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Getting Started
Install Lync
For KU-issued computers: Contact your department technical staff to get Lync installed.

For personal computers: You can find information about downloading Lync online at technology.ku.edu/software/microsoft-lync.

Sign in
To sign in to Lync:

1. Locate the Lync application. Lync will be located in your Applications folder under Microsoft Lync. To find your applications folder, click anywhere on your desktop. You will see the Finder menu at the top of your screen. Select Go then Applications. Look for Lync under Microsoft Lync.
2. Launch Lync by double-clicking the Microsoft Lync application.
3. By Sign in Address, enter your KU primary email address.
4. Leave Sign in as: Automatic.
5. By Username, enter your KU Online ID.
6. By Password, enter your KU online password.

Presence
What is Presence?
As a Mac user, your Presence consists of your social update and availability.

Social update
Your social update is a personal note that lets other people know what’s happening today. Your social update appears below your contact if added to a contact list. To add your social update:

1. In the Lync main window, click the box below your name that says, “Click to create a personal status message.”
2. Type a note, such as "Working from home" or "Working on a deadline, please IM instead of stopping by."
3. Hit enter or return on your keyboard.

Note:
- Your social update will not change unless you change it. For example, if you enter “At home with sick kids,” you will want to delete that message when it is no longer valid. To remove a social update, clear the note box so it’s blank (delete the contents of the note box).
- If you set up an out-of-office message in Outlook, your out-of-office message will override your social update and appear below your contact.

Availability
By default, Lync will determine your availability based on the calendar associated with your KU account and your computer activity. If you are in a meeting on your calendar, you will appear “Busy.” If you have walked away from your computer for more than 5 minutes, you will appear “Away.”
To override this default and specify your own availability:

- Open Lync 2011 and, in the Lync main window, click the availability dropdown menu under your name, and then select a different status, such as **Busy**.

To reset or return to having your availability determined by your calendar:

- Open Lync 2011 and, in the Lync main window, click the availability dropdown menu under your name, then click **Reset Status**.

Here are the available presence statuses and what they mean:

<table>
<thead>
<tr>
<th>Presence status</th>
<th>Contact is ...</th>
<th>How this 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)</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.</td>
</tr>
<tr>
<td>Unknown</td>
<td>presence can’t be detected.</td>
<td>Status may appear to contacts not using Lync IM.</td>
</tr>
</tbody>
</table>
Contacts
You don’t have to add a contact in order to communicate with them—you can simply search for the person and right click their contact.

Find someone
The quickest way to find someone via Lync is to launch a search by typing the person’s last name in the search box on the Lync main window. The results display automatically.

Add a contact to your Lync contact list
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. To add someone as a contact:

1. In the search window, type the last name of the person you want to add. The search results will automatically appear below the search bar.
2. Click on the contact.
3. To the right of the contact’s name, click the Plus sign with the drop down.
4. Select a group to add your new contact to, or select Add to New Group.

After you have searched, to hide the results, select the X in the search box.

Create groups for people you regularly get in touch with
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, select Contact in the menu at the top of the screen.
2. Select Create New Group.
3. A new gray bar will appear at the bottom of your contacts list. Type over the phrase New Group and select enter or return on the keyboard to give your group a name.
4. You can right-click a contact, and then deselect Tag for Status Change Alerts. Or, when you are alerted that the contact’s status has changed, you can select Untag from the notification box.

Rename a group
1. Locate the group you’d like to rename.
2. Hold down control on the keyboard and select the group name.
3. Select Rename group.
4. Type the new group name and select enter or return on the keyboard.

Privacy
Blocking a contact
In Lync, blocking a contact will control how much of your presence information they will see and disable them from sending you messages. You can block a contact in two ways:

- If you receive a notification that the person has added you as a contact, you can select to block them.
• You can also block a contact by searching for the contact. Then, select the contact. In the upper file menu, go to Contact then Block.

What to share using Lync
Lync should not be used to share content or conduct conversations containing Level 1 confidential data. For more information and to see examples of Level 1 confidential data, please visit http://policy.drupal.ku.edu/IT/data-classification-handling-procedures.

Instant Messaging
Send an instant message to one person
1. Locate the person you want to send an instant message to by finding them in Search or your Contacts list. Do one of the following:
   • Select the contact, then select the message icon at the bottom of the window 🤗.
   • Double-click anywhere on their contact listing.
   • Hold down control on the keyboard and select the contact. Then, select Send an Instant Message.
   • Click on the icon beside the contact 👥 and select the message icon 🆙.
2. Type your message at bottom of the conversation window.
3. Press Enter or Return on your keyboard to send the message.

