Microsoft
Lync 2013
Quick Reference Card

Custom Guide
Interactive Learning

The Lync 2013 Window

Availability Menu

Location Menu

Status Update

Microsoft Lync

What's happening today?

Kayla
Available ▾
Set Your Location ▾

View Tabs

Lync Options

Find Contact

Find someone or dial a number 🔍

View Contacts By:

GROUPS | STATUS | RELATIONSHIPS | NEW

Add Contact

▴ Favorites

Quick Lync Bar

💬 📞▾ 📹 👤≡ •••

Contact Group

Rebecca - Available

▴ Other Contacts (0/3)

Brian - Available

Contacts

Joel - Busy

Jon - Away 35 mins

Device Menu

📹▾ 📞▾ CALL FORWARDING OFF ⓘ

Notifications

Call Forwarding Status

Availability Options

Available: Online and able to be contacted. Automatically set for online users.

Busy: Would prefer not to be interrupted. Currently in a call or meeting.

Do Not Disturb: Don't want to be contacted or are presenting in a Lync meeting.

Offline: Not signed in or have blocked your presence from others.

Be Right Back: Stepping away from the computer for a moment.

Away/Inactive: Away from the computer or inactive for a certain amount of time.

Off Work: Not working and would prefer not to be contacted.

Keyboard Shortcuts

General

Accept invitation	⊞ + A
Decline invitation	⊞ + Esc
Contact tab	Ctrl + 1
Persistent chat tab	Ctrl + 2
Conversation tab	Ctrl + 3
Phone tab	Ctrl + 4
Open Help	F1

Phone/Video

Take back screen	Ctrl + Alt + Space
Stop sharing screen	Ctrl + Shift + S
End a call	Alt + Q
Put call on hold	Ctrl + Shift + H
Mute audio	⊞ + F4
Camera on/off	⊞ + F5
Transfer call	Ctrl + Shift + T
Full screen video	F5
Exit full screen	Esc

IM Window

Send a file	Ctrl + F
Show/Hide IM area	Ctrl + W
View participants	Ctrl + R
Save IM record	Ctrl + S
Add carriage return	Shift + Enter
Switch tabs	Ctrl + Tab
Mark important	Ctrl + Shift + I

The Fundamentals

- **To Reset Your Presence Status:** Click the **Availability menu** and select your presence status. Or, select **Reset Status** to set it according to your activity and Outlook calendar.

- **To Let People Know What's Happening in Your Day:** Click the note box above your name and type a note, such as "Meeting with a client on location."

- **To Set Your Location:** Lync displays a location related to the network to which you're connected. Rename this location to make it more meaningful, such as "Work" or "Home."

- **To Add a Contact:** Type a person's name or email address in the **Find a contact search field**. Right-click the person, select **Add to Contacts List**, and select the group where you want to add the contact.

- **To Add a Contact to a Group:** Click and drag a contact into the group. Or, right-click the contact, select **Move/Copy Contact To**, and select the desired group.

- **To Accept an Instant Message Invitation:** Click the alert that appears.

- **To Start an Instant Messaging Conversation:** Double-click the contact. Or, point at the contact's picture and click the **IM button** on the Quick Lync bar.

- **To Send an Instant Message:** Type your message in the text box, and press **Enter**.

- **To Ignore an Instant Message:** Click the **Ignore button** in the alert. The contact will not receive an indication that you declined the message.

- **To Begin an Instant Message Conversation with a Group:** Right-click the contact group and select **Send an Instant Message**.

- **To Begin an Instant Message with Several People:** Press and hold the **Ctrl key** as you click multiple contacts, then right-click and select **Send an Instant Message**.

- **To Invite Additional People to an Existing IM Conversation:** Click and drag a contact name from the Contact list into the conversation window. Or, click the **People Options menu** in the conversation window and select **Invite More People** from the menu.

