

Contents

Getting Started.....	3
Install Lync.....	3
Signing in	3
Signing out	3
Presence.....	4
What is Presence?.....	4
Social update.....	4
Availability.....	4
Location.....	5
Contacts	6
Find someone.....	6
Add a contact to your Lync contact list.....	6
Create groups for your contacts	7
Track down a busy co-worker	7
Privacy.....	7
Privacy relationships	7
Conversation history	8
What to share using Lync.....	8
Instant Messaging.....	8
Send an instant message to one person.....	8
Share a file or image using instant message	9
Send an instant message to many people	9
Invite another contact to a conversation	10
Send separate instant messages to different people	10
Add voice to a conversation.....	10
Add video to a conversation	10
End a conversation.....	10
View previous conversations and missed messages.....	10
Voice	11
Understand your voice options: integrated audio and dial-in conferencing.....	11
Select and test your audio device	12

Call one person	12
Call more than one person.....	12
Answer a conference call invitation.....	12
Invite others to an ongoing call	13
Add voice to an IM conversation	13
Manage call features (mute, call hold, end call).....	13
Request a conference call number	13
Video	14
Using a webcam	14
Accept a video call	15
Change video display options	15
Add video to an IM conversation.....	Error! Bookmark not defined.
Online Meetings.....	15
Start an unscheduled or impromptu meeting	15
Schedule an online meeting.....	16
Change meeting access and presenter options	16
Join a scheduled online meeting.....	16
Join an unscheduled meeting	17
Connect to meeting audio	Error! Bookmark not defined.
Invite people who don't have Lync installed	17
Leave a meeting.....	17
Schedule a meeting on behalf of someone else	17
Collaboration.....	17
Share your desktop or a program	19
Give and take control of a sharing session	20
Create a whiteboard	21
Share a PowerPoint.....	20
Stop sharing	21
Send and receive files	22
Record Meetings.....	22
To record a meeting or conversation.....	22

Getting Started

Install Lync

For KU-issued computers: Contact your department technical staff to install Lync. If you are currently using Office 2010, you can ask to have Lync installed without updating to Office 2013.

For personal computers: Lync 2013 is included as part of the Microsoft Office 2013. Students can download Microsoft Office 2013 at no cost and faculty and staff can purchase and download Microsoft Office 2013 at KU's Software Web Store, kansas.onthehub.com. For more information, see technology.ku.edu/software/microsoft-lync.

Signing in

To sign in to Lync:

1. Launch Lync.
 - a. Select the **Start Menu**.
 - b. Select **All Programs**.
 - c. Look for and click **Lync 2013**. It may be located in the **Microsoft Office 2013** folder under **All Programs**.

KU staff and faculty who are centralized: Lync should automatically populate your username and ID and you won't need to do the following.

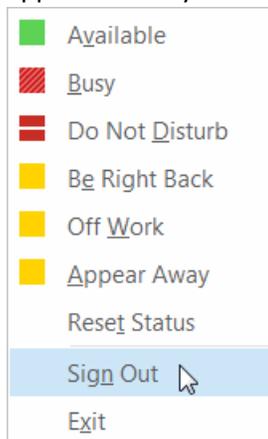
2. Sign in.
 - a. Under **Sign in Address**, enter your KU **primary email address**.
 - b. Under **Username**, enter the domain (home) followed by a backslash (\) and your KU Online ID (i.e. home\OnlineID).
 - c. Under **Password**, enter your **KU online password**.

Lync will automatically launch upon login for PC users unless you manually sign out.

Signing out

There are multiple methods for signing out of Lync. The easiest way to sign out is to:

1. Select the drop-down menu for availability under your name. Select **Sign Out**. You will now appear as Away.



2. If you'd like to sign out completely and appear Offline, follow the directions above and select **Exit**.

Presence

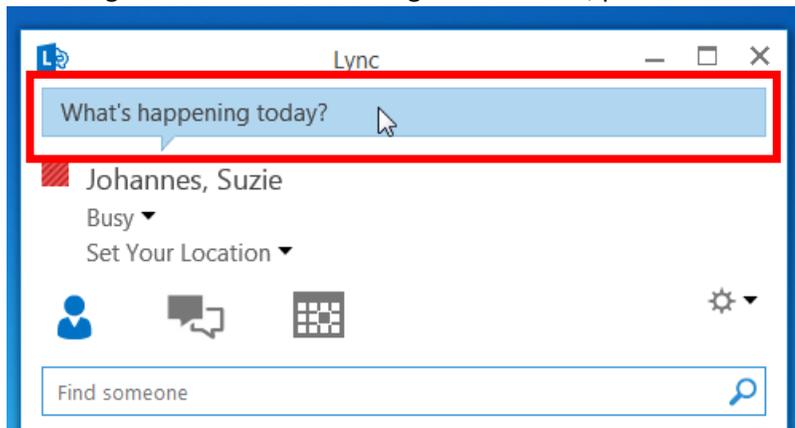
What is Presence?

