Microsoft Lync 2010 – Use and Customization – Quick Guide

Introduction

Microsoft Lync 2010 is an application that is fully integrated with the Microsoft Office suite. The current implementation of Lync only includes the conversation (instant messaging) feature. Microsoft Lync 2010 has a similar interface to other Microsoft applications and the Windows 7 operating system.

Getting Started

Microsoft Lync 2010 is supported on the following operating systems: Windows Vista, Windows XP and Windows 7.

Signing In

1. If you are not automatically signed in to Lync, launch the application from the Start Menu and enter your Sign-in address which is your email address.* Ex. jdoe@csun.edu
2. Select the Sign In button.
3. Optional: Select a presence status to tell your contacts your availability. By default, Lync sets your status based on your current activity or Microsoft Outlook Calendar.
   *To disable Lync from an automatic sign on, select the Options menu, go to Tools and select Options. Uncheck the option for Automatically start Lync when I log on to Windows.

Customizing Lync 2010

1. Add a personal note that displays for all users. A personal note can be a statement about what is happening.
2. Select your availability. If you do not select your availability, Lync 2010 will default to your availability based on your Outlook calendar.*
3. Set your location.
4. To further customize Lync 2010, select Options from the Show menu dropdown located below the personal note display.
   *The Options menu includes the option to remove the availability based on your Outlook calendar.

Adding/Deleting Contacts in Your Messenger

1. In the Search field, type the first/last name or email address of the person you want to add to your Contacts list.
2. To add the contact, select the Add Contact button.
3. Choose between adding the contact to All Contacts or Add to New Group.
4. To delete a contact from a list, select the appropriate contact and press the delete key on your keyboard, or right-click the contact and select Remove from Group or Remove from Contacts list.
CREATING A GROUP FOR YOUR CONTACTS

1. In your Contacts list, right-click any group name (for example, Frequent Contacts), select Create New Group, and enter a group name.
2. To add people to the new group, search for a contact, point to the contacts name in the search results, and select the plus sign (+). Or, right-click the contact in the search results, and select Add to Contacts List, and select the Group Name.

VIEW AND PIN FREQUENT CONTACTS

1. To view your frequent contacts, select the chevron (►) on the Frequent Contacts button.
2. To pin a contact to the Frequent Contacts list, type the person’s name or email address in the Search box.
3. In the search results, right-click the name and select Pin to Frequent Contacts.
   TIP: You can show or hide your Frequent Contacts by using the display options menu.

THE ACTION BAR

Each contact has an Action Bar that displays several options for communicating with that contact such as email and instant messaging.

1. To access the Action Bar, choose a contact and hover the mouse over the contact.
2. Select the appropriate icon for communication with the contact: email, instant message or other.

INSTANT MESSAGE CONVERSATIONS IN OUTLOOK

Each of your instant message conversations are stored in a folder that Lync creates in Outlook. To turn off this feature so conversations are not stored:

1. In the Lync application, select the Show Menu dropdown button and select Tools, then Options.
2. Uncheck the option to “Save instant message conversations in my email Conversations History folder”.

LOGGING OUT

1. Once Lync opens, it may display on your taskbar. The option to close the application may be located in the Show Hidden Icons area of the taskbar. (See example to the left.) To Exit Lync or Sign Out of the Lync messenger, right-click the Lync icon in the Show Hidden Icons area.
2. If you choose Sign Out, the application will continue to run.
3. If you choose Exit, the application will close and Lync will also sign out.

For additional information about Microsoft Lync 2010, visit the IT Training Guides page at: www.csun.edu/it/training/guides