Lync 2011
Delegate Access
for Macintosh

Note: Delegation is only available in Lync 2011 for Macintosh version 14.05 and higher.

To verify the version you are currently running:

1. Click the **Lync** icon on your dock to open Lync.
2. Select **About Lync** from the **Lync** menu.

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Delegate Defined

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.

Set-up Delegate Access in Lync 2011

Microsoft Lync is used to manage phone delegates.

To set-up delegate access in Lync:

1. Open **Lync**.
2. Sign-in to Lync as the **person who wants to give delegate permission**.

When creating a delegate for a department phone, the sign-in address is **ld_xxxxx@central.uh.edu** where **xxxxx** is the **5-digit department phone number**. The password for a department account is available from your local IT support.

3. Select **Preferences** from the **Lync** menu.
4. In the Preferences dialog box, click **Phone Calls**.
5. Click **Edit my delegate members**.

6. In the Delegates dialog box, click **Add**.

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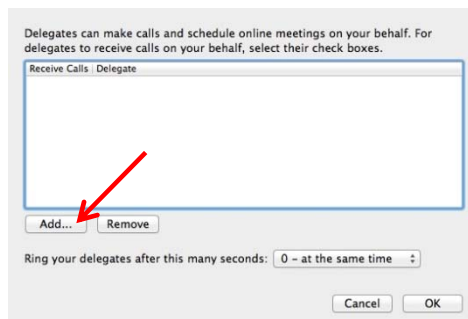
7. In the list of Contacts that appears, select the **desired name**.

Each desired delegate must be a Lync contact. For information on adding a contact in Lync, see UIT document **Using Lync for Macintosh**.

8. Click **Ok**.
9. In the Delegates dialog box, make sure a **check mark** appears next to the person whom you want to be a delegate.
10. Click **Ok**.
11. In the Preferences dialog box, select **Simultaneous Ring**.
12. Click the pop-up menu next to Simultaneous Ring and select **My Delegates**.
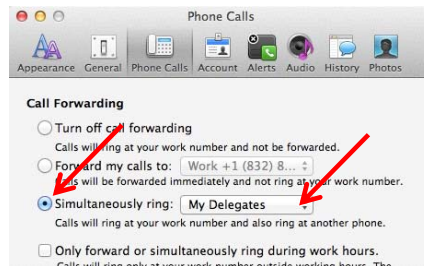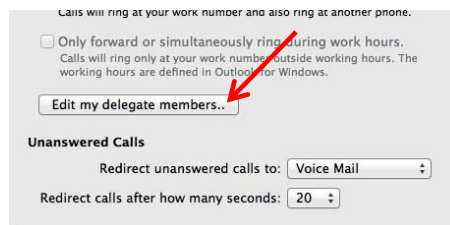

13. Close the Preference dialog box by clicking the **red dot** in the top left corner.

With Simultaneous Ring on and My Delegates selected all incoming calls ring in multiple places. Delegates can see which number an incoming call is ringing and choose whether or not to answer it. If no one answers a delegated number, the call will forward to the voice mail of the person delegating.

Remove a Lync Delegate

To remove a delegate from Lync:

1. Select **Preferences** from the **Lync** menu.
2. In the Preferences dialog box, click **Phone Calls**.
3. Click **Edit my delegate members**.

4. In the Delegates dialog box, select the **name to be removed**.
5. Click **Remove**.
6. Click **Ok**.
7. Close the Preferences dialog box.

Set-up Delegate Access in Outlook 2011

With permission, multiple people can access voice mail messages that are recorded on a department phone (or anyone's phone). To do this, you must use Outlook to set-up delegate access. Sign-in to Outlook as the person who wants to give delegate permission. When creating a delegate for a department phone, sign-in to Outlook with **ld_xxxxx@central.uh.edu** where **xxxxx** is the **5-digit department phone number**. The password for a department account is available from your local IT support.
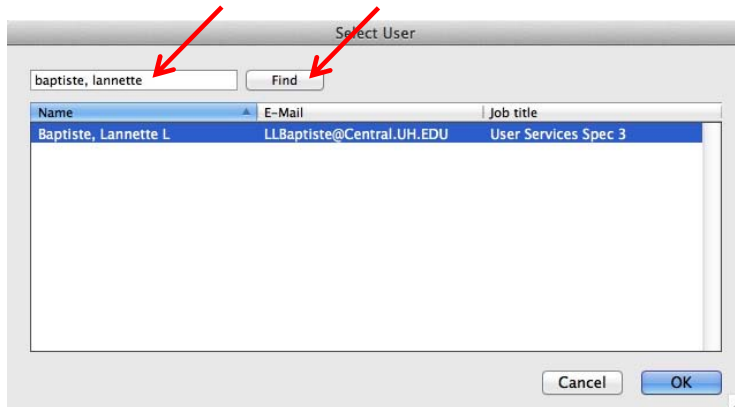
To set-up delegate access in Outlook:

1. Open **Outlook**.
2. Sign-in to Outlook as the **person who wants to give delegate permission**.
3. Select **Accounts** from the **Tools** menu.
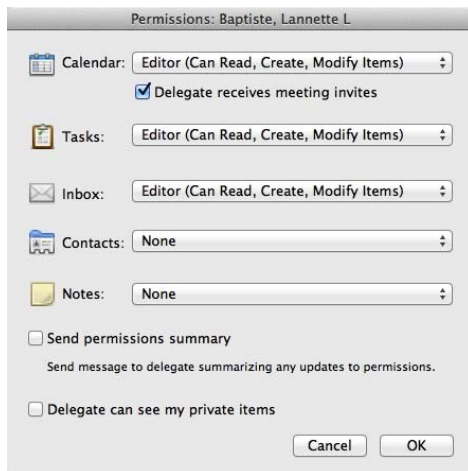4. In the Accounts dialog box, click **Advanced**.
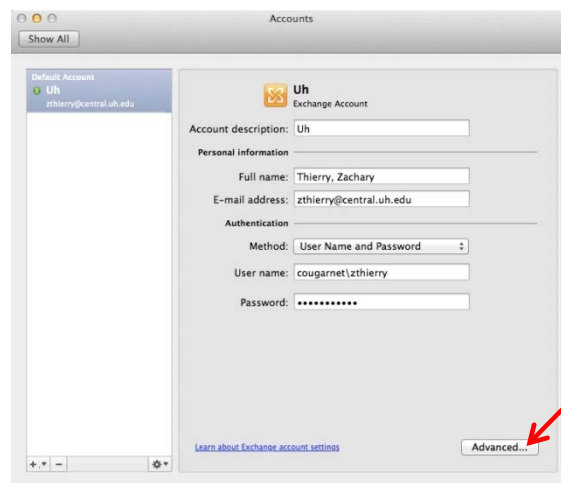
5. In the Advanced dialog box, select **Delegates**.
6. Below the **Delegates who can act on my behalf** field, click the **+** sign to select a delegate.
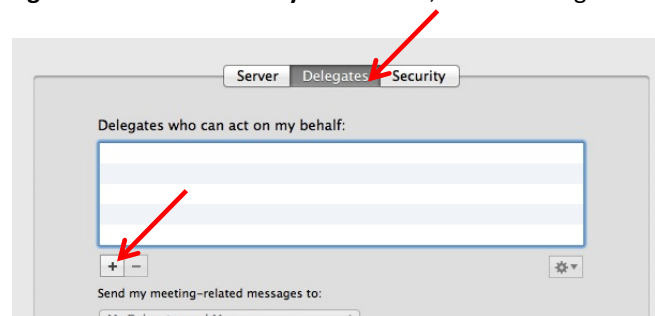
7. In the Select User dialog box, enter the desired **name** in the Find field.
8. Click **Find**.
9. Select the person's **name** from the list that appears.
10. Click **Ok**.

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11. In the Permissions dialog box, select **Editor** from the pop-up menu next to Inbox.
12. Select **Editor** next to any other item you want to delegate.
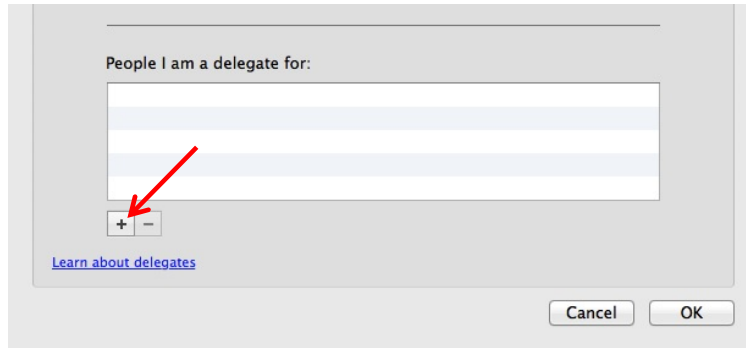13. Click **Ok**.

14. In the Accounts dialog box, click **Ok**.
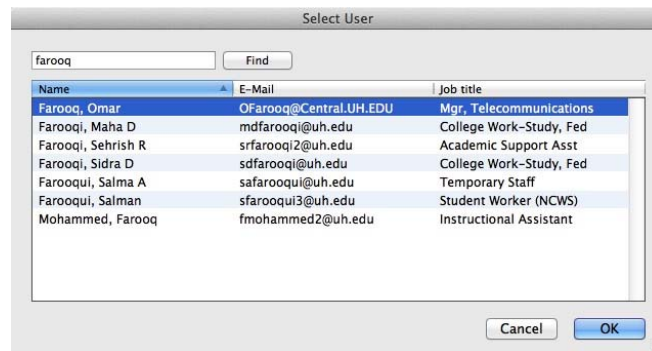15. Close the Accounts dialog box.

Add a Mailbox

After delegate permission is granted, the delegated Mailbox must be added in Outlook for each person who was granted permission.

