Delegate Access
In Lync 2010

UNIVERSITYof **HOUSTON** UIT

Lync

communication • collaboration

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Delegate Defined

A delegate is a person with permission to make and receive calls and messages 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. Delegation not only routes incoming calls to multiple phones, but delegates can also have access to voice mail and missed call messages.

Set-up Delegate Access in Lync 2010

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.
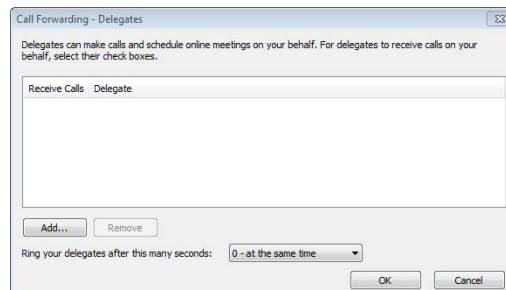
3.   Click the **Options** button.
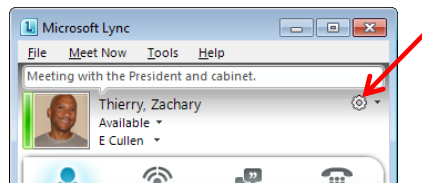
4. Click **Call Forwarding** in the list on the left side of the Options dialog box.
5. Select **Simultaneously Ring**.
6. Click the drop-down menu next to Simultaneously Ring and select **My Delegates**.
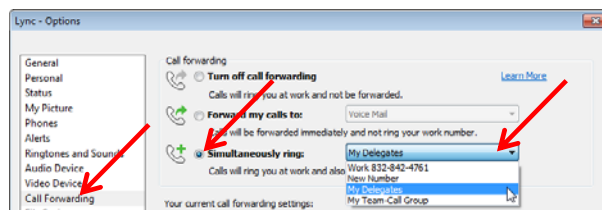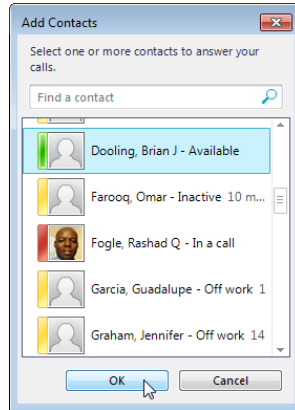

7. In the Delegates dialog box that appears, click **Add**.

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

8. Select the desired contact from the Add Contacts dialog box.
9. Click **Ok**.

10. Click **Ok** in the Delegates dialog box.
11. Click **Ok** in the Options dialog box.

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.

## Set-up Delegate Access Using Outlook 2010

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.
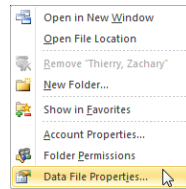
To set-up delegate access, in Outlook:

1. Open **Outlook**.
2. Sign-in to Outlook as the **person who wants to give delegate permission**.
3. Click the **Folder** icon near the bottom left corner of the window.
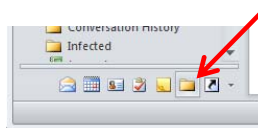
4. Right-click on the **Home** folder, located at the top of the folder list.
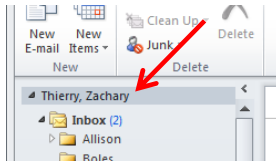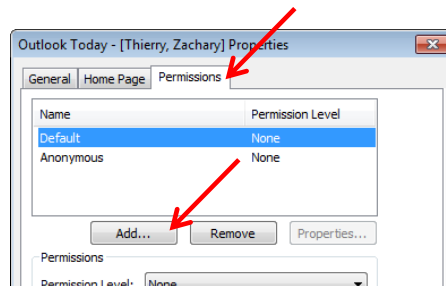
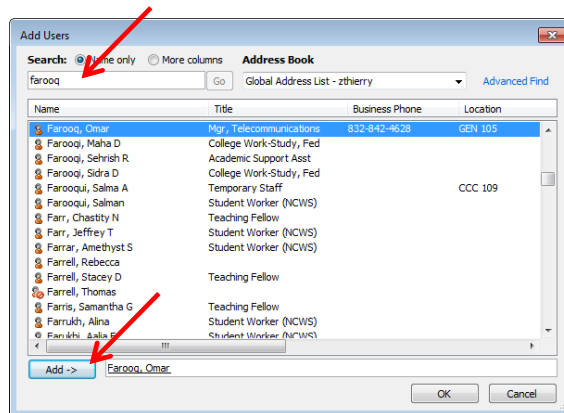5. Select **Data File Properties** from the pop-up menu.

