Table of Contents

*Microsoft Lync 2013* ......................................................................................................................... 1
*Lync 2013 Main Screen* .................................................................................................................... 1
*Lync Options* ....................................................................................................................................... 2
  General Options ................................................................................................................................... 2
  Set your Personal information manager options ................................................................................. 3
  Set contacts list options ...................................................................................................................... 4
  Set status options ............................................................................................................................... 5
Audio Device Settings ............................................................................................................................ 6
Set up and troubleshoot Lync video ....................................................................................................... 7
Set file saving options ........................................................................................................................... 7
Lync recording location and resolution ................................................................................................... 8

*Lync IM, Presence and Contacts* ......................................................................................................... 9
  Find someone ....................................................................................................................................... 9
  Add a contact ....................................................................................................................................... 9
  View a contact card ............................................................................................................................. 9
  Create a group ..................................................................................................................................... 9
  Send an instant message .................................................................................................................... 10
  Add audio, video, sharing, to an IM conversation .............................................................................. 10
  Switch between tabbed conversations ............................................................................................. 10
  Find a previous IM conversation ....................................................................................................... 10
  Accept an IM request ......................................................................................................................... 11
  Set or change your presence .............................................................................................................. 11

*Lync 2013 Video Calls* ....................................................................................................................... 12
  Start a video call ................................................................................................................................. 12
  Start a video meeting ......................................................................................................................... 12
  Answer a video call ............................................................................................................................ 12
  Invite other people to a video call ..................................................................................................... 13
  Add video to an IM conversation ....................................................................................................... 13
  Choose the layout .............................................................................................................................. 13
  Manage the participants .................................................................................................................... 13
  Choose the view ............................................................................................................................... 13

*Lync Meetings* ................................................................................................................................. 15
  Start an unscheduled online meeting or conference call ................................................................. 15
  Schedule a Lync Meeting .................................................................................................................. 15
  Manage participants ......................................................................................................................... 16
  Join a Lync Meeting .......................................................................................................................... 16

*Lync 2013 Sharing and Collaboration* ............................................................................................... 17
  Share your desktop or a program in Lync ......................................................................................... 17
  Present PowerPoint slides in a Lync Meeting ................................................................................... 18
  Transfer a file in a Lync Meeting ....................................................................................................... 19
  Use a Whiteboard in a Lync Meeting ............................................................................................... 20
  Using Poll in a Lync Meeting ............................................................................................................ 21
  Lync Q&A Manager .......................................................................................................................... 22
  Record and play back a Lync Meeting ............................................................................................ 25
Microsoft Lync 2013

Lync helps you stay connected to the people who are important to you via instant messaging, email, audio and video calls, persistent chat rooms, and online meetings and presentations.

Lync 2013 Main Screen

**Me Area:** Change availability status, displayed location, or your personal message.

**View Tabs:** View Contacts, Conversations, Phone, Meetings.

**Search Bar:** Search for contacts by name or email address.

**Groups:** Organize your contacts into customizable groups. Click the arrow next to a group name to expand or collapse.

**Audio Device Menu:** Configure your audio device settings or check call quality.

**Lync Options:** Open the Lync Options dialog box.

**Show Menu Arrow:** Access commands like Meet Now, Tools, and Lync Help.

**Contact Tabs:** View your contacts by group, status, relationship, or how recently they added you.

**Quick Lync Buttons:** Hover over the contact’s picture to IM, call, video call, or see the contact card with a single click. After you start a conversation, you can give a presentation or invite more participants.
In the Lync main window, click the Options Cog >

**General Options**

Set My account options

Use the options under **My account** to specify your sign-in address and configure how you connect to Lync Server.

