Microsoft® Lync™ 2010 IM and Presence Training
Objectives

In this course you will learn how to:

• **Connect with people you care about**  
  *People are easy to get in touch with*

• **Find the right person**  
  *Locate someone using incomplete information with Lync 2010*

• **Let people know where you are and what you are doing**  
  *Share current information using Lync 2010*

• **Stay on top of your daily communication**  
  *Manage my day-to-day communications with Lync 2010*
Connecting with People

This section covers the following features:

- Add people to your Contacts list
- Frequent Contacts – Top 10 contacts
- Create Groups
- Sorting and Displaying Contacts
- Action Bar for Multimodal Communication
Add People to your Contacts List

Add people to your Contacts list
1. In the search field, type the name or email alias of the person you want to add to your Contacts list. Lync displays the results as you type.
2. In the contact card that appears, click the plus sign (+).
3. Select a contact group in which to place the contact.
Frequent Contacts simplifies contact management by giving users easier access to favorite contacts. Lync 2010 automatically populates the Frequent Contacts group based on recent conversations, but you can pin a few of your most important contacts to this group for quick access.

**View Frequent Contacts**
1. Click the chevron (^) next to Frequent Contacts.

**Pin Frequent Contacts**
1. Type the person’s name or email address in the search box.
2. In the search results, right-click the person, and then click Pin to Frequent Contacts.

TIP: You can show or hide your Frequent Contacts by using the display options menu.
Create Groups

When you’ve found the contacts that you want, you can add them to a contact group so you can find them easily next time.

Create a Group
1. In your Contacts list, right-click any group name (for example, Frequent Contacts), click Create New Group, and then give the group a name.

2. To add people to the new group, search for a contact, point to the contacts name in the search results, and then click the plus sign (+). Or, right-click the contact in the search results, and click Add to Contacts List, and then click the group name.
View your Contacts by Sorting

You can sort your contacts by using the Groups, Status, and Relationship buttons.

- To see the contacts in the default groups (including Frequent Contacts and Other Contacts) in addition to any groups you’ve created, click Groups.
- To sort the contacts by presence status (Online, Away, Unknown, and Unavailable), click Status.
- To sort contacts by their privacy relationship, click Relationship.
- To see explanations of what the relationships are, right-click a contact, and then point to Change Privacy Relationship.

- To sort by Display Name or Availability options, click the Display options button, and then select Sort by Display Name or Sort by Availability.
Customize the look of your Contacts list

You can change the way that Lync Online displays contacts.

1. In your Contacts list, click the **Display Options** button below the search bar to switch between one and two lines of information per contact. If your company uses contact photographs, a two-line view displays the photos.

2. For more choices, click the down arrow beside **Display Options** to open the **Layout Options** menu.

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The Action bar helps people understand what Lync 2010 provides, which then lets them decide how to contact someone. You can send an e-mail message, or start an IM or a phone call. You can also choose more options like a video call, schedule a meeting, or share content.

**Use the Action Bar**

1. Hover (pause your mouse pointer) over a contact.
2. Click any icon on the action bar to initiate communication with the contact.
3. Click the **More Options** icon to see additional options for communicating with this contact.
Activity 1: Discover the Action Bar

1. Hover over a contact.
2. Click any icon on the action bar to initiate communication with the contact.
3. Click the **More Options** icon to see additional options for communicating with this contact.
Finding the Right Person

This section covers the following features:

• My Picture and Personal Options
• Presence
• Hover Experience
• Search by Name and/or Keyword
• Contact Card
My Picture and Personal Options

Lync provides quick access to setting and updating information that a user wants to share, including a personal note, status, and location.

**Change your Personal and My Picture options**

1. Click the **Options** button to display Options.
2. Click **Personal** on the list of options.
3. Check options to show pictures of your contacts and update your presence based on your Microsoft Outlook calendar information.
4. Click **My Picture**.
5. Select which picture you’d like to show, or select the option to not show a picture. You can also show a picture from a web address.
6. Click **Ok**.
Presence

Lync 2010 automatically sets your presence based on your activity or Outlook calendar. You can also manually update your status.

Change your Status
1. Click the presence status and select one of the options.

- **Available**: You are online and available to be contacted.
- **Busy**: You are currently in a call or in a meeting.
- **Do Not Disturb**: By default, you will only see conversation alerts from Workgroup contacts.
- **Be Right Back**: You are stepping away from the computer for a few moments.
- **Off Work**: You are not working and not available to contact.
- **Appear Away**: Your computer has been idle for a while.
The Hover Experience

The “Me Area” presents picture, status, and other personal information to help users identify a contact. A contact’s picture is a great place to start an IM.