Share a file or image using instant message
To send a file or image using instant message, do one of the following.
• Initiate an Instant Message. Then drag-and-drop a saved file into the text input area.
• Initiate an Instant Message. Select the paper clip icon 📄 in the window. Browse for the file, select it and select Send.
• Copy and paste a saved file or any image from an Office program into the text input area.
• Press PrtScn on your keyboard to capture an image directly from your screen, and then paste it into the text input area.
Invite another contact to a conversation
Add others to the conversation by dragging their contact listing from your Contacts list into the conversation window.

Or you can select the Settings icon in the message window.

Then select Invite by name or phone number ... Select the person from your Contacts List or search for them, select their contact, then select OK.

Send separate instant messages to different people
You can have separate instant message conversations with different people at the same time. For example, you might be sending instant messages to your manager in one conversation, while checking with another person or group in another conversation.

1. Start an instant message conversation using the steps above.
2. Without closing the existing conversation, repeat the steps above to start a completely new conversation with another contact, number, or group.

Add voice to a conversation
You can quickly add audio to your IM conversation by selecting the Call Icon. You can continue using Instant Message while you talk.

Add video to a conversation
You can quickly add video to your IM conversation by selecting the Camera Icon. You can continue using Instant Message while you talk.

End a conversation
When you’re done with an IM conversation, do the following:

1. Click the Close button in the upper-left corner of the Conversation window.

Conversation history
By default, instant messages and voice and video call logs are available in Lync and in an automatically generated folder in Outlook called Conversation History.

To view your conversation history in Lync:
1. Launch Lync.
2. In the top menu, select Window the Conversation History.

To view your conversation history in Outlook:
1. Launch Outlook or log in at mail.ku.edu.
2. Look for a folder below your inbox called Conversation History.
To change the settings for saving your conversation history:
If someone else has review rights for your mailbox, they will be able to see your conversation history.
You can change these settings and avoid having your conversation history in Outlook by:

1. Launch Lync.
2. In the top menu, select Lync then Preferences.
3. Select the History icon in the top navigation.
4. Deselect or select options according to your preferences.

Voice
Understand your voice options: integrated audio and dial-in conferencing
You have two options when it comes to using audio with Microsoft Lync: integrated audio or dial-in conferencing.

Using integrated Audio:
Integrated audio uses Voice over IP and your computer's microphone and speakers for the audio portion of a meeting. If you have a headset and microphone, or a Webcam with a built-in microphone and speakers, you will be able to use this feature.

There is no cost for connecting to the audio portion of a meeting or conversation using Voice over IP.
Integrated audio does have its limitations when it comes to scheduling meetings with people outside the University who do not have the Lync client installed. They will have to use the Lync Web App or dial-in conferencing.

Using dial-in conferencing:
Dial-in conferencing allows you and other meeting participants to join the audio portion of the meeting using a phone (for example, your desk phone). The meeting organizer must have a dial-in conference number for the meeting participants to use this feature.

Benefits of Dial-in Conferencing:

- It allows meeting participants to join the meeting using a phone rather than a headset and microphone.
- It enables people who join your meetings to use the "Call me at:" feature, which allows them to join the audio portion of the meeting by having Lync call them at a phone number they specify.

Select your audio device
Before using Lync to make a call or join a meeting, select your audio device and check the quality. You can use your computer's mic and speakers or plug in a headset.

1. Plug in your headset (optional).

2. Click the Select an Audio Device button in the lower-left corner of Lync, then select the device you’d like to use.

Note: If you are using a headset or conference puck, it is best to plug it in and select it in advance of the meeting or voice or video call.
Call one person
TIP: It’s always best to send an instant message and ask the person if they are available to talk using Lync before initiating a call. They may need a minute to connect their audio device.

1. Locate a contact in your Contacts List or by searching for them.
2. Select the contact.
3. Select the Telephone Icon at the bottom of the Lync window. Then, select Lync Call.
4. Your phone call will begin, and your contact will receive a notification that you are inviting them to a conversation.

Answer a conference call invitation
When you get a call, an incoming call notification is displayed in the lower-right corner of your computer screen. To answer the call, click the Accept button. You can also reject a call by clicking the Decline button.

Invite others to an ongoing call
1. In the conversation window, click on the Settings Icon.
2. Select Invite by Name or Phone Number ...
3. Choose a contact from your Contacts List or search for a Lync user, select the contact, and click OK.

Add voice to an IM conversation
You can quickly add audio to your IM conversation by selecting the Call Icon. You can continue using Instant Message while you talk.

Manage call features (mute, end call)
During a call, point to the phone/mic button to access the controls.
- You can mute your audio by selecting the icon with the microphone with a slash through it. It will turn to red to signify that your audio is muted.
- To hang up, click the red phone button in the conversation window.

Find a conference call number
To view the conference call number and meeting URL:
1. In the conversation window, click on the Settings Icon.
2. Choose Meeting Join Information.
You should now see the **Conference Number** and **ID**, as well as the **Meeting URL** and **Organizer**.

