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Using Lync and Instant Messaging for Learning and Teaching

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Using Lync and Instant Messaging For Learning and Teaching

Lync is a communication tool that can connect you to people inside and outside of your institution. It includes **instant messaging (IM)** and **Lync video conference** meetings.

- With **IM** you can see when your co-workers are online because their colour changes depending on what they are doing.
- You can start an **IM** conversation directly from your contacts (the **People** tab on the Office 365 menu) as well as schedule a video conference or meeting.
- With **Lync** you can set up meetings where you share screens, make notes of discussions in real time and work collaboratively on documents.
- You can use the **Outlook.com*** calendar and contacts (**People tab**) to use **IM** and schedule **Lync meetings**.

After working through this guide, you will be able to:

- Guide your users on how to download and set up Lync on their devices
- Provision your institution users so that they can access Lync and be able to use it
- Allow external users to connect with your domain Lync meetings
- Understand how to use the features of Lync in your institution
- Use instant messaging to have real-time text conversations with colleagues and students
- Set up and run a Lync meeting, share your desktop and files and collaborate in real time
- Think about how you could use Lync to help enhance learning and teaching

Unlike the other Microsoft Office 365 applications, **Lync** installs from the Office 365 portal **onto the computer or device** you're using. If you don't already have **Lync**, you will need to download it. You can do this the first time you are invited to a Lync meeting. Alternatively, go to **Office 365** and click on the **Settings** icon (the wheel shaped one on the right of the top Office tabs menu bar). This takes you to the Office 365 settings screen. On the left menu, click on **Software** and install the latest versions of Office tools. If you are unable to do this, click on **Lync** on the same left menu.

You will then be able to set up meetings using the **Lync Web Scheduler** by following the simple step by step instructions. You will also be able to use the **Lync Web App** to attend meetings and contribute to the discussions - it will load automatically when you accept invitations and meetings links.

Using the **Lync Web Scheduler** creates a list of your scheduled meetings and gives you a link to each meeting that you can email to your participants.

Formerly known as Outlook Web App.

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1. Provisioning users in Office 365 for using Lync

The basic setup of **Lync Online** is very simple. You need to decide if you're going to allow **meeting** and **messaging** only within your institution or outside of it as well. If you want to connect to outside users, do you want to make connections available to the whole of the Lync network or only nominated people?

- You will already be set up to use **Lync** and **instant messaging (IM**) unless your institution administrator **unticked** the box while setting up the **Office 365 tenancy**.
- If you find you cannot use Lync**,** contact your administrator for help. It is a simple admin exercise to deal with this using the **Lync settings** from the **admin dashboard** in Office 365.
- The **dashboard** looks like this:
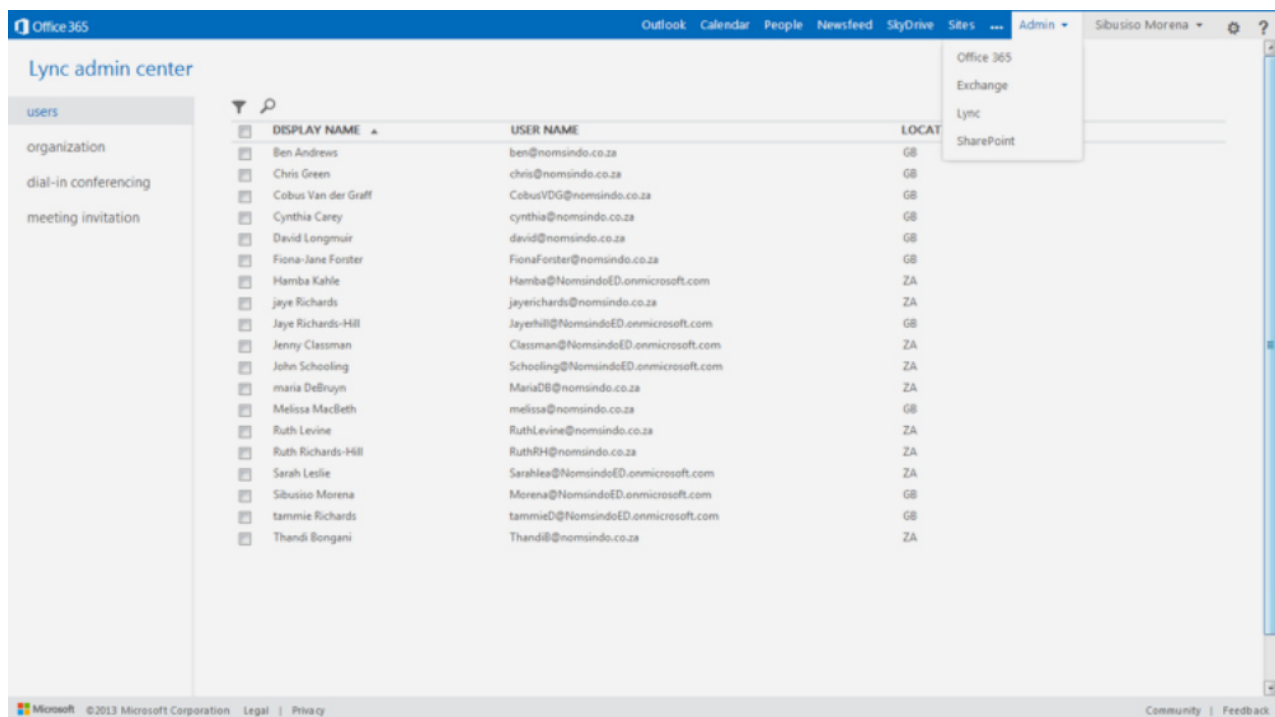
- Ticking the box next to a user name brings up a list of available Lync service features on the right side of the screen.
- Clicking on the **pencil icon** allows the administrator to make changes these services.