- Open Personal options, and, under **My account**, and in the **Sign-in address** box, type the name of your user account (for example, someone@example.com).
- Click the **Advanced** button to configure your connection to Lync Server. Normally you will not have to open this dialog, as these settings will be set automatically or by your technical support team.
- Select the **Automatically start Lync when I log on to Windows** check box to streamline startup and automatically sign in and start Lync each time you log on to the Windows operating system. If you don’t want to automatically sign in, be sure to clear this check box.
- Select the **Show Lync in foreground when it starts** check box next if you want the Lync main window to open in front of other windows when it starts. If this option isn’t selected, the Lync icon appears in the Windows notification area (system tray) when Lync starts.
Set your Personal information manager options

Set My account options
Use the options under My account to specify your sign-in address and configure how you connect to Lync Server.

- Open Personal options, and, under My account, and in the Sign-in address box, type the name of your user account (for example, someone@example.com).
- Click the Advanced button to configure your connection to Lync Server. Normally you will not have to open this dialog, as these settings will be set automatically or by your technical support team.
- Select the Automatically start Lync when I log on to Windows check box to streamline startup and automatically sign in and start Lync each time you log on to the Windows operating system. If you don’t want to automatically sign in, be sure to clear this check box.
- Select the Show Lync in foreground when it starts check box next if you want the Lync main window to open in front of other windows when it starts. If this option isn’t selected, the Lync icon appears in the Windows notification area (system tray) when Lync starts.

Set your Personal information manager options
Use the options under Personal information manager to specify how Lync interacts with other Microsoft Office programs.

- Open Personal options, and, under Personal information manager, select either Microsoft Exchange or Microsoft Outlook or None from the drop-down list. When you select Microsoft Exchange or Microsoft Outlook, the Lync search feature uses the Microsoft Outlook Contact list as a source of contacts, in addition to the global address list. When you select None, the Lync search feature returns contacts only from the global address list. It doesn’t use either the Windows Address Book or the Outlook Contact list.
- To make your presence automatically reflect when you are in a scheduled meeting, select the Update my presence based on my calendar information check box. Use the following settings to further specify who can see this information:
  - To show this information to contacts in your Workgroup, select the Show meeting subject and location to contacts in my Workgroup privacy relationship check box.
To show your Outlook Out of Office information to contacts, select the **Display my Out of Office information to contacts in my Friends and Family, Workgroup, and Colleagues privacy relationships** check box. Clear the check box to hide your Out of Office information from all your contacts.

- To save your conversation history in Outlook, select the **Save instant message conversations in my email Conversation History folder** check box. Clearing this check box means that your instant message history will not be included in this folder.
- To save your phone call history in Outlook, select the **Save call logs in my email Conversation History folder** check box. Clearing this check box means that your phone call history will not be included in this folder.

**Set your Location options**

If your organization has enabled this feature, you may be able to specify whether your location is shared with other programs.

- To allow other programs to use your location information, on the Personal options window, in the Location area, select the **Share my location information with other programs I use** check box.
- To hide your location in other programs, clear this check box.

**Set your Show pictures options**

Use the options under **Show pictures** to specify whether you want to see other peoples’ pictures.

- To display other peoples’ pictures in Lync, open Personal options, and, under Display photo, select the **Show pictures of contacts** check box. If you don’t want to see pictures in Lync, clear this check box. (Not showing pictures enables you to see more contacts in your Contacts list. Clearing this box also removes pictures of sender and receiver in IM and group conversations.)

**Set contacts list options**

- **Display my contacts with**: By default, your Contacts list will include names and, if available, pictures. To remove the pictures, which doubles the number of contacts that can be displayed at one time, click **Contact name only (one line)**.
- **Order my list**: By default, your contacts are listed alphabetically by name, within a given group. If you’d rather have them ordered by their availability, click **By availability**.
- **Show this information**: Select the check boxes in this section to choose from among these additional display options.
Set status options

Set your options for Inactive and Away status changes
When you’ve been inactive on your computer, Lync automatically changes your status. If you haven’t moved your mouse or taken a keyboard action on your computer for a specified period of time, Lync displays a yellow status indicator and the word “Inactive.” After your status has been “Inactive” for a period of time, Lync continues to show the yellow status indicator and displays the word “Away.” Five minutes is the default period for these options, but you can specify a longer time.

