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Usage Guide

A. Sign In

1. Click Start button > Programs > Microsoft Office 2013 > Lync 2013

2. On the interface for signing in, enter your Vanderbilt email Your.Name@vanderbilt.edu as Sign-in address then sign in by clicking Sign In

Enter your VU Password and then click Sign In
B. Set Status and Current Information

You could edit your status and current information as shown in the illustration below on the main interface of Lync.

The following table lists the meaning of each status.

<table>
<thead>
<tr>
<th>Presence status is ...</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.</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>
C. Find a Contact
1. Enter name of teḁ̀ Vanderbilt employee you want to find in Find someone or dial a number
2. Lync will search through your personal contacts and the Vanderbilt Directory. The searching result will be shown immediately on the list below Find someone or dial a number

D. Send an Instant Message (IM)
1. Double-click a contact on the list (see Find a Contact or Build your Contact List) or click the IM icon. A conversation will be popped up.
2. Edit your message. You may change the font color, type and size, and add emoticons.
4. If you want to IM more than one contact, hold down the Ctrl key, and click each contact that you want to reach. And then click Send an IM.

**E. Receive an Instant Message**

When someone sends you an instant message, an instant message alert appears in the bottom-right corner of your screen.
To accept the invitation, click anywhere on the picture display area of the IM request pane or to decline the invitation, click Ignore.

F. Personalize your Contact Info
You can personalize your contact and status. For example, you can add your mobile phone number and make it available to closed contacts only.

1. Click Lync Options

2. Click Phones on the left panel of the Lync – Options, then click Mobile Phone
3. Enter your phone number in **Phone number**, and then click **OK**

![Image of Phone Number Entry]

4. Select **Include in my contact card** check box, and then click **OK**

![Image of Contact Card Options]

5. To let certain people see your personal numbers: in the **Contacts list**, right-click the contact’s name, click **Change Privacy Relationship**, and then click **Friends and Family** or **Workgroup**

![Image of Privacy Relationship Options]
G. Build your Contact List

Create a group

You can set up a group for each team you work with so you can see at a glance who’s available at any given time, or communicate with the entire team at once. To create a new group:

1. In the Lync main window, click the Add a Contact button.
2. In the drop-down menu, select Create a New Group.
3. In the space that opens up at bottom of the window, type over the phrase New Group to give your group a name.

Add a contact

Your Contact list simplifies your communication and let you see contact information for the people most important to you. Add to it the people you expect to have regular interaction.
1. Use Lync Search to find the person, let's say, TEST2 you want to add.
2. Right-click the person’s listing in the search returns.
3. Click Add to Contact List.
4. Click a group to add your new contact to.
H. Make an Appointment with Online Meeting Content

The Online Meeting Add-in for Microsoft Outlook is installed automatically when Microsoft Lync 2013 was installed. Choose one of the following options to schedule an online meeting:

1. Open your Outlook calendar and on the Home tab, click New Lync Meeting

2. Click New Items > Lync Meeting
3. Click **Lync Meeting** in an Appointment

The link for joining the **Join Lync meeting** will be then shown in the message content.
I. Set Meeting Options

You can customize your meeting options to fit your requirements, meeting type, and the participants. For example, customize access, presenters, video sharing permissions, and so on.

1. Click **Meeting Options** under **Online Meeting** group on an **Appointment**

2. To control meeting access, select an option under **These people don’t have to wait in the lobby**. To choose presenters, select an option under **Who's a presenter?** To mute all attendees and prevent them from sharing video, use the options under **Do you want to limit participation?**
**J. Send your Online Meeting Invitation**

Click **Send** in the Appointment to send your invitation after making an appointment (see *Make an Appointment with Online Meeting Content*). The appointment will be added on your calendar and the invitations will be sent. Make sure that you have the date and time of the appointment before sending.

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→ **Join Lync Meeting**

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K. Join the Meeting

The recipients will receive the online meeting invitation you made (see Send your Online Meeting Invitation). In the invitation, there are four options: Accept, Tentative, Decline and Propose New Time. The recipients may click one of them to reply to the sender.

To join a meeting:

1. Click Join Lync Meeting
2. Click the invitation pop-up message and then click Join Lync Meeting

3. Click Join Online in the Outlook reminder. The remainder will be popped-up automatically if reminder of the appointment is set.

