Microsoft

Microsoft® Office Specialist

MOS Study Guide

for Microsoft® Office 365

Includes
Exam-Discount Offer
See back

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Taking a Microsoft Office Specialist Exam

Desktop computing proficiency is increasingly important in today's business world. As a result, when screening, hiring, and training employees, employers can feel reassured by relying on the objectivity and consistency of technology certification to ensure the competence of their workforce. As an employee or job seeker, you can use technology certification to prove that you already have the skills you need to succeed, saving current and future employers the trouble and expense of training you.

Microsoft Office Specialist Certification

Microsoft Office Specialist certification is designed to assist employees in validating their skills with Microsoft Office applications, including Word, Excel, PowerPoint, Outlook, Access, and OneNote, as well as SharePoint and Office 365. The following certification paths are available:

- A Microsoft Office Specialist (MOS) is an individual who has demonstrated proficiency by passing a certification exam in one or more Microsoft Office applications, including Word, Excel, PowerPoint, Outlook, Access, and OneNote, as well as SharePoint and Office 365. The exam for Office 365 covers objectives for skills you need to work in Outlook Web App, Microsoft Lync, and SharePoint Online.
- A Microsoft Office Specialist Expert (MOS Expert) is an individual who has taken his or her knowledge of Office 2010 to the next level and has demonstrated by passing a certification exam that he or she has mastered the more advanced features of Word 2010 or Excel 2010.

Selecting a Certification Path

When deciding which certifications you would like to pursue, you should assess the following:

- The program and program version(s) with which you are familiar
- The length of time you have used the program and how frequently you use it
- Whether you have had formal or informal training in the use of that program

- Whether you use most or all of the available program features
- Whether you are considered a go-to resource by business associates, friends, and family members who have difficulty with the program

Candidates for MOS-level certification are expected to successfully complete a wide range of standard business tasks, such as formatting a document or worksheet and its content; creating and formatting visual content; locating information in a notebook; communicating with coworkers through Lync; or working with SharePoint lists, libraries, and Web Parts. Successful candidates generally have six or more months of experience with a specific Office application, including either formal, instructor-led training or self-study using MOS-approved books, guides, or interactive computer-based materials.

Candidates for MOS Expert-level certification are expected to successfully complete more complex tasks that involve using the advanced functionality of the program. Successful candidates generally have at least six months, and may have several years, of experience with the programs, including formal, instructor-led training or self-study using MOS-approved materials.

Test-Taking Tips

Every MOS certification exam is developed from a set of exam skill standards (referred to as the objective domain) that are derived from studies of how the Office 2010 programs or SharePoint are used in the workplace. Because these skill standards dictate the scope of each exam, they provide critical information about how to prepare for certification. This book follows the structure of the published exam objectives; see “Using This Book to Study for a Certification Exam” later in this book for more information.

The MOS certification exams for Microsoft Office 2010 applications, as well as SharePoint and Office 365, are performance based and require you to complete business-related tasks in the program for which you are seeking certification. You might be told to adjust program settings or be presented with a file and told to do something specific with it. Your score on the exam reflects how well you perform the requested tasks within the allotted time.

Here is some helpful information about taking the exam:

- Keep track of the time. You have 50 minutes to complete the exam. Your exam time does not officially begin until after you finish reading the instructions provided at the beginning of the exam. During the exam, the amount of time remaining is shown at the bottom of the exam interface. You can’t pause the exam after you start it.

- Pace yourself. At the beginning of the exam, you will be told how many questions are included in the exam. Some questions will require that you complete more than one task. During the exam, the number of completed and remaining questions is shown at the bottom of the exam interface.
- Read the exam instructions carefully before beginning. Follow all the instructions provided in each question completely and accurately.
- Enter requested information as it appears in the instructions, but without duplicating the formatting unless you are specifically instructed to do so. For example, the text and values you are asked to enter might appear in the instructions in bold and underlined text, but you should enter the information without applying these formats.
- Close all dialog boxes before proceeding to the next exam question unless you are specifically instructed not to do so.
- Don’t close task panes before proceeding to the next exam question unless you are specifically instructed to do so.
- If you are asked to print a document, worksheet, chart, report, or slide, perform the task, but be aware that nothing will actually be printed.
- Don’t worry about extra keystrokes or mouse clicks. Your work is scored based on its result, not on the method you use to achieve that result (unless a specific method is indicated in the instructions).
- If a computer problem occurs during the exam (for example, if the exam does not respond or the mouse no longer functions) or if a power outage occurs, contact a testing center administrator immediately. The administrator will restart the computer and return the exam to the point where the interruption occurred, with your score intact.

Certification Benefits

At the conclusion of the exam, you will receive a score report, indicating whether you passed the exam. You can print with the assistance of the testing center administrator. If your score meets or exceeds the passing standard (the minimum required score), you will be contacted by email by the Microsoft Certification Program team. The email message you receive will include your Microsoft Certification ID and links to online resources, including the Microsoft Certified Professional site. On this site, you can download or order a printed certificate, create a virtual business card, order an ID card, view and share your certification transcript, access the Logo Builder, and access other useful and interesting resources, including special offers from Microsoft and affiliated companies.

Using the Logo Builder, you can create a personalized certification logo that includes the MOS logo and the specific programs in which you have achieved certification. If you achieve MOS certification in multiple programs, you can include up to six of them in one logo.

Microsoft® Office Specialist
Microsoft Access 2010 Certified
Microsoft Excel 2010 Certified
Microsoft Outlook 2010 Certified
Microsoft PowerPoint 2010 Certified
Microsoft Word 2010 Certified

You can include your personalized logo on business cards and other personal promotional materials. This logo attests to the fact that you are proficient in the applications or cross-application skills necessary to achieve the certification.

For More Information

To learn more about the Microsoft Office Specialist exams and related courseware, visit:

www.microsoft.com/learning/en/us/certification/mos.aspx

Using This Book to Study for a Certification Exam

The Microsoft Office Specialist (MOS) exams for individual Microsoft Office 2010 applications, as well as SharePoint and Office 365, are practical rather than theoretical. You must demonstrate that you can complete certain tasks rather than simply answering questions about program features. The successful MOS certification candidate will have at least six months of experience using all aspects of an application on a regular basis; for example, using Outlook Web App at work to send messages, track contact information, schedule appointments and meetings, track and assign tasks, and take notes.

Each chapter in this book is divided into sections addressing groups of related skills. Each section includes review information, generic procedures, and practice tasks you can complete on your own while studying. You can practice the procedures in this book by using your own files.

As a certification candidate, you probably have a lot of experience with the program you want to become certified in. Many of the procedures we discuss in this book will be familiar to you; others might not be. Read through each study section and ensure that you are familiar with not only the procedures included in the section, but also the concepts and tools discussed in the review information. In some cases, graphics depict the tools you will use to perform procedures related to the skill set. Study the graphics and ensure that you are familiar with all the options available for each tool.

Office 365 Releases and This Book

Microsoft updates Office 365 regularly. To learn about exciting new features and improvements to Office 365, see *http://community.office365.com/en-us/w/office_365_service_updates/default.aspx*. This study guide was written during the spring of 2012 and is based on the E3 edition of the midsize and enterprise plan. It covers the certification exam scheduled to be released in summer 2012.

Features and Conventions of This Book

While covering the objectives and skills described in this book, you can use the detailed table of contents to scan a listing of the topics covered in each chapter and locate specific topics.

You can save time when you use this book by understanding how special instructions, keys to press, buttons to click, and other conventions are indicated in this book.

Convention	Meaning
1 **2**	Numbered steps guide you through step-by-step procedures.
➜	An arrow indicates a procedure that has only one step.
See Also	These paragraphs direct you to more information about a given topic in this book or elsewhere.
Tip	These paragraphs provide a helpful hint or shortcut that makes working through a task easier, or information about other available options.
Interface elements	In procedures, the names of program elements (such as buttons and commands) are shown in bold characters.
Key combinations	A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, "press Ctrl+Home" means "hold down the Ctrl key and press the Home key."
User input	In procedures, anything you should enter appears in bold italic characters.

How to Get Support and Provide Feedback

The following sections provide information on errata, book support, feedback, and contact information.

Errata & Book Support

We've made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site at oreilly.com:

http://go.microsoft.com/FWLink/?Linkid=250941

If you find an error that is not already listed, you can report it to us through the same page.

If you need additional support, please send an email message to Microsoft Press Book Support at *mspinput@microsoft.com*.

Please note that product support for Microsoft software is not offered through the addresses above.

Getting Help with Microsoft Office 365

If your question is about Microsoft Office 365 and not about the content of this Microsoft Press book, your first recourse is the Microsoft Office 365 Help system or community forums. Detailed information about how to access and use the Office 365 Help system and other resources is covered in Chapter 1, "Navigating Office 365."

If your question is about Office 365 or another Microsoft software product and you cannot find the answer in the product's Help system, please search the appropriate product solution center or the Microsoft Knowledge Base at:

support.microsoft.com/

In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. Location-specific software support options are available from:

support.microsoft.com/gp/selfoverview/

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3 Collaborating by Using Lync Online

The skills tested in this section of the Microsoft Office exam for Office 365 relate to how you collaborate using Microsoft Lync Online. Specifically, the following objectives are associated with this set of skills:

- **3.1** Configure Lync options
- **3.2** Employ collaboration tools and techniques
- **3.3** Manage Lync contacts
- **3.4** Use Lync tools

Ease of communication, knowing whether someone is available or in a meeting, and collaborating on content in real time are essential capabilities that Lync provides to users of Office 365. In Lync, you can place calls, send e-mail or instant messages, hold meetings and group conversations, annotate a presentation, and sketch on a whiteboard. In the sections that follow, you'll learn about the skills needed to make use of each of these features and more, how to manage the contacts you communicate with, and about other tools that Lync provides.

3.1 Configure Lync Options

As an introduction to Lync, the first section of this chapter describes the options you can specify for how to work with Lync. To open the Lync Options dialog box, click the Options button to the right of your name. You can also open the dialog box from the Tools menu.