1. Open Status options, and, next to Show me as Inactive when my computer has been idle for this many minutes, click the up or down arrows to specify how long Lync should wait before changing your status to Inactive. The maximum interval of time you can enter is 360 minutes.
2. Next to Change my status from Inactive to Away after this many minutes, click the up or down arrows to specify how long Lync should wait before changing your status to Away. The maximum interval of time you can enter is 360 minutes.

Specify who can see your presence status
By default, everyone except Blocked Contacts can see your presence status. You can change this by opening the Status options window and choosing one of the following:
- I want everyone to be able to see my presence regardless of system settings (override default settings)
- I want the system administrator to decide—currently everyone can see my presence but this could change in the future

Your organization may have enabled Privacy Mode in Lync. If this is the case, you will see the following options instead of the previous ones. You can use these options to choose whether to limit visibility of your presence information to only those people whom you’ve added to your Contacts list:
- I want everyone to be able to see my presence
- I only want people in my Contacts list to see my presence

**NOTE***The presence states in Lync are pre-set and can’t be customized or added to. If you want to give your contacts more details about where you are or what you’re doing, you can write a personal note at the top of the Lync main window.

Set Do Not Disturb status automatically whenever you are presenting
You can set up Lync to automatically block distracting communications whenever you are sharing content or giving a presentation with your Lync-enabled computer. If you enable this feature, Lync will change your status to Presenting whenever you share your screen or duplicate your display in projection mode. Instant messages from your coworkers will be blocked and anyone who views your status will know what you are doing and that you are not to be disturbed.

To enable this feature, select the check boxes labeled Show me as Do Not Disturb when I am Presenting from this device and Show me as Do Not Disturb when my monitor is duplicated.
Audio Device Settings
You can use your computer’s built-in microphone and speakers, or another audio device.

1. In the Lync main window, go to Options 🌐 > Audio device.

2. Use the sliders to adjust the speakers and microphone. Click OK when you’re done.

If you don’t see your device on the list, make sure it’s connected directly to your computer, and then follow the instructions that came with the device to install it. If you’re not able to set up your device, see the troubleshooting section below.

***TIP*** For the best results, select the same device for both the mic and the speaker. Choosing separate devices could cause audio echoing during a call. If you can’t avoid using separate devices, you can minimize echoing by lowering the volume of the mic and the speaker.
Set up and troubleshoot Lync video

For the best results during a Lync video call, set up and test your camera before you use it. You need a camera to make a video call or share your video in a meeting, but you don’t need one to receive a video call or see other people’s videos.

Set up Lync video

1. In the Lync main window, go to Options > Video Device. You’ll see your video in the window.
2. If you have more than one camera and want to switch, select it from the drop-down list.
3. For advanced settings such as color balance, contrast, brightness, and black-and-white mode, click the Camera Settings button.
4. Click OK when you’re done.

Set file saving options

Save your transferred files
You can save files that others send to you in Lync to review, work on, or share later.

- Open File Saving options, and then, under File transfer, click Browse to select the folder that you want to keep received files in.
Lync recording location and resolution

Your Lync recordings are saved in the Videos folder>**Lync Recordings**. If you prefer to change the location, click **Browse** and choose a different folder. For example, you can choose to save your recordings to a location on a shared network, where others have access to.

1. Click **Browse**.
2. Find the folder where you want to save your recordings.
3. Select the folder and click **OK**.

Keep in mind that all your future recordings will be saved in the new location. If you change your mind, you can always come back and pick another folder.

You can also change the resolution of your recording, which by default is 720 Pixel High Definition. Remember, the higher resolution you select, the larger the recording file size will be. So if you prefer to have smaller size files, select lower resolutions.
Find someone
The quickest way to find someone via Lync is to launch a search by typing the person’s name or IM address in the search box on the Lync main window. The results display automatically.

