Successful meetings with Lync 2013

Traditional meetings can be a challenge when people are dispersed across worldwide locations. Communications technology can overcome this physical boundary by allowing people to attend meetings from any location by using Internet or phone access. In addition, by understanding the best practices for conducting meetings and productively using Microsoft Lync 2013 communications software, you can make your meetings more efficient and effective.

Topics in this guide include:

- Getting started with Lync 2013
- Best practices for Lync 2013 meetings
- Scheduling and joining a meeting
- Sharing during a meeting
- Recording a meeting
- For more information
Getting started with Lync 2013

Lync helps you be more efficient by:

- Streamlining multiple communication tools into one.
- Allowing simple meeting organization and execution right from Outlook.
- Reducing coordination of physical meeting spaces, audio conference numbers, and internet communication technologies.
- Facilitating back-to-back meetings while remaining at your desk.

To start using Lync 2013, you need the Lync software that's installed with Microsoft Office Professional Plus 2013. An audio device and webcam are optional.

Checking your audio and video devices

Before you use Lync to make or receive calls, check your settings to make sure that your audio and video devices are configured to function the way that you expect.

To check your audio and video devices:

1. Click the Options button on the upper-right side of the Lync window.
2. In the Lync – Options dialog box, click Audio Device. Use the testing buttons on this page to make sure that your speaker, microphone, and ringer are all working, and that your call quality is acceptable.
3. Click Video Device. Verify that your camera is working properly, and adjust camera settings as needed.

NOTE: Do not use your webcam microphone as the default audio device. If you are using the computer speakers for incoming audio and a sensitive built-in microphone (or a microphone on a webcam) for outgoing audio, you are likely to cause echo because the computer speakers will feed the incoming audio into your microphone.

Setting your meeting-space options in Outlook

It’s a good idea to set your meeting-space options from the start.

To set meeting-space options:

1. In the Microsoft Outlook messaging and collaboration client, open the Calendar, and then click New Lync Meeting.
2. Click **Meeting Options**.

3. In the **Lync Meeting Options** dialog box, click one of the meeting-space options:
   - If you click **A new meeting space (I control permissions)**, Lync creates a new meeting that has a unique ID. You can customize permissions (such as who is a presenter), mute people, or prevent people from sharing video.
     
     **IMPORTANT:** Select this option to avoid the problem of having meeting participants in a current meeting mix with participants who join at the end of that meeting.
   
   - If you click **My dedicated meetings space (less secure)**, you will always use the same meeting ID and permissions. Content, such as a Microsoft PowerPoint presentation, remains in the meeting until you delete it. This is a good option for informal and regular meetings with coworkers.

4. Click **Remember Settings**.

**Best practices for Lync 2013 meetings**

Here are some best practices for attendees:

- To avoid echoes or other audio issues, use an audio device that Microsoft IT recommends.
- To prevent audio feedback, use only one computer to log on to the meeting if other attendees are sitting in the same room.
- Mute your audio unless you’re speaking.
- Use a wired Ethernet connection whenever possible.

Here are some best practices for presenters:

- Set up and test your audio devices 15-20 minutes before the start of your meeting (when possible).
- Provide a clear and complete invitation, including a meeting agenda.
- Join your meeting early to prepare your content. Upload slides or documents to be shared, and start applications that you want others to view during sharing.
- Set your screen display to 1024 × 768 pixels for the best viewing experience (800 × 600 portrait for tablet PCs).
- Mute participants who cause a poor audio experience.
Scheduling and joining a meeting

Lync 2013 is integrated with Microsoft Outlook 2013 to enable organizers and attendees to send and receive meeting requests via email. The Outlook add-in for Lync 2013 is installed automatically when Office is installed.

Lync supports online meetings and calls (video and audio). One meeting request is used for both purposes.

