

Using Lync 2010 for Windows



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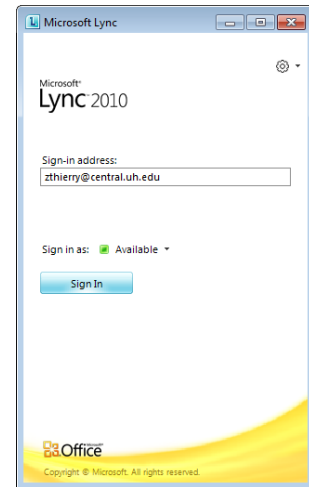
Sign-in to Lync

To open Lync:

1. Click **Start**.
2. Select **All Programs**.
3. Select **Microsoft Lync**.
4. Select **Microsoft Lync 2010**.

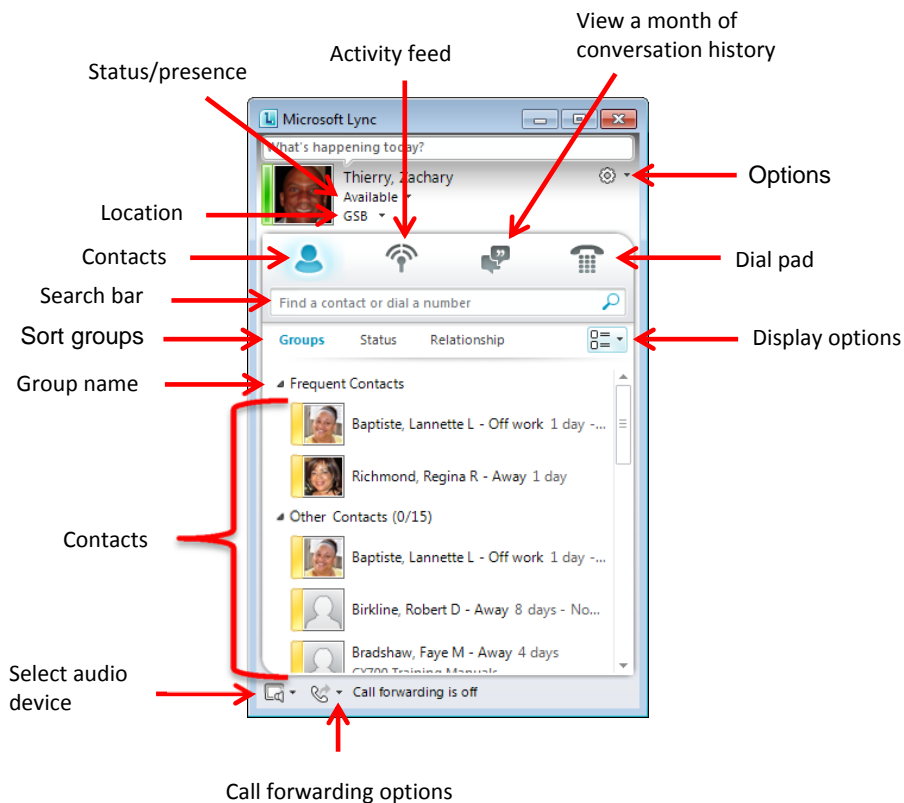
To Sign-in to Lync:

1. Type your full **Exchange email address** (not an alias) in the **Sign-in Address** field. An Exchange email address has **central.uh.edu** at the end of it.
2. Type your **Exchange email password** in the **Password** field.



The Lync Window

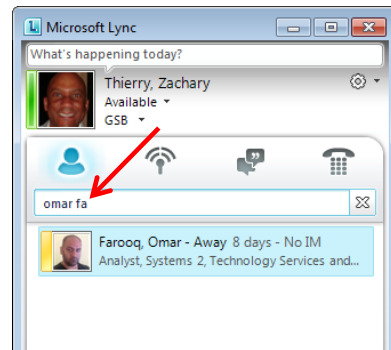
The Lync window that appears after you sign-in is your access to all of the communication tools that are available to you.