6. In the Properties dialog box, click the **Permissions** tab.
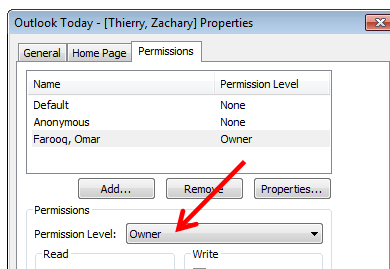7. Click **Add**.

8. In the Add Users dialog box, locate the person receiving delegate access, click **Add**.
9. Click **OK**.

10. In the Properties dialog box, change the Permission Level to **Owner**.
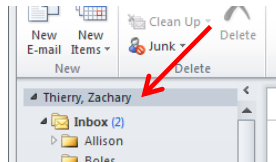
11. Click **Apply**.
12. Click **Ok**.

Add a Mailbox

After delegate permission is granted, the Mailbox must be added for every person who was granted permission. Sign-in to Outlook as the person receiving delegate access.
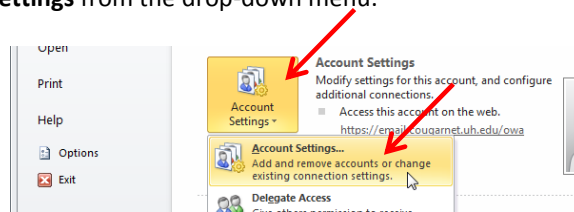
To add a Mailbox:

1. Open **Outlook**.
2. Sign-in as the **person who received delegate access**.
3. Right-click on the **Home** folder, located at the top of the folder list.
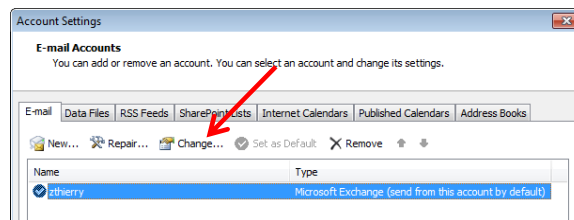

4. Select **Account Properties** from the pop-up menu.
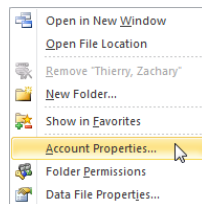
5. Click **Account Settings**.
6. Select **Account Settings** from the drop-down menu.
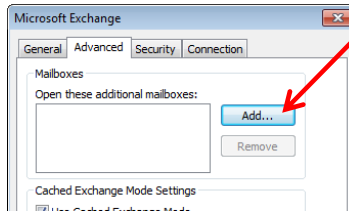

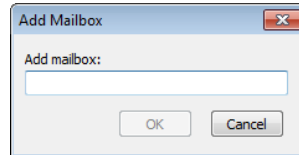7. In the Account Settings dialog box, click **Change**.

8. In the Change Account dialog box, click **More Settings**.
9. In the Microsoft Exchange dialog box, click the **Advanced** tab.

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10. Click **Add**.

11. In the Add Mailbox dialog box, enter the **name of the person** or **department**.

12. If more than one potential match is found, select the desired name in the Check Name dialog box.
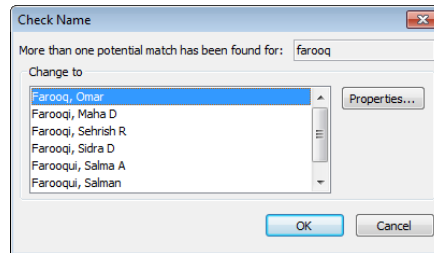
13. Click **OK**.
14. In the Microsoft Exchange dialog box, click **Apply**.
15. Click **OK**.
16. In the Change Account dialog box, click **Next**.
17. Click **Finish**.
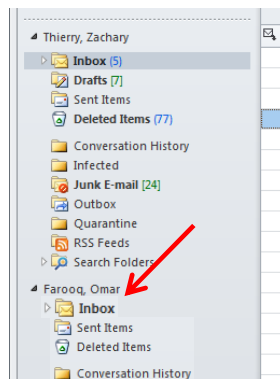18. In the Account Settings dialog box, click **Close**.

