Lync 2010
for Windows
Conferencing
Quick Reference

UNIVERSITYof **HOUSTON** UIT

Lync

communication · collaboration

Contents

Schedule a Phone Conference or Online Meeting

A Lync add-on is installed in Outlook that allows you to invite others to a phone conference or an online meeting. You can even invite people who are not affiliated with UH and are not a Lync user - including students!

To schedule a phone conference or online meeting in Outlook:

1. Open your **Outlook Calendar**.
2. Click **New Online Meeting** on the toolbar.
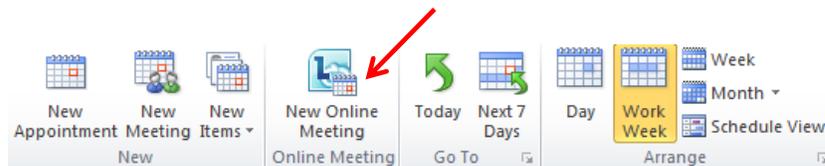
3. Set the **meeting date** and **time**, add **recipients**, and **send** the meeting invitation.

All attendees will receive (shown above) a phone number to dial-in and a web address to join an online meeting using a browser. Joining an online meeting with a web browser allows non-Lync users to see what the Lync users see. The phone number and conference ID provides non-Lync users with a speaker and microphone. There is no need to call UIT to set-up a phone bridge. You can do it all using Outlook.

Set Meeting Options

Note: Changing meeting options can potentially change the conference ID for the current meeting. Make sure any changes to meeting options are made before you send the meeting invitation.

There are two main classifications of people in a meeting: presenter and attendee. Presenters are able to share their desktop and applications, present files, and manage meeting options. By default, everyone at UH is a presenter. Anyone invited to a meeting from outside of UH is an

attendee. It is possible to set meeting options before sending a meeting request. Some of the configurable options are:

- designate who is an attendee or presenter
- designate who waits in the lobby until the organizer is present
- turn on entry and exit announcement

To set meeting options:

1. Follow the steps in the previous section for scheduling a phone conference or online meeting.
2. Before sending the meeting invitation, click **Meeting Options** on the toolbar of the meeting invitation.
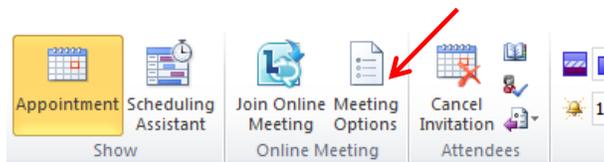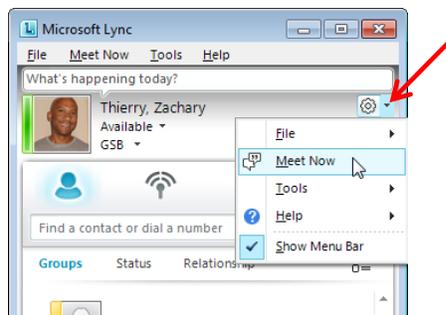

3. Choose the desired **meeting options** in the Online Meeting Options dialog box.
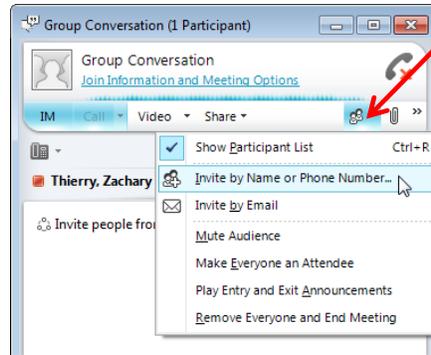4. Click **Ok**.

Meet Now

Meet Now allows you to immediately start a meeting or conference call.

To use Meet Now:

1. Click **Meet Now** on the Lync menu bar or click the arrow next to the **Options** button and select **Meet Now**.

2. In the Group Conversation window that appears, click **People Options** and select **Invite by Name or Phone Number** from the menu that appears.
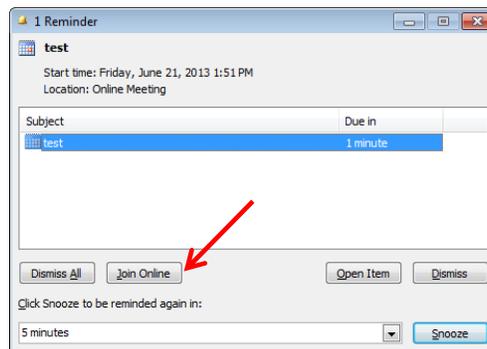
3. In the Invite by Name or Phone Number dialog box that appears, select a **contact**, type a **name**, or type a **phone number**.
4. Click **Ok**.

Join a Scheduled Online Meeting

To join an online meeting, choose one of two options:

1. In the Outlook meeting reminder, click **Join Online**.

2. In the Outlook meeting request, click **Join online meeting**.
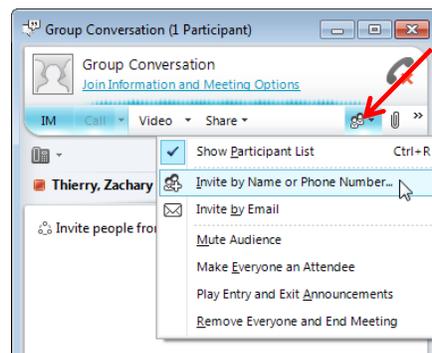
Group IM Conversation

You can start a group instant messaging (IM) conversation by selecting multiple contacts or a contact group in your Contacts list. You can also escalate an IM conversation with one person into a group conversation.