**Start an IM with Someone**
1. Point to a person’s picture.
2. When the contact card opens, click the IM button.

Or

3. Double-click the contact.

**Change Display Options**
1. Click the Display Options arrow.
2. When the group contact card appears, click the IM button to send a message to the whole group.
Using the enhanced search functionality in Lync 2010, you can quickly identify a person and their availability, get search results that find the right person, and also search on more than just names. Expert Search uses keywords to narrow the search for finding a person or group with specific attributes.

**Search for a Person**
1. Type a person’s name in the search box.

Results appear below the box.

**Search for an Expert**
1. Type a keyword to narrow the search for finding someone with specific attributes. You can also just click the **Skill** tab to view keyword-based results for your search.

Results appear with your search criteria highlighted.
The contact card is an ever-present tool for viewing someone’s profile and organizational information.

The contact card also serves as launch point for communication with a person or group.

**View a Contact Card**
1. Hover (pause your mouse pointer) over a person’s picture to display their contact card.
2. Click the chevron (^) for a full version of their contact card.
3. To see their organization, click **Organization**.
Activity 2: Find a Contact and Start an IM

1. Type a person’s name in the search box.
2. Point to the person’s picture.
3. When the contact card opens, click the IM button.

Question: What is another way to start an IM?
Let People Know Where You Are

This section covers the following features:

• Set your Location
• Add a Personal Note
• View Activity Feed
Set your Location

Lync 2010 displays a location under your presence status that is related to the network you’re connected to. You can make this location more meaningful by renaming it “Work” or “Home.” Then, every time you’re working from this location, any contacts you want to let know will have a better idea of where you are.

Set your Location
1. Click the Set Your Location arrow. Select a location.

Create a Custom Location
1. Click the Set Your Location arrow.
2. Click **Set Your Location**.
3. Type your location name in the Edit Location window.
4. Click **OK**.

TIP: 911 Location information can be used by emergency services.

911 Location

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Add a Personal Note

Lync 2010 lets you easily update your location and note. You know at a glance what others are seeing about you so you can make sure your information is accurate and up-to-date. Your personal note is displayed as the second line of your contact information when other people view your contact information in Lync 2010.

**Update your Personal Note**

1. Click in the **Personal Note** area.
2. Type your note.
3. You can also include a hyperlink.
Activity Feeds enable you to see “social updates” from your contacts on your Contacts list. It lets you display to others your most recent personal notes, changes to your picture, and changes to your title or office location.

**View your Feeds**
1. Click the **Activity Feeds** tab.
2. Scroll through available feeds.

You can control whether the above information is shared by doing the following:

1. From the **Tools** menu, click **Options**.
2. On the **Personal** tab, under **Activity Feed**, switch the sharing of these updates on or off.

**Note** Your current personal note and current out-of-office note will appear in the Activity Feed, if they are set. If you do not want information displayed in your personal note, you can simply leave the note field blank.

3. Click **OK**.
Activity 3: Update Your Personal Note

1. Click in the Personal Note area.
2. Type your note.
3. Update your note.

Challenge: Include a hyperlink in your Personal Note. Invite a contact to view your personal note and click the hyperlink.
Stay on Top of Communications

This section covers the following features:

• Notifications
• Windows 7 Integration
• Managing Conversations
Notifications

There are four areas that allow you to organize and easily view information about your contacts. Features like notifications allow you to stay on top of past and present conversations, know when someone is trying to get in touch, and easily manage your active conversations. Notifications help to ensure that communication activity from your contacts becomes known to you.

View Notifications
1. Click **Activity Feeds, Conversations**, or **Phone** to view recent activity, conversations, calls and voice mails.
Windows 7 Integration

With Windows 7 integration, you can hover over the Lync 2010 icon in the task bar to change your status, and view and manage conversations.
Managing Conversations

The Conversation area allows you to stay on top of past and present conversations. You can navigate through open conversations or view past conversations without leaving Lync 2010.

Manage Conversations

1. Click the **Conversations** tab.
2. Scroll through the list of current and past conversations.
Activity 4: Manage Multiple Conversations

1. Use the Conversations tab to view current and past conversations.
2. Hover over the Lync 2010 icon in the task bar to view current conversations.
3. Switch between conversations.
Review

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