



# Lync® 2013 Introduction

## Signing In

1. Fill in the SIGN-IN ADDRESS, then PASSWORD if required. To auto-populate the password, [Click] SAVE MY PASSWORD.
2. To set your Presence status during sign-in, change  to .
3. [Click] SIGN IN.

## Signing out

[Click] the Presence drop-down arrow below your name, then select SIGN OUT or, to sign out and exit Lync, select EXIT.

## Show/Hide the Menu Bar

[Click] the drop-down arrow  then SHOW MENU BAR.















## Using Presence Status

The Presence status indicates a person's availability. Presence status appears below your name and as part of your photo.



Your presence is also indicated in the Windows Notification Area, and on some Lync phones by the color of the notification icon:     

## Status Indicators

-  **AVAILABLE:** Online and can be contacted.
-  **BUSY:** Please do not interrupt.
-  **IN A CALL:** Please do not interrupt while on a phone call.
-  **IN A CONFERENCE CALL:** Please do not interrupt while in a conference conversation.
-  **IN A MEETING:** Please do not interrupt while in a meeting.
-  **DO NOT DISTURB:** Refuses conversation requests, except from Workgroup contacts.
-  **PRESENTING:** Refuses all conversation requests.
-  **BE RIGHT BACK:** Temporarily away, but will return soon.
-  **OFF WORK:** Not at work and not available for contact.
-  **OUT OF OFFICE:** Indicated by asterisk, set automatically by the Outlook calendar status.
-  **INACTIVE:** Away from workstation.
-  **APPEAR AWAY:** Away from workstation.
-  **OFFLINE:** Not signed in.
-  **PRESENCE UNKNOWN:** Presence status is not known.

Contacts see different amounts of Presence information dependent on your privacy relationship. See **Controlling Presence Privacy**.

Status is updated automatically as follows:

- According to your Microsoft Outlook Calendar and when using Outlook's Automatic Replies.
- **AVAILABLE** when active on your workstation unless manually set to **BUSY**, **DO NOT DISTURB**, **BE RIGHT BACK**, **OFF WORK** or **APPEAR AWAY**.
- **INACTIVE** when you haven't used your workstation for 5 minutes.
- **AWAY** when you haven't used your workstation for 10 minutes, your screen/saver engages, or you lock your workstation.
- **PRESENTING** when you share your screen or duplicate your display for projection.

To change how your status is automatically determined:

1. [Click] .
2. [Click] STATUS then change the settings. [Click] OK.

## Changing Status Manually



- [Click] the Presence drop-down arrow below your name, then select a status.
- [Right Click] the Lync icon in the Windows Notification area, select MY STATUS  then select a status.
- Using Windows 7 or 8, [Hover] your mouse pointer over the Lync icon on the Windows Taskbar, then [Click] a status: .

## Using Location Status

Lync automatically updates your location

when signing in from different networks and displays this information to your contacts as part of your Presence status.



- To create a location so that your contacts know where you are, [Click] SET YOUR LOCATION below your Presence status, type your location, then press <Enter>.
- To reset your location list, [Click]  then select REMOVE ALL CUSTOM LOCATIONS.
- To hide your location status, [Click]  then uncheck SHOW OTHERS MY LOCATION.


## Adding a Note to Your Status

- To display a note as part of your Presence status, [Click] WHAT'S HAPPENING TODAY above your name, type your note, then press <Enter>.
- To update or clear your status note, [Click] then select the text, type your new note or press <Delete>, then press <Enter>.



## Viewing Other Users' Notes

If a contact in your list has a status note, the note will be included with their Presence status and will be displayed below their name.

## Adding Contacts

If necessary, [Click] CONTACTS  [Click]  then ADD A CONTACT IN MY ORGANIZATION or ADD A CONTACT NOT IN MY ORGANIZATION. Follow the subsequent steps.

