

Using Lync 2010 for Windows and the CX600 Phone



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The Lync Phone

This section covers the hard phone that sits on your desk. In this section you will learn how to:

- Set Your Sign-in PIN
- Sign-in and Sign-out of Your Phone
- Make and Answer a Call
- Put a Call on Hold
- Transfer a Call
- Park a Call
- Use Voice Mail
- Use the Speakerphone
- Use the Call Log

Set Your Sign-in PIN

Your new Lync phone requires you to sign-in. The phone identifies you and your personal preferences. **You can sign-in to any Lync phone and be recognized.** Before using your Lync phone, you need to set-up a personal identification number (PIN). Similar to a PIN used at a bank, your Sign-in PIN helps keep your sensitive information secure.

To create a Sign-in PIN:

1. In an Internet browser, go to **dialin.central.uh.edu**.
2. Click **Sign-in** and choose **Language**.
3. Click the **Sign-in** button then enter your CougarNet **username** and **password**.
4. Following the criteria on the PIN management screen, enter your PIN in the fields provided.

Note: If you forget your PIN, you can reset it using the steps listed above.



Microsoft
Lync Server 2010

Dial-in Conferencing Settings and PIN Management

Set Your PIN

Your PIN
- must be between 4 and 24 digits long
- cannot contain letters, spaces or special characters
You use this PIN when you dial in to conferences and meetings on your company network.

New PIN:

Confirm PIN:

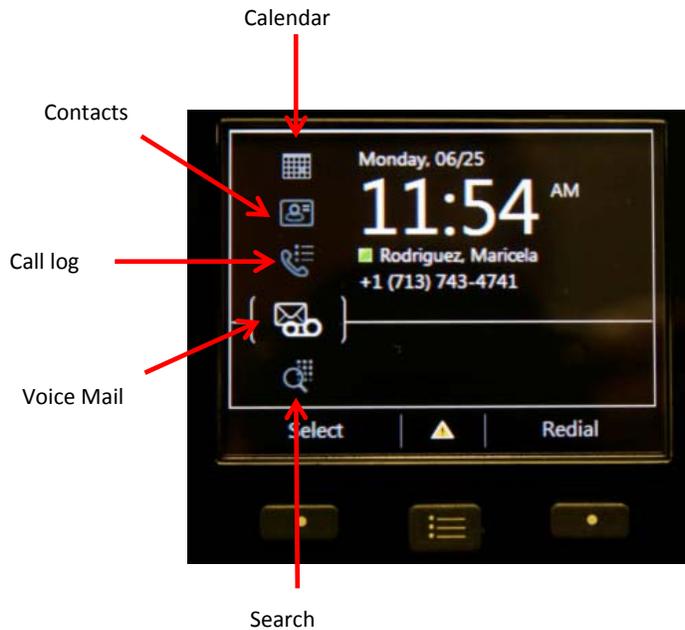
OK Cancel

The Phone Face

Your Lync hard phone provides the same functionality as your existing telephone and more.



The Home screen:



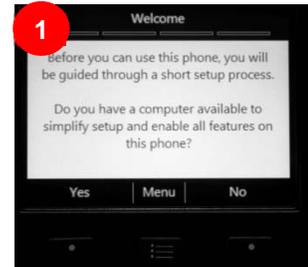
Sign-in to Your Phone

Sign-in to your phone to access your voice mail and other features. This is a one-time-only step. There is no need to sign-in and sign-out of your phone. The only reason to sign-out of your phone is to allow another person to sign-in to it. This occasion might occur if you are sharing a phone with another person.

Note: You can sign-in to *any* Lync phone to receive calls placed to your phone number, as well as check your voice mail.

To sign-in to your phone:

1. On the Welcome Screen press **No**.



2. Enter your 5 digit extension (not your PIN), press **Next**.

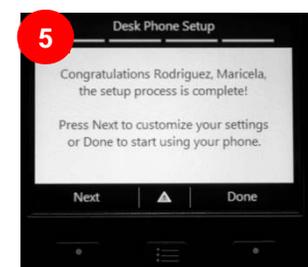


3. Enter your **PIN**, press **Sign-in**.



4. Create a 4 digit Unlock PIN. It can be the same as your sign-in PIN.

5. Press **Done** and you are now signed-in to your phone.



Sign-out of Your Phone

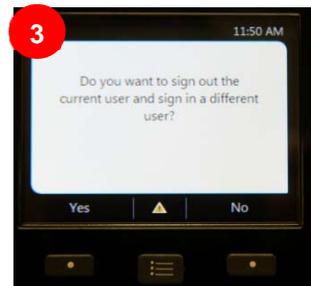
If you sign-in to a phone that is not located on your desk, you should sign-out of the phone when you are done using it.

