Lync 2013 Windows Meeting Environment

Contents

Overview

This document explains how to use the tools available in a Lync Meeting. Information on scheduling or joining a meeting can be found in the following UIT documents:

Using Lync for Windows
Conferencing Quick Reference Guide
Using Lync Web App
Using Lync Attendee

Information for Lync Meetings and Conference Calls

There are four classifications for meeting participants:

- Organizer – the person who schedules a meeting or conference call.
- Leader – the first person to dial-in to a conference call from a Lync phone.
- Presenter – can invite others to an active meeting or conference call. During a meeting, a Presenter can change the classification of other Presenters to Attendee. Only a Presenter can record a meeting, distribute files and share items, such as the desktop, a program, whiteboard and conduct a poll. By default, all faculty and staff members are Presenters. If desired, the meeting Organizer can change the permissions level of any participant from Presenter to Attendee before the Meeting Invitation is sent. This is done using Outlook Meeting Options. For information on accessing Meeting Options, see **Conferencing Quick Reference for Windows**.
- Attendee – can initiate instant message (IM) conversations and view items that are shared.

By default, meeting participants who dial-in from a non-Lync phone (i.e., Rolm, Cisco, mobile or an off-campus phone) must wait in the lobby until a Leader dials-in. The first person to dial-in from a Lync phone becomes the Leader and anyone waiting in the lobby can be given access to the meeting.

If you want to be a Leader or need to be (for instance, if all other participants are not affiliated with UH) and you dial-in from a non-Lync phone, you must enter your Dial-in PIN to become the Leader. The Dial-in PIN is identical to the Sign-in PIN for CX600 phones. If you can't remember your Dial-in PIN or if you never received a Dial-in PIN, go to **dialin.central.uh.edu** to reset your PIN or obtain your first PIN.

Before sending a Meeting Invitation, the Organizer can change the Meeting Options. It is very important to change Meeting Options before sending the Meeting Invitation because changing the options can potentially change the meeting link and Conference ID. The Conference ID is assigned by Lync and appears in an Outlook Meeting Invitation. Meeting options include:

- Everyone waits in the lobby except the Organizer
- No one waits in the lobby
- Only the Organizer is a Presenter

Participant List

The participant list indicates the permissions level of each participant: Presenter or Attendee. By default, every faculty and staff member at UH is always a Presenter. Only Presenters can share their desktop, give PowerPoint presentations, share a whiteboard and access other features, depending on how the Meeting Options are set. If desired, the meeting Organizer can change the permissions level of any participant from Presenter to Attendee.
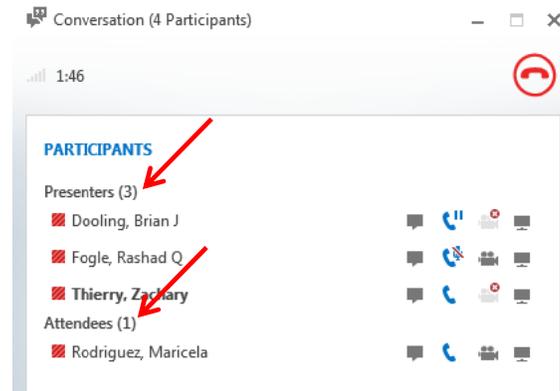
The icons to the right of each name indicate (in this order) if the person is capable of participating in:

- Instant Messaging (IM) – If this icon contains an 'X', this person might have joined the meeting using a smart phone, a desk phone, or another device that is not capable of sending/receiving IMs. A gray icon indicates the function has not been used.
- Meeting Audio – If this icon is gray, this person doesn't have speakers to hear or a microphone to be heard during the meeting. This person did not join the meeting using a telephone. If a participant puts the meeting on Hold to take another call, the icon appears as shown above for the first participant. If a participant's phone is muted, the icon appears as shown above for the second participant.
- Meeting Video – If this icon contains an 'X', this person does not have a video camera. At the start of a meeting, this icon is gray for everyone with a video camera. When someone starts their video camera, this icon is blue.
- Content Sharing – At the start of a meeting, this icon is gray for everyone. When content is shared, this icon is blue.

Change Meeting Audio Settings

If your phone is connected to a computer and the computer has a microphone and speakers, it is possible to change the device used for meeting audio.

To change the audio device during a meeting:

1. At the bottom of the Group Conversation window, hover over the **Call Options** button.

2. In the box that appears, click **Devices**.
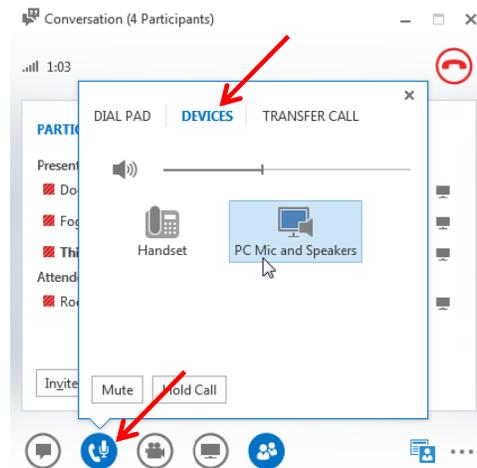
3. Select **Handset** or **PC Mic and Speakers**.

If you are using your PC microphone and speakers, you can put the microphone on Mute which means no one can hear sounds around you including your voice. It is also possible to temporarily turn off the meeting audio which means no one can hear you and you are unable to hear what is said in the meeting.