Custom Guide
Interactive Learning

IM Conversations

Pop this conversation out

Contact Tabs

Enter text here

Font
Emoticons
Set high importance

Instant Message — Call — Video — Present — Participants — More Options
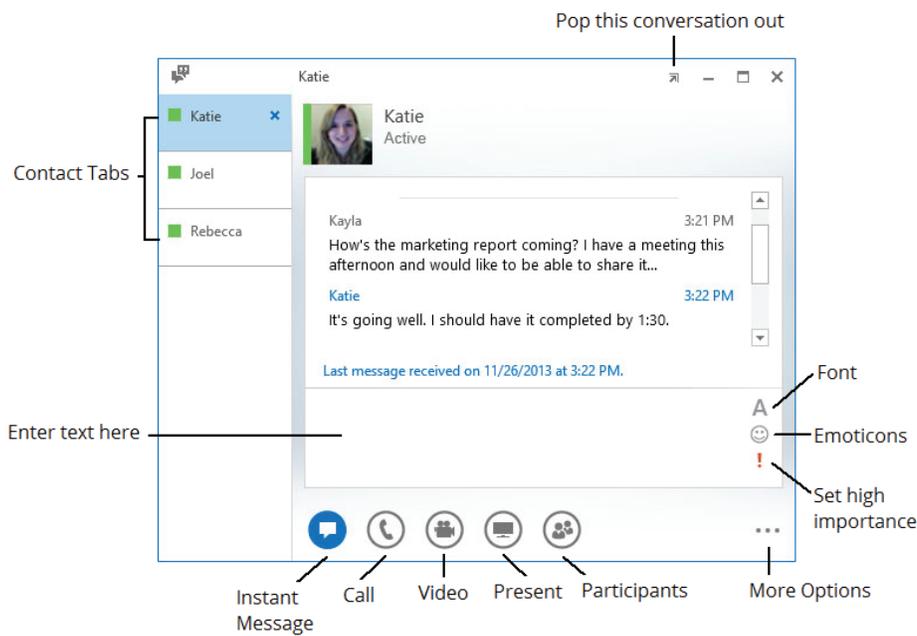
- **To Set a Contact as a Workgroup Contact:** Right-click the contact, select **Change Privacy Relationship**, then select **Workgroup**. You will receive conversation notifications from these contacts even when your status is Do Not Disturb.
- **To View a Saved Conversation:** Click the **Conversations tab** in the main Lync window. Double-click a conversation to review it.
- **To View or Hide Participants:** Click the **Participants menu**.
- **To Change Font Type, Size, or Color:** Click the **Font button** and select the color, font type, or size you wish to use.
- **To Change the Default Text Format for All IM Conversations:** Click the **More Options button**. Click the **General tab**. Select the **Change Font button** and select the font options you wish to use. Then click **OK**.

- **To End a Conversation:** Click the **Close button** in the Conversation window.
- **To Insert an Emoticon:** Click the **Emoticon button** and select the emoticon you wish to use.
- **Change Conversation Saving Settings:** Select **Lync Options** and click the **Personal tab** from the menu in the main Lync window.
- **To Share a File:** Click the **Present button** in the Conversation window. Select the **Attachments tab**, click **Add Attachments**, select the file you wish to share, and select **Open**. Or, simply click and drag the file into the IM text box.
- **To Share Your Desktop or a single Program:** Click the **Present button** and select either **Desktop**, **PowerPoint**, or **Program**.

Calls and Video

- **To Make a Call:** Point to a contact's image and click the **Call button** on the Quick Lync bar.
- **To Make a Video Call:** Point to a contact's image and click the **Video button** on the Quick Lync bar.
- **To Accept a Video Call:** Click anywhere inside the video call notification. The conversation window opens and shows the caller's video stream. To begin streaming for the other party, click **Start My Video**.
- **To Answer a Call:** Click anywhere inside the call notification. Or, if Lync is set up to use your desk phone, pick up the receiver.
- **To Add Video or Audio to an Existing Instant Messaging Conversation:** Click the **Call** or **Video button** in the conversation window.

Meetings

- **To Schedule a Meeting in Lync:** Select the contacts you want to invite in the Contacts list. Right-click and select **Schedule a Meeting**.
- **To Start an Unscheduled Meeting:** In the main window, click the **Options list arrow** and select **Meet Now**. Click the **Participants button**, select **Invite More People**, and choose participants from your Contacts list.
- **To Use OneNote to Take Public Meeting Notes:** Click the **Present button**, select the **OneNote tab**, and click the **MyNotes button**. OneNote automatically creates a shared notebook that can be updated and viewed by everyone in real time.
- **To Use Whiteboard for Collaboration:** Click the **Present button** and select **Whiteboard** on the Present tab.

Contacts

- **To Change Contact List Views:** Click the **Groups**, **Status**, **Relationship**, or **New tab** to sort your contacts accordingly.
- **To Create a New Contact Group:** Right-click any group name and select **Create New Group** from the shortcut menu. Give the group a name.
- **To Reorder Contact Groups:** Click and drag a group to where you would like it to appear within the list.
- **To Delete a Contact Group:** Right-click the group and select **Delete Group**.
- **To Collapse or Expand a Contact Group:** Click the **group header** to show or hide the contacts within that group.
- **To Email a Contact:** Point to a contact's image, select **More Options** from the Quick Lync bar, then select **Send an Email Message**.

- **To Use the Quick Lync bar:** Point to a contact's image so that the Quick Lync bar appears, then select **Instant Message**, **Call**, **Video**, **Contact Card**, or **More Options**.
- **To Hide the Quick Lync bar:** Move the mouse away from the contact's picture.
- **To View a Contact Card:** Point to a contact's image and select **Contact Card** from the Quick Lync Bar.

Instant Message   Call   Video   Contact Card   More Options