To add a Mailbox:

1. Open **Outlook**.
2. Sign-in as the **person who received delegate access**.
3. Select **Accounts** from the **Tools** menu.
4. Select the person's **Exchange account** from the Account list.
5. Click **Advanced**.
6. In the Advanced dialog box, select **Delegates**.
7. Below the **People I am a delegate for** field, click the **+** sign to select a delegate.

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8. In the Select User dialog box, enter the desired **name** in the Find field.
9. Click **Find**.
10. Select the person's **name** from the list that appears.
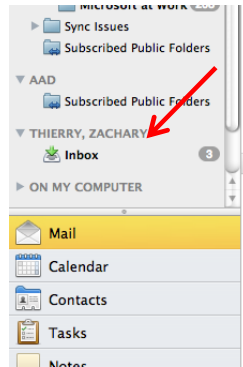11. Click **Ok**.

12. In the Accounts dialog box, click **Ok**.
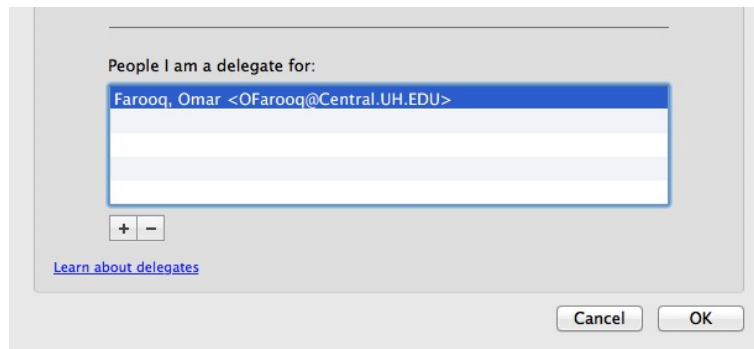
13. Close the Accounts dialog box.

Open a Delegated Mailbox

After a delegated mailbox is added, that mailbox can be found at the bottom of the Outlook folder list. Depending on the permissions set, messages in a delegated mailbox can be sent, read or deleted.

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 UIT document **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 Meeting on Behalf of Another

Using Outlook, a delegate with the proper permissions can schedule a meeting on behalf of another. In the steps below, "dean" is used as the person for whom we are scheduling a meeting.

To schedule a meeting on behalf of another:

1. Open **Outlook**.
2. Open the dean's **calendar**.
3. Click **Meeting** on the toolbar.
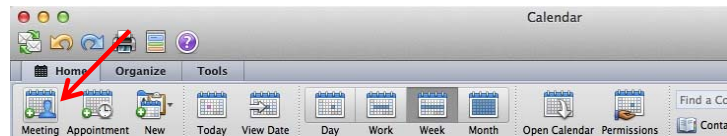
4. In the Meeting window, click **Online Meeting**.
5. Select **Create Online Meeting** from the menu that appears.

6. Add the **recipients** in the To: field.
7. Enter a **subject** in the Subject: field.
8. Click **Send**.

To customize the meeting options:

Note: Customize the meeting options before sending the Meeting Invitation. Changing the meeting options can potentially change the Conference ID.

1. Before sending the Meeting Invitation, click **Online Meeting** on the Meeting Invitation toolbar.
2. Select **Set Access Permissions** from the menu that appears.
3. In the Online Meeting Options dialog box, select the **desired options**.
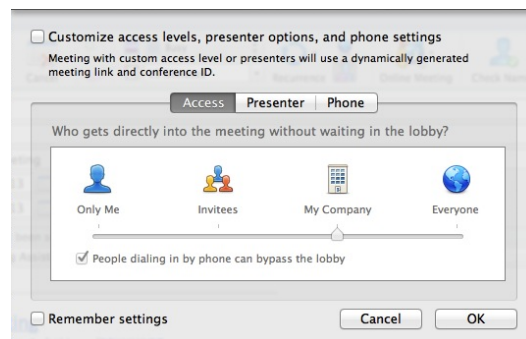
4. Click **Ok**.
5. Click **Send** to send the Meeting Invitation.

The invitation includes your name, the dean's name, and the meeting information; including the meeting URL and Conference ID. The URL allows non-Lync users to join a meeting with a web browser. The Conference ID is used to access the meeting audio. Attendees who join an online meeting with a web browser use their telephone to access the meeting audio. Attendees of a conference call use the Conference ID to access the meeting.

Remove a Delegate in Outlook 2011

Whether you want to remove a person who was granted delegate permission or if you want to remove the mailbox of a person for whom delegation was provided, the steps are almost identical.

To remove a delegate or remove a delegated mailbox:

1. Open **Outlook**.
2. Sign-in to Outlook as the **person who gave delegate permission** or the **person who received permission**.
3. Select **Accounts** from the **Tools** menu.
4. In the Accounts dialog box, click **Advanced**.
5. In the Advanced dialog box, select **Delegates**.
6. In the **Delegates who can act on my behalf** field or in the **People I am a delegate for** field, select the name of the person you want to remove.
7. Click **–** under the appropriate field.
8. Click **Ok**.

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