Your Presence consists of your social update, availability, and optionally your location.

Social update

Your social update is a personal note that lets other people know what's happening today. It appears below your contact when someone adds you to their contacts list. To add a social update:

1. In the Lync main window, click on the grey box above your name, and then type a note, such as "Working from home" or "Working on a deadline, please IM instead of stopping by."



2. Press enter on the keyboard to set your message.

Two notes about social updates:

- Your social update will not change unless you change it, with the exception of out-of-office messages (below). 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, click in the grey box above your name and delete the contents of the box. Press enter on the keyboard.
- If you set up an out-of-office message in Outlook, your out-of-office message will override your last 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 "In a meeting." If you are not in a meeting on your calendar, you will appear as "Available." However, if you walk away from your computer for more than 5 minutes, you will appear "Away" or "Inactive."

To override this default and specify your own availability:

- Open Lync 2013 and, in the Lync main window, click the availability menu under your name, and then select a different status, such as **Do Not Disturb**.

When you manually override the default, your status will remain what you've manually set until you either change it to another status or return to the default settings.

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

- Open Lync 2013 and, in the Lync main window, click the availability menu under your name, then click **Reset Status**.

Here are the available presence statuses and what they mean:

If Presence status is ...	Contact is ...	How this status gets set
Available	online, available to contact.	Automatic or user-selected.
Be Right Back	away from computer briefly.	User-selected.
Away	logged on but has been away from computer for specified period.	Automatic based on inactivity or user-selected. Time interval can be adjusted.
Off Work	not working, not available.	User-selected.
Busy	occupied and shouldn't be interrupted.	Automatic (if user is in an Outlook-scheduled conference) or user-selected.
In a call	in a Lync call (two-party call) and shouldn't be interrupted.	Automatic.
In a meeting	in a meeting (per Lync or per Outlook)	Automatic.
In a conference call	in a Lync conference call (Lync meeting with audio) and shouldn't be interrupted.	Automatic.
Do Not Disturb	not to be disturbed; will see IM requests only if sent by Workgroup members.	User-selected.
Presenting	giving a presentation and therefore not to be disturbed.	Automatic when user is presenting from Lync-enabled computer. IMs are blocked.
Offline	not signed in.	Automatic.
Unknown	presence can't be detected.	Status may appear to contacts not using Lync IM.

Location

By default, no location information is set for you in Lync. You have the option to set up to 10 custom locations to provide Lync users with additional information on where to find you. Setting up locations can be helpful if you often work from different locations, for example you have an office at the Edwards Campus and one at the Lawrence Campus.

Once you set a location, Lync will automatically recognize when you return to that location based on your wired or wireless Internet connection.

Please note: Lync does not use GPS or your meeting calendar to track your location. It only uses what you decide to share.

To specify a custom location:

1. You must be in the location that you'd like to specify.
2. Click the on **Set Your Location**.
3. You will now see a text box. Type your **current location** and press **enter**.

To hide your location:

1. Click the **black drop-down arrow** to the right of the location.
2. Deselect **Show Others My Location**.

To remove custom locations:

1. Click the **black drop-down arrow** to the right of the location.
2. Select **Remove All Custom Locations**.

Contacts

Adding contacts is a good way to stay in touch with colleagues using Lync. However, you don't have to add a person to your contacts list to communicate with them—you can simply search for the person and right click their contact to send an instant message.

Find someone

The quickest way to find someone at Ku via Lync is to launch a search by typing the person's last name in the search box on the Lync main window. Lync will search KU's Global Address List, and the results display automatically.

TIP: You can also search by:

- Department
- Title
- Distribution list – You can add distribution lists with less than 100 members to your contacts list.

Add a contact to your Lync contacts 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, title or department of the person you want to add. The search results will automatically appear below the search bar.
2. Right-click the **person's listing**.
3. Click **Add to Contact List**.
4. Click a **group** to add your new contact to. By default, you will only have one group to choose called "Other Contacts." See **Create groups for you contacts** to learn how to add new groups.