If you want to allow users in your institution to be able to use Lync to connect with **external users**, you need to set this up.

- Go to the admin drop-down menu and select **Lync.** This takes you to the **Lync Admin Centre.**
- From the left side menu, select **organisation** and then **external communications**.
- In the drop-down menu, select the **on except for blocked domains** option, and enter any **domains** you wish to block in the box below.
- Scroll down to the bottom of the page and click **Save.** Your changes will now take effect.

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2. Scheduling a Lync meeting using Outlook

You can use the **Outlook.com calendar** or contacts (**People)** to set up and start a **Lync** online meeting. Alternatively you can open Lync directly after you have downloaded it from Office 365, or use the **Lync Scheduler tool** if you can't download it.

Scheduling a meeting in Outlook is a simple matter of following the steps and instructions that appear on your screen. As you are now more experienced in using Office 365 after using these guides, the commands and functions will have become more familiar to you.

- Go to Calendar and click on **+new event.**
- Go through the form and fill in the details of your meeting including the attendees and the venue.
- Use **Scheduling Assistant** to check for calendar clashes among the attendees.
- As this is to be a **Lync Video Conference** meeting, click the **Online meeting icon.**
- This generates a **hyperlink** to your meeting, which you can send out to the attendees by Outlook email.
- Clicking on this hyperlink starts the **Lync Web App** loading. Attendees will now be able to join the meeting, use the shared whiteboard, work through PowerPoint presentations, share screens and make live meeting action plan notes.
- Anyone can be a participant, even people outside your organisation who don't have Lync installed, as they will automatically get directed to the **Lync Web App client** together with instructions.

3. Using the Lync Web Scheduler

- This is an alternative to scheduling Lync meetings in Outlook.
- Go to your Office 365 settings and select **Software**, then click on **Lync** on the left menu.
- You now have the option to launch the **Lync Web Scheduler** by clicking on the hyperlink.
- The screen will now look like this:

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- Completing the details sets up your meeting. A link is then generated for you to send out to all the participants.
- A summary of your meeting will appear on the screen. It looks like this:
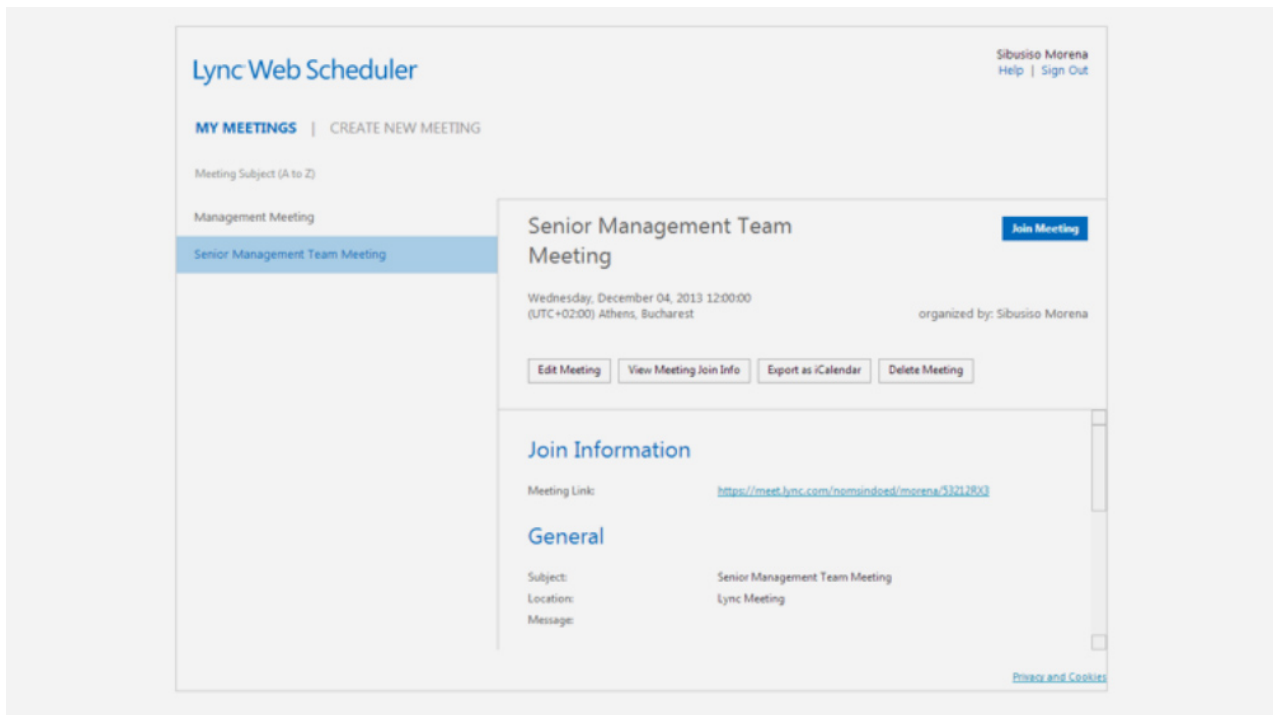

- The people you invite to the meeting simply need to click on the link to join.
- Lync will load for them, either using the version installed on their machines or via the **Lync Web App**. They will have the same functionality either way.

