Setup Information - To conduct this training module on Lync 2011 (Mac), instructors will need a computer running the Lync 2011 client and the most recent Lync update (14.0.1 as of this writing) **it is critical that the latest update be applied.**

**Lync Training Outline**

1. Lync for Mac
   a. Schedule and Run Online Meetings
   b. Messaging in Lync
Lync Client on PC - Getting Started

SPEAKER NOTES: The purpose behind this module is to get users familiar with the initial configuration and logon process for Lync 2011.

The Lync 2011 client allows you to access the University of Arizona’s Unified Communications solution. These solutions allows you to instant message (IM) your peers, perform peer to peer Audio and Video calls and also provides multiparty IM and Audio Video Conferencing with Collaboration. Lync 2011 full functionality is supported on Mac and PC operating systems, limited functionality is available for Linux operating systems (IM only).

See also: Lync Quick Start Guide on office.microsoft.com. (find Mac Linc)

Configuring Lync for first sign-on (Mac)

DEMONSTRATION OVERVIEW For Mac clients (A Lion system was used for these screenshots).

1. Install Lync and apply the latest update (14.0.1) is the latest version as of this writing. If this update is not applied, users may not be able to sign-on.
2. Walk the users through the initial sign on process
3. Sign off and back on to Lync to demonstrate that the settings are retained and that user input will no longer be required for sign in.
Launch the Lync client from the Dock or the Applications Folder. Upon first launch, you will be presented with the sign on screen and prompted for your e-mail address and credentials. The correct entry for the “Email Address:” field is netid@email.arizona.edu. The correct entry for the “User ID:” field is netid. Enter your password and check the “Remember my password” box. Click Sign In.
You are now signed on:

Click the Lync Menu and click **Quit Lync**. The Lync Client will Sign-off and close. The next time you launch Lync, the client will automatically sign in.
Lync Client Quick Overview

*SP**EAKER NOTES: Now that Lync is configured for Sign-On, it is time to go over the UI. This is quick design overview meant to explain the basic UI and Lync options.

When you sign into Lync, you will immediately see the main Lync window with the contact list displayed. Starting from the top you will see your NetID and Full Name (if Outlook 2011 is installed), below the NetID you will find the presence menu (presence will be covered shortly). Below the presence menu you will see the personal status message entry box. Below the personal status entry box, you will see the Contact Search box. To the right of the Contact Search box you will find the View Menu. Just below that you will find your contact lists. Below the contact lists you will see the Action buttons.
Setting Display Options

If you click on the View Menu, you can change how your contacts are displayed.

Setting Lync Preferences

SPEAKER NOTES: In this section we will go over setting Lync configuration options. Most of the settings are self-explanatory.
You can set Lync options by opening the Lync menu and selecting “Preferences”

When the preferences window comes up, it will first display “Appearance preferences” these options are pretty self-explanatory. Click the “General” light switch icon. You will now see the General preference settings.

Here you can select which applications you wish to have handle Presence/Telephone and Conference services. All should be configured to use Microsoft Lync. Below the Services settings you will see Logging, you can turn on logging here if you are having issues signing-on to Lync. When this box is checked, the Lync client will create and store log files which can be used by support staff to troubleshoot any issues. Below Logging you will see Downloads, here you can specify where you would like Lync to store any files sent to you by your contacts.
The **Phone Calls** preferences do not apply to the UA Lync deployment, so we will skip that page. Click **Account**. You will now see the Account Preferences screen.

On this screen you can configure personal options, such as how or if you would like Lync to change your status to “away” after you are inactive for X number of minutes. You can also configure Lync to use Microsoft Exchange and Outlook for managing personal information, use calendar information and whether or not to display your Out of Office information to any contacts.
Setting Lync Alert Options

If you click Alerts you will be able to set Notification and Alert sound preferences. These settings are fairly self explanatory.

Setting History Options

If you click History you will see the History preferences page. If you check the “Save Conversations” box, Lync will keep a record of all instant messages sent to and from you. These messages are stored in your Conversation History folder in Outlook and by Lync. You can set “Delete all Conversation” expiration dates as well.

SPEAKER NOTES: This is the end of the Settings and Options Section.
Instant Messaging and Presence

SPEAKER NOTES: Below you will find an overview of Presence and Instant Messaging (IM). While the text can appear a bit “dry” it is important to mention how without appreciating and valuing proper presence states, the value of Lync as a collaboration/communication tool can be diminished.