**Video**

**Using video**

For most Mac users, you can add video using the webcam on your Mac. You need a camera to share your video, but you don’t need one to see other people’s videos. Lync automatically detects the webcam and uses it for your next video call.

**Start a video call**

**Note:** Often, the best way to start a video call is to start with an instant message and ask if the person is free for a video call. You can quickly add video to your IM conversation by selecting the **Camera Icon** 📹. You can continue using Instant Message while you talk.

---

**To start a video call:**

1. Find a contact either in your Contacts List or using the search window.

2. Select the contact and then select the **Camera Icon** 📹. Your video call will begin, and your contact will receive a notification that you would like to video conference with them.

---

**To end a video call:**

- To end only the video and voice portion of the call, hang up by selecting the **Red Telephone Icon** 📞. The instant message conversation will remain.

- To leave the video, voice, and instant message portion of the call, close the window.

---

**To answer a video call:**

When someone calls you, an incoming conversation invitation notification is displayed in the lower-right corner of your computer screen. To join a conversation call, click **Accept**. You can also reject a call by clicking **Ignore**.

**Add video to an IM conversation**

You can quickly add video to your IM conversation by selecting the **Camera Icon** 📹. You can continue using Instant Message while you talk.

The video call starts. You can continue to send instant messages to the call recipient and also to other contacts. **Note:** If you accept someone’s incoming video call, they won’t see you unless you add video from your side of the conversation.

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**Online Meetings**

**Start an unscheduled or impromptu meeting**

An unscheduled or impromptu meeting is any conversation with one or more other Lync users.

**To start an unscheduled meeting by Instant Message:**

1. Select a contact and initiate an instant message by selecting the message icon at the bottom of the window 📩.
2. Add voice, video, or collaboration features using the icons at the top of the Instant Message window.

3. Add others to the conversation by dragging their contact listing from your Contacts list into the conversation window. Or, you can select the Settings icon in the message window.

Then select **Invite by name or phone number** ... Select the person from your Contacts List or search for them, select their contact, then select **OK**.

**To start an unscheduled meeting by using the Meet Now command, follow these steps:**

1. Open Lync, and in the menu at the top of your screen, select **Conversation**. Then, select **Meet Now**. Choose from the options: **Meet with a Call, Meet with Video or Meet with Desktop Sharing**.

2. A window will open with your meeting.

3. To invite others, select the **Settings icon** at the top of the window and choose one of the following:
   a. **Invite by name or phone number**... to invite other Lync users.
   b. **Send email invite**... to invite Lync or non-Lync users. This will create an email using your default email client with a hyperlink to the meeting. Non-Lync users will click on the hyperlink and join the meeting using the **Lync Web App**.

**Schedule an online meeting**

You can schedule an online Lync meeting and invite attendees who use Lync and those who do not. Attendees who do not use Lync will attend using the Lync Web App. To schedule the meeting, you must use Outlook.

**To create an online meeting or conference call request:**

1. Open **Microsoft Outlook**.
2. In the Calendar view in the top navigation, click **New Meeting** (Note: Don’t choose New Appointment).
3. A new meeting request will appear.

4. In the top navigation, select the **Online Meeting** icon. Then in the drop-down menu, select **Create Online Meeting**.
5. An automatically generated footer will appear with a hyperlink to the online meeting and a phone number and conference ID to join by phone. **NOTE**: Do not modify any of the existing text in the meeting request. Doing so may prevent people from joining the meeting.
6. In the meeting request, in the **To** box, type the email addresses of the people you want to invite to the meeting, separated by semicolons. By default, Lync will include assume all attendees are presenters. To change this, see *Change meeting access and presenter options*. You can invite people who don’t have Lync installed to a scheduled online Lync meeting. They will receive an email with a hyperlink that says → *Join Lync Meeting*. When they click on the hyperlink, the Lync Web App will launch in their default browser. For more on joining and participating in meetings using this method, see *Online Meeting with the Lync Web App*.

7. (Optional) Use **Scheduling** to ensure that everyone is available during the time you choose.

8. In the meeting request, in the **Subject** box, type a subject for the meeting.

9. By default, the location will appear as **Lync Meeting**. Add a location if the meeting will have an in-person component.

10. (Optional) In the body of the meeting request, above the Join Online Meeting link, type additional meeting details.

11. Send the invitation.

**Change meeting access and presenter options**

By default, Lync will include assume all attendees are presenters. These default options work well for small meetings with 7-10 participants, but you will want to limit access and presenter options for larger meetings.

To change meeting access and presenter options:

1. In the Lync online meeting request, select the **Online Meeting** icon and **Set Access and Permissions**...

2. To change the permissions, select **Customize access levels, presenter options, and phone settings**.

3. You can now define presenters, as well as specify attendees who need to wait in a virtual lobby until the meeting starts.