To start a group conversation from your Contacts list:

1. Hold down the <CTRL> key and click each **contact** that you want to invite.
2. Right-click the last contact selected and select **Send an Instant Message** from the menu.
3. In the Group Conversation window that appears, type your message in the message input area.
4. Press <ENTER>.

To escalate a one-on-one IM conversation to a group conversation, in the Conversation window:

1. Click **People Options** and select **Invite by Name or Phone Number**.

2. Select the **contacts** you want to invite.
3. Click **Ok**.


Enhance an IM Conversation

The Conversation window is your gateway to all of the communication and collaboration tools that are at your disposal. During an IM conversation, you can add one or more of these tools:

- audio
- video
- share a monitor
- share a document

- share a program
- share your desktop

To add any of the previously mentioned communication or collaboration tools to an IM conversation:

1. In the Conversation window, click **Call**, **Video** or **Share**.
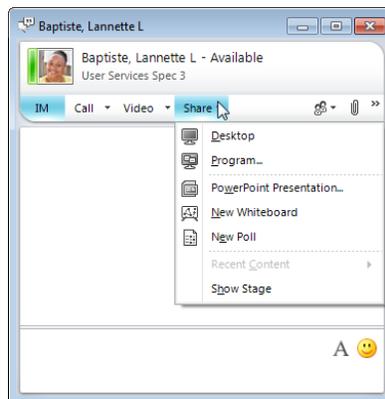
Join a Phone Conference

If you receive a request to join a phone conference, access information is included in the meeting request. To dial-in as the leader or an authenticated caller, you will need the following information:

- dial-in phone number
- conference ID
- your conference PIN
- your phone number

Note: Your Conference PIN is identical to the PIN used to sign-in to the CX600 phone. If you don't have a PIN or if you would like a new PIN, follow the instructions in the next section.

Set Your PIN

Your Lync Conference PIN is identical to the Sign-in PIN for the CX600 phone. The PIN identifies you as someone with authorized access to our network. A Conference PIN is required if you are dialing in from outside of our network.

To create or reset a Conference PIN:

1. In a web browser, go to **dialin.central.uh.edu**.
2. Click **Sign-in** and choose **Language**.
3. Click the **Sign-in** button then enter your CougarNet **username** and **password**.
4. Following the criteria on the PIN management screen, enter your PIN in the fields provided.


Note: If you forget your PIN, you can reset it using the steps listed above.

Transfer to Your Cell Phone

If you are in a phone conference or online meeting and are pulled away from your desk, you can continue the audio portion of the group conversation on your cell phone.

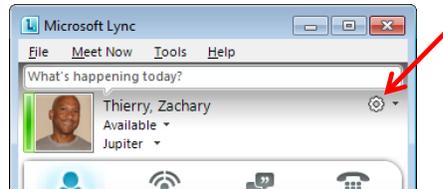To transfer the audio of a group conversation to your cell phone:

1. In the Group Conversation window, click the **Transfer** button.
2. Select your **cell phone number** from the menu.
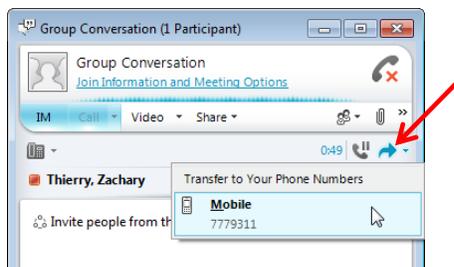
In order for your cell phone number to appear in the Transfer menu, the number must be entered into Lync options.

To add your cell phone number to Lync:

1. In the Lync window, click the **Options** button.

2. In the Options dialog box, click **Phones** in the left column.
3. Click **Mobile Phone**.
4. In the Edit dialog box, enter your **cell number**.
5. Click **Ok**.
6. Uncheck **Include on my contact card** if you want the number to remain private.
7. Click **Ok**.
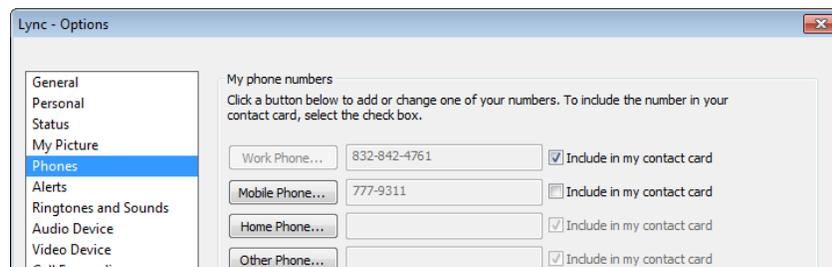
Add a Long Distance Number

Adding a person with a long distance number to a conference call must be done by making a separate call, and then merging the two conversations together. A long distance authorization code is required to add someone with a long distance number to a conference call or online meeting. Your long distance authorization code must be entered using the Lync keypad.

1. In the Search field of the Lync window, using your keyboard, enter a **domestic long distance number** or **011 followed by an international long distance number.**
2. Press **<Enter>**.
3. In the Conversation window of the long distance call, click the **Keypad** icon.

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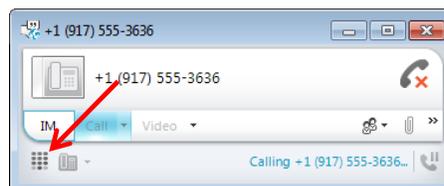
4. After the long distance number is dialed, one or two beeps can be heard. After hearing the beep(s), enter your **long distance authorization code** in the keypad. If you enter your long distance code too soon, the call will fail.
5. In the same Conversation window, click **People Options**.
6. From the drop-down menu that appears, select the group conversation to which you want to merge.