Choose your preference and then click OK in Join Meeting Audio
L. Send Messages, Add Audio and Video

You may add different communication modes to your IM conversation. For example, you can start an Instant Message (IM) conversation with a single contact and then add audio and video. You may share multiple documents/slides/programs which are running by sharing your desktop (see Share your Desktop); or attach files (see Attach a File to a Group Conversation).

Remark:- (1) All conversation is saved in the conversations tab in Lync and in the Conversation History folder in Outlook. (2) Microphone and speaker/headphone MUST be worked properly on your computer for making a call via Lync. (3) Web camera, microphone and speaker/headphone MUST be worked properly on your computer for making a video call.
**M. Share your Desktop**

You could share your desktop (i.e. your screen) so that all conversation participants are able to see everything on your screen. In the following example, ITS Test2 is going to share his desktop to the participant – ITS TEST1

In ITS TEST2 side, click the **Manage Presentation Content** and on the **Present** tab: click **Desktop** to show all the content of his desktop

Click **Ok** when the pop up message will be shown below:
In ITS TEST1 side, click Request Control, the desktop sharing session is established.

N. Stop Sharing

You may click Stop Presenting on the top task bar of your screen or conversation in the sharing session to stop sharing.
O. Give Control of your Desktop to Others

After the desktop sharing session is established, you could **Give Control** to one of participants and **Take Back Control** anytime. Participants could **Request Control** actively.

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**Your Action**

To give your desktop control to others, you may click **Give Control** and then select one of attendees (participants) to take the control of your desktop.

A message that you want it back, press Ctrl+Alt+Space. Click **OK**.

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To take your desktop control back, you may click **Give Control** and then **Take Back Control**

To allow control to be taken automatically, you may click **Give Control** and then **Give Control Automatically**

### Participants’ Action

Participant may click **Request Control** in the desktop sharing session to get the control
Participant may click **Release Control** (after clicking Request Control) to release the control.

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**P. Share a Program, PowerPoint Presentation, Whiteboard & Conduct a Poll**

Besides sharing desktop, you can share some running programs, PowerPoint presentation, whiteboard and conduct a poll.

- To share a particular running program such as Word document,
  
a. Click the ![Program](#) and on the **Present** tab: click ![Program](#) and double-click the program you want
- To share PowerPoint,
  a. On the Present tab, click PowerPoint
  b. Select PowerPoint file you would like to share
  c. To move the slides, click Thumbnails, then click the slide you want to show, or use arrows at the bottom of the meeting room.
  d. To see your presenter notes, click Notes
  e. Click the Annotations button on the upper-right of the slide to open the toolbar, and use highlights, stamps, laser pointer, and so on

- To share white board,
  a. On the Present tab, click Whiteboard
  b. Use the annotation toolset on the right side of the whiteboard, that includes items such as highlight, stamps, laser pointer, writing, and drawing tools
  c. Click Stop Presenting to stop sharing
• To conduct a poll,
  a. Click Poll
  b. Enter information of the poll such as Questions and Choices
  c. Click Create

• When the polling is started,
  a. Let participants vote
  b. You could view the result immediately

• When the polling is finished,
  a. You may click Clear everyone’s votes to restart the polling
  b. You may save the result as png type file after polling by selecting Save the poll results
In the sharing session, only one content (e.g. poll, whiteboard and PowerPoint) could be presented/shared at one time. You could switch to another content at any time for sharing.

You may click on **Manage Presentable Content** to switch to another content for sharing.
**Q. Transfer a File an individual contact**

Drag-and-drop is the simplest way to send a file. In this example, ITS TEST1 sends a pptx file to ITS TEST2 and TEST2 accepts. TEST1 receives a message when the transfer is completed.

<table>
<thead>
<tr>
<th>TEST1 (Your Action)</th>
<th>TEST2 (Participants’ Actions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Drag a file from file explorer or your Desktop</td>
<td>• Click Accept to save the file at a default location; OR</td>
</tr>
<tr>
<td>2. Drop it into a conversation or a contact on your contact list</td>
<td>• Click Save As and select a file location for saving the file; OR</td>
</tr>
<tr>
<td></td>
<td>• Click Decline</td>
</tr>
</tbody>
</table>

![Image of transfer process]

You will receive notification when the transfer is completed or declined.

Click the link to view the file.

![Image of file preview]

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