Add a contact
Your Contacts list simplifies your communications and lets you see presence and contact information for the people most important to you. Add to it the people you expect to be interacting with regularly. If your company allows it, you can add Lync users outside your company as well as within. To add someone as a contact:

1. Use Lync search to find the person you want to add. (See Find someone.)
2. Right-click the person’s listing in the search returns.
3. Click Add to Contact List.
4. Click a group to add your new contact to.

View a contact card
The contact card contains details from a contact’s company directory, such as the person’s office location, phone numbers, organization, and Outlook calendar free/busy information. To see someone’s card, find the person in your Contact list or via search, point to his or her picture, and then click See Contact Card.

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

1. In the Lync main window, click the Add a Contact button.
2. In the drop-down menu, select Create a New Group.
3. In the space that opens up at bottom of the window, type over the phrase New Group to give your group a name.
Send an instant message
Use instant messaging (IM) to get in touch right away with your available contacts.

1. In your Contacts list, point to the picture of the contact you want to send an instant message to. To have an IM conversation with more than one contact, hold down the Ctrl key, and click each contact you want to include.

2. In the display bar that appears, click the IM button.
3. Type your message in the message input area at the bottom of the IM window, and then press the Enter key on your keyboard.

Add audio, video, sharing, to an IM conversation
You can quickly add audio, video, or a presentation to your IM conversation, and/or invite others to join the conversation by selecting the appropriate button(s) at the bottom of the conversation window:

Switch between tabbed conversations
If you have several conversations or meetings going on at the same time, Lync displays them all in one place, which lets you toggle between them. Click any tab to bring that activity to the foreground.

Find a previous IM conversation
If you use Outlook and Exchange, Lync automatically saves your IM conversation history. To view or continue a previous IM conversation or see an IM request you missed:

1. Near the top of the Lync main window, click the Conversations tab.
2. Click All or Missed, depending on what you’re looking for. If you don’t see the conversation you’re looking for, click View More in Outlook, at the bottom of the list.
3. Double-click the conversation that you want to view or resume.
Accept an IM request
Click anywhere on the picture display area of the IM request pane.

Set or change your presence
Presence lets other people see at a glance whether you and your contacts are currently available. Here are the available presence statuses and what they mean:

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

To change your presence, in the Lync main window, click the arrow next to your status, and then select a status from the list, such as Do Not Disturb.
Lync 2013 Video Calls

Start a video call
In your Contacts list, point to a contact’s photo and click the camera icon.

A message pops up on your contact’s screen to accept your call.
To end the video portion of the call, point to the camera icon, and then click one of the following:

- **Stop My Video** to stop your video stream. You’ll still see others’ video.
- **End Video** to stop seeing all video. You’ll still have audio.

**TIP** During an instant messaging or audio call, click the camera icon to make it a video call.

Start a video meeting
Start an ad-hoc video meeting to discuss a subject that needs immediate attention.
1. In your Contacts list, select multiple contacts by holding down the Ctrl key and clicking the names.
2. Right-click one of the selected names, and click **Start a Video Call**. When you start a video call, you automatically use Lync computer audio.
3. Use the video controls to manage the meeting.

Answer a video call
When someone calls you, an alert pops up on your screen.
To answer the call, click anywhere on the photo area.
Click **Ignore** to reject the call.
Click **Options** and the appropriate selection to do any of the following:

- Reply by IM instead of by video.
- Answer with audio only if you don’t want to share your video.
- Change your status to Do Not Disturb to ignore this call and others, until you change your status.
Invite other people to a video call

1. In the conversation window, pause on the people icon, and click Invite More People.

2. Type or select the new invitee(s), and then click OK.

Your new invitees receive an request message to join your call.

