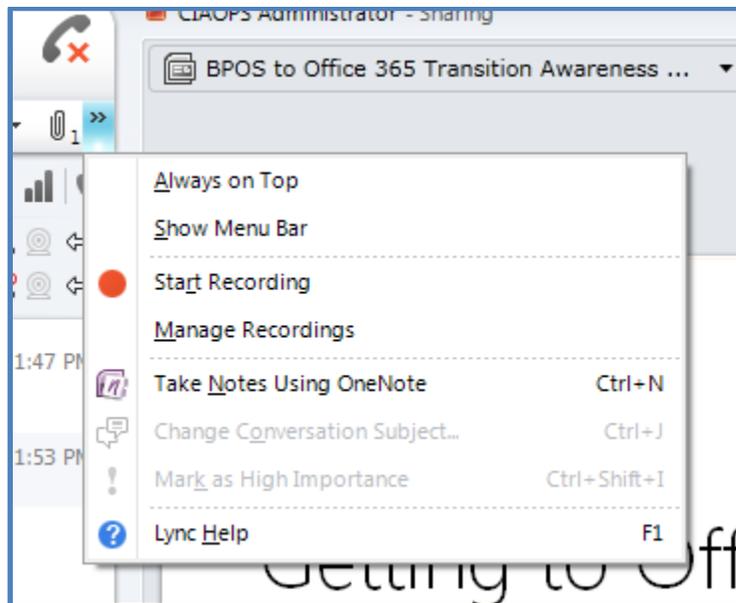
Other attendees of the meeting will be notified via a banner under their menu bar that an attachment is available as well as the number of available attachments being displayed next to the paperclip.



Clicking on the Attachment button will display the attachments available for download.

More Options

The final choice on the menu bar is two arrows.



When pressed, these arrows will open the *More Options* menu as shown.

Here you can:

- Ensure the Lync meeting is *Always on Top* of other windows on your desktop.

- Show the *Menu Bar* options.
- *Start Recording* of the meeting (details covered later on).
- *Manage Recordings* (details covered later on).
- *Take Notes using OneNote* will automatically open a OneNote notebook and populate with some information about the meeting to make it easier to take notes.
- *Change the Conversation Subject* allows you to rename your meeting. This may be of benefit when you record a meeting rather than using the generic name.
- *Mark as High Importance*. This works for person-to-person conversations, but is not available for meetings. When you send the message, the High Importance flag appears in the recipient's Conversation Window.
- *Lync Help* allows access to the online help for [Lync](#).