To mute your computer microphone:

1. Hover over the **Call Options** button.
2. In the box that appears, click **Mute**.
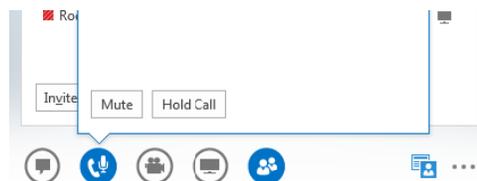
To unmute your computer microphone:

1. Hover over the **Call Options** button.
2. Select **Unmute**.

To turn off meeting audio:

1. Hover over the **Call Options** button.
2. Select **Hold Call**.

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To turn on meeting audio:

1. Click **Resume Call**.
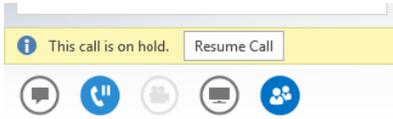
If a PC microphone and speakers are used for meeting audio, it is possible to check the quality of your network connection which can affect call quality.

To check the quality of your network connection:

1. Hover over the **Network Connectivity** icon.

Immediately upon hovering, a network quality message appears.
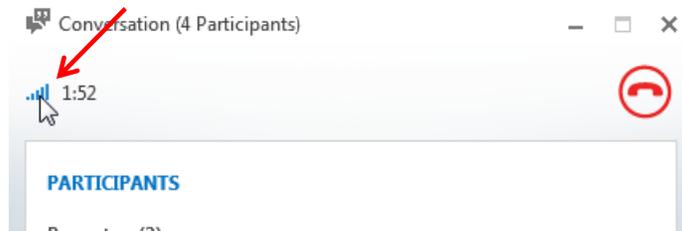
Transfer Meeting Audio to Your Mobile Phone

If your mobile number is in Lync, it is possible to transfer meeting audio to your mobile phone. This is handy on the occasion when you have to walk across campus during a meeting, but you would like to stay connected and interact in the meeting. Your mobile number must be in Lync for the transfer to mobile option to appear.

To put your mobile number in Lync:

1. In the main Lync window, click the **Options** button.
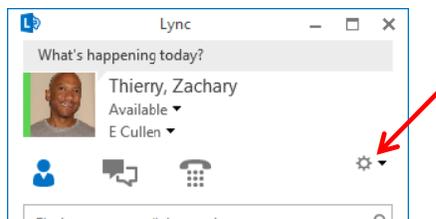
2. In the Options dialog box, click **Phones** then click **Mobile Phone**.
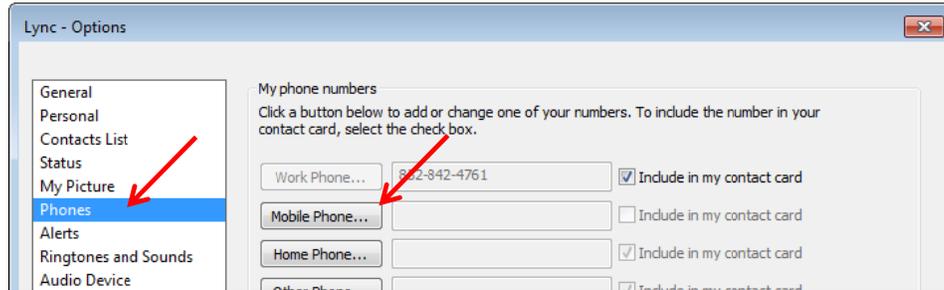
3. In the Edit Phone Number dialog box that appears, enter your **mobile number**.
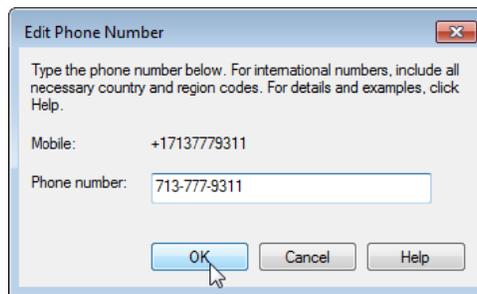
4. Click **Ok**.

To hide your mobile number so it doesn't appear on your Contact Card:

1. In the Options dialog box, uncheck **Include in my contact card**.
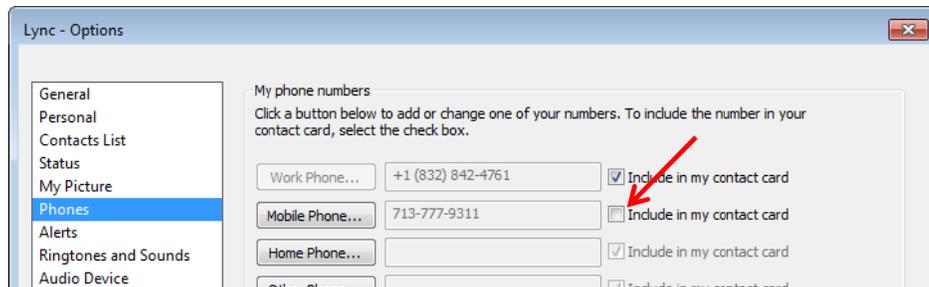
2. Click **Ok**.