4. Using Lync and instant messaging for meetings

- When it is time to start your planned meeting, invitees click on the link they have received and join the meeting.
- The meeting screen will load in **Office 365 Lync**. The main functions are at the bottom left side of the meeting screen (**IM**, **presentation materials**, **participant list** and **actions**)
- There are also a few **icons** at the top right side of the screen (**settings, touch-screen, help** and **meeting exit**)
- You can send **instant messages (IMs)** to the meeting participants during the meeting. However, your messages will be sent to **all** the attendees - you can't send **IMs** to individual participants. Click on the **message button** to open an IM window. Type your message and click on **Enter** to send the message.

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5. Other functions and tools in Office 365 Lync to help you with your meetings

- Click on the **phone/mic** button to access the audio controls menu. You can **mute/unmute** yourself and control your audio volume from this menu during the meeting**.**
- If your camera is connected and set up, you can choose to share your video with other meeting participants making **Lync** more like a face-to-face meeting experience. Click on the **camera** button to preview your video. If you are happy to use video and share with other participants, select **Start My Video**.
- The **present** icon (the monitor- shaped button) allows you to share content and run the meeting. Other participants can also **take over presenting** using this command. The screen might now look like this if you are exploring all of the functions:
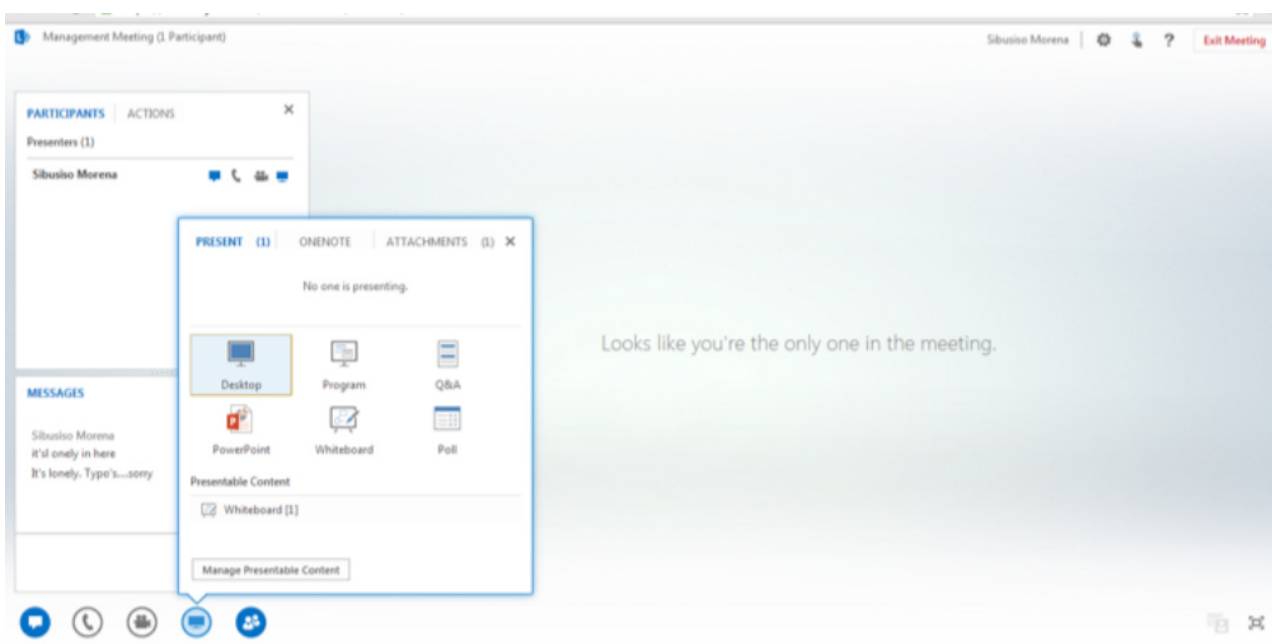
- If you're a presenter in the meeting, you can share content with the other participants by using this **monitor** button, and then selecting the type of content you want to share from the **Present** tab - your device **desktop** screen, an **open programme** on your device, a **PowerPoint** presentation, a blank whiteboard that all participants can write on, or a poll.
- Use the **OneNote** tab to access the **OneNote** notebooks shared by **Lync 2013** users in the meeting. Use the **Attachments** tab to send attachments to the meeting participants that they can download to their devices.
- If you're a presenter, you can use the **People** button to manage the meeting privileges of participants during the meeting.
- On the **Participants** tab, you'll see all the presenters and attendees in the meeting listed in separate groups. Next to each participant's name, you'll see **icons** that indicate the status of their IM, audio, video and sharing capabilities.

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- To change a participant's privileges, **right click** or **double click** a participant's name to display the participant options. You can then choose to **mute/unmute**, **remove**, or make the participant a **presenter** or **attendee**.