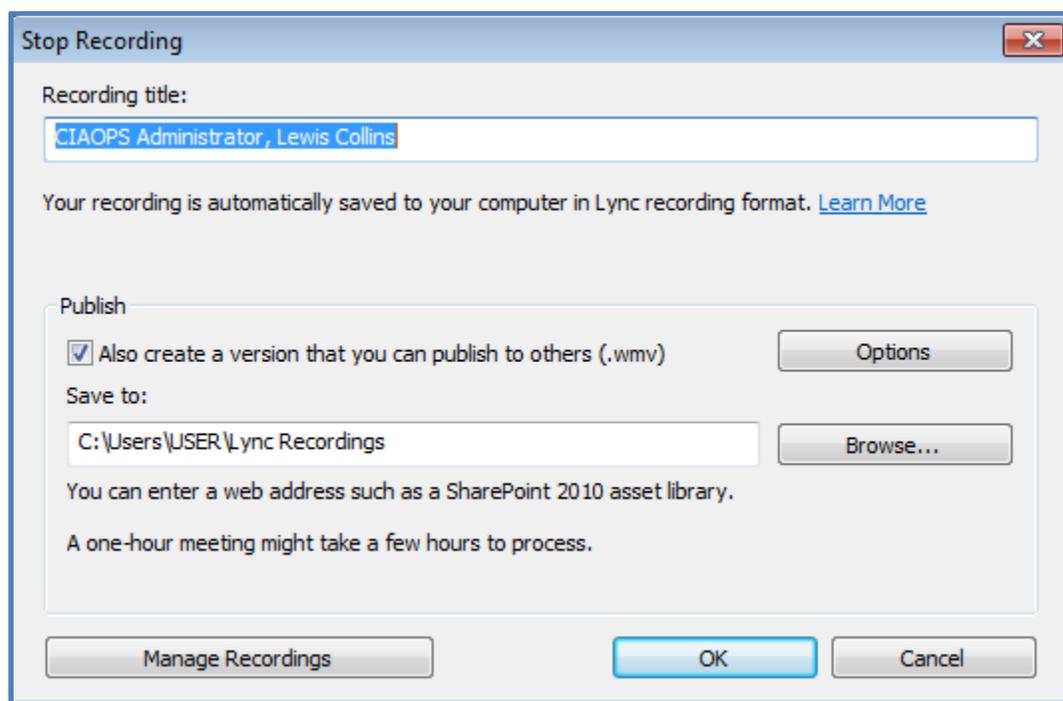
Recordings

The option to record may not be available in all locations. This is due to country and regional restrictions. Once you commence a recording of the meeting, all attendees will see the meeting is being recorded.



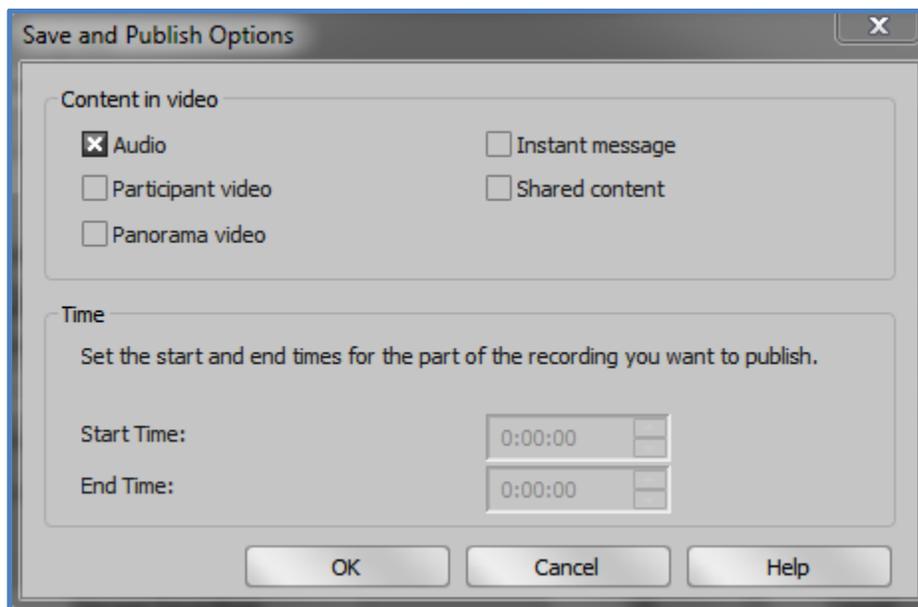
The presenter who initiated the recording will also see the recording control banner as shown.

With this they can pause and end the recording.



Ending a recording will not end the meeting, however, it will pop up the above dialog box asking for information about how to save the recording.

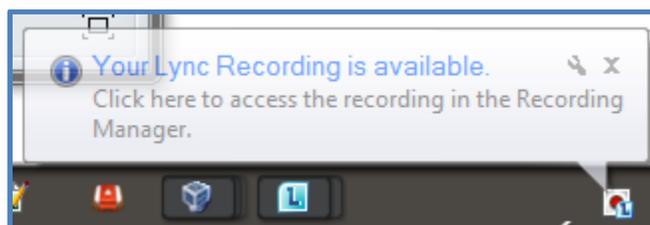
You can change the recording title, whether a version of the meeting will be published as a WMV file and where the recording is saved.