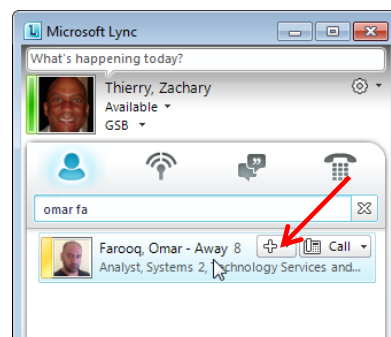
Add a Contact

To add a Contact:

1. Type a name in the **Search** field.
2. The person's contact information appears in the area below the Search field.



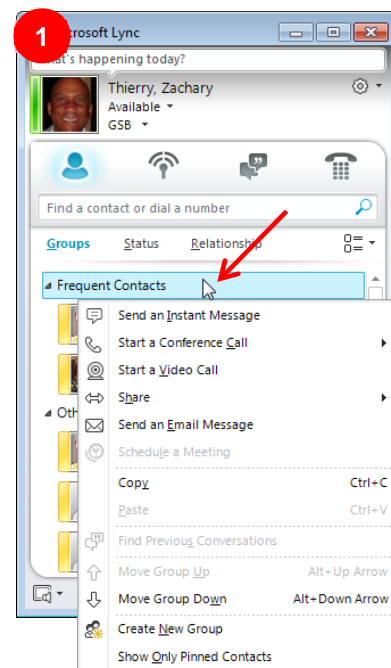
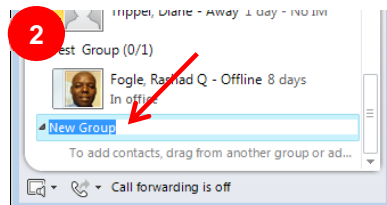
3. Hover over the name of the person you want to add as a Contact.
4. Click the + that appears.
5. Select the desired Contact group.



Create a Contact Group

To create a Contact Group:

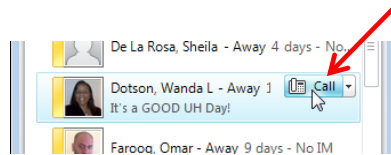
1. In the **Lync** window, right-click an existing group name, and click **Create New Group**.
2. Type a **name** for your new Group in the **Group Name** field.
3. Press **<ENTER>**.



Make a Call with One-Click

To call a Contact with one-click:

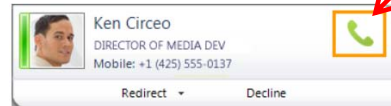
1. Hover your mouse over a Contact.
2. Click the **Call** button that appears and Lync calls the contact.



Answer a Call

To answer a call:

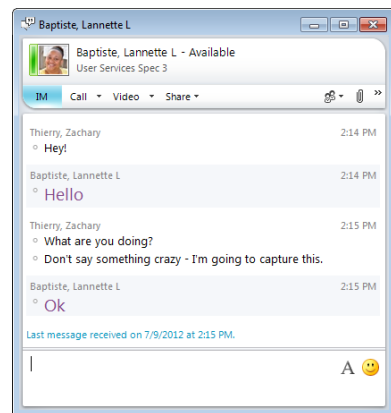
1. When you receive a phone call, a Call Invitation alert appears in the lower right corner of your screen.
2. Click the green **Handset** icon.



Send an Instant Message (IM)

To send an Instant Message (IM):

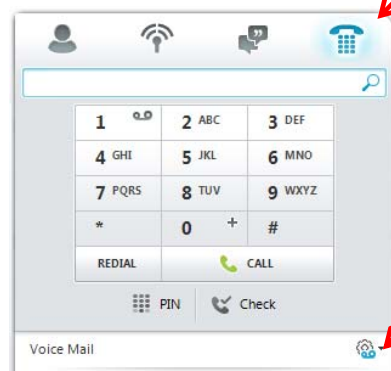
1. Double-click a **Contact**, a Conversation window appears.
2. Type the message that you want to send.
3. Press **<ENTER>**.
4. When the IM conversation is complete, click the **X** in the top right corner of the window to close the Conversation window.