Create groups for your contacts

You can set up a group for each team you work with so you can see at a glance who is 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. A new entry box will appear at the bottom of your contacts list. Type over the phrase **New Group** to give your group a name. Press **enter** on the keyboard to set it.

TIP: You can send an instant message to an entire group by right clicking on the group name and selecting **Send and IM**.

Placing contacts in groups

You have several options for adding a contact to a group.

- If the person is not in your contacts list, you can search for them by last name, right-click their contact. Then, choose **Add to Contacts List** and select the **Group Name**.
- You can drag and drop a contact from one group to another.
- You can right-click on a contact in your contacts list and choose **Move Contact To** or **Copy Contact To** and select the new group.

TIP: You can have one contact in multiple groups.

Track down a busy co-worker

One great feature of Lync is being able to “tag” a contact for status change alerts, which means Lync will display a notification as soon a contact’s status changes, so you know that it’s okay to send an instant message or drop by.

To tag a contact:

1. In the Lync main window, in your Contacts list, right-click a contact, and then click **Tag for Status Change Alerts**.

To untag a contact:

2. 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.

Privacy

Privacy relationships

In Lync, privacy relationships control how much of your presence information others see. Each of your contacts has one of five privacy relationships with you, and each relationship gives access to a different amount of information.

By default, all contacts are the Colleagues privacy relationships. This means they can learn more about where you are, when you’ll be available, and how to reach you. Friends and Family, as you might expect, can see more of this information than all the others. Giving someone a Workgroup relationship means that these contacts can see your meeting locations and get your attention via Lync even if you’ve set your status to Do Not Disturb.

For more on privacy relationships, see [Microsoft's website](#).

Change the privacy relationship for a contact

By default, contacts are assigned the Colleagues privacy relationship when you add them to your contacts list. If you have any contacts that you've later assigned to another relationship, you can change the privacy relationship back to Colleagues by clicking either Colleagues or Auto-assign Relationship.

To view your contacts according to their privacy relationships:

1. Open Lync, and, in your Contacts list, click the Relationships tab in the area just above your contacts (other options are Groups, Status, and New).

TIP: When you view your contacts by Relationships, you can drag and drop contacts into different privacy groups.

To change the privacy relationship you have with a contact:

1. In your Contacts list, right-click the contact, point to Change Privacy Relationship, and then click a new privacy relationship for the contact.

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. Click on the messages icon in the interface.

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 and click on the grey gear **Options**  button.
2. Select **Personal** in the left navigation.
3. Deselecting "Save IM conversations in my email Conversation History folder" and/or "Save call logs in my email Conversation History folder."

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 their contact in Search or your Contacts list. Do one of the following:

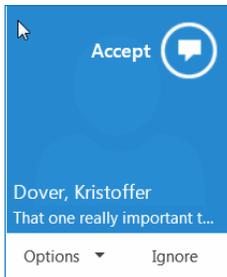
- Hover over their presence icon (square with color) in the Contacts list or search results and click the IM button on the Quick Lync bar.



- Double-click anywhere on their contact listing.
 - Right-click their listing and select **Send an IM**.
2. Type your message at bottom of the conversation window.
 3. Press **Enter** or **Return** on your keyboard to send the message.

Answer an instant message

1. Click anywhere on the blue area of the IM request pane.



2. Type a response in the 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, do one of the following:

- Drag-and-drop a saved file into the text input area of an instant message. Then, hit **Enter** or **Return** on the keyboard to send it.
- Copy and paste a saved file or any image from an Office program into the text input area.
- Press the **PrtScn** button on your keyboard to capture an image directly from your screen, and then paste it into the text input area.

TIP: If you are in a group IM conversation, share the image by saving it, then clicking the Presentation Icon > Attachments tab > Insert Files (the file will be sent an icon that the recipient transfers to their computer to view), or by pasting it to an interactive Whiteboard.

Send an instant message to many people

You can send an instant message to multiple contacts using two methods:

- If they are in the same group. Right-click on the gray bar with the name of the group and select **Send an IM**.
- Hold down the Ctrl key and select multiple contacts or hold down the Shift key and select a series of contacts. Right-click and select **Send and IM**.

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:

1. Select the **Invite more people** button  .
2. Select **Invite More People**.
3. Select the contact from your contacts list or search for the contact by last name.

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 **Telephone 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-right corner of the Conversation window.

View previous conversations and missed messages

Lync automatically saves your conversation history in Lync and in an automatically generated folder in Outlook called Conversation History. If your conversation was an instant message, Lync will save the entire conversation. With voice and video calls, Lync stores a log that the call happen and who was included.