When you press the **Options** button you will see a dialog as shown above. Here you can select which components of the recording you wish to appear in the published version. For example, even though the meeting included video of attendees you may not wish that published. Simply unselect that option when you publish. Press the **OK** button when complete to save the *Options*.

Press the **OK** button on the *Stop Recording* window to continue.

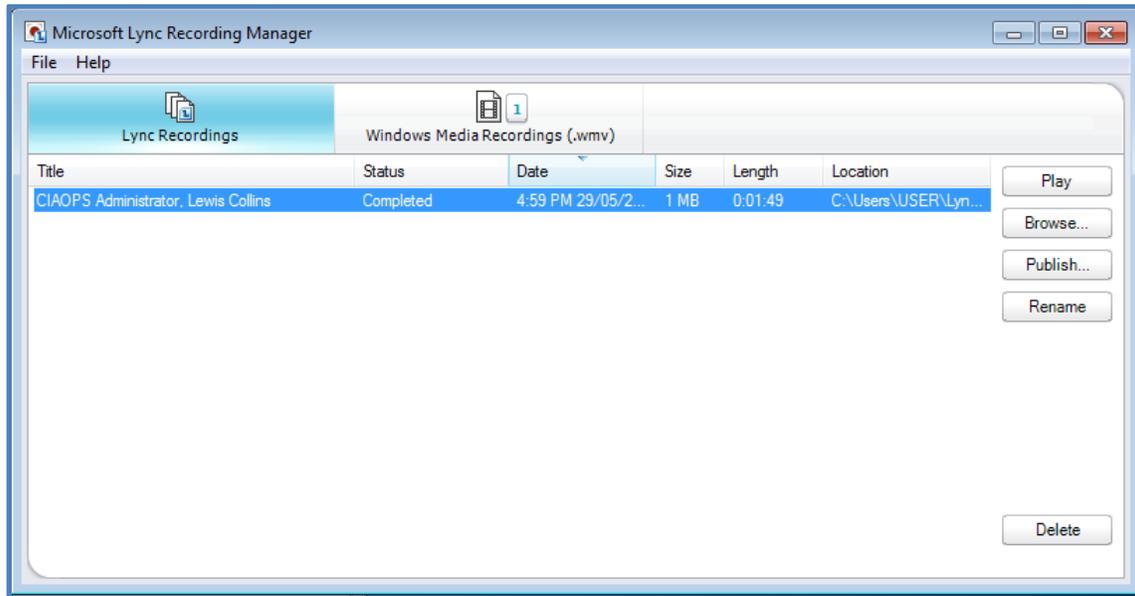
The meeting recording will now be saved to the local directory selected during the above process. The recording will also commence being published if you selected that option.



When the recording is available you should receive a message from your system tray as shown above. Simply click the message to open the *Recording Manager*.

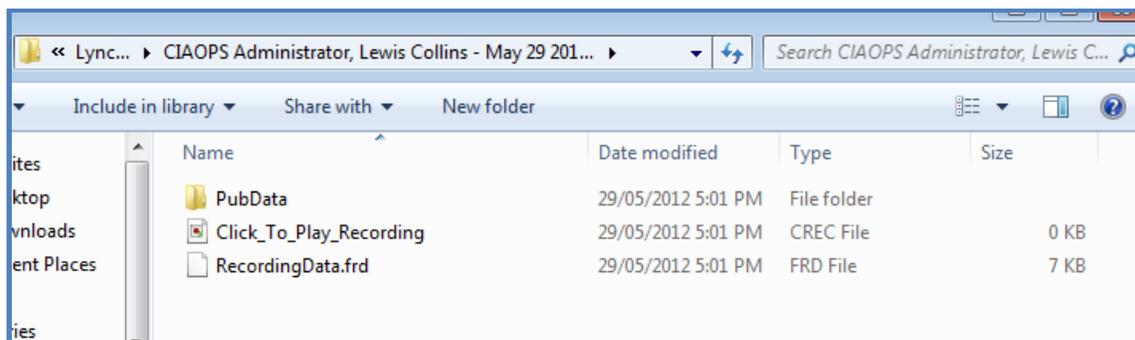
Recordings Manager

You can access this program either directly from Lync or via the Start menu of your desktop.