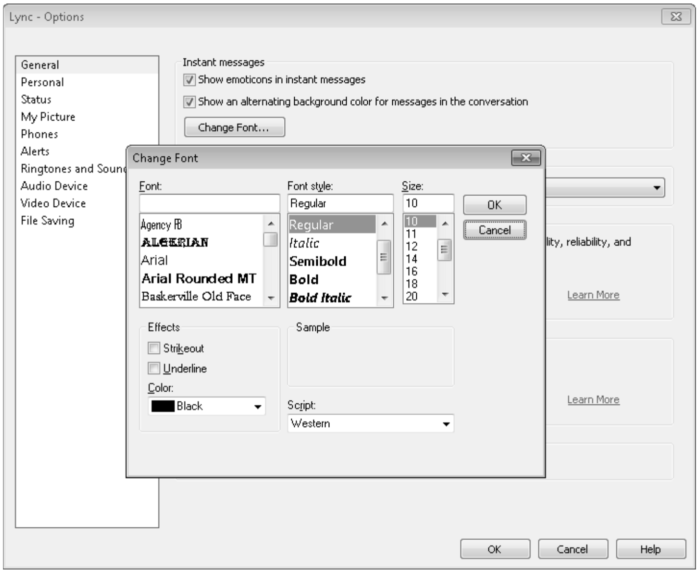
Tip **To view the Tools menu, click the arrow next to the Options button. To show the menu bar in the Lync window, click the arrow and then choose Show Menu bar.**

General Page

At the top of the General page are options that control the formatting of instant messages. These options control the display of emoticons, the background color in the instant message window, and the font properties of the text you type. Keep the option Show Emoticons In Instant Messages selected if you want to replace specific keyboard combinations—for example, **:)**—with a graphic. In this case, you would see a small smiling face.

In instant message conversations, Lync by default alternates the background color so that you can distinguish elements of the conversation more easily. Clear the check box that controls this option if you want to keep the background a consistent color.

Click Change Font to open a dialog box in which you can select a different font and specify properties such as color, size, and formatting (italics, semibold, bold, and others). The settings you select in the Change Font dialog box affect the text you type but not the text in messages you receive from contacts.



Instant messages

☑ Show emoticons in instant messages

☑ Show an alternating background color for messages in the conversation

Change Font

Font:

Font style: Regular

Size: 10

Effects

☐ Strikeout

☐ Underline

Color: Black

Script: Western

Lync - Options
General
Personal
Status
My Picture
Phones
Alerts
Ringtones and Sound
Audio Device
Video Device
File Saving
Change Font...
Agency FB
ALGERIAN
Arial
Arial Rounded MT
Baskerville Old Face
Regular
Italic
Semibold
Bold
Bold Italic
10
11
12
14
16
18
20
OK
Cancel
Sample
lity, reliability, and
Learn More
Learn More
OK
Cancel
Help

Use the Change Font button to set options for the font you use in instant messages.

Use the other options on the General page to control the following settings:

- If you installed versions of Lync in more than one language, select the language you want to use in this area.
- Microsoft uses its Customer Experience Improvement Program to collect information from users, which Microsoft then analyzes to see how its customers use the features in its software. You can opt in to this program by selecting the option

Allow Microsoft To Collect Information About How I Use Lync. The Learn More link for this option takes you to a page that provides answers to frequently asked questions and tells you more about what Microsoft does with the information it collects and how it protects your privacy.

- Logs are used by system administrators to collect, analyze, and save data. A system administrator might ask you to turn on either of the two logging options to do troubleshooting. Standard users who are not asked to activate these options don't need to be concerned with them.
- When you minimize the Lync application window, the minimized window appears as an item on the Windows task bar by default. You can select the Minimize To The Notification Area Instead Of The Task Bar option in the Application Window area if you prefer that the minimized window appear in the notification area.

Personal Page

Use the Personal page to configure the following options:

- **My Account** Update the e-mail address you use to sign in to Lync. By default, connection settings for the Lync server that your account is associated with are detected automatically. Click the Advanced button to open a dialog box in which you can choose an option to manually configure connection settings. You need to know the name or IP address for the internal server and external server and whether your connection uses the TCP or TLS connection protocol. These are advanced settings.

  In the My Account area, you can also select or clear options to start Lync when you log on to Windows and to display Lync in the foreground when it starts.
- **Personal Information Manager** In this area, you can specify how Lync works together with Microsoft Exchange Server or Microsoft Outlook. By default, all the options in this area are selected. With these options set, Lync uses information from your Outlook calendar to display presence and status information, which alerts your Lync contacts whether you are available, in a meeting, or on a call. For example, during the time in which your calendar in Outlook shows that you are busy, your presence in Lync is shown the same way.

  As you'll learn more about later in this chapter, you can set privacy relationships in Lync to specify which of your contacts can view details about meetings and your other activities. You should consider privacy relationships in choosing whether to maintain or clear the option that shows an active out-of-office message to contacts who you've defined with the privacy relationship Family And Friends, Workgroup, or Colleagues.

A record of your instant message conversations and call logs is stored in an Outlook folder named Conversation History. Clear either or both of these options to do without this record.

The final option in this area specifies whether Lync contacts are stored as personal contacts in Exchange.

- **Location** Depending on how your organization has configured Lync, you can use the option in the Location area to share information about your location with other programs.
- **Display Photo** If you don't want to see pictures of your contacts, clear this option. If you maintain this option, you'll see thumbnail photographs of the contacts who have posted them.

> **See Also** **You'll learn more about posting your own photograph in the section "My Picture Page."**

- **Activity Feed** Activities such as changes in your status, notes you add to Lync, and changes to personal information are displayed in the Activities Feed list for your contacts to see. Clear this option if you want only personal notes and out-of-office messages to be displayed.

Status Page

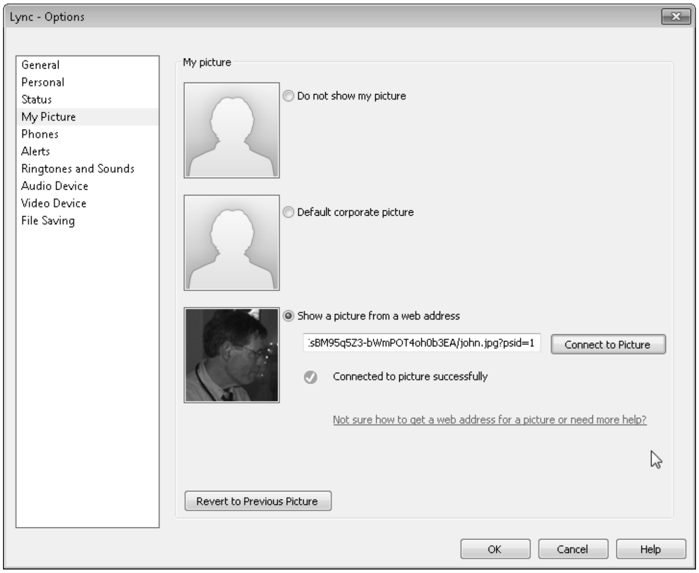
As mentioned earlier, Lync shows your status on the basis of your activities. Lync also uses a colored presence indicator to let contacts know when you are busy or available. You can change your status to Busy, Away, or Do Not Disturb by choosing an option from the menu that appears under your name in the Lync window.

The settings on the Status page control when Lync changes your status automatically. By default, if your computer remains idle for five minutes, Lync switches your status to Inactive. If your status is Inactive for five minutes, Lync switches your status to Away. Use the options on this page to change the timing of these changes.

You can also select an option through which system settings are overridden and everyone can see your presence. If you don't want to exercise this option, keep the default setting, which leaves this decision to the system administrator.

My Picture Page

You can include a picture that others see as part of your contact information. If your organization has set up a picture directory, you can use an image of yourself stored there. If you don't want to use your standard organizational picture, you can select the option Do Not Show My Picture or point to a picture of yourself that you've stored on a website.


Lync - Options
General
Personal
Status
My Picture
Phones
Alerts
Ringtones and Sounds
Audio Device
Video Device
File Saving
My picture
Connect to Picture
Not sure how to get a web address for a picture or need more help?
Revert to Previous Picture
OK
Cancel
Help

○ Do not show my picture

○ Default corporate picture

● Show a picture from a web address

:sBM95q5Z3-bWmPOT4oh0b3EA/john.jpg?psid=1

✓ Connected to picture successfully

Select the top option if you don't want to display a picture or post a picture of your own. You must post the picture to a web location that doesn't have restricted access.

A picture that you store on a website must be no more than 30 kilobytes (KB). You can right-click the image file and choose Properties to see the image's file size. If you need to resize the picture to make it smaller, open the picture in Windows Photo Editor (or a comparable program) and then use the Snipping Tool (under Accessories on the Start menu) to capture a smaller portion of the image. You can also edit the picture in Paint.

The picture must be stored in a publicly available location on a site such as Windows Live SkyDrive, Facebook, Flickr, or LinkedIn. Once you have the picture uploaded to the site, navigate to the image so that you can copy the image's URL. To find the URL, right-click the image and choose Properties or use a command such as Get Link. Copy the URL, return to the Lync Options dialog box, and then paste the URL into the text box below the option Show A Picture From A Web Address. Click Connect To Picture to check that the URL is correct.

Phones Page

Use the buttons at the top of the Phones page to enter your work, home, mobile, or other phone number. The numbers you provide here are visible on your contact card in Lync, depending on the privacy relationship you've designated for a contact. These numbers are visible to contacts with the Colleagues, Workgroup, or Friends And Family privacy relationships, but they are not visible to contacts you've designated as blocked contacts or external contacts.

Depending on your organization's configuration of Lync, the Phone Integration option might not be enabled.

If you or a contact use Teletype (TTY) because of a hearing impairment, connect a TTY device to your computer and then select this option.

In the Joining Conference Calls area on the Phones page, you can specify how you want to participate in conference calls. By default, the conference call number is set to use Lync (via the Voice over Internet Protocol, or VoIP). You can list a work number as a phone number on this page and then choose which method you want to use during conference calls or online meetings. If you want to be prompted before joining a call, select that option as well.

Alerts Page

The four options on the Alerts page manage when you receive notifications. By default, Lync alerts you when another user adds you to that user's contact list and allows you to add that person to your list. Clear the check box for this option if you don't want to receive this alert.

You can choose one of three options for receiving alerts when your status is set to Do Not Disturb. You can choose not to see any alerts, to see only conversation alerts from people specified as members of your workgroup, or to see all alerts but only conversation alerts from people in your workgroup.

Ringtones And Sounds Page

You can assign one of the built-in ringtones for calls that occur in Lync. Select an entry in the Calls To list and then select the ringtone you want to associate with that item. You'll hear a preview of the ringtone when you select an item in the Ringtone list. Choose None to turn off ringtones.

By default, Lync plays sounds, which include a ringtone for incoming calls and instant messages. Clear the check box for this option if you prefer to hear no sounds from Lync. If you keep this option selected, use the three related options to fine-tune the conditions when Lync plays a sound. For example, Lync mutes sounds for incoming instant messages if you are viewing an instant messaging conversation. Clear this check box if you don't want Lync to mute sounds in this situation.

Also by default, Lync “keeps sounds to a minimum” when your status is set to Do Not Disturb. You can apply this practice to when your status is Busy as well.