To view or continue a previous IM conversation or see an IM request you missed:

1. Near the top of the Lync main window, click the **Conversations** view  .
2. Click **All** or **Missed**, depending on what you're looking for. If you don't see the conversation you're looking for, click **View More in Outlook**, at the bottom of the list.
3. Double-click the conversation to view, or
4. Right-click the conversation to delete or continue the conversation.

To view an IM conversation in Outlook:

1. Open Outlook on your computer or log in at mail.ku.edu.
2. Look for a folder below your inbox called **Conversation History**.

You can delete conversations in Outlook just like you would an email. If you delete a Lync conversation in Outlook, it will disappear in Lync.

TIP: You can file your conversations within folders in Outlook much like you would email. When you file a conversation, it will disappear from your Conversation History. You can avoid this by copying the message into the folder by holding down **Ctrl** and dragging and dropping the message into the folder.

To change your preferences on storing 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 and go to **Options** .
2. Select **Personal** in the left navigation.
3. Deselect **Save IM conversations in my email Conversation History folder** and/or **Save call logs in my email Conversation History folder**.



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. You can also use a headset or conference speaker/microphone to participate in voice calls and online meetings.

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 with a computer with a microphone and speaker or use 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 is a great option for attendees who are traveling and don't have internet or computer access.

Select and test 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 **Select Primary Device** in the lower-left corner of Lync, then click **Audio Device Settings**.
3. Pick your device from the **Audio Device** menu, and adjust the speaker and microphone volume, as needed.
4. Select **Check Call Quality** to record a message and hear it played back.

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. Initiate an instant message and ask if the person is available to talk.
2. Add voice by selecting the telephone icon .

Or, to start with a voice call:

1. Pause on a contact's presence icon (square with color) anywhere it appears.
2. Select the phone icon from the shortcut menu.



Call more than one person

You can start a Lync-to-Lync conference call with multiple contacts using two methods:

- If they are in the same group. Right-click on the gray bar with the name of the group and select **Start a Conference Call** and then select **Lync Call**.
- Hold down the Ctrl key and select multiple contacts or hold down the Shift key and select a series of contacts. Right-click and select **Start a Conference Call** and then select **Lync Call**.

Answer a conference call invitation

When someone calls you, an alert pops up on your screen.

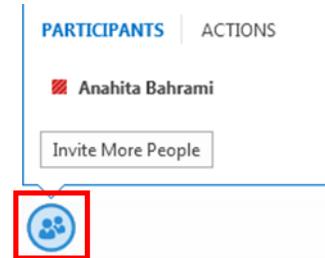
- To answer the call, click anywhere in the blue area.
- To reject the call, click **Ignore**.

- To start an instant messaging (IM) conversation with the caller instead of an audio call, click **Options**, and then **Reply by IM**.
- To reject the call and other calls, until you change your status click **Options**, and then **Set to Do not Disturb**.
-

Invite others to an ongoing call

1. In the conversation window, point to the **Invite More People** button , and then click the **Invite More People**.
2. Type the name(s) of the contact(s) you'd like to add or select the contact(s) from the list, and then click **OK**.

Your new invitees will receive a request to join your call.



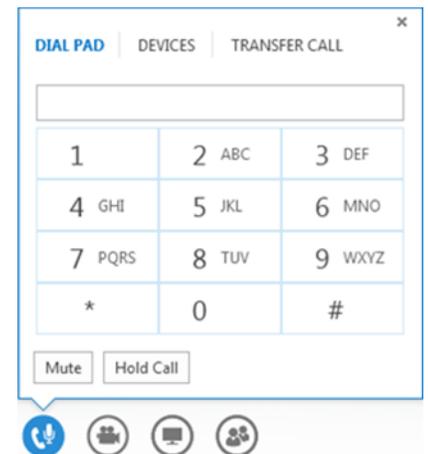
Add voice to an IM conversation

In the conversation window, point to the phone icon, and then select **Lync Call**.

Manage call features (mute, call hold, end call)

During a call, point to the phone/mic button to access the controls.

- To put the call on hold, click the **Hold Call** button.
- To mute your audio, click the **Mute** button or click the **Call** button itself.
- If call transferring is available for your account, click the **Transfer Call** tab, and select the number you want.
- To hang up, click the **red phone** button  in the conversation window. This will only hand up the voice and/or video portion of the call.
- To close the conversation completely, close the conversation window by selecting the grey X.