- The **settings icon** (the wheel-shaped symbol) at the top right of the page gives you some more advanced options. Explore these, but don't worry too much about them at the moment.

- Select the **hand** button to switch between **touch screen** and **mouse/pad** navigation modes. If you're using Lync on a touch screen device, touch mode is on automatically.

- Clicking on the**?** icon opens the help menu where you can find tips for using Lync and answers to any questions about how to use all of the different meeting functions.

- If you hover your cursor over the icons at the bottom right of the page, you will find the **Gallery** function. The gallery is the part of the screen where the videos or static pictures of the meeting participants are displayed. To change the layout for the gallery, click on the **Pick a Layout** button. You can choose from **Gallery View, Speaker View** or **Presentation View,** so explore these options and see which one you prefer.

You are now ready to have your first meeting. Why not set up and schedule a test meeting with a few of your colleagues so that you can all try out some of the functions and discover how **Lync meetings** might work for you?

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# User Scenario - Scheduling a Lync meeting for a Student Revision Session

Lync in Office 365 is really great for working with students in a safe and secure environment to extend learning beyond the hours in the classroom, either in one to one or group situations - up to 250 participants!

- Just use Lync IM to work through files on the shared screen with students.
- Turn on video and audio for more realistic interactions.
- Share resources online in real time.
- Type or draw notes on top of slides to aid explanations and learning.
- Use the polling feature to check students' engagement with the meeting content.
- Interact with students by writing/typing or drawing on a shared whiteboard.
- Record Lync meetings for future reference if Lync 2013 is installed on your device (not available when using the Lync Web App).

As it is nearly time for examinations, Mr Morena decides to start holding evening revision sessions using **Lync video meetings**. He knows that his students will be able to load the **Lync Web App** in all of their different operating systems and web browsers.

- He logs into **Office 365** and clicks on the **People** tab from the main Office 365 menu in order to access his contacts.
- He has previously set up a contacts group for his Grade 9 Chemistry class and so he starts to type this into the search bar, then clicks on the **find** icon (shaped like a magnifying glass).

His class group loads onto his screen. It looks like this:
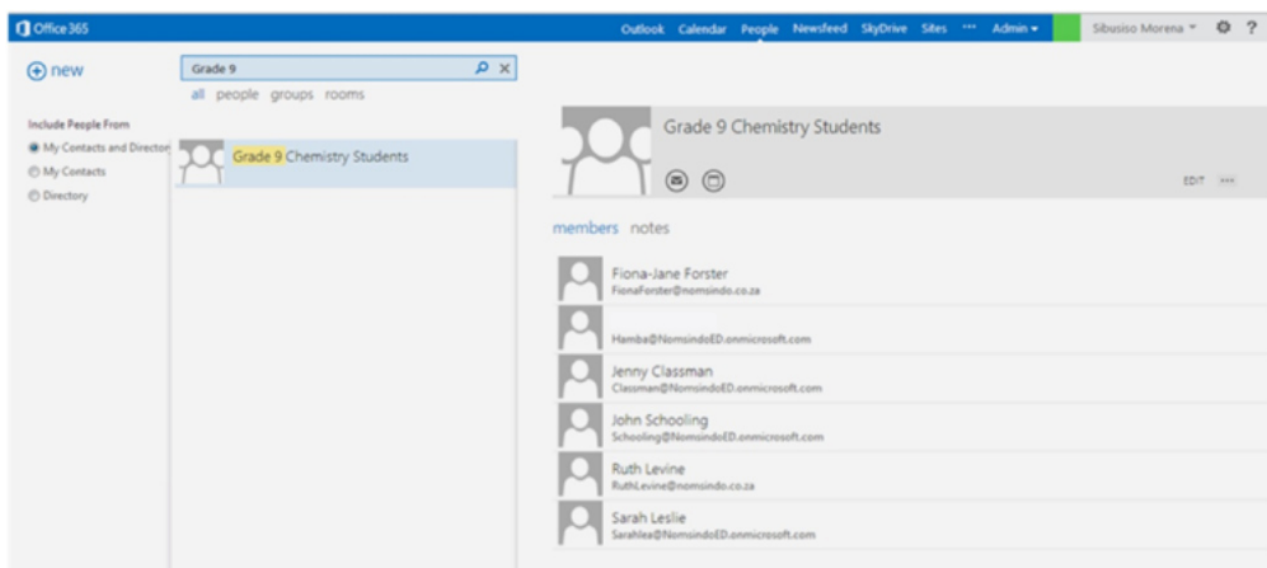
- Using the **calendar** icon on the **mini contact card** for the group, he sees he can schedule a meeting. He clicks on this icon and enters his meeting details into the spaces on the screen box.

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- To look for a time that works for everyone, he clicks on **Scheduling Assistant** at the top of the **meeting window**. This will let him see when most people are available - at least, those who have shared calendars with him.
- After he has entered all of the meeting details and selected the **Online Meeting Settings** option, his screen now looks like this:

- Mr Morena sees that a hyperlink to the meeting has been generated by Office 365 Outlook.
- He clicks **send** and the meeting notification is sent to all members of his class email group.
- He copies the link so that he can paste it into the **Newsfeed** of the Chemistry Student SharePoint group with a message to start a revision topics discussion in the Newsfeed.
- He can also add it onto the SharePoint Chemistry group **calendar**.
- His students will now get an email with the meeting link and see it on their **calendars** when they accept the meeting request. They will also see it on their SharePoint **Newsfeed**.