If you want to associate specific sounds with events in Lync, click the Sound Settings button to open the Sound dialog box. On the dialog box’s Sounds tab, scroll down in the Program Events list until you see Microsoft Lync 2010. Under Lync, you’ll see a number of events with which you can associate a sound. The following events are available:

Busy Signal
Call Ended
Call Error
Connecting Tone
Data Sharing Invitation
Dial Tone
Howler
Incoming Call
Incoming Call in Full Screen Mode
Incoming Delegate Call
Incoming Instant Message
Incoming Private Line Call
Incoming Response Group Call
Income Team Call
Muting Tone
New Message
On Hold
Outgoing Call
Redirect Call
Second Incoming Call
Status Alert
Untag

Select an event in the list to see which sound file is currently associated with it. You can switch to a different .wav file or choose None for a particular event.

Audio Device Page

You can control the volume for your speaker, microphone, and ringer on this page. Select the audio device whose settings you want to test or change. Use the buttons in the Speaker and Ringer areas to test the volume, and use the slider to adjust the volume if you need to. For the microphone setting, speak at the volume you would for a meeting or a call. The volume bar moves as you speak more softly or more loudly.

Use the Also Ring check box under Secondary Ringer if you want to activate that feature. If you select a secondary ringer, you can choose the option to have Lync unmute the ringer when your phone rings.

Video Device Page

If you have a webcam connected to your computer, you can provide a video feed during calls and online meetings you hold in Lync. You use the Video Device page to configure the settings for the webcam. Select a webcam and then click Webcam Settings.

The Properties dialog box Lync displays depends on the type of webcam you have. As an example, for a Microsoft LifeCam, you see a dialog box with the tabs Camera Control and Video Settings. Options on the Camera Control tab affect focus, zoom, pan, and tilt. You need to clear the Auto check box to make changes to the setting for focus. Click Default to return the settings on this tab to their default values.

The Video Settings tab's options affect brightness, white balance, and saturation. These options will depend on the webcam you have.

> **Important** **Your webcam must be connected to work with the options on this page. Be sure to view the webcam image as you work with these settings so that you can see how your changes are applied to the resolution and the quality of the video.**

File Saving Page

During meetings and calls you hold using Lync, you can exchange files as attachments. Lync also has a built-in feature that lets you record calls and meetings, which you can then play back or publish for others to see.

> **See Also** **For more information about recording meetings and managing recordings, see "Holding Web Conferences" and "Using Recording Manager" later in this chapter.**

The File Saving page shows the path to where Lync stores files you receive in Lync and the recordings you make of conversations. For file transfers, the default location is C:\Users\username\Documents\My Received Files. For Lync recordings, the default location is C:\Users\username\Lync Recordings. Use the Browse buttons to open a dialog box in which you can select a different folder for one or both of these settings.

Before Lync changes the path for recordings, it displays a message prompting you to confirm the action. Lync takes this extra step to alert you that choosing not to store recordings in the default location makes the recordings available to people with access to the folder you choose.

➤ To open the Options dialog box

- ➜ In the Lync window, click the **Options** button to the right of your name.

  Or

- ➜ Click the arrow to the right of the **Options** button, point to **Tools**, and then click **Options**.

➤ To turn off instant message conversation history

1. In the **Lync Options** dialog box, click the **Personal** page.
2. Clear the option **Save my instant message conversations in my email Conversation History folder**.

➤ To add a picture

1. In the **Lync Options** dialog box, click the **My Picture** page.
2. Choose the option you want to use—to display no picture, the default picture from your organization, or a picture you post on the Web.
3. If you select the third option, post the picture in a publicly available site (such as Windows Live SkyDrive or Facebook).
4. Copy the URL that points to the picture, and then copy that URL into the **Lync Options** dialog box.
5. Click **Connect to Picture**.

➤ To specify ringtones and sounds

1. In the **Lync Options** dialog box, click the **Ringtones and Sounds** page.
2. Select the phone number you want to work with, and then select the ringtone you want to assign to the number.
3. Use the **Sounds** options to specify whether and when Lync plays sounds to notify you of events.
4. Click **Sound Settings** to open the **Sound** dialog box.
5. In the **Program Events** list, scroll to view the options for Microsoft Lync 2010.
6. Select the event you want to work with, and then select the sound file you want to associate with that event.

➤ To change file saving paths

1. Display the **File Saving** page of the **Lync Options** dialog box.
2. Click the **Browse** button for the setting you want to change.
3. In the **Browse for Folder** dialog box, select the new location and then click **OK**.

Practice Tasks

Practice the skills you learned in this section by performing the following tasks in Lync. If you are just learning how to work with Lync, you might want to return to the Lync Options dialog box after you gain more practice. To start, do the following:

- Sign in to Lync and then open the Options dialog box.
- Enter phone numbers you want to share with appropriate contacts.
- If you have a webcam, go to the Video Device page and update the settings for the webcam.
- Use the Ringtones And Sounds page to experiment with the audio clues Lync can provide.

3.2 Employ Collaboration Tools and Techniques

In this section, you'll explore the range of ways in which Lync enables collaboration, including group conversations in which you can review, annotate, or update documents; online meetings; instant messaging; and audio and video conferences.

Holding Group Conversations

During an online meeting or a call that you set up with Lync, you can supplement and focus the conversation by using Lync to share information. You can open a Microsoft PowerPoint presentation, for example, and discuss and annotate the presentation's slides. You can share your entire desktop or the content you are working on in a specific program. You can also use an online whiteboard to gather ideas in a brainstorming session or conduct a quick poll to collect opinions.

Later in this section, you'll learn more details about conferences and online meetings, but one quick way to initiate a group conversation is to click the arrow next to the Options button, click Meet Now, and then use the People Options button to invite one person or more to join a discussion with you. (You can also drag a contact entry from the Lync window to the conversation window to invite that person to a conversation.) With the group assembled online, you can then use commands on the conversation window's Share menu to collaborate in a number of ways.

Important The participants in a group conversation that you set up with the Meet Now command are designated as presenters by default. Presenters can share content and perform other operations during a conversation that participants designated as attendees cannot. When you invite participants by using the People Options button, choose Make Everyone An Attendee if you (as the organizer) want more control of the conversation.

Sharing Your Desktop

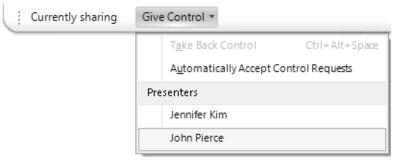
To work as a group on a document, to view a web page, or to review other content, you can share your desktop as part of a group conversation. You can grant control of your desktop to another participant (either a presenter or an attendee) and let that participant work with the programs or files on your computer. Participants can also request control, which you can approve or reject.

Tip Sharing your desktop through Lync can be a helpful way to troubleshoot or solve a problem you are having with your system. Start a conversation in Lync with a member of your help desk staff or a colleague who has experience in the area you're having trouble with. You can turn over control to that person so that he can check settings and configurations on your computer.

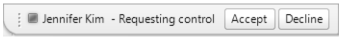
In the conversation window, select Desktop from the Share menu to start this process. If you initiate this action, you can click Preview in the Lync window notification bar to see what participants are looking at.

Across the top of your screen, you'll see a toolbar that indicates you are currently sharing your desktop. Lync notifies participants in the conversation that you have shared content, and they can then accept (or decline) to view the shared content. Lync loads and displays your desktop in a portion of the Lync window referred to as the *stage*.

Participants see activity on your desktop in real time. The text you type in a Word document, for example, appears on their screens as you type it. To turn over control to another participant, click Give Control and then select the participant from the list. If a participant clicks Request Control at the top of her screen, you see a notification that lets you accept or decline the request. You can regain control by clicking Give Control and choosing Take Back Control or by pressing Ctrl+Alt+Spacebar.


Currently sharing
Give Control
Take Back Control Ctrl+Alt+Space
Automatically Accept Control Requests
Presenters
Jennifer Kim
John Pierce

You work with the controls shown here when you share your desktop. You can grant access to another participant, say yes or no to a request sent to you, and take back control when you need to.


Jennifer Kim - Requesting control
Accept
Decline

To avoid having to accept control requests from people you know, you can select Automatically Accept Control Requests, an option on the menu that appears when you click Give Control. Click Stop Sharing when you no longer need to share your desktop.

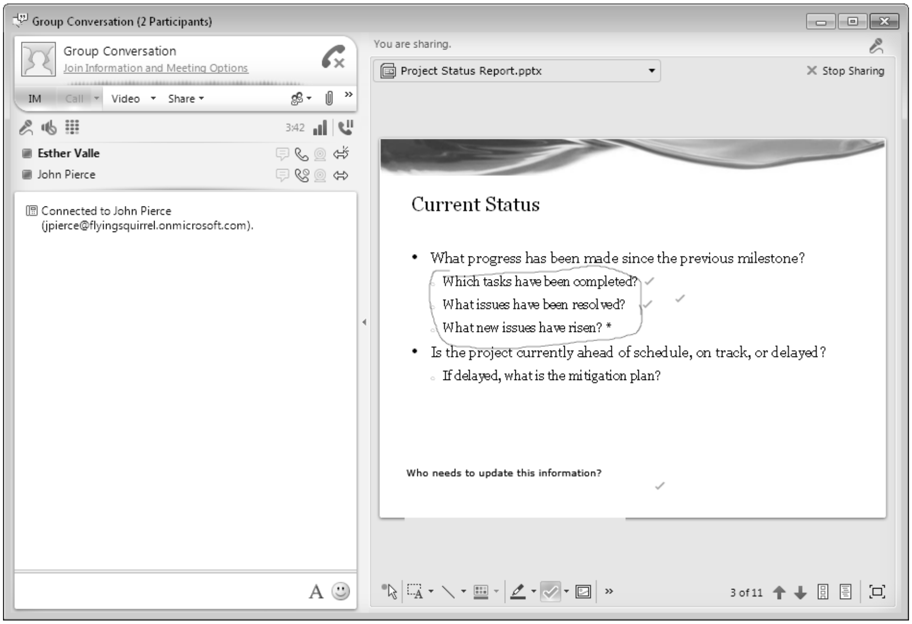
➤ **To share your desktop**

1. In the conversation window, click **Share** and then click **Desktop**.
2. In the notification bar, click **Preview** to see a small rendering of your desktop in the Lync stage.
3. To turn control over to a participant, click **Give Control** and then select the participant's name.
4. To regain control of your desktop, click **Give Control** and then select **Take Back Control**.
5. To close the shared desktop, click **Stop Sharing**.

Sharing a PowerPoint Presentation

When you select PowerPoint from the Share menu, Lync displays the Share PowerPoint dialog box, where you select the presentation you want to describe or talk through with others. Once Lync loads the presentation, you'll see the name of the presentation below the You Are Sharing label in the top-left corner of the stage. Participants in the conversation see a sharing request in Lync that they accept to see the presentation.

