

Lync Best Practices

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General:

Use your primary email when first connecting to Lync. Email addresses that are aliases (example: fname.lname@uky.edu) may not let you log in properly or at all. Lync saves your IM (Instant Messages) conversations in Outlook under your mailboxes. There should be a mail folder labeled Conversation History that will contain your IM conversations. An alternate way and maybe an easier way is to go to your main Lync box that comes up when Lync first loads and click on the message icon indicated here



as two word boxes. This will show a list of conversations. Find the one you want and click on it to see the conversation. This is helpful when you receive an IM, but was not able to respond.

By default Lync is set to run when the computer starts so that others will be able to see your status and seek opportunities to interact. You always have the option to set your status to busy or do not disturb if needed. Failing to auto connect defeats the whole intent. If you use a laptop at times, be sure to load Lync on it also. Since the log-in requires your UK username and password you will see the same interface and all of your contacts like you do at the office.

If you see someone is available on line that you need to speak to and it is after hours or at an unusual time, be courteous. Don't over stay your welcome. If your status shows that you are available but you are actually busy and someone IMs you, don't feel obligated to respond. Even if someone appears available you should IM them first to see if they can join a conversation prior to making a Lync Call. If someone IMs you with a question that you don't know, but you know someone who will know, look to see if that person is available and add that person to the conversation. If needed, you can bow out and leave the two you have connected to resolve the problem. (See the  icon for instruction on adding someone to a conversation or conference)

Conferencing:

Do not use Google Chrome as your default browser when joining a Lync conference from your Outlook calendar. Either Internet Explorer or Firefox should be set as your default for this. You may still use Chrome if you wish for general browsing. There are some compatibility issues with Chrome and Lync. Do not connect your headset or microphone after starting Lync. If your mic doesn't seem to be working, it may be necessary to shut your computer down and reboot with your mic or headset connected. (We have had several sound issues.)

Make sure that sound and video issues are addressed well ahead of a session by logging in 15 minutes ahead of the scheduled starting time. You are still at your desk and can still work, so log on early and make sure that all of your equipment is working correctly. This allows for a moderator or someone else in the room to help address any issues. A good idea would be to use Lync with people you know outside of a Lyncinar setting to make sure your mic is at a proper volume.

Any training session where a remote speaker is used needs a good moderator. That could be an agent or other that makes sure that the speaker and participants get the most from the session. Set video camera so that the remote speaker can see the audience if possible.

If not signed up for a conference, don't IM the speaker at the last moment to get in. Do not send private IMs to a presenter during a presentation. Presenters cannot deal with connection problems or other issues while speaking. A moderator can help to address any issues and provide feedback to the speaker or speakers.

If moderating a session, be sure to provide speakers with good feedback. For example a speaker will at the least ask if everyone can hear them. Someone should be near the mic to reply clearly "yes we can, please go ahead" or equivalent.

Participant should look for audio cues from the speaker such as “I’m going to share PowerPoint or other”. A participant may have to accept the sharing in some cases. Likewise a speaker should telegraph all actions. “I am going to share a word document” for example. Also, a speaker can use tools such as the pointer or arrow to emphasize a bullet point or a feature on a picture, underline an item on a PowerPoint to give it emphasis, or use the pointer to trace a line on a graph.

Questions should be typed into the instant message area at the bottom on the Lync conferencing area so that everyone in the session can see the questions. A good moderator will watch the messaging area to insure that all questions are answered in a timely manner. Speakers are encouraged to take breaks often to answer questions that are submitted by instant messaging or verbally during the break. Don’t necessarily expect speakers to address every question as they are submitted by instant messaging.

Do not draw on or advance a speaker’s PowerPoint during a presentation unless invited to do so by the speaker. While these additions are not permanent they can be distracting and a little rude if used during a presentation by anyone but the speaker. If you have something good to add request permission from the speakers, but do so sparingly and don’t take over the presentation.