To transfer meeting audio to your mobile phone:

1. In the Group Conversation window, hover over the **Call Options** button.
2. In the box that appears, click **Transfer Call**.
3. Select your **mobile number**.
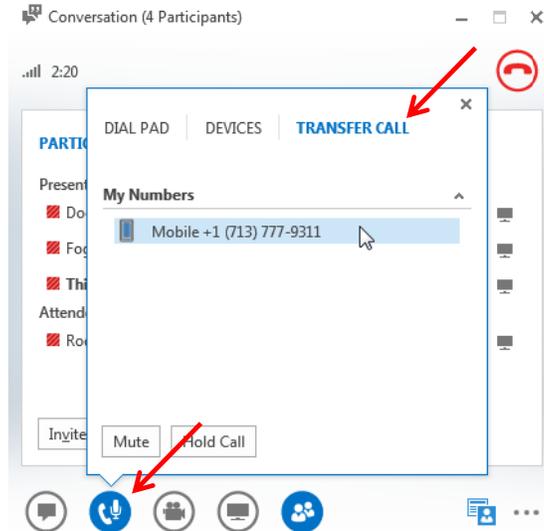
Add a Person to a Meeting

Presenters have permission to invite others to a meeting. By default, every faculty and staff member invited to a Lync Meeting or Conference Call is a Presenter unless the Organizer made a change to the Meeting Options. If you are a Presenter in a meeting, you can add others to the meeting.

To add a person to a meeting:

1. In the Group Conversation window, click **Invite More People**.
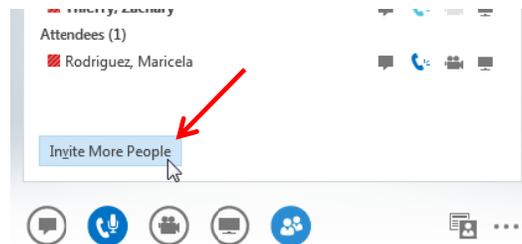
2. In the Invite by Name or Number dialog box that appears, select **your contact(s)** or enter a phone number.
3. Click **Ok**.

Note: Drag and drop names from your Contact list to the Group Conversation window for a faster way to invite others.

Send an Instant Message

To send an instant message (IM) to all meeting participants:

1. At the bottom of the Group Conversation window, hover over the **Instant Message** button.
2. At the bottom of the box that appears, type **your message** in the message input area.
3. Press **<ENTER>**.

Your message is sent to all meeting participants.
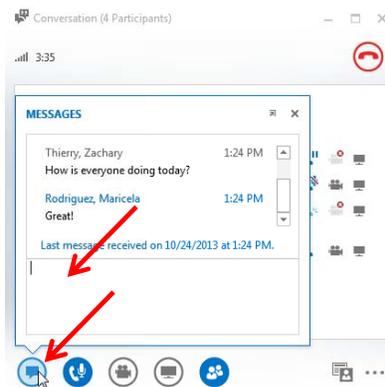
Send a File

The Attachments option allows you to send a file to each meeting participant.

To send a file to all participants:

1. In the Group Conversation window, hover over the **Share** button.
2. In the box that appears, click **Attachments**.
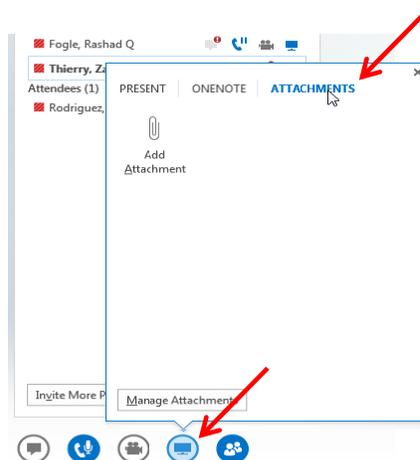
3. Click **Add Attachment**.
4. Using the dialog box that appears, locate the **file** you want to send.
5. Click **Open**.

Meeting participants are alerted of the file which they can save for later viewing.

Save a File Sent to You

If a file is sent during a meeting, an indicator notifying you of the file appears on the Share button.

To save a file that someone sends during a meeting:

1. In the Group Conversation window, hover over the **Share** button.
2. In the box that appears, click **Manage Attachments**.
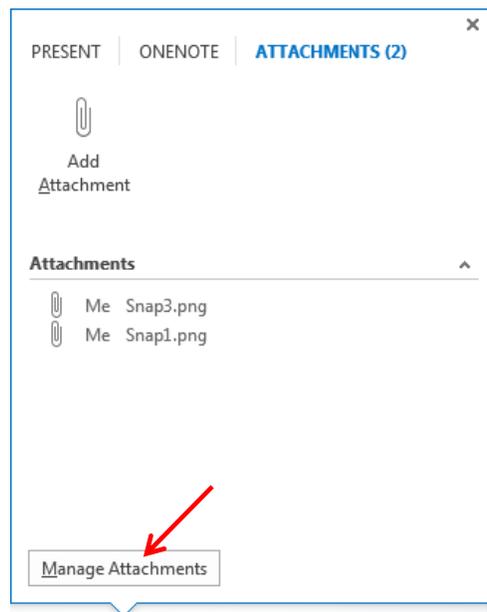
The Attachments dialog box opens.