The tools at the bottom of the stage let you annotate a presentation (or a whiteboard). You can highlight text, add typewritten annotations, or work with a pen. Save the annotations when you finish.


Group Conversation (2 Participants)
Group Conversation
Join Information and Meeting Options
IM
Call
Video
Share
3:42
Esther Valle
John Pierce
You are sharing.
Project Status Report.pptx
Stop Sharing
3 of 11

Connected to John Pierce (jpierce@flyingsquirrel.onmicrosoft.com).

Current Status

- What progress has been made since the previous milestone?
  - Which tasks have been completed?
  - What issues have been resolved?
  - What new issues have risen?
- Is the project currently ahead of schedule, on track, or delayed?
  - If delayed, what is the mitigation plan?

Who needs to update this information?

Although you can't add slides to a presentation you are sharing, the presentation isn't simply static content. You can add annotations, images, shapes, and other objects while you work in Lync to emphasize elements on a slide or to provide directions for modifications. The set of tools at the bottom of the stage area (from left to right) lets you do the following:

- **Point to objects** Use the laser pointer if you are leading the conversation and want to point to a specific area or item on the current slide. A small ScreenTip appears in Lync to identify the participant who is pointing.
- **Select and type annotations** Use this tool to type an annotation on the current slide. Click where you want the annotation to appear and then type. The text appears in a container you can select and drag to a different position if that's necessary. You can change the font and font size by clicking the down arrow at the right of this tool and then making the selections you want from the lists Lync displays.
- **Add lines and shapes** The drawing tools let you add basic shapes to the slide—a plain line, a single arrow line, a double arrow line, an oval, and a rectangle. You can use these shapes to enclose text that needs modifications, for example, or to extend a line from an annotation to an object on the slide. Use the color selector just

to the right of the drawing tools button to draw in a particular color. Participants can choose specific colors to identify their additions to the slide.

- **Write notes on the presentation using a pen or highlighter** If you have a pen or stylus attached to your computer (or are adept at writing with a mouse), select a pen or highlighter from the options presented, and then add notes to the slide or highlight content that needs changes, further review, or different formatting, for example. You can choose from four colors for pens or highlighters, but you cannot change the line thickness.
- **Add check marks, arrows, and Xs** Another way to annotate a slide is by using one of the stamp shapes available. You can add a check mark, an arrow, or an X. Use the arrow at the right of this tool to choose the stamp you want to add.
- **Insert images** Click Insert Image to choose an image to add to the current slide. Use the handle at the bottom-right corner of the image to resize it. You can drag the image to change its position on the slide.
- **Save the presentation with the annotations you've added** Click this button to create an XPS file of the presentation showing the annotations added during the group conversation.

Tip **You can view an XPS file in most web browsers or in a viewer application available from Microsoft.**

Attendees as well as presenters can annotate the slides. Only presenters can save an annotated presentation. As the group reviews the presentation, a presenter can use the up and down arrows at the right of the presentation window to navigate back and forth between slides. Presenters (but not attendees) can also click the Thumbnails button to display thumbnail images of the slides along the right side of the stage. If you want to see the notes related to a slide, click Presenter Notes. Both of these buttons toggle on and off the display of these features.

Tip **You can display the presentation in full screen by clicking the Full Screen button in the bottom-right corner of the stage. Click Esc to show the presentation within the Lync application window again.**

➤ To share and annotate a presentation

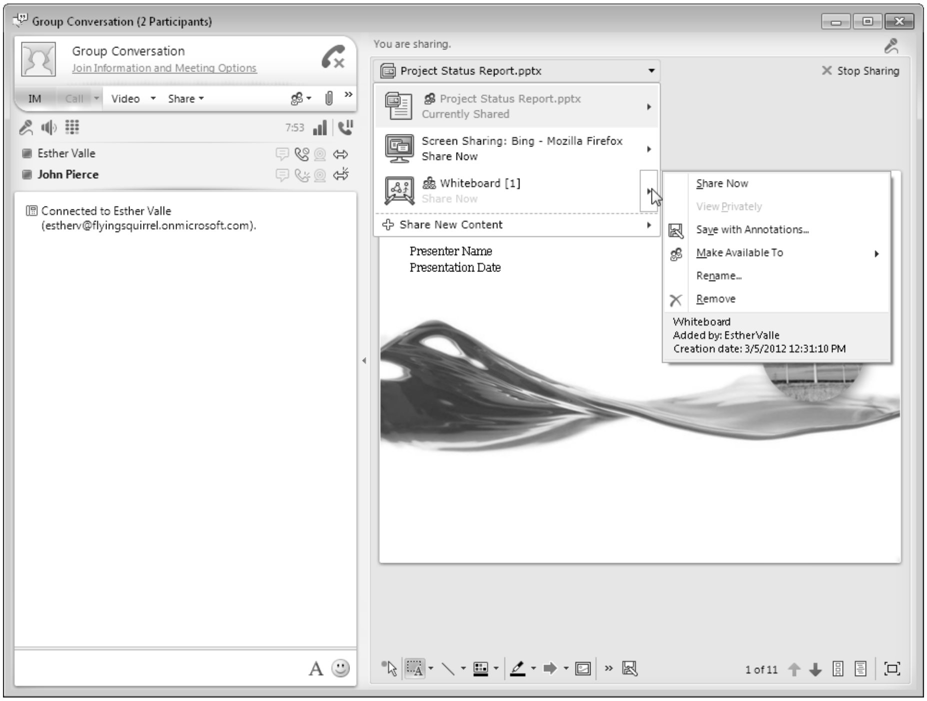
1. In the conversation window, click **Share** and then click **PowerPoint Presentation**.
2. In the **Share PowerPoint** dialog box, select the PowerPoint file you want to share.
3. Use the tools at the bottom of the stage to annotate the slides.

4. Click **Save with Annotations** to save the presentation with your annotations in place.

Sharing Content from the Stage

When you stop sharing content during a conversation, the content remains available if you need to refer to it again. Use the drop-down list at the top-left corner of the stage to view a record of the shared content. Click the arrow related to an item to open a menu that lets you share that content again, save it, rename it, and so on. Choose Share New Content to select a different program, presentation, or sharing option.

You can manage shared content using this menu in the stage.


Group Conversation (2 Participants)
Group Conversation
Join Information and Meeting Options
IM
Call
Video
Share
7:53
Esther Valle
John Pierce
You are sharing.
Project Status Report.pptx
Stop Sharing
Project Status Report.pptx
Currently Shared
Screen Sharing: Bing - Mozilla Firefox
Share Now
Whiteboard [1]
Share Now
Share New Content
Share Now
View Privately
Save with Annotations...
Make Available To
Rename...
Remove
Whiteboard
Added by: EstherValle
Creation date: 3/5/2012 12:31:10 PM
Presenter Name
Presentation Date
1 of 11

Connected to Esther Valle (estherv@flyingsquirrel.onmicrosoft.com).

You can also add attachments to the conversation window during a meeting. Click Add Or View Attachments in the conversation window's toolbar, and then click Add Attachment. Choose the file or files you want to provide to participants. Participants then click in the notification area of their conversation window to view or save the attachments.

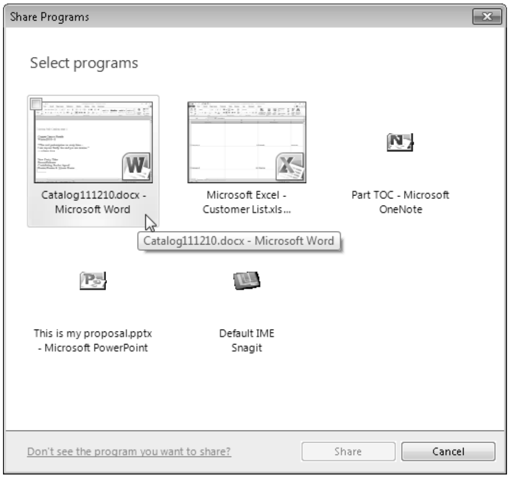
Tip You can also drag a file into the conversation window to add it to a conversation. If you want to cancel the transfer of an attachment, press Alt+Q.

Sharing a Program

Sharing your desktop lets participants in a group conversation see everything that's currently running on your computer. If instead of sharing your desktop, you want to share a document in a particular program, start the program and then choose the Program command on the Share menu.

Important The program you want to share must be running on your computer before you share it. In other words, Lync doesn't give you the option to start a program when you choose the Program command.

When you select Program, Lync displays the Share Programs dialog box, which shows thumbnail images of other programs currently running on your computer. Select the program or programs you want to share (hold down the Ctrl key to select more than one), and then click the Share button.


Share Programs
Select programs
Catalog111210.docx - Microsoft Word
Microsoft Excel - Customer List.xls...
Part TOC - Microsoft OneNote
Catalog111210.docx - Microsoft Word
This is my proposal.pptx - Microsoft PowerPoint
Default IME Snagit
Don't see the program you want to share?
Share
Cancel

Instead of sharing your desktop, share one or more specific programs to work on documents as a group.

A shared program comes to the foreground on your computer and is displayed in the stage on participants' computers. You can give control of the program to a participant, who can then interact with the program. Use the Give Control button to select a participant, to choose the option to automatically accept control requests, and to take back control if you've released it. A participant can also request control.

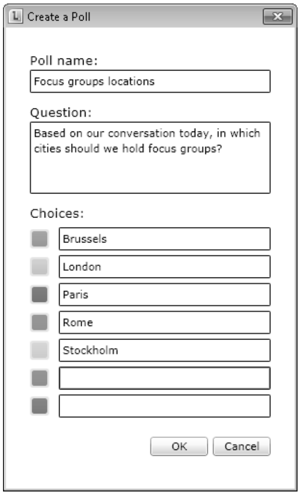
Important You cannot share the following programs: Lync 2010, Microsoft Lync 2010 Recording Manager, Microsoft Lync 2010 Attendee, Windows Explorer, Sticky Notes, Windows Sidebar, or any program running with user privileges that are higher than the privileges for Lync 2010.

➤ To share a program

1. In the conversation window, click **Share** and then click **Program**.
2. In the **Share Programs** dialog box, select the program or programs you want to share with participants.
3. Click **Share**.
4. Use the **Give Control** button to grant control to a participant if necessary.
5. Click **Stop Sharing** when the session is over.

Conducting an Online Poll

You can use a group conversation in Lync as a forum to conduct a simple opinion poll. The New Poll command on the Share menu opens the Create A Poll dialog box. Provide a name for the poll, type a question, and then enter the set of choices. You can provide up to seven options for users to choose from. When you click OK in this dialog box, the poll questions appear in the stage area.



Poll name: Focus groups locations

Question: Based on our conversation today, in which cities should we hold focus groups?

Choices:
Brussels
London
Paris
Rome
Stockholm

Inform group decisions by the opinions collected in a poll conducted in Lync.