Open a Delegated Mailbox

After a delegated mailbox is added, that mailbox can be found in your Outlook folder list. Messages in a delegated mailbox can be sent, read, or deleted as if it were your own mailbox.

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 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 (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" will be used as the person for whom we are scheduling a meeting.

To schedule a meeting:

1. Open **Outlook**.
2. Open the dean's **calendar**.
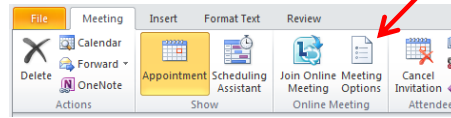3. Select a time and click **New Online Meeting** on the toolbar.
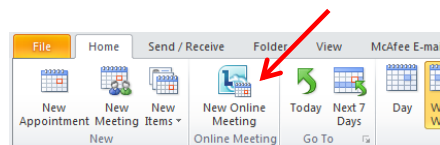
4. Add the **invitees** in the To: field.

5. Type a **subject** in the Subject: field.
6. Click **Send**.

To customize the meeting options:

1. Before sending the Meeting Invitation, click **Meeting Options** on the toolbar.

2. In the Online Meeting Options dialog box, select the desired options.
3. Click **OK**.
4. To send the Meeting Invitation, click **Send**.

The invitation includes your name, the dean's name, and the meeting information, including the meeting link and audio information.
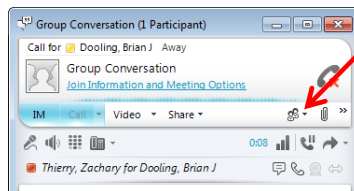
Start an Unscheduled Meeting on Behalf of Another

To start an unscheduled meeting on behalf of the "dean":

1. Open **Lync**.
2. Click **Meet Now** on the menu bar and select **For [the_dean]**, or click the **arrow** next to the Options button and select **Meet Now -> For [the_dean]**.
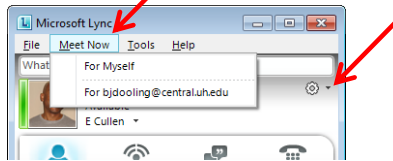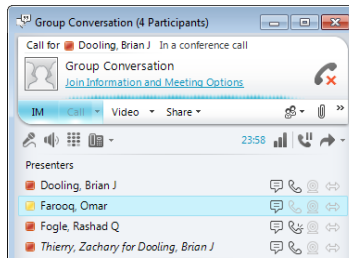

3. In the Group Conversation window that appears, click the People button and select **Invite by Name or Phone Number**.

A list of your contacts appears in the Invite by Name or Phone Number dialog box.

4. Using your mouse, highlight the names (including the dean, if desired) of the contacts you want to invite by simultaneously holding down the <ctrl> key on your keyboard while you click the names.
5. Invite someone who is not in your contact list by typing a 5-digit or 10-digit phone number in the Search field.
6. Click **OK**.

Each person invited receives a Meeting Notification. Clicking the Meeting Notification allows them to join the meeting. The name of each person appears in the Group Conversation window as they join the meeting.
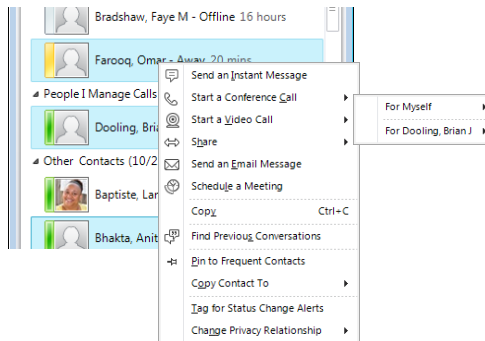

To end the meeting, close the Group Conversation window.

Start a Conference Call on Behalf of Another

To start a conference call on behalf of another:

1. Open **Lync**.
2. Using your mouse, highlight the names of the contacts you want to invite by simultaneously holding down the <ctrl> key on your keyboard while you click the names.
3. Right-click the selection and select **Start a Conference Call -> For [the_dean] -> Lync**.

To end a conference call, close the Group Conversation window.