3. Locate the **attachment** you want to save.
4. Click **More**.
5. From the menu that appears, select **Save As**.
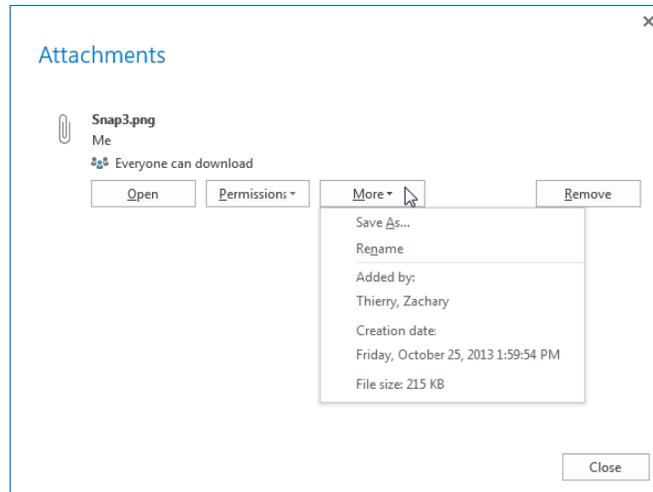
6. In the Save As dialog box, select a **location** for the attachment.
7. Click **Save**.

Share Your Desktop

Sharing your desktop is used to allow all meeting participants to see what you see on your screen. Not only can you share your desktop, it is possible to give control of your desktop to a meeting participant. Only Presenters can share a desktop.

To share your desktop:

1. In the Group Conversation window, hover over the **Share** button.
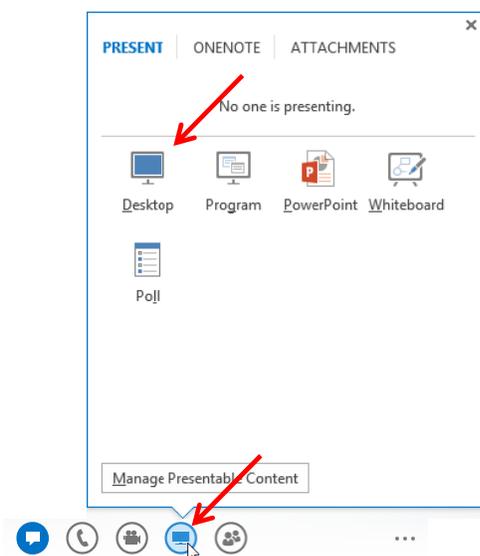
2. In the box that appears, select **Desktop**.

The Group Conversation window expands showing a stage for all participants to see the shared desktop. The following image shows how your stage appears when someone other than you shares a desktop.
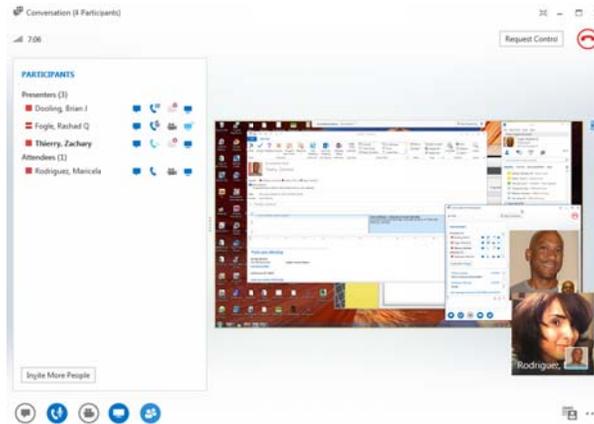
Note: When sharing your desktop, participants will see all content surrounded by a yellow border.

While sharing a desktop the Sharing Control Bar appears at the top of your screen.
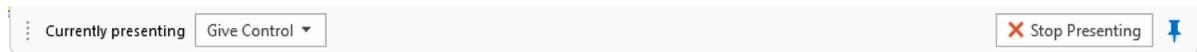
Giving control means a selected person gains control of your mouse.

To give control of your desktop:

1. On the Sharing Control Bar, click **Give Control**.
2. From the list of names that appears, select the **person** to whom you want to give control.

The following dialog box appears.
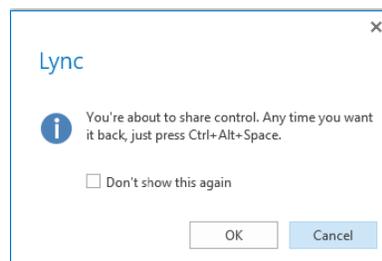
3. Click **Ok**.

To regain control of your desktop:

1. Simultaneously press **<CTRL> <ALT> <SPACE>**.

To stop sharing your desktop:

1. On the Sharing Control Bar at the top of your screen, click **Stop Sharing**.

Share a Program

It is possible to share individual programs with participants instead of your entire desktop. Not only can you share a program, it is possible to give control of a program to a meeting participant. Only Presenters can share a program.

To share a program:

1. In the Group Conversation window, hover over the **Share** button.
2. In the box that appears, select **Program**.
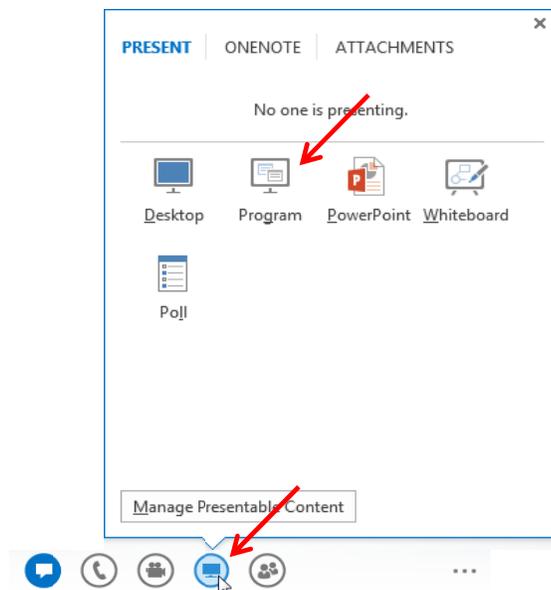
The Present Programs dialog box appears.