When you first post a poll, the poll is open but responses are hidden from attendees. Presenters can use the buttons at the bottom of the stage to close the poll, show results to all participants, edit the poll question and choices, and clear votes. When you choose to edit the poll question and answers, the current answers are cleared. Once the results are in, you can save the poll as a PNG image file or as a comma-separated value file (.csv) that you can open in Microsoft Excel.

> **Tip** To conduct a poll with multiple questions, define the first question, collect answers, and then save that poll. Then edit the current poll and define a new question and set of answers.

➤ To create and manage a poll

1. In the conversation window, click **Share** and then click **New Poll**.
2. In the **Create a Poll** dialog box, type a name for the poll, the question, and the array of possible answers.
3. Click **OK** to display the poll in the stage.
4. After participants have answered the poll question, close the poll, reveal the results to attendees, and edit the poll to provide a new question if needed.
5. Click **Save Poll** to preserve the results.
6. Click **Stop Sharing** to clear the stage.

Working Together on a Whiteboard

For a group brainstorming session, share a new whiteboard. Lync displays a blank page in the stage area and provides a set of tools at the bottom of the window that lets you sketch and outline your ideas. The tools available are essentially the same as those you can use to annotate a shared PowerPoint presentation. For a description of these tools, see “Sharing a PowerPoint Presentation” earlier in this chapter.

Take a look at the notification above the top-left corner of the stage that indicates that everyone in the group conversation can contribute to the whiteboard. With a whiteboard displayed, you won’t see the Give Control or Request Control buttons. To preserve the working session you conduct with a whiteboard, save it. You can save a whiteboard as an XPS file or a PNG file.

➤ To share a whiteboard

1. In the conversation window, click **Share** and then click **New Whiteboard**.
2. Use the tools at the bottom of the stage to add ideas and sketches to the whiteboard.
3. Click the **Save with Annotations** button to preserve the whiteboard as an XPS or a PNG file.

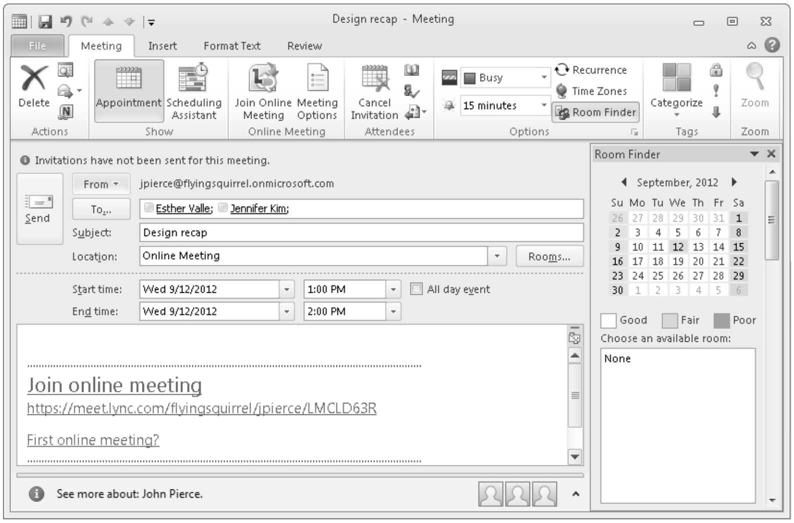
Holding Web Conferences

If you set up your Office 365 e-mail account in Outlook 2010, you can schedule a meeting that is held online using Lync.

> **Tip** **You can use the Mail option in Control Panel to set up your Office 365 e-mail account in Outlook 2010. In the Mail Setup dialog box, click E-Mail Accounts and then click New. Walk through the Add New Account wizard. After you enter your name, e-mail address, and password, your settings should be configured automatically. Be aware that in some organizations, this operation might be restricted.**

Display the calendar in Outlook 2010, and then click New Online Meeting on the Calendar view's Home tab. Outlook opens a new meeting request and adds a link that you and recipients can use to start and join the meeting at the scheduled time. You can then address the meeting request to recipients, type the subject, and add other information.

You can set up online meetings in Outlook 2010. Click Join Online Meeting to open the Lync conversation window and conduct the meeting.


Design recap - Meeting
File
Meeting
Insert
Format Text
Review
Delete
Actions
Appointment
Scheduling Assistant
Show
Join Online Meeting
Meeting Options
Online Meeting
Cancel Invitation
Attendees
Busy
15 minutes
Recurrence
Time Zones
Room Finder
Options
Categorize
Tags
Zoom
Zoom
Send
From
To...
Rooms...
Room Finder
September, 2012
Good
Fair
Poor
Choose an available room:
None

Invitations have not been sent for this meeting.

From: jpierce@flyingsquirrel.onmicrosoft.com

To...: Esther Valle; Jennifer Kim;

Subject: Design recap

Location: Online Meeting

Start time: Wed 9/12/2012 1:00 PM ☐ All day event

End time: Wed 9/12/2012 2:00 PM

Join online meeting

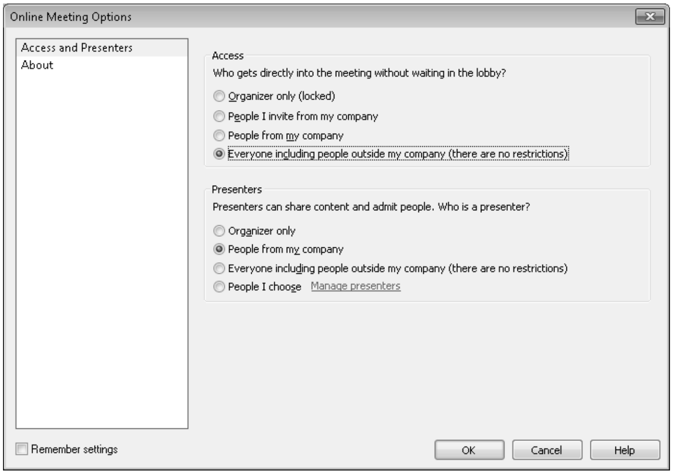
https://meet.lync.com/flyingsquirrel/jpierce/LMCLD63R

First online meeting?

See more about: John Pierce.

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Before you send the meeting request, click Meeting Options in the Online Meeting group on the Meeting tab. Use the dialog box that's displayed to change options for access and presenters. By default, everyone you invite to an online meeting, including external contacts, can join the meeting without having to be admitted. Instead of admitting everyone, you can set up a meeting so that only the organizer is admitted immediately, only people from your organization, or only those people in your organization who you invite directly.


Online Meeting Options

Access and Presenters
About

Access
Who gets directly into the meeting without waiting in the lobby?
○ Organizer only (locked)
○ People I invite from my company
○ People from my company
● Everyone including people outside my company (there are no restrictions)

Presenters
Presenters can share content and admit people. Who is a presenter?
○ Organizer only
● People from my company
○ Everyone including people outside my company (there are no restrictions)
○ People I choose Manage presenters

☐ Remember settings

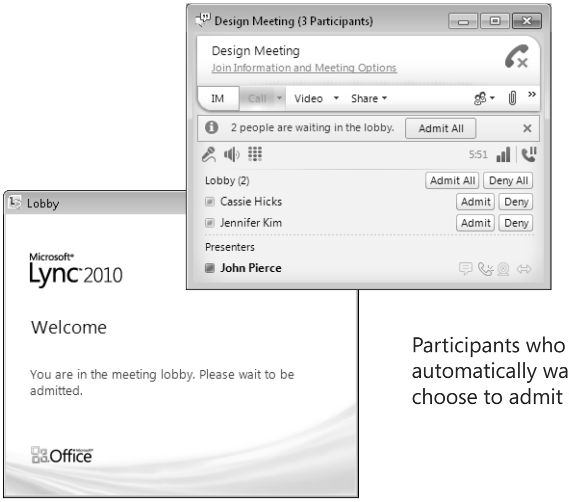
Manage an online meeting by setting options for who will be admitted automatically and who will be designated presenters.

For presenters, the default setting is that everyone from your company who attends the meeting is a presenter. You can choose instead Organizer Only, select the option that imposes no restrictions, or designate presenters. If you select People I Choose, click Manage Presenters to identify the individuals who can serve in that role. (You must have already added recipients to the meeting request to designate presenters. If you haven't done this, the list you see when you click Manage Presenters is blank.)

Tip If you want to use these settings for other online meetings, select the option Remember Settings in the lower-left corner of the Online Meeting Options dialog box.

To start the meeting, open the meeting request and click Join Online Meeting on the Meeting tab or double-click the link in the meeting request. (If you open the meeting request in Outlook Web App, you need to click the link.) Those actions open the conversation window in Lync, with the meeting's subject line in the title bar. (If a meeting participant doesn't have Lync installed, she can join the meeting by using the Lync Attendee. When the participant clicks the Join Online Meeting link, the option to download Lync Attendee is provided, which lets the participant join the meeting without having the full Lync client.)

If meeting options were set up so that admittance to the meeting is not automatic, the organizer needs to admit attendees who are waiting. These attendees see a notification that they are waiting in the lobby.


Design Meeting (3 Participants)
Design Meeting
Join Information and Meeting Options
IM
Call
Video
Share
Admit All
5:51
Lobby (2)
Admit All
Deny All
Cassie Hicks
Admit
Deny
Jennifer Kim
Admit
Deny
Presenters
John Pierce
Lobby
Microsoft Lync 2010
Welcome
Office

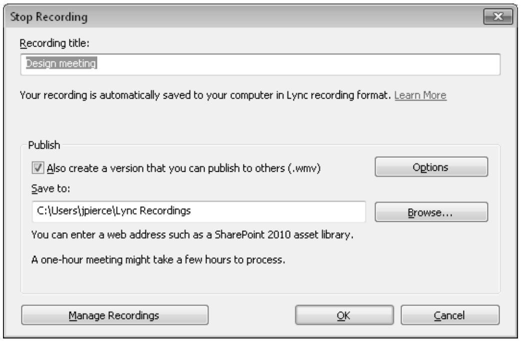
2 people are waiting in the lobby.

You are in the meeting lobby. Please wait to be admitted.

Participants who aren’t admitted to an online meeting automatically wait in the lobby. The organizer must choose to admit them.

During a meeting, presenters can share content, and they can record an online meeting to capture audio and video, including discussions of shared content. To begin recording a meeting, click the More Options arrow at the right side of the conversation window toolbar and choose Start Recording. Use the same menu to pause recording and to stop recording.

When you stop a recording, Lync displays a dialog box in which you can specify a recording title (the meeting subject is used by default) and also choose to create a version of the recording that you can publish for others to see. The path in the Save To box shows the default location or a different location specified in the Lync Options dialog box.