See also Change your presence status on office.microsoft.com

Presence information enables users to approach colleagues at the right time with the right form of communication, to lead to a more productive work environment. A user’s presence is a collection of information that includes availability, willingness to communicate, additional notes (such as location and status), and how the user can be contacted.

Presence is enhanced in Lync 2011 with pictures, and a default set of presence states that includes “Off Work,” “Do Not Disturb,” “Be Right Back,” “Available,” “Busy,” and “In a Conference.”

Users can set different levels of contacts, each of which can view different levels of presence information. By simply looking at a Contacts list, users can find everything they need to know at a glance. Simple colored icons indicate other users’ presence status, and picture and location are also shown.

With the Instant Messaging in Lync, users can quickly message each other with timely information.

Conversation history enables users to keep track of old IM conversations, and retrieve information that may have been communicated by IM months ago.
As indicated in the table, some presence states can be set by the Lync user, some are set automatically by Lync, and some can be set either way.

A red asterisk next to a contact’s status indicates that he or she has set an Out of Office notification in Outlook/Exchange.
Once signed onto Lync, simply click the presence menu under the user name/netid and select the desired presence state.

Set a personal note

The presence states in Lync cannot be customized or added to. However if the user wishes he or she may want to provide additional details about where they are or what they are doing. This is accomplished by setting a “personal note”.

To set a personal note, click the note display area, this is the text balloon above your name. Once you click on the text you can type over anything that is currently displayed.

Managing Contacts

SPEAKER NOTES: In this section we will cover the basic concepts of adding to the contact list, group creation, and viewing contact data.
Adding a Contact

In order to communicate with someone in Lync you will need to add him or her to your contact list. Once you have signed on to Lync, you will need to enter either the user’s name or email address in the “Find a Contact” box.

In this case, we will use the user’s email address. Enter the email address and you will see the search results appear below. Once the contact appears, you have the option to add the user to your contact list, or add the user to a contact group. Once you click the plus sign (+) the contact will appear in your contact list.

Removing a Contact

Removing a contact is just as simple as adding one. It is important to note that there are two ways to “remove” a contact. You can remove a contact from a contact group (such as frequent contacts), and you can also remove a contact from the contact list, which will remove the contact from all groups and the main contact list.
To remove a contact from the contact list and any associated groups. Control-Click the contact you wish to remove. You will be presented with the contacts option menu, select “Remove from Contact List”. The contact will be removed.

Viewing Contact information and Checking Availability

SPEAKER NOTES: It is possible to view expanded contact information such as e-mail address and scheduling information.

It is possible to view expanded information of your Lync contacts. Click on a Lync contact, you will see the users contact card appear on the left in addition to communication options: E-Mail, IM, Audio or Video call.
**Initiating Conversations and Calls**

You can initiate an Instant Messaging Conversation with any contact simply by double-clicking it.

**Instant Message Conversation:**

You can elevate any in-progress IM conversation to an Audio or Video call simply by clicking the **Phone** or **Video** Camera buttons. You can also add additional participants by clicking the “people” icon on the right (which is showing the current participant count=2) or dragging a contact into an in progress IM/Audio/Video session or clicking the **Gear** icon on the far right.

**Collaboration and Sharing**

Clicking the **Monitor** button displays desktop sharing options:

**Desktop:** This will share your entire desktop to any participant(s) of the current conversation. This feature is useful for support or demonstration purposes.

If you click on the **Paperclip** icon, you can send a file attachment to any contact or
You can also Initiate all Calling and Collaboration/Sharing events via the “Contact” menu. Simply click on any contact and then open the **Contact** menu:
Creating and Managing Contact Groups

*SPEAKER NOTES: Unlike the PC version of Lync, Groups on the Mac client serve more as an organizational rather than productivity enhancement.*

You can use groups to organize your contacts. A contact can be placed into more than one group.

To create a group simply Sign into Lync. Once you are signed on, control click “Pinned” or any other pre-existing group. You will now see the contact list menu. Select “Create a New Group”

The new group will appear.