Set-up Voice Mail Using Your Soft Phone

To set-up voice mail:

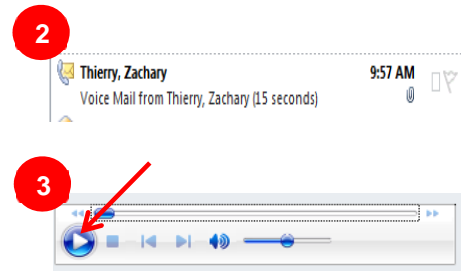
1. Click the **Keypad** icon.
2. Click the **Voice Mail** drop-down menu located under the keypad.
3. Select **Set-Up Voice Mail** from the menu.



Listen to Voice Mail in Outlook

To listen to your voice mail in Outlook:

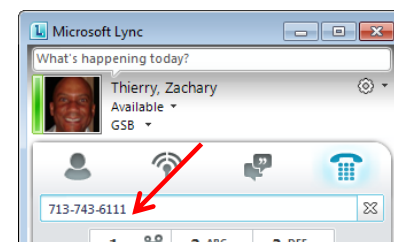
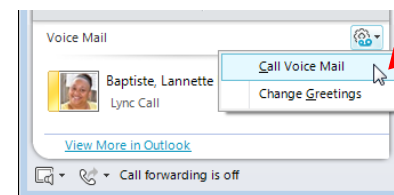
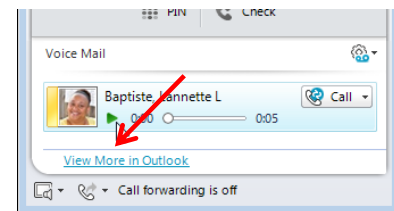
1. Go to your Outlook Inbox.
2. Open any **email** from Lync with Voice Mail in the subject line.
3. Click the **Blue** play button to listen to Voice Mail.



Listen to Voice Mail with Your Soft Phone

To listen to voice mail with your soft phone, choose one of three options:

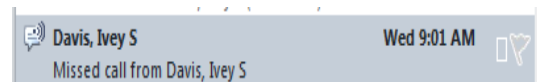
1. In the Lync window, click . Your voice mail appears at the bottom of the window. Hover over the desired message. Click the play button.
2. Click . Click the **Voice Mail** drop-down menu. Select **Call Voice Mail** from the menu.
3. Type **713-743-6111** in the Search field, press **<ENTER>**. Lync dials into the Voice Mail system.



View Missed Calls in Outlook

To view missed calls in Outlook:

1. Go to your Outlook Inbox.
2. Double-click any **email** from Lync with **Missed Call** as the subject.



You missed a call from Davis, Ivey S at isdavis@central.uh.edu
 Caller-Id: isdavis@central.uh.edu
 Job Title: Lead, User Services Spec
 Company: University of Houston
 Work: [713-743-1411](tel:713-743-1411)
 E-mail: ISDavis@Central.UH.edu
 IM Address: ISDavis@Central.UH.edu

Information for Online 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 an 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 a Presenter. 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 Meeting Options. For information on accessing Meeting Options, see **Conferencing Quick Reference for Windows** or **Conferencing Quick Reference for Macintosh**.
- 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 (Rolm, Cisco, or off-campus) 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 is automatically connected 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. Meeting options include:

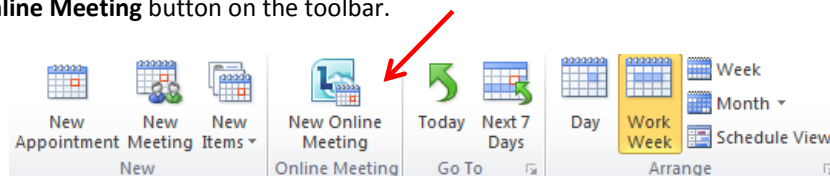
- Everyone waits in the lobby except the Organizer
- No one waits in the lobby
- Only the Organizer is a Presenter

Schedule a Phone Conference or Online Meeting in Outlook

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.