Stop Recording
Publish
Options
Browse...
Manage Recordings
OK
Cancel

Recording title: Design meeting

Your recording is automatically saved to your computer in Lync recording format. Learn More

☑ Also create a version that you can publish to others (.wmv)

Save to: C:\Users\jpierce\Lync Recordings

You can enter a web address such as a SharePoint 2010 asset library.

A one-hour meeting might take a few hours to process.

If you want to share a recording with other users, keep the option to create a version that you can publish.

See Also For more information about working with recorded meetings, see ”Using Recording Manager” later in this chapter.

Participants can leave a meeting by clicking the phone icon at the top right of the conversation window. The meeting's organizer can end a meeting by clicking the People Options button and then choosing Remove Everyone And End Meeting.

➤ To schedule an online meeting

1. Open Outlook 2010, and switch to **Calendar** view.
2. On the **Home** tab, click **New Online Meeting**.
3. Add the meeting attendees, type a subject, and then add any message to the body of the meeting request.
4. In the meeting request, click **Meeting Options** if you need to change default settings for meeting access and the designation of presenters.
5. Click **Send**.

➤ To join an online meeting

1. Open the meeting request.
2. Click the link embedded in the request.

   Lync opens the conversation window. You might need to specify how you want to join the audio portion of the meeting.

➤ To record a meeting

1. In the conversation window, click the **More Options** arrow at the right side of the toolbar.
2. Click **Start Recording**.
3. Click **Pause Recording** if necessary during the meeting.
4. Click **Stop Recording** when you are ready.

Sending Instant Messages

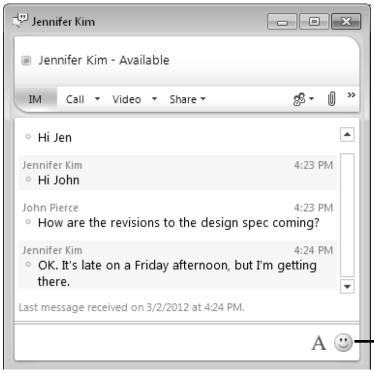
You will frequently use Lync to exchange instant messages with contacts and coworkers. You only need to double-click the contact's entry in the Lync window or right-click the entry and choose Send An Instant Message. In the window that Lync displays, type your message and then press Enter. The message's recipient receives a notification of the message from Lync and can reply with a return message, redirect the message as a Lync call, ignore the message, or indicate that he doesn't want to be disturbed.

You can engage in more than one instant message conversation at the same time. After you start the first instant message session, right-click another contact and send an instant message to that person as well. You can also add multiple contacts to a single instant message session. Select the first contact, press the Ctrl key, and then select the other contacts you want to include.

> **Tip** **You can send an instant message to a group of contacts by right-clicking the group's name in the contact list and choosing Send An Instant Message. You can add a contact to an instant message session by dragging the contact's entry from the contact list in the Lync window to the conversation window.**

In most respects, an instant message session is like other group conversations you hold in Lync. You can share your desktop or a presentation, for example, or set up a poll or a whiteboard. While an instant message session is under way, you can copy and paste text and links to websites or documents into the instant message window. To add another contact to the conversation, click the People Options button and then invite that person to join via e-mail, by searching your contact list, or by dragging the contact's entry into the conversation window. You can use other options on this menu to make all other participants attendees (which means they can't share content) or to end the session.

During the conversation, use the Share menu to open a presentation, share your desktop or a program, or open a whiteboard for brainstorming. To add a video feed, click Video and then click Start A Video Call. If you want to switch from exchanging instant messages to a Lync call, click Call to set up a conference call with the people in the session. The other participants are notified of the switch and need to join the call to become active in it.



Hi Jen

Jennifer Kim 4:23 PM
Hi John

John Pierce 4:23 PM
How are the revisions to the design spec coming?

Jennifer Kim 4:24 PM
OK. It's late on a Friday afternoon, but I'm getting there.

Last message received on 3/2/2012 at 4:24 PM.

The formatting buttons at the bottom of the instant message window let you emphasize text, change the font, and add emoticons.

Use the formatting button at the bottom of the conversation window to change to a different font or to apply formatting such as bold or italic. Click Select An Emoticon to display a palette of icons you can add to a message for emphasis and humor.

Responding to an E-mail Message or a Call with an Instant Message

When a contact calls you in Lync or sends you an e-mail message, you can respond with an instant message instead.

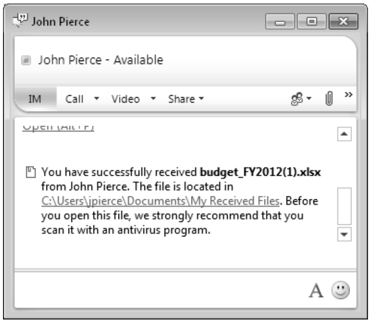
For a call, click the Redirect button on the notification Lync displays when you receive the call, and then choose Reply With Instant Message. When you choose this command, Lync opens the instant message window and the person who calls is informed that you chose to reply in that way. Lync also informs the caller that you've invited her to a conversation. Type your reply in the instant message window and then press Enter to continue.

For an e-mail message you receive in Outlook Web App, you can respond with an instant message by right-clicking the contact's name in the reading pane and choosing Chat. You can also open the message and then click Chat in the toolbar. In Outlook 2010, you can double-click a contact's name to display a small contact card. In the toolbar at the top of the contact card, click the Send An Instant Message To button.

Sending a File in an Instant Message

You can send file attachments in an instant message. The recipient of the message can then choose to accept the file, save it, or decline its delivery. The recipient can also double-click the notification Lync displays to open the file. By default, files that are accepted, saved, or transferred are stored in the My Received Files folder in the user's Documents library.

The sender of the instant message sees a message indicating the action taken by the recipient.



You have successfully received **budget_FY2012(1).xlsx** from John Pierce. The file is located in C:\Users\jpierce\Documents\My Received Files. Before you open this file, we strongly recommend that you scan it with an antivirus program.

Add to the content of an instant message session by including an attachment. By default, attachments are saved in a user's Documents library, in the folder My Received Files.

➤ To send an instant message to a contact

1. Right-click the contact's entry, and then choose **Send an Instant Message**.
2. Type your message in the conversation window, and then press Enter.
3. Use the formatting tools at the bottom of the conversation to change fonts, to add bold or italic emphasis, or to insert an emoticon in the instant message.

➤ To redirect an instant message to a Lync call

- ➜ In the instant message notification you receive, click **Redirect** and then choose **Respond with Lync Call**.

➤ To reply to an e-mail message with an instant message

- ➜ In Outlook Web App, open the e-mail message and then click **Chat**.

Audio Conferencing

Lync calls use Voice over Internet Protocol (VoIP) for communication between computers. When you place a call to a contact, each device that the contact has enabled to receive calls from Lync rings—which might include a desktop computer as well as a laptop. Calls you place via Lync bypass the standard telephone network.

Start a Lync call by pointing at a contact and then clicking Call. During the call, you can add contacts by pointing to the People Options button and then inviting other people to join the conference.

You can start a group call by selecting each contact you want to talk to. (Use the Ctrl key to select more than one entry in the contact list.) Right-click the selection, and then choose Start A Conference Call.

➤ To start a conference call with multiple contacts

1. Select the contacts you want to call.
2. Right-click the selection, and then choose **Start a Conference Call**.

Setting Up a Video Conference

If you have a webcam connected to your computer, you can include a video feed in the group conversations you hold in Lync.

After you connect the webcam, go to the Lync Options dialog box and check the settings for focus, brightness, and other properties. (See “Video Device Page” earlier in this chapter for more details.) You can then select a contact (or a group of contacts), right-click, and choose Start A Video Call.

You see your own video feed in a preview window that is inset at the bottom-right corner of the conversation window. The Video menu includes a command that lets you hide the preview or expand it so that it’s shown in a larger portion of the conversation window. Use the Video menu also to end or pause your video stream, to view the video in full screen, and to display the video feed in its own window. (The standalone video window includes a button in its top-right corner that lets you incorporate the video in the conversation window again.)

As you can in conversations that don't feature video, use the Share menu to display your desktop, a specific program, a whiteboard, and other such items to the participants in the video call. Click the IM button in the conversation window to send a participant an instant message during the call.

When you click End Video, the call itself is not ended. You can carry on via voice or instant messaging.

If you are engaged in a group conversation, open the Video menu and then choose Add Video to start a video feed for the conversation.

➤ To set up a video call

1. Select the contact or contacts you want to include in the video call.
2. Right-click the selection, and then choose **Start Video Call**.
3. During the call, use the **Video** menu to do the following:
    - Hide, show, expand, or shrink your preview
    - Pause the video
    - View the video in full screen
    - View the video in a separate window
    - End the video

Practice Tasks

Practice the skills you learned in this section by performing the following tasks in Lync:

- Work with colleagues in your organization to hold a group conversation. If you organize the conversation, share your desktop or a presentation with the other participants.
- Exchange instant messages with your colleagues. Redirect an instant message to a Lync call.
- If you and your colleagues have webcams available, set up and conduct a video conference.

3.3 Manage Lync Contacts

In many ways, your contact list is the center of your work in Lync. Using the list, you can initiate calls, send instant messages or e-mail, schedule a meeting, and perform other tasks. You learned how many of these features work in the previous section. In this section, you'll learn more about organizing and managing your contacts in Lync.

Using Contact Groups

Organizing Lync contacts into groups helps you find a contact and, more important, lets you communicate with all the members of the group in one step. Lync sets up two groups by default: Frequent Contacts and Other Contacts. You can create your own groups and then add contacts to them.

> **Tip You can also create a group when you add a contact to your list. You'll learn how to do this in the next section.**

After you add contacts to a group, point to the group's name in the contact list to display the Call button. Click Call to start a conference call with the group's members. For more options, right-click a group name to display a menu from which you can do the following:

- Send an instant message to the group
- Start a conference call
- Start a video call
- Share your desktop in a group conversation
- Send an e-mail message to group members
- Schedule a meeting with group members (if your account uses Outlook 2010)

➤ To create a group

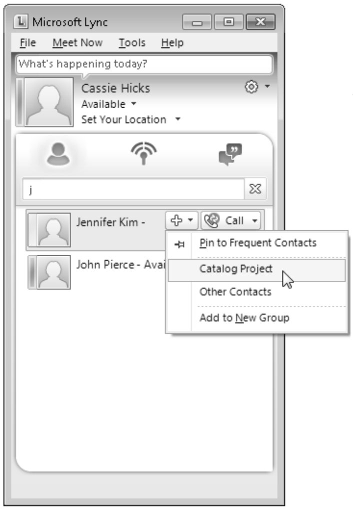
1. Above the contacts list, click **Groups**.
2. In the list, right-click a group name (for example, **Other Contacts**) and choose **Create New Group**.
3. Type a name for the group, and then click away from the text box.