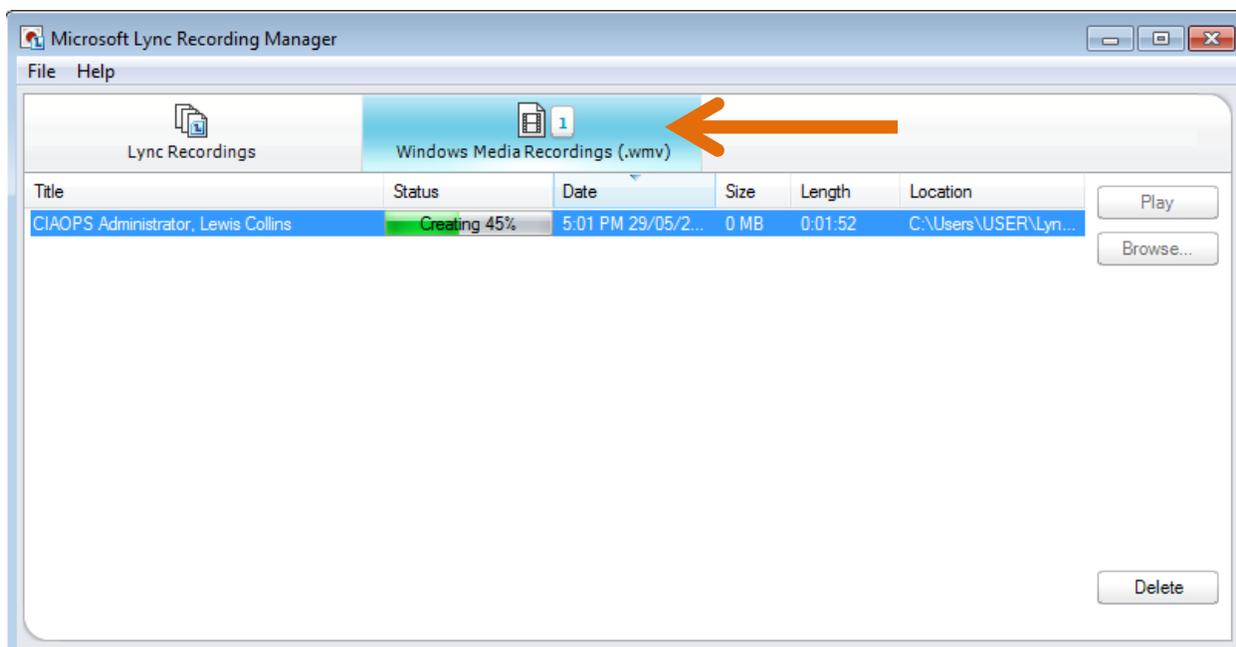


After launching you should see a list of the Lync recordings you have made and their details. You can select any of these and then select from the buttons at the right which include:

- *Play*. Show a Lync recording.
- *Browse*. Show the location where the Lync files are saved.
- *Publish*. Create a WMV output file of the recording for sharing.
- *Rename*. Change the name of a recording.
- *Delete*. Remove the recording and associated files.



When you select **Browse**, a file, an explorer window should open with the native recording files displayed as shown above.