3. Select one or more **programs**.
4. Click **Present**.
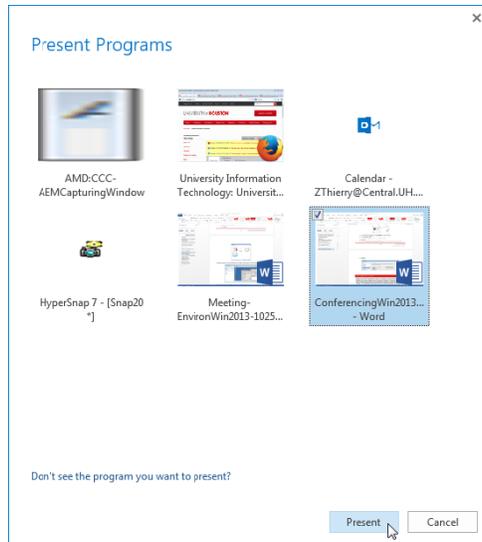
The Group Conversation window expands showing a stage for all participants to see the shared program(s).

Note: Participants will see all programs that are surrounded by a yellow border.

The Sharing Control Bar appears at the top of your screen.
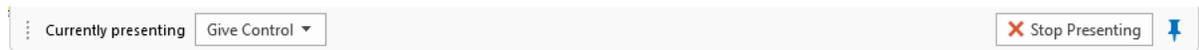
Giving control means a selected person gains control of your mouse.

To give control of your program(s):

1. On the Sharing Control Bar at the top of your screen, click **Give Control**.
2. From the list of names that appears, select the **person** to whom you want to give control.

The following dialog box appears.
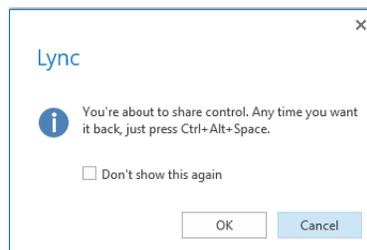
3. Click **Ok**.

To regain control of your program(s):

1. Simultaneously press **<CTRL> <ALT> <SPACE>**.

To stop sharing your program(s):

1. On the Sharing Control Bar at the top of your screen, click **Stop Sharing**.

Share a Whiteboard

Whiteboard is a digital version of the whiteboards found in most conference rooms. Whiteboard has a laser pointer, typing tool, drawing tools, pens and more. A shared whiteboard is immediately available for all meeting participants to use. Only Presenters can share a whiteboard.

To share a whiteboard:

1. In the Group Conversation window, hover over the **Share** button.
2. From the box that appears, select **Whiteboard**.
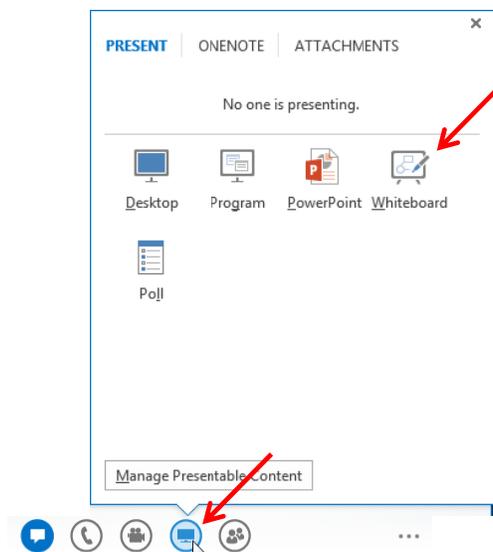
The Group Conversation window expands showing a stage for all participants to see the whiteboard.
When a meeting participant writes on the whiteboard, everyone in the meeting can view what is written.
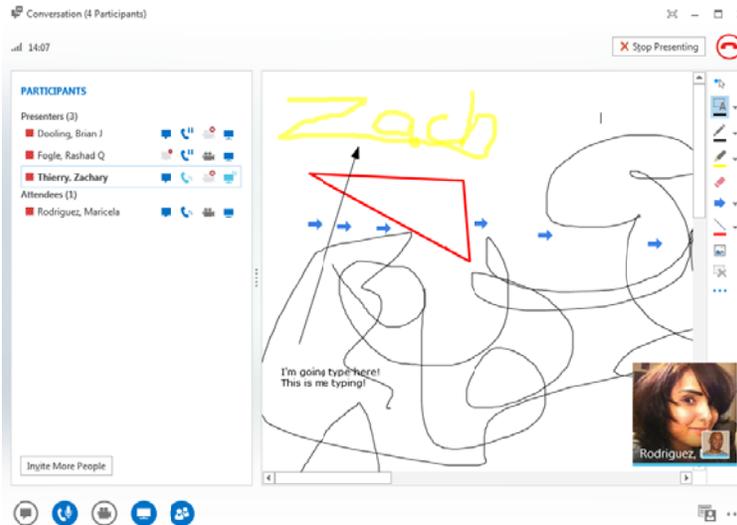
3. Select a **tool** from the right side of the whiteboard to add information to the whiteboard.