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Sarah Leslie is working in Office 365 at home, busy with revision for her upcoming subject examinations. She gets an incoming email notification and goes to Outlook. She sees the online revision meeting notification. Her screen looks like this:
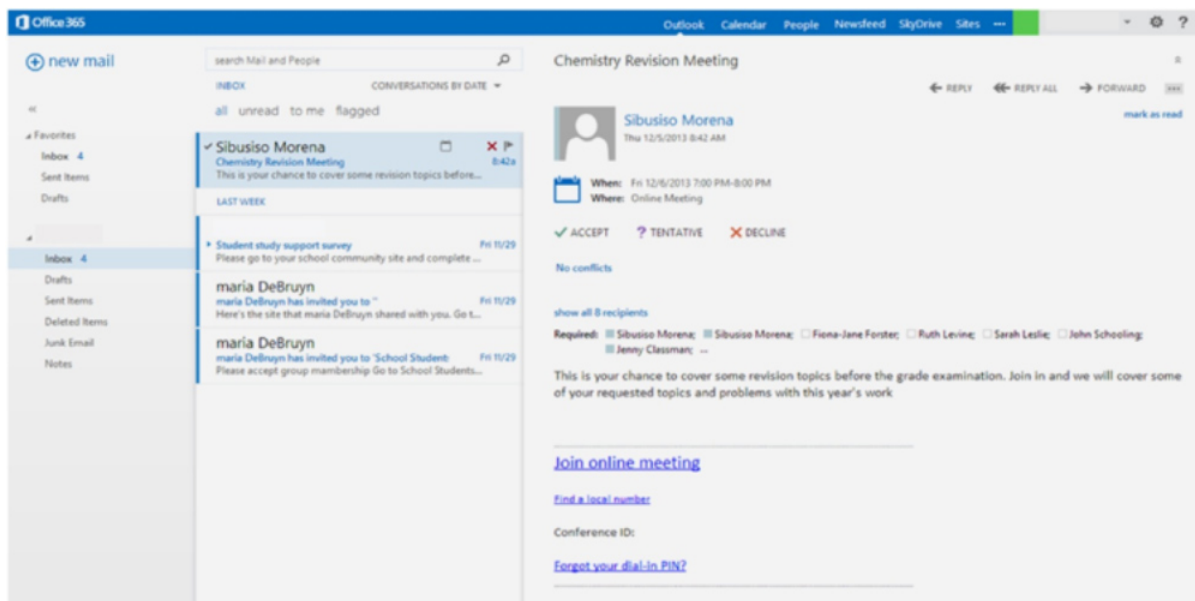
- Outlook automatically checks for conflicts with scheduled events on her own calendar. As there are none, Sarah accepts the meeting notification and goes to her calendar where she sees the meeting has been entered.
- Clicking on the **meeting text** brings up all of the meeting details. She also notices that she will get a reminder alarm one hour before the meeting.
- She is pleased to be getting this extra support with her work, and starts to think of topics to raise with Mr Morena that she is unsure about or needs extra help with.

Meanwhile, Mr Morena sees that emails are starting to arrive in his Office 365 Outlook from his Chemistry students. He opens up **Outlook.com**.

- He notices that Jenny Classman has **declined** the revision meeting without adding a message explaining why. Two others have also declined.
- He sends them an email asking why they cannot join the meeting as it is an important part of the extra study support requested by the student representative council following their survey of all students (they took part in this via an **Excel Online survey**).

Mr Morena now starts to plan for his revision session and gather learning materials so that they are ready to use during the session.

- The students have all been told about the session in a few different ways and so are well aware that it is available to them.
- He publishes details of the revision session on the school public calendar and website so that parents/caregivers are also aware of it.

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User Scenario – Student Revision Sessions

Chris Green has been absent from school for six weeks after breaking his leg in a soccer match. He is worried about missing so much class time in the run-up to examination week and has been using Office 365 to keep in touch with his fellow students and teachers and to try and keep up with his studies.