Scheduling a Lync meeting in Outlook

To schedule a Lync meeting:

1. Open Outlook and go to the Calendar.
2. Click **New Lync Meeting**.

   ![New Lync Meeting button](image)

   **NOTE:** You can also open a regular meeting first, and then click **Lync Meeting** on the ribbon.

3. Set up the meeting:
   - In the **To** box, enter the email addresses for the people that you want to invite.
   - Type a subject, and then select a start and end time.
4. Type the agenda in the message body, but be careful not to change any of the Lync meeting information.
5. Click **Scheduling Assistant** (optional) on the ribbon to check schedules for the people that you are inviting. Click a time slot to select a different time.

   ![Scheduling Assistant](image)

   **TIP:** It is both common courtesy and a best practice to check the calendar to determine whether any of your invitees have a schedule conflict. When there is a conflict, be proactive and send a separate note to them to see if they can attend the meeting. Assume all calendars are up to date.
6. Double-check the information, and then click **Send**.
TIPS:

- If you have both in-person and online attendees, you might want to run your Lync meeting in a conference room. Click Room Finder in the Scheduling Assistant to find and add a conference room in the building of your choice. Or book the room separately, and then add the room information in the Location box.

- If your meeting is with people outside of your organization, or you’re scheduling a large event, change the meeting options before you send the meeting request to better fit your meeting requirements.

Joining a scheduled meeting

You can use Lync to join meetings over the Internet from any Internet-connected computer or device.

To join a scheduled meeting:

1. In the Outlook meeting request, click Join Lync Meeting.

   ![Join Lync Meeting](image)

   NOTE: You can also join a meeting by right-clicking the meeting in the Calendar, and then clicking Join Lync Meeting.

2. In the Join Meeting Audio dialog box, select a type of audio connection. Use the following table as a guide.

<table>
<thead>
<tr>
<th>Select this option</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Lync (full audio and video experience)</td>
<td>Your computer has built-in mics and speakers, or you have a headset. If you don't use a webcam, you can still see other attendees’ videos. <em>We recommend this option.</em></td>
</tr>
<tr>
<td>Call me at</td>
<td>You want Lync to call you at any number, such as your home phone or cell phone. Just type a new number or use a listed number.</td>
</tr>
<tr>
<td>Don’t join audio</td>
<td>You’re calling in to the meeting from a phone or want to connect to audio later. The audio numbers and conference ID are included in the meeting request.</td>
</tr>
</tbody>
</table>

TIPS:

- Attendees are muted by default when they log on to a meeting.
• If you are joining by using a mobile phone that isn’t configured with your account, you may be asked for a PIN and a work number/extension. You can find this information in the invitation.

There are other ways to join a meeting, depending on the type of computer or device that you’re using.

Scenario 1: Joining a meeting by using a work computer

To join a meeting by using a work computer that’s a domain member:

• In your Outlook Calendar, right-click the meeting that you want to join, and then click Join Lync Meeting.

–Or–

• In the meeting reminder, click JOIN ONLINE.

Scenario 2: Joining a meeting by using a non-work computer

Use Microsoft Lync Web App to join a Lync meeting from your browser if you don’t have Lync 2013 installed.

To join a meeting by using a non-work computer:

1. Connect an audio device to your computer. If you don’t have an audio device, you can call in by using a phone to connect to the audio portion of the meeting.

2. Click the Join Lync Meeting link in the Outlook invitation.

3. Type your name in the text box, and make sure that the option to install the Lync Web App plug-in is selected.

4. Click Join Meeting.

5. When you’re prompted to run or save the plug-in file, click Run.

Scenario 3: Joining a meeting by using a mobile phone

To join a meeting by using a mobile phone:
1. Call the conference phone number that’s listed in the meeting invitation.

2. When you’re prompted, enter the conference ID.

**Scenario 4: Joining a meeting by using the Lync mobile client**

You can also join a Lync meeting by using the Lync mobile client on a supported mobile device.

**Starting an unplanned meeting**

To start an unplanned meeting to discuss a subject that needs immediate attention:

1. Select your Lync contacts by holding down the Ctrl key as you click each name in your Contacts list.
2. Right-click the selection, click Start a Conference Call, and then click Lync Call.