To schedule a phone conference or online meeting in Outlook:

1. Open your **Outlook Calendar**.
2. Click the **New Online Meeting** button on the toolbar.



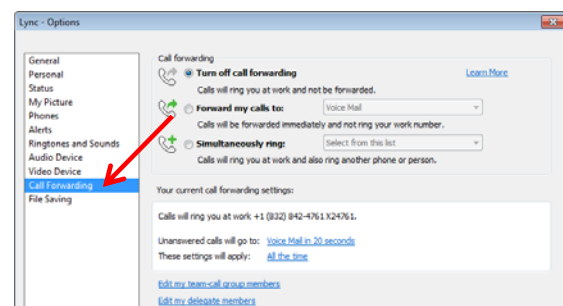
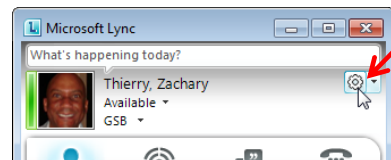
3. Set the meeting date and time, and send the meeting invitation.

All attendees will receive a phone number to dial into and a web address if they need 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. There is no need to call UIT to set-up a phone bridge. You can do it all using Outlook.

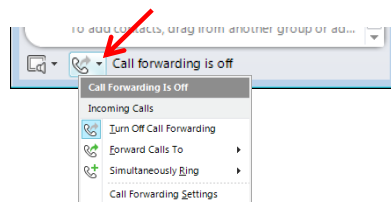
Call Forwarding

There are three call forwarding options. To access all three options, click the **Options** button and click on **Call Forwarding** in the Options window.

1. Turn off call forwarding – calls will ring in Lync and your work phone.
2. Forward my calls to – sends calls directly to Voice Mail, another number, a Contact, or a Delegate.
3. Simultaneously ring – calls will ring in Lync and your work phone, while also ringing at another location that you set.



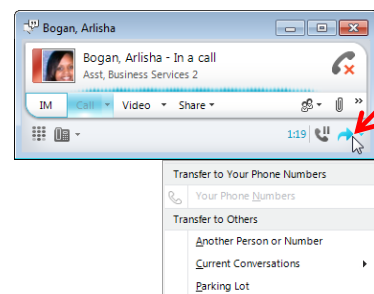
Note: All Call Forwarding options can be accessed by clicking the Call Forward button at the bottom of the Lync window. Select the desired option from the drop-down menu.



Transfer a Call

To transfer a call:

1. In the Conversation Window, click the **Transfer** button.
2. Select the desired Transfer option from the drop-down menu.

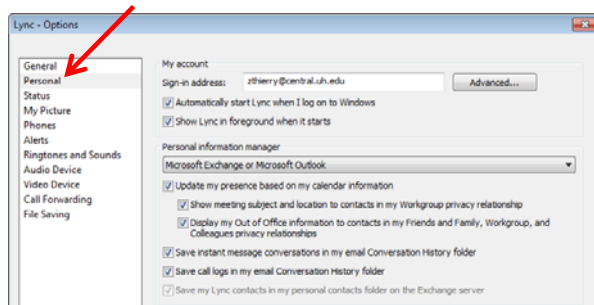


Saved Conversations

If you have a UIT Exchange account, all your IM conversations and phone logs are stored in Outlook, in a folder named Conversation History. By default, Lync stores all IM conversations, phone logs, and Lync contacts in Outlook.

To manage how your IM conversations and phone logs are stored in Conversation History in Outlook:

1. In the main Lync window, click the **Options** button.
2. Click **Personal** and select the desired settings.



Set a Picture

If you have a picture of yourself published on the web (e.g. Windows Live, Facebook, LinkedIn, Flickr, etc.), Lync can grab that picture and use it as your Lync Contact picture.

To have Lync grab your picture from a website:

1. Go to the site where your picture is located.
2. Right-click the picture and select **Copy Image Location**.
3. In the Lync window, click the **Options** button.
4. Click **My Picture**.
5. Select **Show a picture from a web address**.
6. Paste the web address in the field provided.
7. Click **Connect to Picture**.
8. Click **Ok**.