Request a conference call number

To view the conference call number and meeting URL:

1. Click the additional options button in the bottom right corner of the meeting window **...**.
2. Select **Meeting Entry Info**.

You should now see the **Conference Number** and **ID**, as well as the **Meeting Link** and **Organizer**.

Video

Using a webcam

For the closest thing to a face-to-face conversation, connect a web camera to your computer. Lync automatically detects the web camera and uses it for your next video call.

Note: You do not need a web camera to participate in video calls and online meetings. The camera only enables you to share your own video. If you do not have a web camera or do not have it enabled, you will appear as a generic blue icon to others.

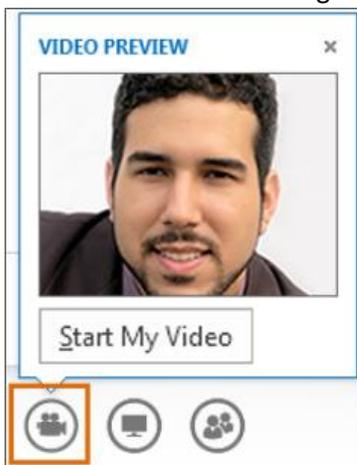
To set up your camera:

1. If you are using an external webcam, plug it in to your computer.
2. Click **Options**  in the Lync main window, then click **Video Device**.
3. If you don't see your video preview, make sure the camera is working correctly. To adjust settings, click **Camera Settings**.

To start a video call:

TIP: It's always best to send an instant message and ask the person if they are available for a Lync video call before initiating a call. They may need a minute to connect an audio and/or video device.

1. Initiate an instant message and ask for permission to initiate a video call.
2. Pause on the **camera icon** to preview your video.
3. Fully click on the **camera icon** or click **Start My Video** to initiate the video.
4. Your video starts streaming and is visible to everyone in the meeting.



You can continue to send instant messages to the call recipient(s) 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.

To stop or end a video call:

- To end video, pause on the camera icon and select an option:
 - **Stop My Video** ends your video, but you can still see other participants' videos.

- **Leave video** ends all the videos for you, but you'll still have audio.
- To end the call completely, close the window by selecting the grey **X** in the upper right corner of the window.

Accept a video call

When someone calls you, an alert pops up on your screen.

- To answer the call, click anywhere in the blue area.
- To reject the call, click **Ignore**.
- Click **Options** to take other actions:
 - **Reply by IM** instead of video.
 - **Answer with Audio Only** if you don't want to share your video.
 - **Set to Do not Disturb** to reject the call and avoid other calls.

Note: You can participate in multiple voice or video calls at the same time. If you accept a video or voice call while you are on a different call, it will put your current call on hold.

Change video display options

1. Click the **Video** drop-down menu during a video call to select how you would like to view the video.
2. You can view video in full screen mode or in a pop-out window . You can also expand or hide the preview of your own video stream.

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 or impromptu meeting by instant message:

1. Select one or more contacts.
2. Right-click and select **Send an IM**. (You can also right-click on a group's name in your contact list.)
3. Add voice, video, or collaboration features using the icons at the bottom of the instant message window.

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

1. Open Lync, and in the Lync main window, click the **Show Menu** black arrow to the right of the Options button Options arrow, and then click **Meet Now**.
2. In the conversation window, click the People Options menu Lync People Options button, and then do one of the following:
 - a. To invite people from your Contacts list, click Invite by Name or Phone Number, type a phone number or select one or more contacts, and then click OK.
 - b. To invite people by sending an email, click Invite by Email, and then fill out the meeting request.

Schedule an online meeting

You can create an online Lync meeting and invite attendees that use Lync and those who do not. Attendees who do not use Lync will attend using the Lync Web App.

To create an online meeting or conference call request:

1. Open **Microsoft Outlook**.
2. In the Calendar view, on the Home tab, click **New Lync Meeting** . In Outlook 2010, select **New Online Meeting**. Or, create a new meeting and select **Lync Meeting** in the Meeting tab.
3. 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.
4. 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](#).
5. (Optional) In the meeting request, on the Meeting tab, in the Show group, click Scheduling Assistant. Use the Scheduling Assistant to ensure that everyone is available during the time you choose.
6. In the meeting request, in the **Subject box**, type a subject for the meeting.
7. By default, the location will appear as **Lync Meeting**. If you are also holding an in-person meeting at the same time, add the room and reserve it as you normally would.
8. (Optional) In the body of the meeting request, above the Join Online Meeting link, type additional meeting details.