➤ To communicate with group members

1. Right-click the group name.
2. On the menu, choose the command for how you want to communicate with the group. For example, choose **Send an Instant Message** or **Start a Video Call**.

Finding and Adding Contacts

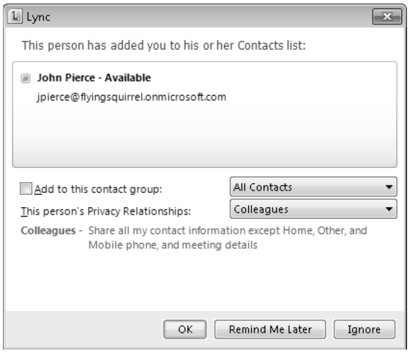
Use the search box in the Lync window to locate a contact you want to add to your list or communicate with. Lync can search by name, e-mail address, or phone number. Lync lists the contact or makes suggestions on the basis of the characters you type. Point to the contact you want to add (if more than one is displayed), and then click the plus sign to open a menu that lets you pin the contact to your group of frequent contacts or add the contact to the Other Contacts group, a group you defined, or a new group.


Microsoft Lync
File
Meet Now
Tools
Help
What's happening today?
Cassie Hicks
Available
Set Your Location
j
Jennifer Kim -
Call
John Pierce - Avai
Pin to Frequent Contacts
Catalog Project
Other Contacts
Add to New Group

Lync locates contacts after you type just a few characters. Add contacts to a built-in group, a group you define, or a new group.

If you simply want to communicate with one of the contacts Lync found, click Call or right-click the contact's entry and then choose Send An Instant Message, Share, or another of the available commands.

When you add a contact to your list, the person you add is notified of the action and can choose to add you to a specific contact group and to select the privacy relationship that she wants to apply. You can ignore the notification or click Remind Me Later to postpone making the settings you want for this contact.


Lync

This person has added you to his or her Contacts list:

John Pierce - Available
jpierce@flyingsquirrel.onmicrosoft.com

☐ Add to this contact group: All Contacts
This person's Privacy Relationships: Colleagues
Colleagues - Share all my contact information except Home, Other, and Mobile phone, and meeting details

OK
Remind Me Later
Ignore

Lync notifies a contact that you've added to your list. He or she can then specify a contact group and apply a privacy relationship.

➤ To find and add a contact

1. In the search box, start typing the name, e-mail address, or phone number for a contact you are looking for.
2. In the list Lync displays, point to the contact you want to add.
3. Click the plus sign, and then select the group you want to add the contact to or select **Add to New Group**.
4. If you select **Add to New Group**, type the group name in the text box Lync provides.

Editing and Managing Contact Groups

When you right-click a group name in the contacts list, you can use commands on that menu to do the following:

- Move a group up or down in the contact list.
- Rename a group.
- Delete the group.
- View a contact card for the group. From the group contact card, you can send an e-mail or an instant message to the group, start a conference call or a video call, or share your desktop in a group conversation.

➤ To edit and manage contact groups

➜ In the contact list, right-click a contact group and then choose one of the following commands:

- Move Group Up
- Move Group Down
- Rename Group
- Delete Group
- View Contact Card

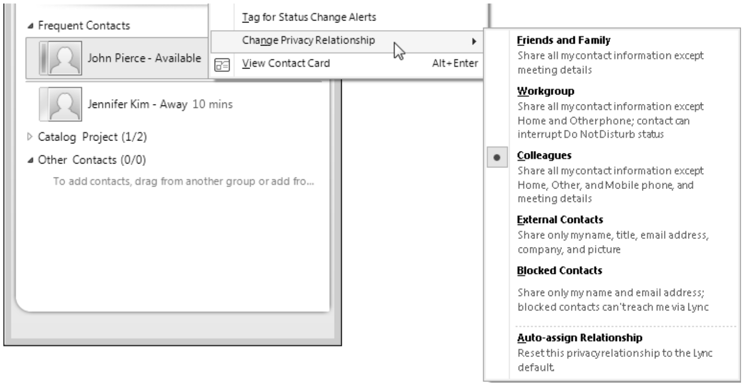
Specifying Contact Relationships

One way in which you manage the information that Lync provides about your status, schedule, availability, and activities is by specifying the relationship you have with a contact. Depending on the category you place a contact in, that contact can see more or less of your contact information and activities. You can add a contact to the following categories:

- Friends And Family
- Workgroup
- Colleagues
- External Contacts
- Blocked Contacts

Contacts in your organization are designated as colleagues by default. You can change the relationship for a contact by right-clicking the contact's entry and choosing Change Privacy Relationship.

Privacy relationships determine what information a contact can see. Coworkers are designated colleagues by default. Choose Blocked Contacts to reveal no information to someone.


Frequent Contacts
John Pierce - Available
Jennifer Kim - Away 10 mins
Catalog Project (1/2)
Other Contacts (0/0)
To add contacts, drag from another group or add fro...
Tag for Status Change Alerts
Change Privacy Relationship
View Contact Card
Alt+Enter

Friends and Family
Share all my contact information except meeting details

Workgroup
Share all my contact information except Home and Other phone; contact can interrupt Do Not Disturb status

● **Colleagues**
Share all my contact information except Home, Other, and Mobile phone, and meeting details

External Contacts
Share only my name, title, email address, company, and picture

Blocked Contacts
Share only my name and email address; blocked contacts can't reach me via Lync

Auto-assign Relationship
Reset this privacy relationship to the Lync default.

The following table, taken from the Lync Help content, lists the information available within each relationship.

Note **An asterisk (*) indicates that if this attribute is defined in the company's directory service, it will be visible to all contacts in your organization, regardless of the privacy relationship, and to external contacts (if configured and recognized by your organization's network). A pound sign (#) indicates that this attribute is visible by default.**

Presence Information	External Contacts	Colleagues	Workgroup	Friends And Family
Presence Status	X	X	X	X
Display Name	X	X	X	X
Email Address	X	X	X	X
Title*	X	X	X	X
Work Phone*		X	X	X
Mobile Phone*			X	X
Home Phone*				X
Other Phone				X
Company*	X	X	X	X
Office*	X	X	X	X
Work Address*	X	X	X	X
SharePoint Site*	X	X	X	X
Meeting Location#			X	
Meeting Subject#			X	
Free Busy		X	X	X
Working Hours		X	X	X
Location#		X	X	X
Notes (Out-of-Office Note)		X	X	X
Notes (Personal)		X	X	X
Last Active		X	X	X
Personal Photo Web Address	X	X	X	X

➤ To specify a privacy relationship

1. Right-click the entry for the contact you want to work with.
2. Point to **Change Privacy Relationship** and then select the setting you want to apply to this contact.

Managing Status and Presence Settings

Your current status appears under your name in the Lync window. By default, Lync uses entries in your Outlook calendar to set your status. For example, during the time period for an appointment, your status shows that you are busy. When you are engaged in a call, Lync changes your status to In A Call. Likewise, Lync uses the status settings In A Meeting and In A Conference Call when you are involved in those activities.

You can also manually change your status to alert your contacts that you are away or don't want to be disturbed. The choices for your status are as follows:

- **Available** Your status is set to Available when Lync detects you're using your computer. You can set your status to Available yourself as well.
- **Busy** Lync sets your status to Busy when you have an appointment on your calendar in Outlook. You can also set your status to Busy manually.
- **Do Not Disturb** You can select this status from the menu of options. When your status is set to Do Not Disturb, you don't see any instant messages or calls, but you will see any calls or instant messages you missed in the conversation history in Outlook.
- **Be Right Back** This is another status setting that you set yourself.
- **Off Work** You select this status when you are away from your office and from work.
- **Appear Away** Set your status to Appear Away when you don't want to be contacted.

Tip **To revert from the status you set and have Lync automatically update your status, click Reset Status.**

Lync sets your status as Inactive and then Away after your computer is idle for the period of time specified in the Lync Options dialog box. For more information, see "Status Page" earlier in this chapter.

You will also see status settings such as Offline or Unknown for your contacts. Lync sets your status to Offline when you log off your computer. The Unknown status setting is shown when Lync can't detect the status of a contact.

The presence states defined in Lync can't be customized, and you can't create presence states of your own. However, if you want to give your contacts more details about where you are or what you're doing, add a note in the text box above your name (which displays the prompt "What's happening today?"). The note you add here appears with your contact card and in the Activity Feeds lists for your contacts. You can also add a place to the Set Your Location box (Home and Work are suggested by Lync) to associate a location with the network you are connected to.

➤ To set your presence status

1. Click the arrow next to the current status setting, and then select the setting you want.

2. To reset your status so that Lync sets it automatically based on your activity, choose **Reset Status from the options on this menu**.

Managing Activity Feeds

You can let your contacts know more about what you're up to by typing a note in the text box above your name. The notes you add are displayed under your entry in the contacts list as well as in the Activity Feeds list. In addition to the notes you add, the Activity Feeds list shows status changes, changed pictures, and updated contact information.

As you can with conversations and calls, you can view and filter activity feeds. Above the search box, click the Activity Feeds button (the middle one) to display the current list. Use the filters at the top of the list to view all activities for your contacts, the activities of only your frequent contacts, or the activities you entered for yourself. The entries in the Activity Feeds list act like regular contact entries. You can double-click an entry to send that contact an instant message, for example. Right-click the entry to see other options.

Tip **By default, updates to your personal note appear in the Activity Feeds list for everyone (except blocked contacts and external contacts). To not show notes, open the Lync Options dialog box and clear the Show All My Updates In Activity Feed option on the Personal page.**

➤ To manage activity feeds

1. Above the contacts list, click the **Activities Feed** button.
2. Use the filters to see all activity feeds, the activities of your frequent contacts, or your own activities.

Viewing Conversation History

Lync can maintain a history of the calls and conversations you have with contacts. You can look back on this information to see calls you missed or to pick up a conversation you want to continue. You can also view recent conversations you had with particular contacts.

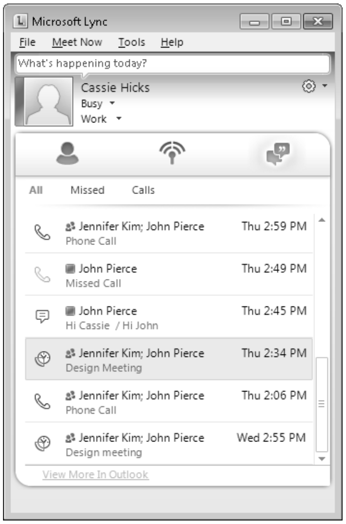
The View Conversation History command appears on the File menu. (The command might not be available. Its availability depends on how Lync 2010 is set up in your organization.)

When you choose this command, Microsoft Outlook runs, and you see your recent incoming and outgoing instant messages, phone calls, and meetings listed in the Conversation History folder.