Add video to an IM conversation

1. In the conversation window, point to the camera icon, and check your preview.

2. Adjust your camera if needed, and click Start My Video.

3. To end sharing your video, click Stop My Video.

***TIP*** Click End Video to stop sharing your video with others AND to end their video feeds to you.

Choose the layout

In the video conversation window, click Pick a Layout, and choose one of the following:

- **Gallery View** to show all the participants’ videos.
- **Speaker View** to show only the presenters’ videos.
- **Content View** to show only the meeting content.
- **Compact View** to show the tiles of the participants in a compact window.

Manage the participants

To manage the participants, right-click a person’s video or photo, and click:

- **Mute, Unmute, or Remove** to mute, unmute, or remove that person from the call.
- **Lock the Video Spotlight** to make that person’s video the spotlighted video.
- **Pin to Gallery** to keep that person in the Gallery View.

Choose the view

In the video conversation window, click Pop out video gallery to see the videos in a separate window, Full Screen View for a large view of the videos, and click Pop in video gallery to go back to normal view.
Start an unscheduled online meeting or conference call
You can start an unscheduled online meeting or conference call in Lync 2010 communications software by using the Meet Now command or by selecting contacts, right-clicking them, and then choosing the type of interaction you want. Unscheduled meetings are ideal when you have a document or topic to discuss that requires immediate attention.

Start an unscheduled meeting by using Meet Now
To start an unscheduled meeting by using the Meet Now command, do the following:

1. In the Lync main window, click the Show Menu arrow, and then click Meet Now.
2. Click the Participants button and select Invite More People.
3. Type a Name or Phone Number into the space provided.

Schedule a Lync Meeting
You can schedule a Lync Meeting by using the Outlook.
To schedule a meeting with Outlook:

1. Open your Outlook calendar, and on the Home tab, click New Lync Meeting.
2. In the meeting request, add recipients, a subject, agenda, and date/time.

The meeting request contains the meeting link and, if your account is configured for dial-in conferencing, audio information that the participant can use to join the meeting.

Set meeting options
You can customize some meeting options, including who can access, present in, and share video during an individual meeting, and whether instant messaging (IM) is enabled. The options you can set vary depending on whether you use Outlook.

If you use Outlook, set meeting options from the meeting request for a meeting you set up.

- Open the meeting request, and on the Home tab, click Meeting Options, and then in Access and Presenter options and Audio and Phone options, choose the appropriate selections.
Manage participants
In the meeting window, point to the people button, and do any of the following:

1. To manage a participant, on the Participants tab, right-click the person’s name, and use the options to mute, unmute, remove, and so on.

2. To manage all, on the Actions tab, click:
   - **Invite More People** to add participants.
   - **Mute Audience** to eliminate background noise.
   - **No Meeting IM** to turn off meeting IM
   - **No Attendee Video** to block attendees from starting their video.
   - **Hide Names** to hide the names on the pictures.
   - **Everyone an Attendee** if you have too many presenters.
   - **Invite by Email** to send email invitations to additional people.

Join a Lync Meeting
1. Do any of the following:
   - In the Lync main window, above the search box, click the Meetings icon, and then, double click the meeting or right click and select Join.
   - In the Outlook Meeting Request, click Join Lync meeting.

   ➤ Join Lync Meeting
   
   Join by phone
   (407) 823-0080 (Orlando, FL)    English (United States)
   Find a local number

   Conference ID: 163127
   
   Forgot your dial-in PIN? | Help

   • In the Outlook meeting reminder, click Join Online.
   • If the meeting request includes call-in information, you can call in to the meeting from a phone.
Lync 2013 Sharing and Collaboration

With Lync you can start collaborating without having to schedule a meeting. You can start an impromptu meeting, share something on your computer (a file, a website, and so on), take and share notes, brainstorm together on a whiteboard, give or work on a PowerPoint presentation, or send a file.

Share your desktop or a program in Lync
You can show your entire desktop or just a program to everyone in a Lync Meeting, call, or instant messaging (IM) conversation.

- **Share your desktop** when you need to switch between programs or work on files from different programs.
- **Share a program** when you need to present specific programs or files and don’t want people to see anything else on your computer.