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, in the Online Meeting group, click **Meeting Options** .
2. Accept or change the default options as required. For details, see Microsoft's Web page: <http://office.microsoft.com/en-us/lync-help/set-options-for-lync-meetings-HA102809361.aspx>

Join a scheduled online meeting

To join a scheduled online Lync meeting:

1. Do any of the following:
 - In the Lync main window, above the search box, click the **Calendar icon**. Right-click the meeting listing and click **Join**.
 - In the meeting request, click the **Join Lync meeting** hyperlink.
 - In the meeting reminder, click **Join Online**.
 - Using the **conference phone number and ID**, you can call in and join the meeting by phone.

2. Unless you call in, on the **Join Meeting Audio** window, select one of these options.

Use Lync (full audio and video experience)	You can use computer audio and video with your computer's built-in devices, or a headset and camera.
Call me at	Lync calls you at a number you provide, such as your desk phone.
Don't join audio	Select this if you decide you want to call into the meeting with a phone (and the meeting request includes call-in details) or join the audio portion later. Use the conference numbers and ID in the invitation to dial in.

Join an unscheduled meeting

You may be invited to an unscheduled or Meet Now meeting or to a meeting that is already in progress:

1. In the notification that appears in the lower-right corner of your screen, click **Join**.
2. Refer to the audio options above.

Invite people who don't have Lync installed

You can invite people who don't have Lync installed to 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](#).

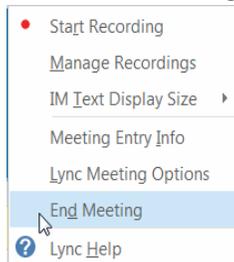
Leave a meeting

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. Click the additional options button in the bottom right corner of the meeting window **...**.
2. Select **End Meeting** (below).



Schedule a meeting on behalf of someone else

At this time, delegates cannot schedule Lync meetings on behalf of someone else without using a workaround.

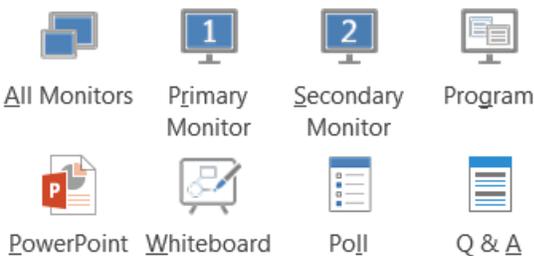
1. Have the person that you are delegating on behalf of create a Lync meeting in Outlook and invite you.
2. Copy the meeting join information in the footer.
3. Create future Lync meetings by creating a new meeting request and pasting the meeting join information from the previous meeting into the invitation.
4. Complete and send the meeting request as you normally do.

Collaboration

Lync has many options for collaboration during conversations and scheduled meetings. You can show your entire desktop or just selected programs. In addition, you can give over control to others, which will enable them to control what's being shared on your computer. You can conduct polls, share interactive whiteboards, and hold Q & A sessions.

Keep in mind that you need to be a presenter to share presentable content. By default, all meeting invitees and conversation participants will be designated as presenters. If the sharing option is grayed out, ask one of the presenters to give you [presenter access](#).

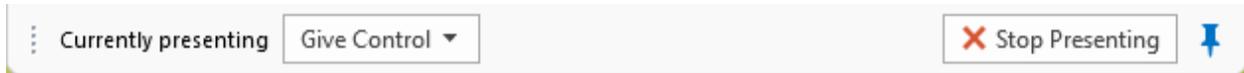
Note: Meeting attendees who join using the mobile app will not be able to see collaborative content.



- **Share your monitor** when you have to switch between programs, or work on documents from different programs. If you are using multiple monitors, you can choose to share one or both monitors.
- **Share a program** when you want to present specific programs or documents, and you don't want people to see anything else on your computer.
- **Share a PowerPoint presentation** when you to give a more formal presentation using PowerPoint slides. Presenters will be able to cycle through the slides independently and share annotations.
- **Share a whiteboard** when you want to collaborate on something visual or brainstorm. You can also copy and paste meeting notes into a whiteboard and participants will be able to add to them. When you're done, you can save the whiteboard as a PNG.
- **Create and conduct a poll** to gather quantifiable feedback from all online meeting participants. Polls are anonymous, and you can choose to hide results from attendees.
- **Add Q & A** (question and answer) to provide a structured environment for answering questions during the meeting. This can be especially helpful in large meetings with multiple presenters. Attendees can ask questions, which appear for presenters to answer.