If you want to see the entries for a particular contact in Outlook, right-click the contact in Lync and then choose Find Previous Conversations.

You can also see a record of your conversations in Lync. Above the search box, click the Conversations button. Lync displays a list of phone calls, missed calls (if any), meetings, instant message sessions, and group conversations. Use the filters at the top of the list to see all conversations, just missed calls, or calls (including group conversations, missed calls, and online meetings). Here is an explanation of the options you see:

- All shows your 100 most-recent conversations.
- Missed shows any missed conversation during that timeframe (up to the 100 most recent).
- Calls shows any calls during that timeframe (up to the 100 most recent).



Jennifer Kim; John Pierce — Phone Call — Thu 2:59 PM
John Pierce — Missed Call — Thu 2:49 PM
John Pierce — Hi Cassie / Hi John — Thu 2:45 PM
Jennifer Kim; John Pierce — Design Meeting — Thu 2:34 PM
Jennifer Kim; John Pierce — Phone Call — Thu 2:06 PM
Jennifer Kim; John Pierce — Design meeting — Wed 2:55 PM

Filter the conversation history list in Lync to find recent conversations and calls and to continue a conversation when necessary.

To continue a call, for example, point to an entry in the conversation list and then click Rejoin. For an instant message session, double-click the entry to open the conversation window with the previous conversation intact. You can also point to an instant message session and then click Call.

To delete a conversation from the list, right-click the entry and choose Delete Conversation. You can also use this menu to continue a conversation.

➤ To view the Conversation History folder

➜ On the **File** menu, click **View Conversation History**.

Microsoft Outlook opens and displays the Conversation History folder. You can then sort conversations or search for a conversation by keyword or contact.

➤ To find a previous conversation with a specific contact

➜ In the contacts list, right-click the contact, and then choose **Find Previous Conversations**.

Outlook opens and displays that contact's conversations in the Conversation History folder.

➤ To find and manage a recent or missed conversation

1. Above the search box, click the **Conversations** icon.
2. Use the filters to see all or a subset of the conversations.
3. Point to an entry for a conversation you want to continue, and then click **Rejoin** or **Call**.
4. Right-click the conversation entry you want to remove, and then click **Delete Conversation**.
5. If the conversation you are looking for is not among your most recent 100 conversations, click **View More in Outlook** to open the **Outlook Conversation History** folder.

Practice Tasks

Practice the skills you learned in this section by performing the following tasks in Lync:

- Set up contact groups for projects you are working on currently. Add members of the project teams as contacts.
- Add a personal note and then view the note in the Activity Feeds list.
- Start calls, meetings, and other activities, and observe how Lync automatically changes your status.

3.4 Use Lync Tools

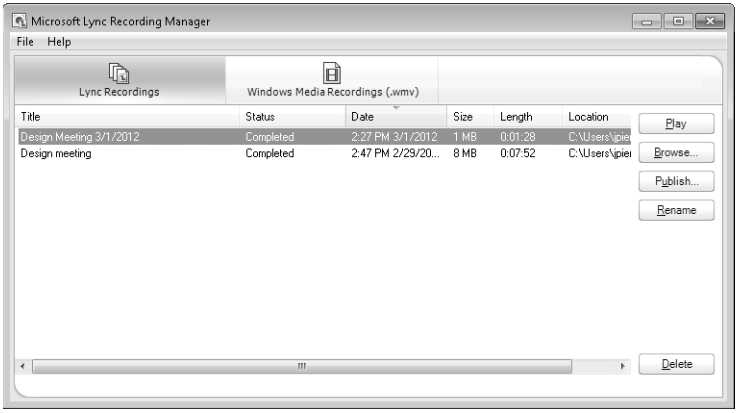
This section describes features in Lync that you use to manage recordings, take notes during a conversation, redirect a conversation, and handle a series of incoming calls.

Using Recording Manager

The Lync Recording Manager is a separate application. You can open it directly from the Start menu (Lync doesn't need to be running) or from the Tools menu in the Lync application window when you are signed in to Lync.

Tip When you stop recording a conversation or a meeting, you'll see a notification that the recording is available. You can also open Recording Manager by clicking the notification.

In Recording Manager, you can replay recordings, browse to the location where a recording is stored, and delete a recording. If you are working with Lync recordings (as opposed to Windows Media recordings), you can rename a recording or save all or parts of the recording in Windows Media format and publish it for other people to view.

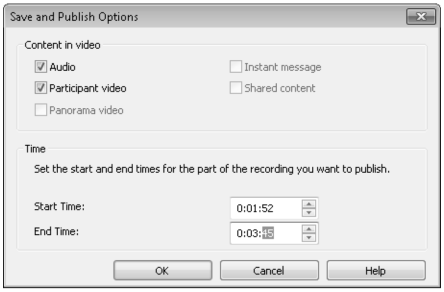

Microsoft Lync Recording Manager
File
Help
Lync Recordings
Windows Media Recordings (.wmv)
Play
Browse...
Publish...
Rename
Delete

Title	Status	Date	Size	Length	Location
Design Meeting 3/1/2012	Completed	2:27 PM 3/1/2012	1 MB	0:01:28	C:\Users\jpie
Design meeting	Completed	2:47 PM 2/29/20...	8 MB	0:07:52	C:\Users\jpie

The Recording Manager lets you replay recordings and publish recordings for other users.

When you use the Recording Manager to replay a recording (select a recording and click Play or double-click the recording to start it), you view the recording in the Lync Recording Player. In this window, you hear the audio and watch the video (if any) of the meeting and can also see what content was being shared. Use the Information And Attachments button at the top of the Recording Player window to see a list of participants and attachments (if any) that were included in the meeting. When you click Content Sharing And People Speaking, you display or hide a pane that shows which content was shared during the meeting and who is speaking. The Recording Player also lets you show or hide a meeting's video feed. Use the controls at the bottom of the window to stop or pause the recording and adjust the volume.

On the Lync Recordings tab, you have the additional options of renaming a recording and publishing it to a public location (such as a SharePoint site). To make a recording publicly available, click Publish on the Lync Recordings tab. In the Save And Publish dialog box, use the Browse button to navigate to the location where you'll publish the recording. Click the Options button to specify which types of content to include in the published version. For example, if you want to reduce the size of the file you are publishing, clear the Participant Video option in the Save And Publish Options dialog box because video can take up a lot of space and might not be of good quality. You can also use the Save And Publish Options dialog box to specify start and end times for parts of the recording you want to publish.



☑ Audio
☐ Instant message
☑ Participant video
☐ Shared content
☐ Panorama video

Set the start and end times for the part of the recording you want to publish.

Start Time: 0:01:52
End Time: 0:03:45

Set the Start Time and End Time to publish a segment of a recording.
Clear the Participant Video option to reduce the file size for the recording.

➤ To manage recordings

1. On the **Start** menu, click **All Programs**, **Microsoft Lync**, **Microsoft Lync Recording Manager**. (You can also start the Recording Manager by selecting Recording Manager from the Tools menu in Lync.)
2. Select a recording you want to view, and then click **Play**.
3. To make a recording available to others, on the **Lync Recordings** tab, select a recording and then click **Publish**.
4. In the **Save and Publish** dialog box, type a name for the shared recording.
5. Click **Browse** to open the location where you want to post the recording.
6. Click **Options**, and then in the **Save and Publish Options** dialog box, select which content to include in the recording and specify start and end times if you don't want to publish the entire recording.
7. Click **OK** to save your selections and close the dialog boxes.

Using the Always On Top Option

To keep the Lync window visible so that it is on top of other windows, choose Always On Top from the Tools menu. The Lync window is small enough that you can position it in a corner of your screen and continue working in other applications. Clear this setting when you want the Lync window to move to the background when another application is active.

➤ To keep the Lync window on top

1. Click the arrow next to the **Options** button.
2. Point to **Tools**, and then choose **Always On Top**.

Taking Notes in OneNote

If you don't want to make a recording of a meeting, you can take notes in Microsoft OneNote while the conversation takes place and then compile and distribute notes to participants.

Start a conversation or an online meeting and then click the More Options arrow at the right end of the conversation window's toolbar. Then choose Take Notes Using OneNote, which starts OneNote and adds a page to the Unfiled Notes area. In OneNote, you can move this page to a specific notebook (a notebook for a specific project, for example) after you conclude the conversation.

The page OneNote displays is tentatively titled Conversation and includes the date and a time stamp of when the conversation began. The page also lists the participants. To take notes, just start typing on the page, in the note container that OneNote provides. You can add notes to a different area of the page by clicking and then typing the text.

Taking notes in OneNote is not the same as sharing a program through Lync. If you start OneNote, you are the only conversation participant working in that instance of the program.

See Also **If you aren't familiar with Microsoft OneNote, it is a notebook application that comes with some editions of Microsoft Office 2010. You can find out more at *www.microsoft.com/office/onenote*.**

Ending the conversation in Lync doesn't close OneNote. Keep OneNote open if you want to edit and organize the raw notes, move the page to a notebook, insert images or files to augment the notes you've taken, and so on. You don't need to save your work in OneNote—the program saves new content automatically. Close OneNote when you're ready.

➤ **To take notes in OneNote**

1. Start a group conversation, instant message session, or an online meeting.
2. In the conversation window, click the **More Options** button and then choose **Take Notes in OneNote**.
3. Add notes (typewritten or handwritten) to the new page in OneNote.
4. When the conversation concludes, edit the notes in OneNote. You can distribute them as an attachment in Lync or post them to a shared location, if necessary.

Changing the Conversation Subject

When you initiate a Lync call or an instant message exchange, you can specify a conversation topic so that the person you are contacting knows what you want to talk about. The subject you enter appears in the notification that Lync displays for the contact or contacts you call.

During the conversation, you can change the subject when you need to. For example, you might update the subject when you are working through a meeting agenda. The subject you enter in Lync appears in the title bar in the conversation window.

The Change Conversation Subject command is on the More Options menu. Choose this command and then type the subject you want to use.

➤ **To change the conversation subject**

1. In the conversation window, click the **More Options** button at the right end of the toolbar.
2. Choose **Change Conversation Subject**.
3. Type the subject in the dialog box Lync displays, and then click **OK**.

Practice Tasks

Practice the skills you learned in this section by performing the following tasks on your site:

- Set up and record a meeting with some of your coworkers.
- Use the Recording Manager to publish an excerpt of the recording.
- During the meeting, open OneNote and take notes about the conversation.
- Ask one or more of your colleagues to change the subject as you talk with each other.

Objective Review

Before finishing this chapter, be sure you have mastered the following skills:

3.1 Configure Lync options
3.2 Employ collaboration tools and techniques
3.3 Manage Lync contacts
3.4 Use Lync tools

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