- He notices a **meeting request email** from his Chemistry teacher, Mr Morena about an evening revision video conference. His screen looks like this:
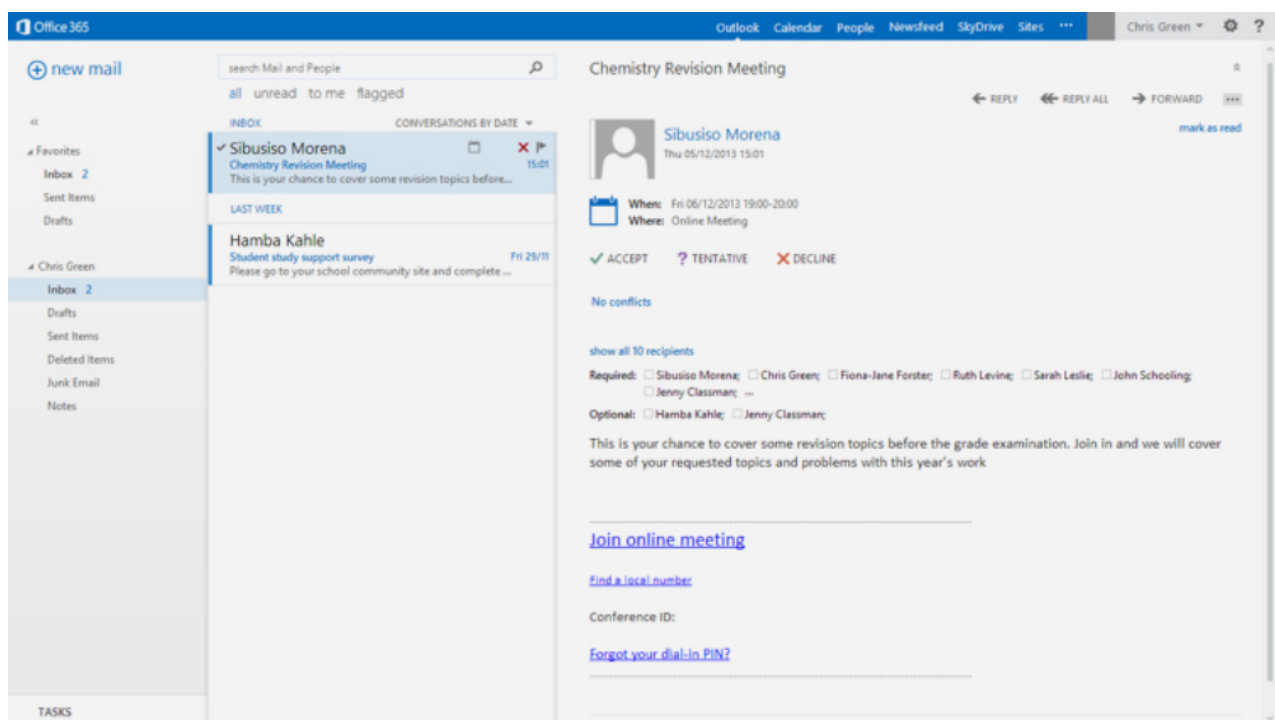
- He clicks on **Accept** and the meeting details are entered into his **calendar**. Fortunately there are no conflicts with other events.
- He sees that most of his class have already indicated that they are attending.

On the evening of the revision session, Chris logs into Office 365 and goes to his **Outlook calendar**.

- He clicks on the calendar entry and opens up a window containing the meeting details.
- He clicks on the **join the meeting** icon (the **globe-shaped** symbol) and the **Lync Web App** opens up.
- He has time for a quick chat with his classmates using **instant messaging (IM)** and video before the session starts.
- Mr Morena runs through a revision PowerPoint presentation and students ask questions using **IM**.
- Mr Morena uses **quick polls** to ensure that the students are paying attention. He also asks and answers questions using **IM**, and is able to annotate his PowerPoint presentation for the students.
- Mr Morena then makes his desktop screen public while he shows a short video and talks through what they are seeing. Again, he uses the **poll** feature to check that students understand what they see.

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- Chris is able to follow the session and ask questions that he might have asked in class if he had not been absent. His classmates sometimes chip in with answers to his **IM** questions.
- Mr Morena is very happy with the **peer-assisted learning** that is taking place in his Lync revision meeting. They are all able to use their webcams, which makes the work more fun.
- The session finishes with a quick quiz in a Word document attachment that Mr Morena prepared prior to coming online for the meeting. The students download the quiz and promise to return it for feedback.
- After Mr Morena leaves the meeting, a few students stay online and use **IM** to complete the quiz together.
- Before they finish, they receive an **IM** from Mr Morena to let them know that the PowerPoint presentations and other files are available on their SharePoint class site.

Chris is much happier after the revision session as he feels he has reconnected with his classmates and with learning. He is now more confident of doing well in his forthcoming Chemistry examination

Using Lync for online meetings between students and educators encourages the following:

- Peer-assisted learning
- Greater engagement with learning materials and schoolwork
- Students taking ownership of their learning
- Individual quality interactions
- Out of class contact and learning in a safe, secure and controlled environment

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User Scenario – Using a Lync meeting for Educator Professional Development

As an educator, **Lync** can offer you the experience of having all your colleagues available in one place at the same time.

- In your colleague group contacts list, each person has a colour next to their name that indicates whether they are available online or away.
- Colleagues can take over your shared desktop for explanations. This is useful, for example, if you need help with installation or maintenance from tech support.
- If you share the PowerPoint presentation you are working on for a team project, colleagues can annotate your slides with suggestions and talk you through them.
- Teacher professional development opportunities are increased as virtual meetings and presentations are easier to arrange and attendance maximised.

Mrs de Bruyn has read about some fantastic teacher development activity using video conferencing and decides that she would like to try and arrange this using **Office 365 Lync** for her colleagues in the school.

One of the other school leaders she regularly networks with is an expert on using technology in the classroom. She thinks her colleagues would benefit from the opportunity of a training session with her friend using Lync.

Her school Office 365 account has been set up to allow external users to take part in Lync conferences. Mrs de Bruyn logs into Office 365 and proceeds to set up her meeting using her **calendar**, sending an email to notify her staff colleagues and her friend Thembi Khumalo who will deliver the training session.