**Share your desktop or a program**

1. At the bottom of the conversation window, point to the presentation (monitor) icon, and, on the **Present** tab, do one of the following:
   - To share the content on your desktop, click **Desktop**.

***Important*** When sharing your desktop, everyone in the meeting can see your programs, files, and notifications. If you have confidential information or files that you don’t want people to see, close them or use program sharing instead.

- To share one or more program or file, click **Program**, and then select the specific program(s) or file(s).

2. Use the sharing toolbar at the top of the screen to stop sharing or give control to participants. For details, see the following section.

**Share primary, secondary or all monitors**
If you have more than one monitor, they all display on the **Present** tab, and you can choose which one to share.

When sharing programs or a desktop with multiple monitors, the sharing toolbar opens on the primary monitor, except if you choose to share the secondary monitor.

**Give and take control of a sharing session**
If you want another meeting participant to change a file, help you present, or demonstrate something, you can grant control to that person. You will both be in control of the sharing, and you can take back control anytime.

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

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

3. To take control back, click **Give Control** again, and then click **Take Back Control**.

**Tip** You can allow people to automatically take control of your sharing session at any time, by clicking **Give Control Automatically** on the sharing toolbar. We recommend you choose this option only in small and casual meetings. To take back automatic permission, click **Give Control**, and clear the **Give Control Automatically** check box.
Present PowerPoint slides in a Lync Meeting

Presenting PowerPoint slides is an effective way to get your ideas across, and make your presentation memorable by focusing on bulleted items and avoiding too many details. Use the meeting controls such as annotation tools, presenter notes, and switching presenters, to help you during your presentation. You can even make the slides available for downloading to all attendees to review after the meeting.

Upload your PowerPoint presentation

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

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

Select who can download your presentation

To keep the focus on what you’re presenting and avoid distractions, you can restrict access to download your presentation. Then at the end of the meeting, you can change the options to let people download the slides to view later.

1. After you’ve uploaded the presentation in the meeting, pause on the presentation icon, and click **Manage Presentable Content**.
2. Click the **Permissions** menu and choose an option:
   - **Organizer** Only the person who scheduled the meeting can download the presentation.
   - **Presenters** Any of the presenters in the meeting can download the presentation.
   - **Everyone** Anyone in the meeting can download the presentation to their computers.

Download the presentation

The participants, who have permission to download the presentation, can save the file on their computer.

1. Pause over the presentation (monitor) icon.
2. Click **Manage Presentable Content**.
3. Click **More**, and then **Save As**, or **Save with Annotations**.
Select who can view your presentation privately
If you don’t want attendees looking ahead in the presentation, you can lock them to your view. Be aware that other presenters can still look ahead in the presentation.

1. In the meeting room, click More Options > Lync Meeting Options.
2. Choose the permissions on annotations and view options:
   - Who can annotate PowerPoint presentations
   - Who can look at content on their own
Use this option when you want your participants to be able to look at the presentation on their own, without interrupting your meeting. This is also a good option for other presenters who might want to skip ahead to a slide they’re about to present.

View privately or Take Over as Presenter
Presenters can take turns presenting the slides in a meeting. While one person is presenting, another can skip ahead to a specific slide and then return to the current view.

1. To view the slides privately, click the arrows at the bottom of the meeting to move through the slides. This won’t interrupt the meeting, and you’ll be notified that you are viewing the meeting privately.
2. To go back to the current view, click Return to Presenter’s View to synchronize your view with the active presenter.
3. To present, click Take Over as Presenter to take control of the presentation. Be aware that the meeting automatically switches to your view.
4. When you have finished your presentation, click Stop Presenting.

Transfer a file in a Lync Meeting
Sometimes you need to provide a hand out or file to your meeting participants, such as a copy of the presentation you’re sharing or a document that they need to review. You can upload the files directly into the meeting in advance, which your participants can download on their computer.

You can do this right after you schedule the meeting. Just sign in to your meeting and add the handouts.