Share presentable content

1. In a meeting or conversation, pause on the **presentation icon**  at the bottom of the window.
2. On the **Present** tab, choose the option you'd like.
3. You should now see the presenter's toolbar at the top of the window if you are sharing your desktop or program.



3. On the sharing toolbar, at the top of the screen, use any of these options:
 - Click **Give Control** to share control of your desktop or programs with the participants. For details, see [Give and take control of a sharing session](#).
 - Click the **blue pin** to hide the toolbar and have more space. To un-hide the toolbar, move the mouse to the top of the screen. When the sharing toolbar appears, use any of the controls or click the pin again to keep the toolbar visible.

NOTE: While you are sharing, your Lync status changes to **Presenting**, and you won't receive instant messages or calls.

4. Choose Stop Presenting in the presenter's toolbar to stop sharing.

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.

Share primary, secondary or all monitors:

If you have more than one monitor, they all display on the **Present** tab, and you can choose which one to share. When you share **All Monitors**, the sharing toolbar opens on your primary monitor.



Share a program

1. Launch the program you'd like to share.
2. Hover over the **monitor icon** and select **Program**.
3. Lync will display all of the programs you currently have open. Select the one you'd like to share.
4. You will now be presenting the program. The window with the program will appear to have a yellow outline, and you'll see the presenter's toolbar at the top. You can use the options on the presenter's toolbar to give control to others and end the presentation.

Give and take control of a sharing session

If you want another meeting participant to change a document, help you present, or demonstrate something, you can grant control to that person. You'll both be in control of the sharing and you can take back control at any time.

1. On the sharing toolbar, click **Give Control**.
2. Select the name of the person you want to give control to.

Lync sends a notification to that person to let them know you're sharing control.

1. To take back control, click **Give Control** on the sharing toolbar again, and then click **Take Back Control**.

TIP: You can enable people to automatically take control of your sharing session at any time, by clicking **Give Control Automatically** on the sharing toolbar. We recommend that you select this option only in small and casual meetings. To take back automatic permission, click **Give Control** on the sharing toolbar, and clear **Give Control Automatically**.

Share a PowerPoint

Giving a PowerPoint presentation is an effective way to get your ideas across. It lets you present your ideas visually and organize them in highlights to make them more memorable.

Use the meeting controls such as annotation tools, presenter notes, and switching presenters, to help you during your presentation. You can even make the slides available for downloading to all attendees to review after the meeting.

To upload your PowerPoint presentation:

It's a good idea to upload your presentation in advance and practice with the presentation tools so you're comfortable using them in the meeting.

1. Pause on the presentation (monitor) icon, and click **PowerPoint**.
2. Find your presentation, and double-click it to upload in the meeting.
3. To move the slides, use the arrows at the bottom of the meeting, or the arrow keys on your keyboard. You can also use the **Thumbnails**.
4. Click **Notes** to see your presenter notes (visible only to you).
5. If a slide contains a video, pause on the slide to unhide the video controls, such as **Play**, **Pause** or **Stop**. The audio plays for participants who used computer audio when joining.
6. Any animations in the slides play just like they do outside the Lync Meeting.
7. Press **F5** on your keyboard to go to full-screen view, and **Esc** to go back to normal view.
8. Click the **Annotations** button on the right side of the slide to unhide the tools and draw, stamp, highlight, and so on. See later in this article for more information.

To view slides privately:

If someone else has uploaded and started sharing a PowerPoint presentation, you can move ahead or back to view the slides privately, or take control of the presentation. Please note that you must be designated as a presenter to do this.

1. Tap or click the slide, then use the arrows at the bottom of the meeting to move through the slides.

This won't interrupt the meeting, and you'll be able to return to the slide that the presenter is currently showing at any time. Just select **Return to Presenter's View**.

Create a whiteboard

A Whiteboard is a blank page that you can use to work together with other meeting participants by being able to type notes, draw, or import images. When your meeting is over, you can save the Whiteboard with the data from the participants' collaboration.

For more on interactive whiteboards, see [Microsoft's website](#).

Create and conduct a poll

Conducting a poll is a great way to get measurable feedback on a question. Polls are anonymous, and you can choose whether to hide or show results to attendees. You can export the results as a PNG.

1. Hover over the **monitor icon** and choose **Poll**.
2. Give your poll a name.
3. Type a question to ask with the poll.
4. Provide choices.
5. Select Create to distribute to everyone in the session.