Type in a name for the group and hit “Enter”. Group creation is now complete.
Dealing a Group

**SPEAKER NOTES:** Removing a group is a fairly simple process. It is important to remind the users that there is a chance of completely removing a contact if it only exists in the group being deleted. If there are copies of the contact in other groups, the copies will not be affected.

To delete a group, simply control click on the group and select **Delete Group**.

You will see a confirmation window, click OK. Please note that if the group contains the only copy of a contact, you will need to re-add the contact or move it out of the group before you delete it. If you have a copy of the contact in another group, it will not be affected.
Adding a Contact to a Group

There are a couple of ways to populate groups. The simplest would be to just drag a contact into a group. This method moves a contact from one group to another. You can also control click a contact and select copy contact to then select the group you wish to copy the contact to. The benefit of this method is that you can have a contact in multiple groups, and the deletion of one copy will not affect others.
blocking Contacts

To block a contact so that they cannot contact you using Lync, control-click the person you want to block and select “Block”.

![Image of Lync interface with a contact being blocked]
Conferencing

SPEAKER NOTES: In this section we will go over scheduling and joining an Online Meeting via the Outlook plugin. Once a user has joined a conference either as a presenter or a participant they will be able to perform the Collaboration actions mentioned earlier in this document.

One major Lync feature is Conferencing (Online Meetings). With Online Meetings, you can collaborate, share information and coordinate efforts with your peers in realtime. Voice and Video conferencing capabilities can be used from any location with an Internet connection. Meeting tools integrated into Outlook 2010 enable you to schedule a meeting or start an impromptu conference with a single click.

Joining an Online Meeting

SPEAKER NOTES: Most folks tend to “consume” rather than create meetings/content. We will cover scheduling a meeting as well.

Once you have the Lync client installed and configured, joining and participating in a meeting is as simple as clicking a link. Simply double click the meetings calendar entry in Outlook, and you will see the “Join online meeting” link/url.

Join online meeting
https://meet.catnet.arizona.edu/netid/YMSZ6NP7

First online meeting?
You may also join an Online meeting by opening the corresponding calendar entry in OWA:

```
Join online meeting
https://meet.catnet.arizona.edu/meetid/YMSZ6NP7
```

Please note that you can still join an online meeting by clicking the Join link even if you do not have the Lync client installed however, you will be prompted to run the Lync Web Attendee. However, for the Mac audio and video is currently not supported via the Lync Web Attendee (you will have to call in for audio), because of this we recommend that you have the full Lync client installed on your Mac.

In addition to clicking the Join Online url in the calendar item, you may also join the Online meeting by clicking the “Join Online” button from the Office (full client only) reminder screen:
Joining Process

SPEAKER NOTES: Now that we have covered how to join, we will go over what actually happens when you click the “Joining Online” link/button.

When you actually click the Join Online Meeting link/button, your web browser will launch to start the meeting join process:

If you have the Lync 2011 client installed, Lync will start (if not open), and you will automatically be joined to the meeting. If you do not have Lync installed, you will be given the option to run the Lync WebApp (not recommended/supported).
Scheduling Online Meetings

*SPEAKER NOTES: There are two ways you can schedule a meeting. You can use Outlook via the Lync Online Meeting plugin and the Lync Web Scheduler. We will cover the Outlook Lync Plugin first.*

Scheduling an Online Meeting is fairly simple. When the Lync client is installed, there is also an Online Meeting plugin for Outlook that gets installed as well. There are two ways to schedule a meeting in Outlook.
First select Calendar View in Outlook. Once it is open Click on the **New Meeting** button (1) then in the new meeting window click **Create Online Meeting** (2)

It is also possible to schedule an Online meeting from the Lync client itself. Simply click on the **Calendar** button on the bottom right of the Lync client:
Once you have a meeting scheduled, you can change the meeting properties by opening up the calendar item in Outlook and clicking the Online Meeting button. This will present you with a menu listing three options. The option we are interested in is **Set Access and Permissions**.

The first screen describes Access levels. If you check the “customize” box you can change who gets directly into the meeting without waiting in the lobby. The “lobby”, is sort of a “waiting room” for a conference. By default everyone is immediately joined into a conference. If you wish to control how users can join a conference you can change the setting here. (It is not common to change this setting from the default)
If you click “Presenter” you are shown Presenter options. A presenter can control the meeting and mute participants, if audio is being used.

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