Attach a file in the meeting

1. Pause on the presentation (monitor) icon, and click the ATTACHMENTS tab.
2. Click Add Attachment and upload the file.
3. Click Manage Attachments > Permissions to choose who can download the file, or remove it.

Meeting participants can then download the file from the presentation menu on the Attachments tab.
Use a Whiteboard in a Lync Meeting

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

Open a new Whiteboard

1. Pause on the present (monitor) icon, and then click Whiteboard under the Present tab.
2. A blank Whiteboard opens on the meeting stage on everyone’s screen.
3. The annotation tool set opens automatically on the right side of the Whiteboard.
4. Click any of the tools to annotate on the Whiteboard, such as: Pointer tool, Pen, Highlighter, Eraser, and so on.

The Whiteboard closes automatically if you switch to another presenting option, but will be available in the Presentable Content window if you want to open it later in the meeting.

Just pause on the presentation (monitor) icon and click Manage Presentable Content, to access the Whiteboard again.

Use the annotation tools

Use the tools along the side of the Whiteboard to visually focus on the page or brainstorm with the participants. Many people can work on the Whiteboard at the same time, but each tool can be used only by one person at a time.

- Laser Pointer: a virtual laser pointer. Click and drag the pointer across the page. A blue circle appears in the meeting indicating your name.
- Select and Type: selects an area to type. You can change font, size, and color by clicking the arrow next to the Select and Type to open the menu.
- Pen: draws freehand. Click and start writing or drawing in black, or click the down arrow next to the button, and then select another color.
- Highlighter: highlights a specific area of the current slide.
- Eraser: removes specific annotation you choose.
- Stamp: inserts a stamp on the page: Arrow, Check, or X. Choose an option from the menu, then click on the Whiteboard to stamp.
- Shape: draws shapes such as lines, arrows and squares. Click the down arrow next to the button to select another shape or color.
- Insert Picture: inserts an image on the slide from your computer.
- Delete Selected Annotation: removes the annotations that you’ve selected.
- More options: provides options to select the annotation, undo, redo, copy, cut, paste, paste as image, Save as, and Send to One Note.

Move or delete drawings

You can select, then move or delete any of the drawings on the Whiteboard.

Move objects

1. Click the Select and Type button, and then click one or multiple drawings that you want to move. A selection rectangle appears around the selected object(s).
2. Drag the rectangle to a new position.

Delete an object

1. Click the Select and Type button, and then select the drawing that you want to delete.
2. Press Delete on your keyboard.

Who added or changed content?

To see who added or changed content on the Whiteboard, do one of the following:

- For non-text items on the Whiteboard, hold the mouse pointer over the drawing to see “Created by” and “Last modified by” information.
Manage your Whiteboard

1. Pause on the presentation (monitor) icon, and then click Manage Presentable Content.
2. Click the Permissions menu and choose who can download the Whiteboard to their computer:
   - Organizer Only the person who scheduled the meeting can download.
   - Presenters Any of the presenters in the meeting can download.
   - Everyone Anyone in the meeting can download.
3. Click the More menu and choose an option: Save As, Send to OneNote, or Rename.

Using Poll in a Lync Meeting

Polling is a great way to get people involved and interacting in your meeting, and find out what they think about the ideas you’re sharing.

1. In the meeting window, pause on the presentation icon.
2. Make sure you’re on the Present tab, then click Poll.
3. In the Create a Poll window, type your question and the answers, then click Create.

The poll page opens in the meeting and results are shown to everyone as the participants select an option.

4. Click Poll Actions to manage the poll, such as open, close, edit, show, or hide results.
5. When you’re done, click Stop Presenting at the top of the meeting room.
6. To delete a Poll page, hover over the presentation, (monitor) icon, click Manage Presentable Content and then click Remove.
Lync Q&A Manager

Lync Q&A Manager (question and answer) provides a structured environment for answering questions during a meeting. This feature is especially helpful in large meetings where a presenter can answer questions, while someone else is presenting meeting content. Keep in mind that attendees can ask questions, but only presenters can answer.