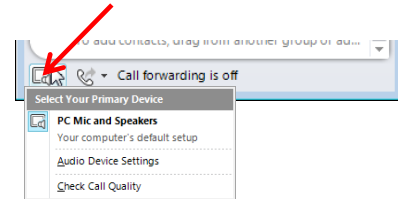
Note: In Internet Explorer, right-click your picture and select **Properties**. Copy the image location shown in the Properties dialog box.

Setting Audio/Video Devices

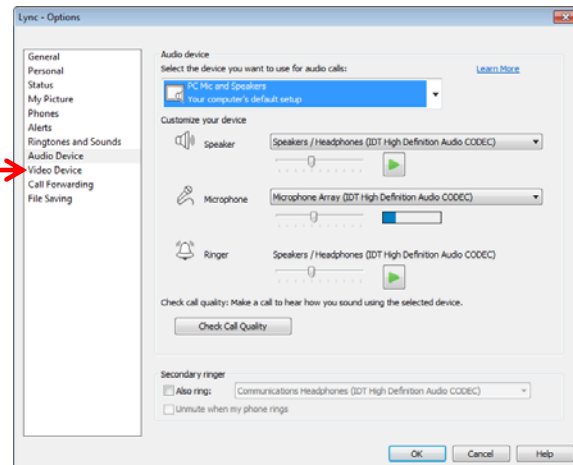
The Options dialog box is used to adjust audio settings and check audio quality.

To access Audio Device options:

1. In the lower-left corner of the Lync window, click the **Audio Device** button, and select **Audio Device Settings** from the drop-down menu.



Access video settings



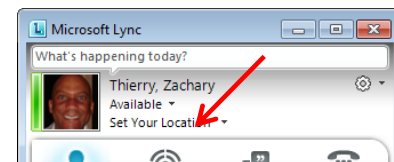
To access Video Device options:

1. In the lower-left corner of the Lync window, click the **Audio Device** button, and select **Audio Device Settings** from the drop-down menu.
2. In the Options dialog box, click **Video Device**.

Set Your Presence

To indicate your presence:

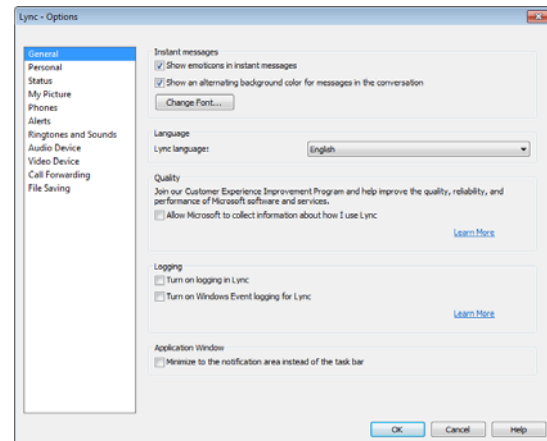
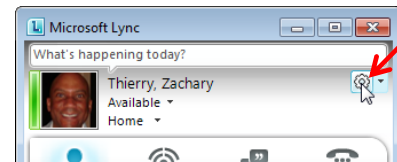
1. Click the **Location** field.
2. Type your **location**.
3. Press **Enter**.



Change Your Personal Options

To change your Personal options:

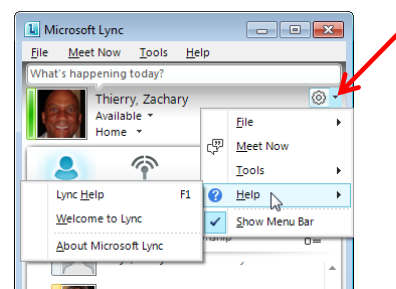
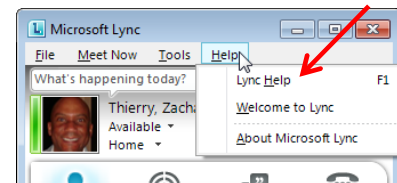
1. Click the **Options** button.
2. In the Options dialog box, select the personal options that you want to change.
3. Click **Ok**.



Self Help

To access Lync Help, choose one of two options:

1. Select **Lync Help** from the **Help** menu.
2. Select **Help** from the **Options** drop-down menu, then select **Lync Help** from the sub-menu.