To stop sharing the whiteboard:

1. Near the top right corner, click **Stop Presenting**.

Give a PowerPoint Presentation

An Attendee or a Presenter can upload a PowerPoint presentation. Only a Presenter can share a PowerPoint presentation. Only a Presenter can give a PowerPoint presentation.

To give a PowerPoint presentation:

1. In the Group Conversation window, hover over the **Share** button.
2. In the box that appears, select **PowerPoint**.
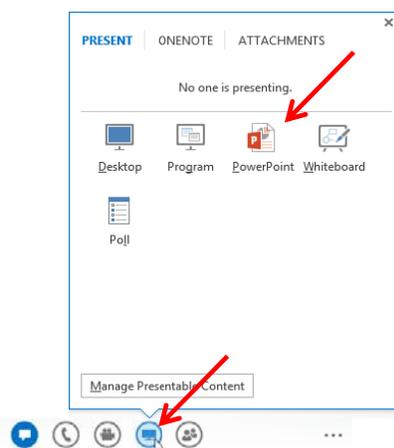
3. In the Present PowerPoint dialog box that appears, select the **PowerPoint file**.
4. Click **Open**.

The Group Conversation window expands showing a stage for all participants to see the presentation.
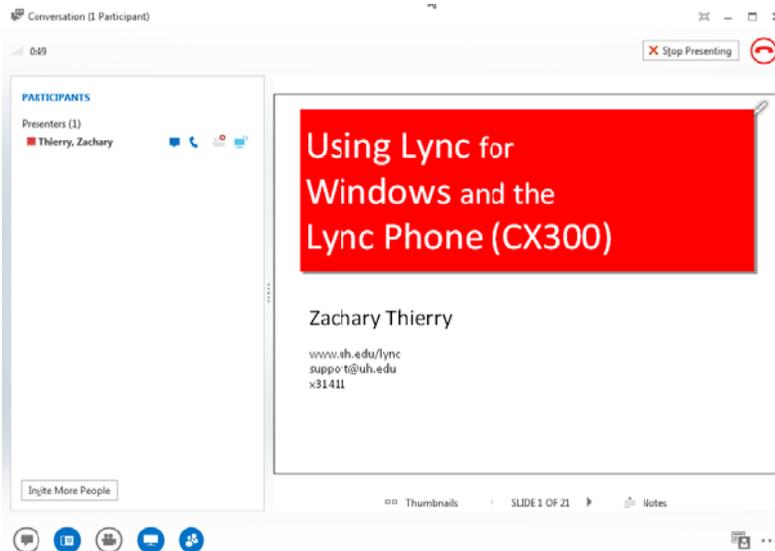
5. Navigate the presentation using the **arrows** under the presentation.
6. Click **Thumbnails** to present the slides in a different order.

To end the presentation:

1. Near the top right corner, click **Stop Presenting**.

Conduct a Poll

It is possible to conduct a poll or gain a consensus of the meeting participants by offering multiple choices to a question. A poll is anonymous and instant with the results displayed for all participants to view. Only a Presenter can conduct a poll. By default, only Presenters can see the results.

To conduct a poll:

1. In the Group Conversation window, hover over the **Share** button.
2. In the box that appears, select **Poll**.
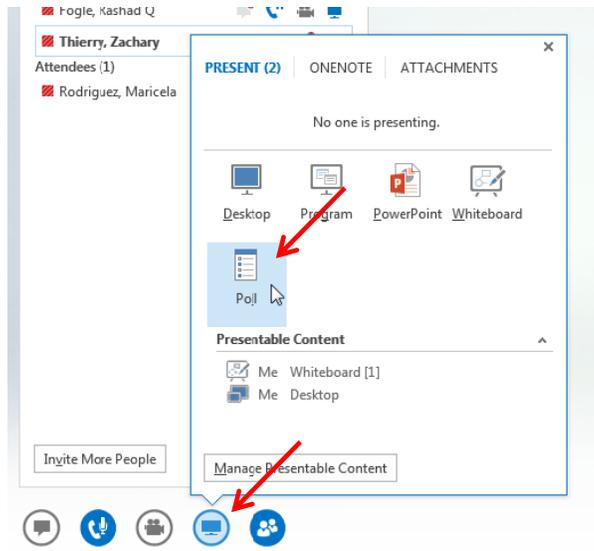
3. In the Create a Poll dialog box that appears, enter a **name for the poll** in the Poll Name: field.
4. Enter a **question** in the Question: field.
5. In the Choices: fields, enter up to seven **choices** from which participants can choose.
6. Click **Create**.

Following is an example of a completed poll.
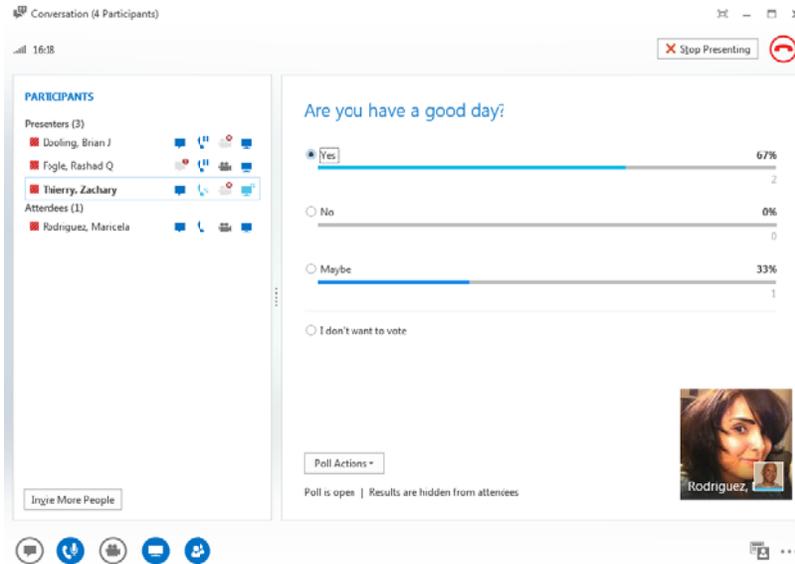
To allow Presenters and Attendees to see poll results:

1. Click the **Poll Actions** pop-up menu.
2. Select **Results are shown to everyone**.
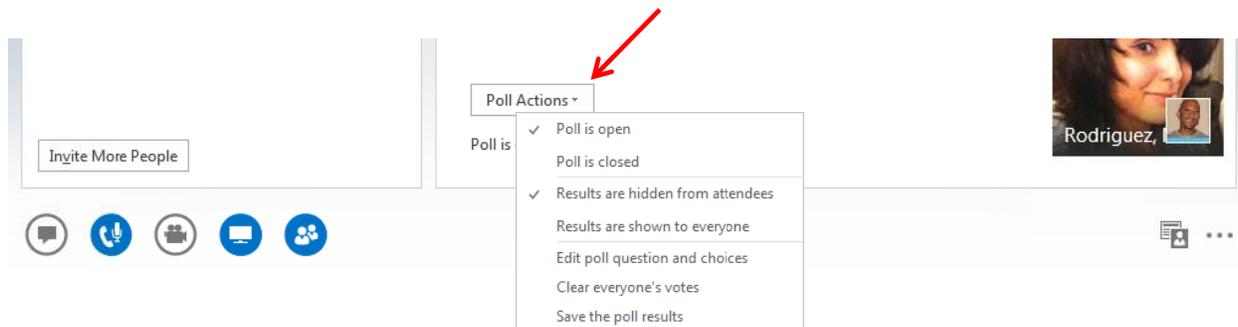
To end the Poll:

1. Near the top right corner, click **Stop Presenting**.

Manage the Stage

The most recently shared item appears on the stage on top of the previously shared item. All participants see the same shared item at the same time. If a whiteboard, a program and a poll are shared, it is not possible for two participants to view the whiteboard while another two view the program. Only a Presenter can decide which shared item is viewed.

To select which shared item is currently viewed by all participants:

1. In the Group Conversation window, hover over the **Share** button.
2. In the box that appears, click **Manage Presentable Content**.

3. In the Presentable Content dialog box that appears, click **Present Now** for an item to appear on everyone's stage.
4. Click **Remove** to remove an item that is no longer needed.
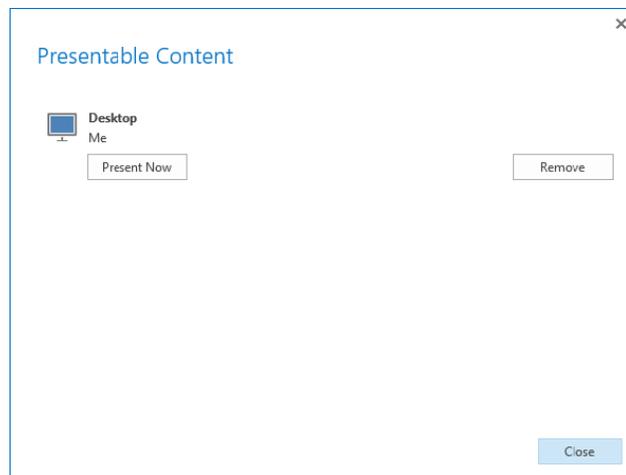
5. When you are done, click **Close**.

Add Video

If a participant has a video camera connected to their computer, it is possible to add video to the meeting. A participant, who doesn't have a video camera, can see the video image of other participants who do have a video camera.

To add video to a meeting:

1. In the Group Conversation window, hover over the **Video** button.
2. In the box that appears, select **Start My Video**.

Only one video image at a time appears in the Group Conversation window. The video image displayed belongs to the person currently speaking.

Following is the Group Conversation window of a person without a video camera who is able to see the video image of a participant with a video camera.
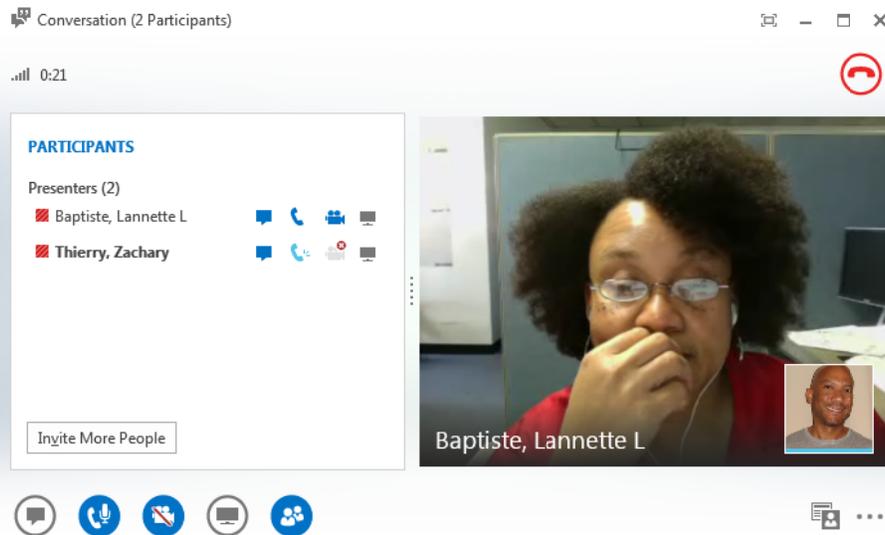
To turn video off:

1. Hover over the **Video** button.
2. In the box that appears, click **Leave Video**.
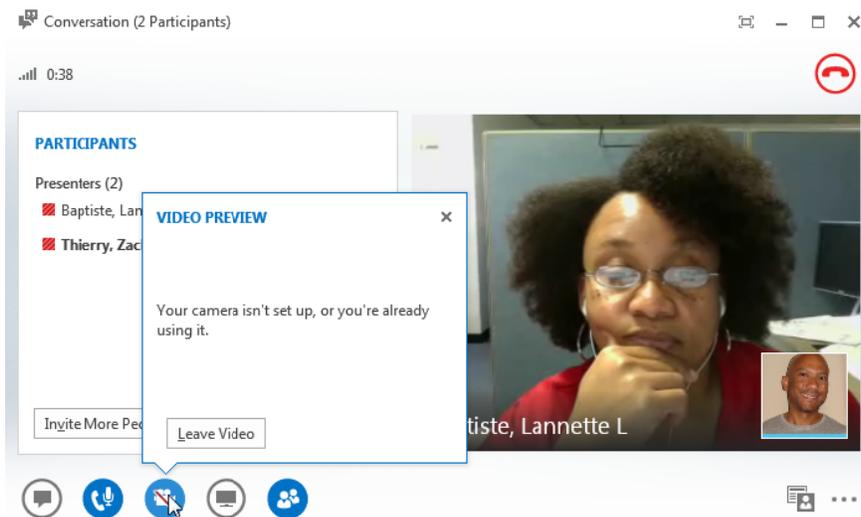
3. In the confirmation dialog box that appears, click **Ok**.

Record a Meeting

Presenters can record video and audio of everything that is shared during a meeting. Recording notification appears in the Group Conversation window of all participants and remains until recording ends.

To start recording:

1. In the bottom right corner of the Group Conversation window, click the **ellipsis**.
2. From the menu that appears, select **Start Recording**.
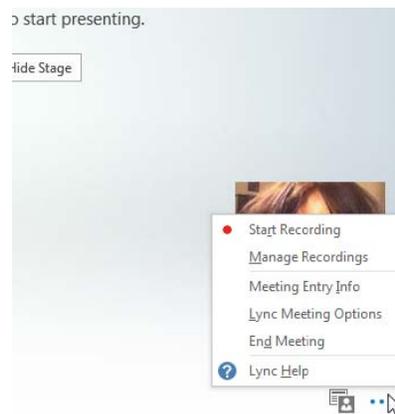
Recording controls appear near the bottom of the window to pause, resume or stop recording.

To end recording:

1. Click the **Stop** icon.

Recording Manager

All Lync recordings are saved to your Windows user directory on your hard drive in Windows media (wmv) format. Lync Recording Manager displays a list of all recorded meetings and allows you to play, rename, convert to MP4 or publish a recording directly to SharePoint. There are two ways to access the Recording Manager.

To access the Recording Manager while in a meeting:

1. In the bottom right corner of the Group Conversation window, click the **ellipsis**.
2. From the menu that appears, select **Manage Recordings**.

To open the Recording Manager when not in a meeting:

1. In the main Lync window, click the **arrow** next to the Options button.
2. From the menu, select **Tools** -> **Recording Manager**.
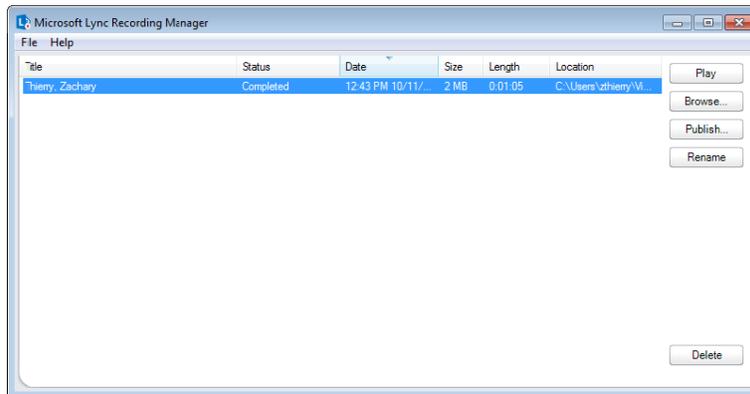
End a Meeting

To end a meeting:

1. In the top right corner of the Group Conversation window, click the **red handset**.
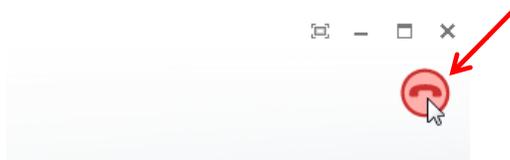
Using the above method to end a meeting leaves the Group Conversation open in case you want to rejoin the meeting with one click of the Rejoin button.

To end a meeting and close the Group Conversation window:

1. In the top right corner of the Group Conversation windows, click the **X**.