Start the Q&A Manager

1. In your Lync Meeting, point to the presentation (monitor) icon, then click **Q&A**.

If there are no other content presented, the content stage opens and displays the Q&A manager for all participants. If other content is active, the **Q&A** tab displays as a new tab next to the **Presentation** tab. The Meeting IM is automatically turned off until you stop the Q&A Manager.
2. When a question is submitted, any of the presenters can click Answer and type a reply. Then press Enter on the keyboard to post the answer.

If you’re presenting content when a question is submitted, you’ll see a notification about the new question. You can click the Q&A tab at any time to answer the question, and then go back to Presentation tab to continue your presentation.

3. If you start typing an answer and change your mind, click Cancel to answer later, or for another presenter to pick up the question.

4. Click the Unanswered tab to filter for the questions that haven’t been answered yet.

5. At the end of the session, click Stop Q&A. When Lync asks if you want to enable IM, click Allow All Meeting IM, or click X on the notification if you want to keep the IM off.

6. If you want a record of the Q&A session, click Save As, type a name and save the file on your computer. Q&A is saved in Notepad and contains the questions, answers, time stamps and the names of attendees and presenters who participated.

Use the Q&A Manager as a participant
When the Q&A session is shared by a presenter, all the meeting attendees can view and ask questions. Keep in mind that you can switch between the Q&A and Presentation tabs at any time during the meeting.

1. Type a question in the Ask a question box.
2. When the question is answered, you’ll see the response below your question.
3. If you only want to see your questions, click the My Questions tab.
4. To have a local copy of the questions and Answers, click Save as..., and select a location on your computer.
<table>
<thead>
<tr>
<th>ALL (5)</th>
<th>MY QUESTIONS (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anshita Bahana: How is the project budget planning going? 11:52 AM</td>
<td>HASSAN 11:53 AM</td>
</tr>
<tr>
<td>HASSAN 11:53 AM</td>
<td>We are on track.</td>
</tr>
<tr>
<td>Ravi Gaba: When will the project files be posted for the team to review? 11:53 AM</td>
<td>HASSAN 11:54 AM</td>
</tr>
<tr>
<td>HASSAN 11:54 AM</td>
<td>By the end of next week.</td>
</tr>
<tr>
<td>Anshita Bahana: Are we still planning for end of Nov to deliver the product? 12:01 PM</td>
<td>HASSAN 12:01 PM</td>
</tr>
<tr>
<td>HASSAN 12:01 PM</td>
<td>Yes, but we'll let the team know if there are any changes.</td>
</tr>
</tbody>
</table>
Record and play back a Lync Meeting

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

Record your Lync Meeting

1. Click More Options \(\text{More Options} \rightarrow \text{Start Recording}\.  
   ***If the recording option is missing, you have not added audio to your meeting or your audio might not be connected. Click the mic/phone icon to connect audio, then try again.***

2. Use the controls at the bottom of the meeting to pause, resume, or stop the recording.

3. To see who else is recording, point to the red recording button.
4. When you’re done, click \text{Stop Recording}.
5. Lync automatically saves the recording in MP4 format that plays in Windows Media Player and Zune.

You can exit the meeting while the recording is being processed.

Play and share a recording

When your recording has been processed, you can access it to play or send to others. Lync displays a message when the recording is ready. You can click the alert to open Recording Manager, or if you miss that, click Tools on the Lync main window, then Recording Manager.

In the Recording Manager window:

1. Click your recording to highlight it, then click \text{Play} on the right side of the window.
2. You can also rename or delete your recording here.
3. To share your recording with others, click \text{Browse} to locate it, then copy the file to post on a shared location, such as OneDrive or an internal SharePoint site.

If you cannot post the recording, check to make sure you have enough space on the page.
***TIP*** Recordings are saved in the Videos/Lync Recordings folder on your computer.