**Start or join a scheduled online meeting**

You have two options for attending a scheduled online Lync meeting—join using the Lync client installed on your computer or join using the Lync Web App. Using the Lync Web App to join a meeting will give you more options for sharing content, however you may run into issues sharing your voice and videos. See the Lync Web App page, <<URL>> for more information about joining online meetings using this method.
To start or join a scheduled online Lync meeting using the Lync client:

1. Open the meeting request and click on the hyperlink for the meeting or click on the Online Meeting icon in the navigation.
   TIP: If you receive a meeting reminder, you can click Join Online.

2. Your browser will launch the Lync Web App. Instead of logging in, choose Join using Lync for Mac (the last option).

   **Join using Lync for Mac or Communicator for Mac**

3. You will see a message box that asks you to specify which application to use. Lync should be selected. Select OK.
1. You will then be taken to the meeting room in the Lync desktop client.

To join an unscheduled meeting:
You may be invited to an unscheduled meeting or to a meeting that is already in progress.

2. You should receive a notification that you've been invited to a conference call.

3. To join the meeting, click Accept.
4. You will then be taken to a meeting room in the Lync desktop client.

Options while in the meeting

To mute and unmute audio:
By default your audio will be connected. You can mute your audio by selecting the icon with the microphone with a slash through it. It will turn to red to signify that your audio is muted.

Leave a meeting

To leave a meeting as a participant:
1. Close the conversation or meeting window. Note: Lync will notify you that you are leaving the meeting and that the conversation will continue without you.

If you are a host and want to end the meeting for everyone:
1. Select the Settings icon at the top of the window and choose Remove Everyone and End Meeting.

Schedule a meeting on behalf of someone else
You can schedule online meetings or conference calls on behalf of another person if you have been set up as a delegate on that person’s Microsoft Outlook account.

If someone would like you to serve as a delegate, Microsoft provides instructions that explain how to allow someone else to manage your mail and calendar. You can also contact the KU IT Customer Service Center at itcsc@ku.edu or 785-864-0177 or request assistance from your departmental IT support team.

Note: Both you and your manager must be using Lync.
After you’ve been set up as a delegate, you can open your manager’s Microsoft Outlook calendar on your own computer and schedule the meeting.

Sharing
As a Mac users, you can show your entire desktop to everyone in a Lync meeting using the Lync 2011 desktop client. Remember that a Lync meeting can be an impromptu conversation with one or more Lync users, or a scheduled meeting with Lync and non-Lync users. Also, presenters using Lync 2013 for PC or the Lync Web App will have more options for sharing.

To share your screen, you need to be a presenter. If the sharing option is grayed out, ask one of the presenters to give you presenter access.

Share your desktop
1. At the top of the meeting window, click on the Monitor icon.

2. From the drop-down menu, choose Desktop. IMPORTANT: When you share your desktop, everyone in the meeting can see your programs, documents, and notifications. Close confidential information or documents that you don’t want people to see.

3. When you begin sharing, you will notice a green border around your monitor. In addition, you will see the Stage.
4. To hide the Stage and share more of your screen, select **Hide Stage**.

If you want a meeting attendee to share their screen, give them **presenter access**, so they can use the controls. If they don’t use Lync, they can still use **Lync Web App** to present. See [Share your desktop and programs from Lync Web App](#) for more information.

**Stop sharing your desktop**

1. To stop sharing your desktop, click on the **Monitor icon** at the top of the window and select **Show Stage**.
2. At the top of the stage, select the Desktop – Your Name button. Hover over Desktop – Your Name and select Stop Sharing.

3. The green border around your screen will disappear. You will still see the Stage, but the grey button at the top will appear as Desktop Not Shared.

Share a PowerPoint
Using Lync 2011 for Mac, you can share a PowerPoint presentation as an attachment. To actually present the PowerPoint slides in the meeting space, you will need to use the Windows version of Lync or have someone using the Windows version upload the file. Once the presentation is uploaded by a Window’s user, the PowerPoint icon at the top of the Stage will no longer appear grayed out. The name of the presentation will appear near the top of the window. The presentation has not been shared.

To share a PowerPoint presentation uploaded by a participant:
1. Near the top of the stage, click the presentation name.
2. From the drop-down menu that appears, select Share Now.

To save a PowerPoint presentation to your hard drive:
1. Click the presentation name.
2. From the drop-down menu that appears, select Save As.
3. In the Save As dialog box, select a location.
4. Click Save.

Send and receive files
You can share files as long as they are not currently open.

1. Click on the Paperclip Icon.
2. An area with the heading Attachments will appear. Select the plus sign.
3. Browse your computer and select the file. Then, click Open.
4. Your file will now appear in the Attachments area.