Advanced Client Features

This section covers advanced Lync soft phone features. In this section you will learn how to:

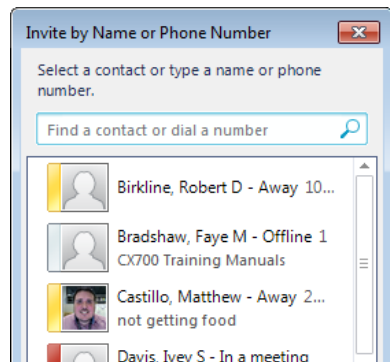
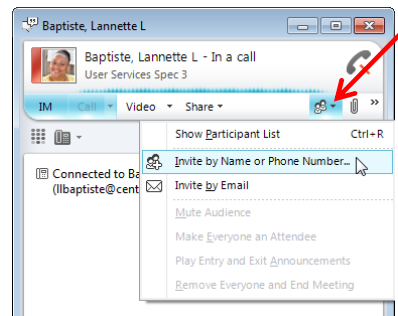
- Start a Conference Call
- Start a Video Call
- Share Your Desktop or a Program
- Send an Attachment
- Record Video
- Use a Federated Contact List
- Assign a Delegate
- Response Group
- Dialing 911

Start a Conference Call

If you are on a call and you decide that you need to have a conference call that includes the Contact to whom you are speaking and additional participants, this can be done in the Conversation window of your current call.

To escalate a call to a conference call:

1. During a call, in the Conversation window, click the **People Options** button.
2. From the drop-down menu that appears, select **Invite by Name or Phone Number**.
3. In the Invite by Name or Phone Number dialog box, select a **Contact**.
4. Click **Ok**.

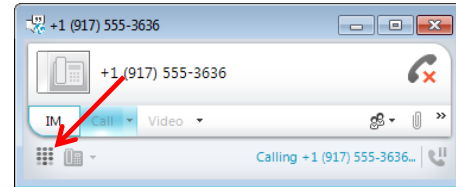


Dial a Long Distance Number

Your long distance authorization code must be entered using the Lync keypad.

To dial a long distance number:


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



Add a Long Distance Number to a Conference Call

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.

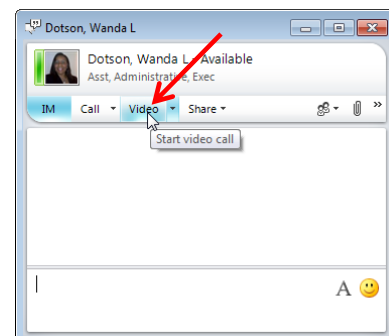
To add a long distance number to a conference call:

1. Follow the steps in the previous section.
2. In the Conversation window of the new call, click **People Options** .
3. From the drop-down menu that appears, select the conversation that you want the call to merge into.

Start a Video Call

To make a video call:

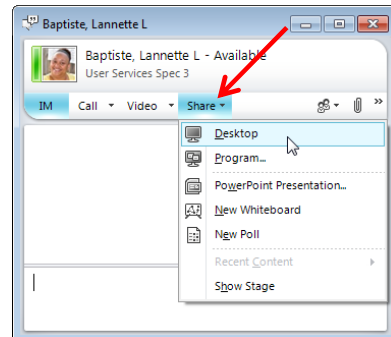
1. In the Conversation window, click **Video**.
2. To end a Video Call, close the Conversation window.



Share Your Desktop or a Program

To share your desktop or an application:

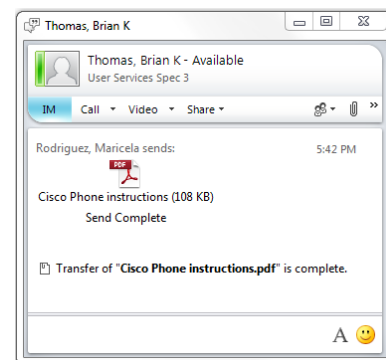
1. During a call, in the Conversation window, click **Share**.
2. Select **Desktop** or **Program** from the drop-down menu.
3. When you are done sharing your desktop, click **Stop Sharing**.