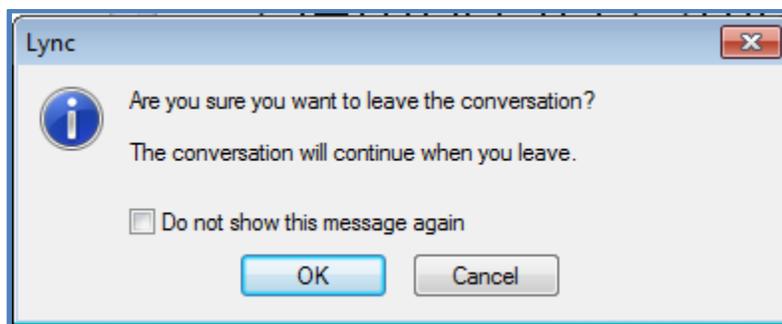


When you click on the **Windows Media Recordings (.wmv)** button at the top of the Recording Manager, you will be taken to the list of recordings you have elected to publish. The publishing of recordings, if selected, will commence immediately and a progress status will show as seen above.

From this window you can select any previously published recording and *Play* it or *Browse* to the location where it is stored. You can also *Delete* the recording by selecting it and pressing the *Delete* button.

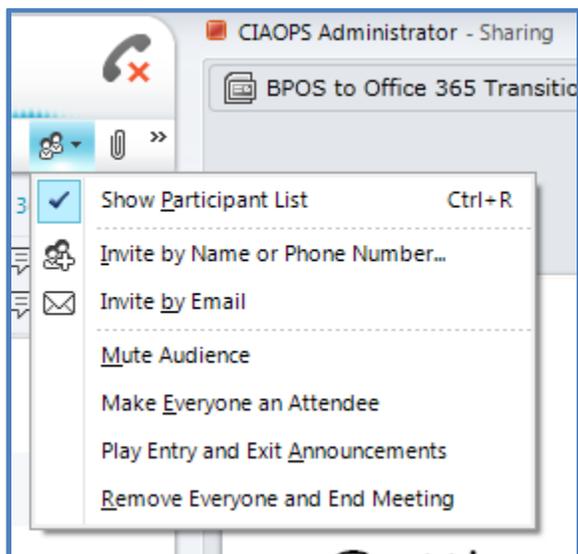
Ending a meeting

To end a meeting, close the Lync client window. You will be prompted with the following message.

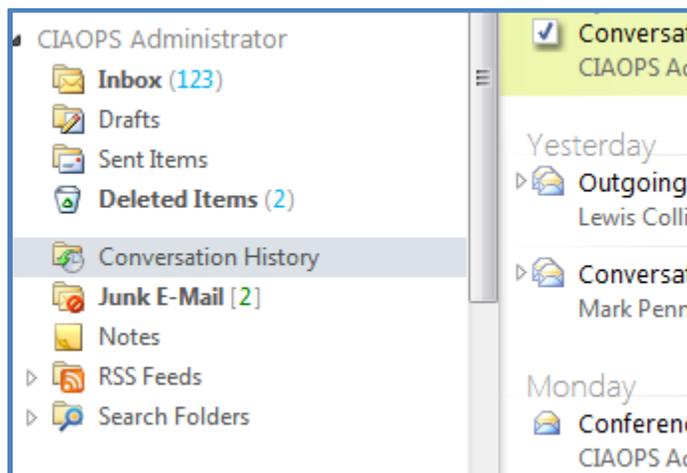


Select whether you wish to see the message again and press the **OK** button to close. If you leave the meeting this way only you will exit the meeting, any other attendees will remain and the meeting will continue without you.

If you are a presenter and you wish to end the meeting for all attendees you can do so via the attendees menu in Lync as shown previously:



If you exit a meeting any recording prior to that point will be converted and saved as per your preferences.



Lync will automatically save your chat history and call history in a folder called *Conversation History*. This will be located in your Office 365 Inbox as shown above.

Conclusion

Lync is very powerful component of Microsoft Office 365. It provides a range of communication options from instant messaging to video calls and conferencing to multiple attendees. Lync is integrated not only directly into Office 365 components such as SharePoint and Exchange, but it also integrates seamlessly with the latest Office desktop software such as Word, Excel, PowerPoint, etc.