TIP: You can join your meeting and create a poll before your meeting starts.

Enable Q&A

Enabling Q&A (question and answer) provides a structured way for collaboration during the meeting. Any presenter can initiate the Q&A session. Attendees and presenters can ask questions, but only presenters can answer.

Note: When you initiate a Q&A session, meeting instant messaging will be turned off until the Q&A is over.

1. Hover over the **monitor icon** and choose **Q&A**. If there are no other content presented, the content stage opens and displays the Q&A manager for all participants. If other content is active, the Q&A tab displays as a new tab next to the Presentation tab.
2. When a question is submitted, any of the presenters can click Answer and type a reply. Then press Enter on the keyboard to post the answer.
3. If you're presenting content when a question is submitted, you'll see a notification about the new question. You can click the **Q&A tab** at any time to answer the question, and then go back to Presentation tab to continue your presentation.
4. If you start typing an answer and change your mind, click **Cancel** to answer later, or for another presenter to pick up the question.

5. Click the Unanswered tab to filter for the questions that haven't been answered yet.
6. At the end of the session, click **Stop Q&A**. When Lync asks if you want to enable IM, click **Allow All Meeting IM**, or click **X** on the notification if you want to keep the IM off.
7. If you want a record of the Q&A session, click **Save As**, type a name and save the file on your computer. Q&A is saved in Notepad and contains the questions, answers, time stamps and the names of attendees and presenters who participated.

Send and receive files

1. Pause over the monitor icon and select the **Attachments** tab.
2. Select **Add Attachment**.
3. Browse your computer, select the file, and select **Open**.

Record Meetings

When you record a Lync Meeting, you capture audio, video, instant messaging (IM), screen sharing, PowerPoint slides, whiteboard, and polling. Any of the presenters can record a meeting and save it on their computers.

Please note:

- You'll need to plug into a power source to record a meeting.
- Unlike with Adobe Connect, the recording of the meeting is saved on your local computer. Once the meeting is finished, the video will need to process. To share the video, you'll need to upload it to a host, such as mediahub.ku.edu to be able to share with a URL.
- When you begin recording, all attendees are notified.

To record a meeting or conversation

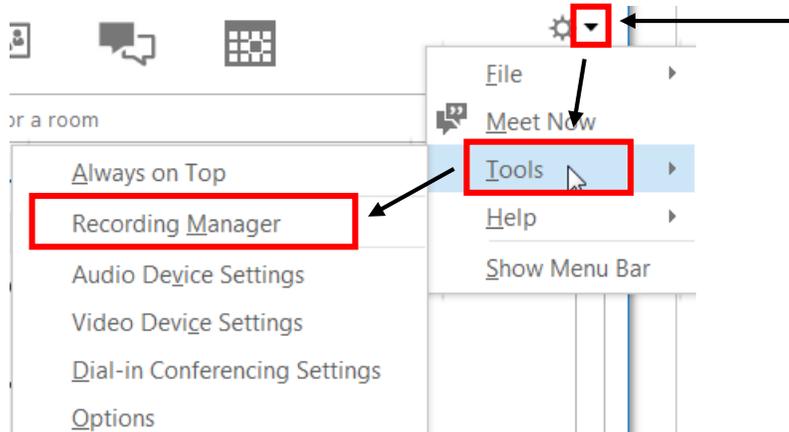
Before beginning to record, plug in to a power source.

1. In the meeting window, click **More Options**  , and then click **Start Recording**.
2. Use the controls at the bottom of the meeting room to pause, resume, or stop the recording.

After the recording is stopped, Lync will process the recording and save it in a format that plays in **Windows Media Player**.

To play, rename, or delete a recording

1. Go to the Recording Manager by selecting the **black drop-down icon** by the options icon. Select **Tools** and then select **Recording Manager**.



2. Click on the record and then select **Play, Browse, or Delete**.

To share the recording using a URL using Media Hub

Media Hub is an online media host that is automatically available to all KU students, faculty, and staff at no cost.

1. Launch a web browser and go to **mediahub.ku.edu**.
2. Log in using your KU Online ID and password.
3. Select **Media Upload** and then select **+Choose a file to upload**.
4. Navigate to your video(s). By default, they will be stored under **My Videos > Lync Recordings** under your user profile. Select the **file** and then select **Open**.
5. Your file will automatically start uploading. When it is done, select **Go to media page**.
6. Under the video, click the **Share** tab. You will now see the hyperlink for the video, or you can choose **Embed** to get options for embedding the video.