**TIP:** To add more contacts to the call, just drag them from the Contacts list to the group conversation window.

**Sharing during a meeting**

You can share any of the following in a Lync 2013 meeting:

- **Desktop.** Let other participants view your desktop as you view it.
- **Program.** Let other participants view specific programs that are running on your computer.
- **PowerPoint presentation.** Share a PowerPoint presentation from your computer.
- **Whiteboard.** Use the whiteboard tool to illustrate or to brainstorm with other participants.
- **Poll.** Conduct a poll to learn about participants’ feedback in real time.
IMPORTANT: Use desktop sharing rather than program sharing whenever possible. Desktop sharing uses significantly fewer networking resources than program sharing does.

To share any of the preceding items during a meeting:

1. From your meeting window, point to the Manage Presentable Content button.
2. In the pop-up window, click the PRESENT tab, and then select what you want to share (for example, your desktop or a PowerPoint presentation).

![Screenshot of Present tab in Lync 2013]

Your Lync status changes to Presenting. You won’t receive instant messages or calls while you’re presenting.

3. If desired, use the sharing toolbar at the top of the screen to give control of your desktop or programs to another participant. Meeting participants can also request control from the sharing toolbar.

![Screenshot of Sharing toolbar in Lync 2013]

4. When you’ve finished sharing, click Stop Presenting on the sharing toolbar.

TIPS:

- For best results, when you’re sharing content, use a wired network connection when possible.
- After you create or upload content for sharing, Lync adds it to the Presentable Content list. As you share more content, you can use this list to indicate what content you want to share at any time by tapping or clicking the Present button and selecting from the options that appear.
- Large PowerPoint presentations can take up to five minutes to load in the sharing window. To save time, join the meeting early and load the file that you want to share.
• If you experience poor call quality while using your non domain joined computer, use the GIVE FEEDBACK link to share your experience.

![Image of Lync 2013 interface showing feedback and meeting details]

**Sharing live video**

You can also share live video of yourself during a meeting by using a webcam.

To share live video:

1. Click the Video button on the Lync toolbar.
2. Click Start my video.
3. To stop sharing video, point to the Video button, and then click Stop my video.

**TIP:** When conferences include attendees both in a physical meeting room and online, the Microsoft RoundTable communications and archival system enables users to interact by using concurrent video and audio transmissions. For more information about RoundTable, see [http://www.microsoft.com/en-us/download/details.aspx?id=6204](http://www.microsoft.com/en-us/download/details.aspx?id=6204).

**Recording a meeting**

When you record a Lync meeting, you capture audio, video, instant messages, application sharing, PowerPoint presentations, whiteboards, and polls. Lync saves the recording in MP4 format. Only meeting presenters can record a meeting.

**IMPORTANT NOTE:** Before you begin, inform all attendees that you are recording the meeting.

**Create a recording:**

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

**NOTE:** To see who else is recording the meeting, point to the red recording button. You’ll see the names of other presenters who are recording the meeting.
3. When you’ve finished, click **Stop Recording**.

**Play back a recorded meeting:**

1. In the Lync window, click the arrow next to the **Options** button, point to **Tools**, and then click **Recording Manager**.

2. Click to select the recording that you want to play back, and then click **Play**.

In Recording Manager, you can also do the following:

- Click **Browse** to view the list of recordings in File Explorer/Windows Explorer.
- Click **Rename** to provide a new name for the recording in Recording Manager. (The file name in File Explorer/Windows Explorer is not affected.)

**For more information**

What’s new in Lync 2013


Video: What’s new in Lync 2013

Basic tasks in Lync 2013

What is Lync Basic?

Make the switch to Lync 2013

Microsoft Lync Server 2010 Enterprise Voice

Work Smart by Microsoft IT
http://aka.ms/customerworksmart

Modern IT Experience featuring IT Showcase
http://microsoft.com/microsoft-IT

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