Transfer a File

To send an attachment in Instant Message, choose one of two options:

1. With your mouse, drag and drop the file that you want to send onto the Conversation window.
2. While in the IM Conversation window, click the paperclip and select the desired file. Click **Ok**.

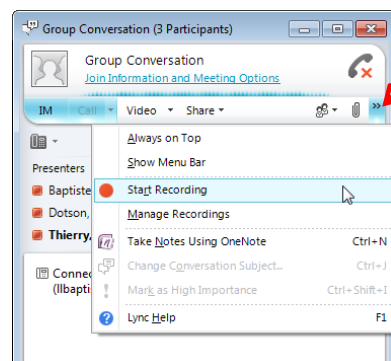


Make a Video Recording of a Meeting

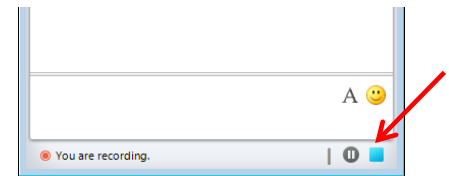
Note: You must be a Presenter to record meetings.

To start recording in a meeting or Conversation window:

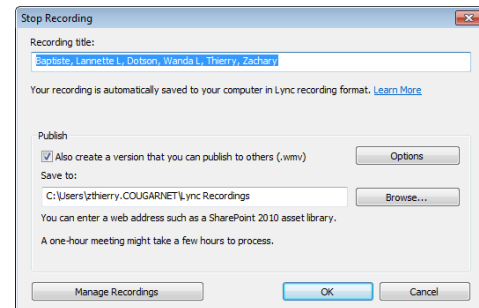
1. Click the **More Options** button, and select **Start Recording** from the drop-down menu.



2. While recording, you can use the controls at the bottom of the window to pause, resume, or stop recording.

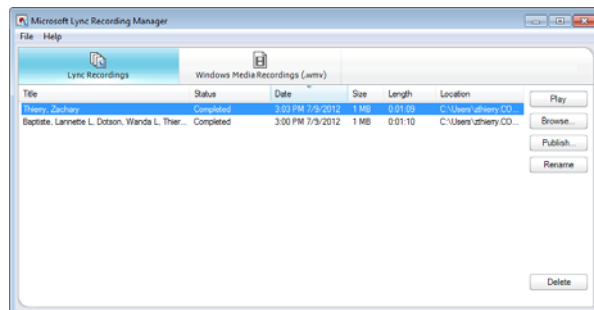


3. To save the Video recordings click the **Stop** button at the bottom of the window.



4. Select the directory where you want to save the recording and click **OK**.

5. To view the saved recording, either go to the directory you saved it in or click on **Start > All Programs > Microsoft Lync > Microsoft Lync Recording Manager**.



Federated Contact Lists

The Lync federation lets you communicate faster and more effectively with those outside of the university, such as partners, suppliers, vendors or other universities.

When enabled, being federated allows you to:

1. Add users from other organizations to your Contacts list.
2. Send instant messages to your federated contacts.
3. Invite federated Contacts to audio calls, video calls, or conferences.
4. Exchange presence information.
5. Escalate person-to-person instant messages to multi-person conferences.

UH is openly federated. You can use all of Lync's unified communication tools to communicate with someone who is at an openly federated organization. Lync also supports federation with Microsoft Messenger public instant messaging (IM).

Note: At the address below, you can see which organizations are federated. There are almost 5,000 organizations around the world that have joined.

http://windowspbxblogspot.com/2011/09/usa-microsoft-lync-federation-directory_02.html