- Her meeting starts as everyone clicks on the link they received in the email. They are guided through the materials by Mrs Khumalo, the presenter, using PowerPoint as well as video material on her shared desktop.
- The controls for the different types of shared materials are all on the bottom left of the Lync meeting screen.
- At the end of the meeting, Mrs Khumalo uses the **Q&A Manager** function to answer questions from the participants in a structured manner. This automatically turns off **IM** for the duration of the Q&A.
- As questions come in from the participants, Mrs Khumalo can answer them immediately below each question.
- The Q&A session is recorded and will be made available to participants along with the rest of the meeting materials.
- Mrs de Bruyn then uses the **Poll** function to get feedback from her colleagues about the Lync meeting and online professional development activity, before closing the session.

Using Lync to bring in external experts to work with your colleagues and students is a really powerful boost to professional development and for learning activity.

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User Scenario – Using Instant Messaging to Connect and Offer Extra Student Support

Neo Nkosi is a student studying Chemistry. His teacher is Mr Morena and he has shown his students how to use the school **Office 365** platform.

He has encouraged his students to use the communication features in Office 365 to connect with each other and collaborate as much as possible.

Neo's class has a chemistry assignment due for submission the following day. He is working on it and finds he has left it too late to ask for help from his teacher during school time. He knows he can access **instant messaging (IM)** from his **contacts** so thinks trying to chat with classmates might help.

As he is already logged into Office 365 and working on his homework, he goes to his contacts list by clicking the **People** tab on the main Office 365 menu to search for his friends.

- He starts to type Jenny Classman's name into the search bar and clicks on the find icon.
- Jenny's details appear on her screen in a **mini contact card** and he noticed that she is available on **instant messaging.** His screen looks like this:
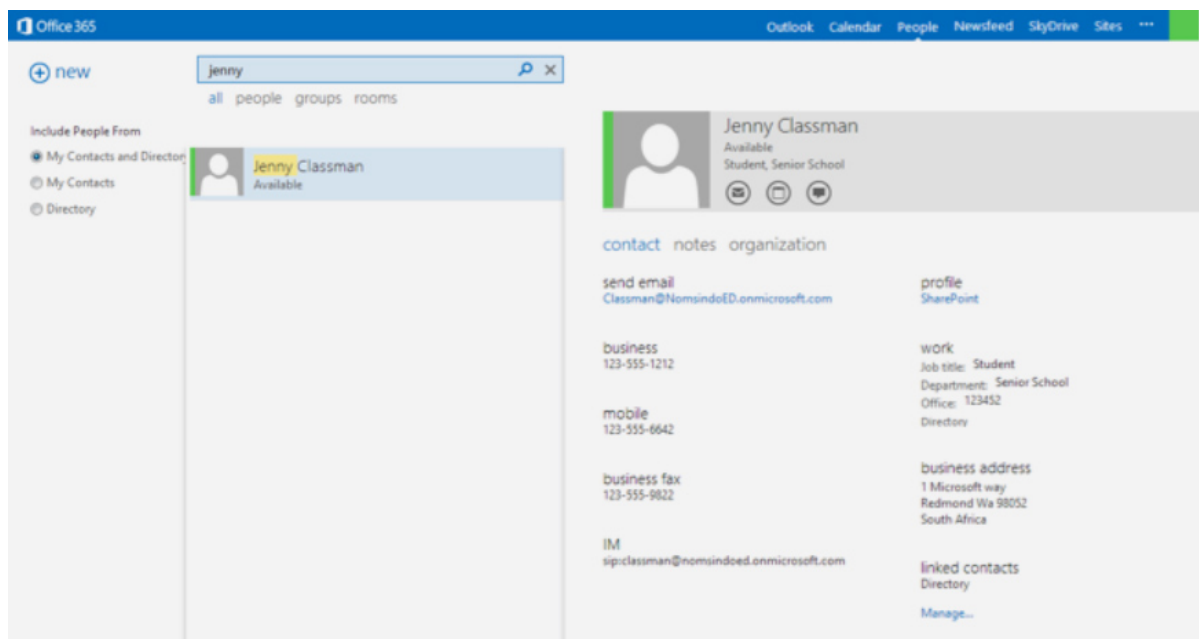

- The **green bar** on the side of Jenny's picture window shows that she is online.
- Jenny's status is also displayed as text underneath her name in the **mini contact card**.