This document has provided a very basic overview of some of the most common features available with Lync Online for Office 365 as well as taking you through a basic tutorial of these features. This document should make a great starting point for anyone wanting to come to grips with the basics of Lync Online on Office 365.

Where to go from here?

What has been shown here is only the tip of the iceberg as to what can be accomplished with Lync Online. The first place to start, if you want more information, are the **Links** and **Video** section below. These will provide you with more information about Lync.

Further documents and information about utilizing the advanced features of Office 365 can be found at <http://www.ciaops.com>. If you are interested in receiving information about any upcoming documents about Office365 please send an email to director@ciaops.com asking to be added to our regular newsletter.

If you have any feedback on the information provided here please contact director@ciaops.com.

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<http://www.ciaops.com>

Glossary

Lync - is a Microsoft product that is available either on site or from the 'cloud'. It is an integrated solution for instant messaging, presence, conferencing and voice. It also provides direct integration into other Microsoft products like Outlook, SharePoint and Office applications such as Word and Excel which permit you to communicate with team members without leaving what you are doing. You can share desktops, whiteboards, presentations and online polls using Lync.

Lync Online - is a component of Microsoft Office 365 and is a hosted version of Lync Server 2010 in Microsoft datacenters. It is accessed across the Internet typically using software that is installed on your device. Software is available for PCs, MAC's, iPad, Windows Phone and most mobile platforms.

Office 365 – Is hosted versions of Microsoft Exchange, SharePoint and Lync. They can be purchased as a suite or individually. All of the servers live in Microsoft data centers but can be accessed anywhere an Internet connection is available.

Stage – Location in the Lync client where shared items are displayed. This is generally to the right of the chat window. The Stage can only display one shared item at time whether that be a whiteboard, PowerPoint, desktop, etc.

Links

- Joining a Lync 2010 Online Meeting
<http://office.microsoft.com/en-us/communicator-help/joining-a-lync-2010-online-meeting-RZ102498560.aspx?section=1>
- How to troubleshoot recording online meetings with Lync
<http://support.microsoft.com/kb/2433212/>
- Set up your network for Lync Online
<http://onlinehelp.microsoft.com/en-us/office365-enterprises/hh416761.aspx>
- Office 365
<http://www.office365.com>

Videos

- What is Lync
<http://www.youtube.com/watch?v=-ET8wnasqj4>
- Lync Online Help and How to
<http://office.microsoft.com/en-us/communicator-help/CL102270108.aspx>
- Join a meeting using Lync for iPad
<http://www.youtube.com/watch?v=13L-g7MKk1A>
- Making a call using Microsoft Lync for iPad
<http://www.youtube.com/watch?v=vcC0grn1Oml>
- Lionbridge keeps employees connected and productive with Lync 2010 for Windows Phone
<http://www.youtube.com/watch?v=8TO6bNroGel>

About

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Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 15 years of IT experience in a variety of fields and positions, including working on Wall St in New York. In 2012 he was recognized with a Microsoft Most Valuable Professional (MVP) Award for his work with Office 365. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number of topics for the Computer Information Agency including being involved in the SMBITPro community in Sydney. Robert can be contacted via director@ciaops.com.

Company – Computer Information Agency (www.ciaops.com)

Founded in 1995, the Computer Information Agency is a specialized technology consultancy in Sydney, Australia that focuses on assisting businesses and individuals improve their productivity using technology and smart business practices. The Computer Information Agency has high levels of experience in technologies such as Windows Servers, including Small Business Server, and desktop applications such as Outlook, Word, Excel and Onenote.

With special emphasis placed on the business benefits of technology the Computer Information Agency is unique in its ability to work with companies to improve and streamline their processes utilizing the technology they already have in place. The focus is on providing an improved end result for the business which in the long run leads to greater productivity and profitability. More information about the Computer Information Agency can be found at <http://www.ciaops.com>.

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