Note that during a conference those entering the conference will automatically have their mics muted, a feature that prevents someone that enter the conference late from distracting other participant by rattling their mics or otherwise making distracting noises when they first come into the conference. Participants should mute their mic while a presentation is in progress. Mute your mic by either clicking on the microphone icon on the left near the letters IM or by right clicking the phone receiver icon selecting mute. Don’t get mad if someone mutes your mic for you. A speaker may choose to mute everyone as they start the presentation. A speaker may also choose to make all participant attendees. Attendees have limited interaction and cannot share or manipulate presentation or share a whiteboard, program or presentation. A good moderator should look at the phone icon by each presenter’s name and mute those that are unmuted or by noting where noise may be coming from and muting that person. (The phone icon will flash with added sign that sound is coming from the receiver of that person which will be an indication that their mic may need to be muted). It is common for participant to take a telephone call when in a conference. Good moderators will pick up on who may have answered their telephone and will quickly mute that participant without limited distractions to other participants. **Do not make the mistake of muting the speaker.**

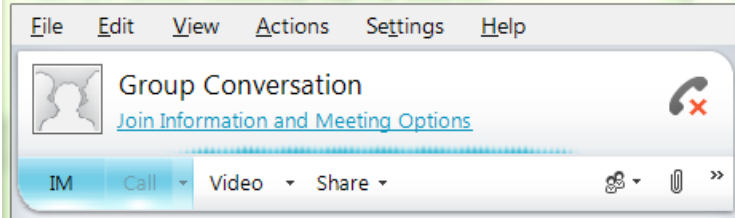
Turn off desktop phone ringers, cell phone and close office door when you have open mic. **Never, ever take a phone call during a conversation, collaboration, or training unless you have your microphone muted.** Some microphones can pick up hallway chatter disturbing the presenter and the participants. Nothing is more annoying that someone having a side conversation that is drowning out the speaker. This is not unique to Lync but is common on any conference call. You may find that a headset with a mic works best to minimize distractions.

Sign up for sessions well in advance so that an invite can be sent. Be sure to accept invites so that it will go directly to your Outlook Calendar. To join the conference all you will need to do is double click on the entry in your calendar and click on the “Join online meeting” link or “Join online meeting” in the command ribbon. Remember that Google Chrome doesn’t work if set as the default browser. Otherwise you may have to hunt for the original email to find the original invite which will also have the “Join Online Meeting” link. If some time has passed, it may be hard to locate the original email delaying your entry into the conference. Speakers and moderators will not appreciate participants IM’ing a request to be invited into a meeting that they could have joined easily if they had accepted the meeting invitation initially.


If a moderator initiates a session and loads a PowerPoint, the speaker will need to click on “take control of presentation” in the upper right of the sharing stage to control the presentation.

Sharing:

A group conversation or conference will have the following look. One of the most important aspects of Lync is the Share area with a down arrow () indicating options. (Note: participants may have to accept the initial sharing by clicking on a yellow area that requests that you accept the sharing.)




Depending on individual systems the drop down menu under Share may list “Desktop” or if there are multiple monitors it will list each monitor. By clicking on desktop or monitor you can share what is on that computer including websites, programs, attached USB microscopes, etc. In addition to monitors, “Programs” may be selected to share. Once selected, Lync will display a list of programs that are up and ready to share. (It is advised to not have so many programs running when doing this to make selection easier). Therefore in order to share a Word document you must have the document up in Word before selecting “Programs”. Use this function if you want to collaborate on a document, PowerPoint or Excel spreadsheet. If you want to present a PowerPoint presentation, select share PowerPoint presentation. This will pop up your directory where you will locate the PowerPoint and click on it to load it into Lync. This may take a few minutes to load on participant computer and it is ok to ask for feedback on whether it has loaded. Slower systems will take longer. All tools at the bottom of the stage (large area on the right) can be used for illustration without permanent change to the presentation. Select Whiteboard to share pictures, small outlines or graphics etc. Whiteboards are good for collaborative sessions where specifics can be pointed out or potential design changes can be share. Those in a session can select share a New Poll to construct a poll to get instant feedback.

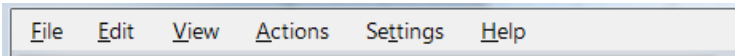
 Use this icon to add or invite individuals to join the conference or conversation. This is easiest if they are in your Outlook address book. You can mute everyone so that noise or distractions are minimized. If the moderator does this they need to make sure that the person presenting is un-muted. You can make everyone an attendee which changes their status so that they no longer can add things or otherwise control things in the stage area.



This is the messaging area. Don’t forget to press return to send the message.

 The paperclip can be used to attach things for download. This should not be used to share documents during the session. For an individual one on one session, you do not have to use the paperclip to share. Simply copy the file and past into the message area shown above. The other participant will receive a message to click to accept or download.

Don’t see the menu bar that looks like this?



Turn it on by clicking on the little cog. This will drop down the menu bar (see below) which can be permanently displayed by checking the “Show Menu Bar”.

This is a work in progress and more will be added at a later date.