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- Neo clicks on the **IM** icon and a new window opens where he can type his message and start up an **IM** conversation. The screen now looks like this:
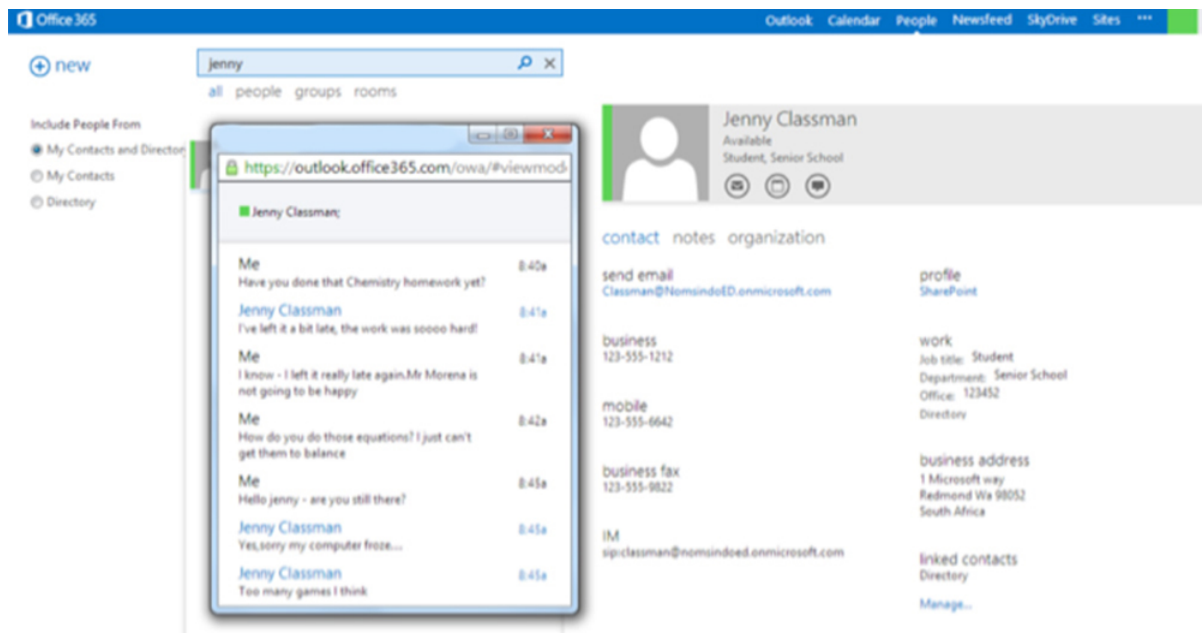
- The **IM conversation pane** fills up with their messages.
- Neo can search for other classmates and even her teacher if he is online.
- He starts to type Mr Morena's name into the search bar on his **People** screen and opens up his **mini contact card.**
- He sees he is available and sends him an **IM.**
- Mr Morena gets Neo's message and is asked if he wants to accept. He clicks OK and receives his message.
- He can now have an **IM conversation** with him about the Chemistry homework. His screen looks like this:

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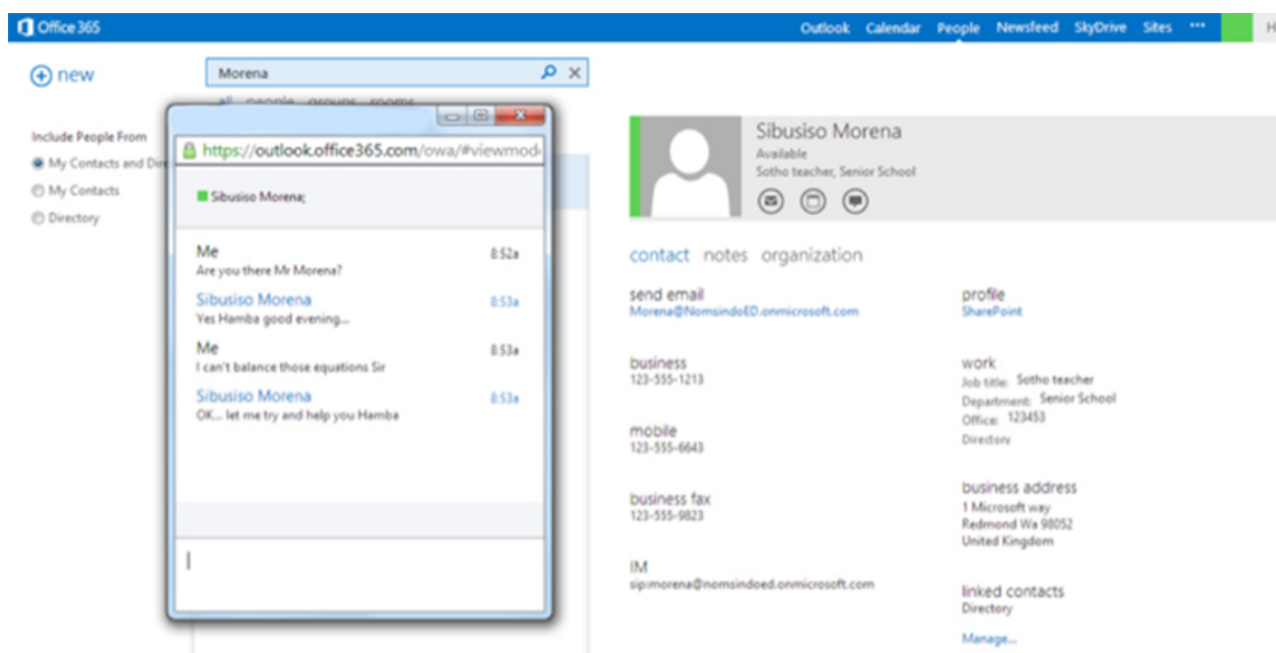
- He is able to have a quick tutorial from his teacher and can then make a better attempt at his homework.
- This can happen at any time both participants are logged into their institution's **Office 365 platform.**
- Mr Morena is keen to support his students by making himself available at certain times outside of school hours when they might be completing Chemistry homework or revision.
- **IM** is a quick and easy way to offer basic student support outside of school.

IM is a safe way for students and teachers to communicate with each other as it is secure within the education institution's Office 365 platform. There is no need to use a social network or external email for communication between institution users.

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