To search and add a contact:

1. In the FIND SOMEONE... box, type a name, email address, distribution group, alias, or phone number.
    - To close the search results and return to your contact list, [Click] .
  2. [Hover] over a contact's picture, [Click]  then select ADD TO FAVORITES or ADD TO CONTACTS LIST, then desired list.
- Or, on a Lync phone:
1. Select CALL LOGS, then press OK.
  2. Select a recent call, press <MENU>, select ADD TO <CONTACTS> then OK.
  3. Select one of the CONTACT GROUPS, then ADD.

## Deleting Contacts

Select a contact, then press <Delete>, then [Click] YES. Or, [Right Click] a contact, then select REMOVE FROM CONTACTS LIST. [Click] YES.

## Emailing a Contact



[Right Click] a contact, then select SEND AN EMAIL MESSAGE. Compose and send the email as usual.

## Using the Favorites Group

By default, the contacts you communicate with most are shown in the FAVORITES group at the top of your contact list. You can also manually add contacts to this list. To add a contact to the FAVORITES group, [Right Click] the person, choose ADD TO FAVORITES. To remove a contact, [Right Click] the person, then select REMOVE FROM FAVORITES.

## Viewing Contact Cards

Contact cards provide quick access for connecting with your contacts and can display information about your contacts depending on your privacy relationship.

- To view a contact card for one of your contacts, [Hover] over the contact's status icon then [Click] . Or, [Right Click] the contact, then choose SEE CONTACT CARD.
- To keep a contact card visible [Click] .
- To move, [Drag] the card to a new position.

## Monitoring a Contact's Status

To receive an alert whenever a contact's Presence status changes to AVAILABLE, [Right Click] a person from your contacts, then select TAG FOR STATUS-CHANGE ALERTS. An alert box will display in the Windows Notification Area when the tagged contact becomes available. [Click] the alert to begin a conversation.

To stop receiving alerts, [Right Click] the contact, then deselect TAG FOR STATUS-CHANGE ALERTS.

## Controlling Presence Privacy

When you add a contact, their default Presence Privacy relationship is Colleagues.

To change the privacy relationship assigned to one of your contacts, [Right Click] the contact and select CHANGE PRIVACY RELATIONSHIP, then select a privacy relationship.

- **FRIENDS AND FAMILY** see all published contact information except meeting details.
- **WORKGROUP** contacts see all published contact information except home and other phone numbers. Contact can interrupt DO NOT DISTURB status.
- **COLLEAGUES** see all published contact information except home, other and mobile phone numbers and meeting details.
- **EXTERNAL CONTACTS** see only name, title, e-mail address, company and picture.
- **BLOCKED CONTACTS** see only name and e-mail address. The contact cannot make contact with you via Lync.

## Keyboard Shortcuts

Global	
Open main Lync window	 Y
Accept invitation	 A
Decline invitation	 Esc
Main Window	
Go to Contacts list tab	Ctrl-1
Go to Persistent Chat tab	Ctrl-2
Go to Conversation list tab	Ctrl-3
Go to Phone tab	Ctrl-4
Open File menu	Alt-F
Open Tools menu	Alt-T
Open Help menu	Alt-H
Conversation window	
Close conversation window	Alt-F4
Save As box for received file	Alt-S
Show/Hide IM area	Ctrl-W
Show/Hide participant list	Ctrl-R
Change to compact view	Ctrl-Shift-P
Call controls	
End call	Alt-Q
Put call on hold	Ctrl-Shift-H
IM (Conversation window)	
Save IM conversation	F12
Open a received file	Alt-P
Decline a sent file	Alt-D
Conversation or meeting stage	
View conversation meeting in full screen	F5
Take back control when screen sharing	Ctrl-Alt-Spacebar
Stop sharing	Alt-T or Ctrl-Shift-S
Show/Hide sharing stage	Ctrl-Shift-Y
Change to speaker view	Ctrl-Shift-J
Change to gallery view	Ctrl-Shift-I

# Microsoft Lync Quick Reference Guide

**Julia Schneider**



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