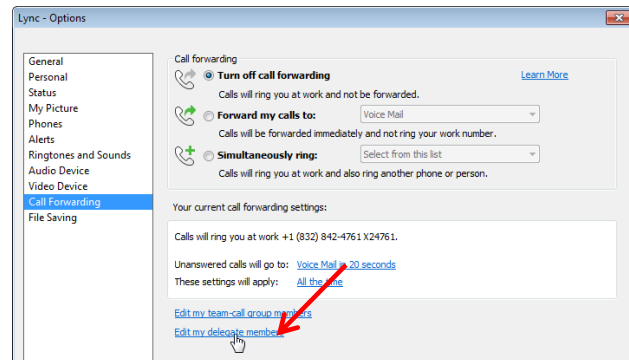
Administrative Work Group

Assign a Delegate

A delegate is a person with permission to receive calls, messages and schedule meetings on behalf of another. Deans, directors and department heads commonly use a delegate, as well as department phones. If a phone must be answered at all times, delegation provides a solution by routing incoming calls to multiple phones. Using Outlook, delegates can also have access to voice mail and missed call messages. For more information on delegation including how to delegate an Outlook mailbox, see **UIT Delegate Access in Lync 2010**.

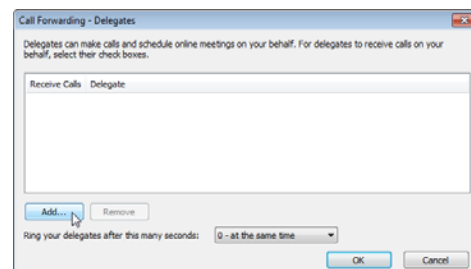
To set-up a Delegate:

1. In the Lync window, click the **Options** button.
2. In the Options dialog box, click **Call Forwarding**.
3. Near the bottom of the dialog box, click **Edit my delegate members**.
4. In the **Delegates** dialog box, click **Add**.
5. Select the person(s) you want to assign to be a Delegate.
6. Click **Ok**.



To rescind Delegate permission:

1. Use the steps listed above to access the Delegates dialog box.
2. Check the box next to the Delegate you no longer want to be a Delegate.
3. Click **Remove**.
4. Click **Ok**.



Response Group

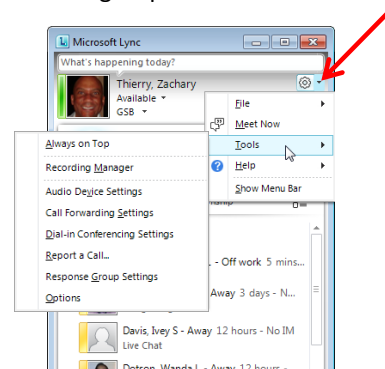
Response Group is a unified communications application that is used to create and configure workflows. Workflows can route and queue incoming calls to designated groups. An agent group is a collection of agents who handle incoming calls from the Response Group. When an administrator creates an agent group, he or she can select the agents that are assigned to the group, and specify whether the group requires agents to sign in and out. A person will be considered either an informal agent or a formal agent, depending on whether you are required formally sign in to your agent group to begin receiving calls.

Informal agents are agents that have been assigned to an agent group that does not require them to sign in and out. Informal agents are automatically signed in to the group when they sign-in to Microsoft Office Communications Server 2007 R2. If you are an informal agent, you can receive calls routed to your group by using Microsoft Office Communicator 2007 R2 Attendant or Office Communicator 2007 R2.

Formal agents are agents that have been assigned to an agent group that requires them to sign in and out. Formal agents must be signed in to the group before they can receive calls routed to the group.

To View which Response Group you are in:

1. In the Lync window, click the **Show Menu** drop-down arrow, select **Tools**, and **Response Group Settings**.
2. Sign-in with your CougarNet username and password.



Dialing 911 on Your Lync Soft Phone

Your Lync hard phone and the soft phone on your computer offer an amazing amount of flexibility. One of the most powerful features of Lync is the ability to make calls from any location through the internet via your laptop computer. Unfortunately, the technology of the Emergency 911 system has not kept pace with Lync technology, so even though you can place work calls from home, hotels, or even a cybercafé, the 911 system will recognize the call as being placed from your office. This problem is not unique to Lync. It affects Skype, Vonage, and other IP phone service providers.

Please remember, if you place a 911 call using your Lync soft phone (the Lync client), the 911 system will connect to the Houston emergency services and dispatch responders to your office location that is associated with your phone number. If you must place a 911 call from an off-campus location using Lync, you must specifically notify the first responder of your actual location. When possible, it would be preferable in those situations to use a local phone or a cellular phone for 911 calls.