To sign-out of a phone:

1. Press the **Menu** button.
2. Select **Switch User**.



3. Select **Yes**.



Answer a Call

To answer a call, choose one of four options:

1. Lift **Handset**.
2. Press the **Answer** button.
3. Press the **Speakerphone** button.
4. Press the **Headset** button.



Make a Call

To make a call, choose one of two options:

1. Dial a **5-digit** campus extension.
2. Dial a **10-digit** off-campus number.

You no longer need to use a 9 to dial off-campus.

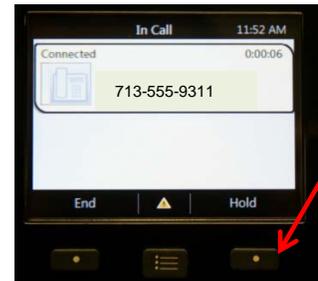
Long distance call: a domestic number [listen for a beep] + your long distance code.

International call: 011 + an international number [listen for a beep] + your long distance code.

Put a Call on Hold

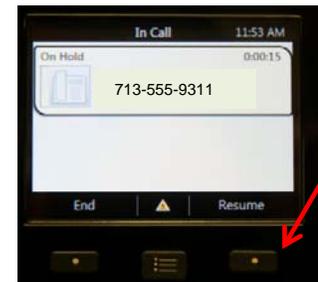
To put a call on hold:

1. During a call, press the **Hold** button.



To retrieve a call from hold:

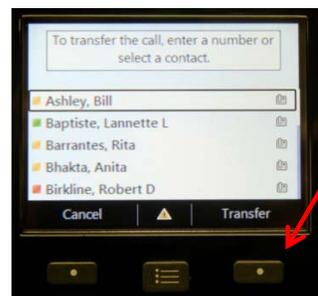
1. Press the **Resume** button.



Transfer a Call

To transfer a call:

1. While on a call, press the **Menu** button.
2. Select **Transfer directly to**.
3. Enter a **number** or select a **contact**. If selecting a contact then you have the option of choosing the contact's phone number or doing a direct Lync call by selecting the blue circle.
4. Press **Transfer**.



Park a Call

Instead of putting a call on hold, you can park the call in a holding queue.

To park a call:

1. During a call, press the **Menu** button.
2. Select **Transfer to Parking Lot**. The call is assigned a retrieval number.

Anyone on campus can retrieve a call from the Parking Lot.

To retrieve a call from the Parking Lot:

1. Using any Lync phone on-campus, enter * followed by the **three digit retrieval** number and press **Call**.

If you want to retrieve a call that you parked, there is no need for you to enter the retrieval number. You can select the call on your Home screen and press **Retrieve**.

Escalate a Call to a Conference Call

To escalate a call to a conference call:

1. While on a call, press the **Menu** button
2. Select **Add Others** from the menu.

Add a Long Distance Number to a Conference Call

The **Add Others** command does not give you an opportunity to enter a long distance authorization code when adding a person with a long distance number.

To add a long distance number to a conference call:

1. Press **Menu** and select **New Call**. Your current call is put on Hold.
2. Dial a **long distance number** or select a **Contact**.
3. Wait for the beep, and then enter your **long distance code**.
4. With the new call on your phone, press **Menu** and select **Merge Calls**.

Make a Call with the Speakerphone

To make a call with the speakerphone, choose one of two options:

1. Dial the desired number, press the **Speakerphone** button.
2. Press the **Speakerphone** button, enter the desired number.



Record Your Voice Mail Greeting

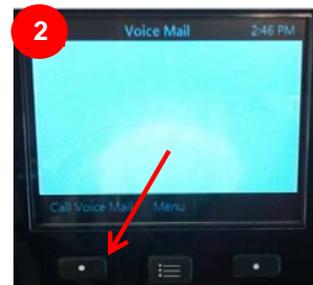
To record your voice mail greeting:

1. On the Home screen, select **Voice Mail**.



2. Press **Call Voice Mail**.
3. Say **Personal Options**.

Follow the instructions given to you over your phone by the Lync assistant.



Reset Your Voice Mail PIN

To reset your Voice Mail PIN with Internet Explorer:

1. Go to email.uh.edu.
2. Log-in to your Email Account.
3. Click on **Options** and click on **Voice Mail**.
4. Click **Reset**.

To reset your Voice Mail PIN with Outlook:

1. Open **Outlook**.
2. Select **Manage Voice Mail** from the **File**.
3. In the Voice Mail Options dialog box, click **Reset PIN**.

Check Your Voice Mail

A red light appears at the upper right corner of your phone if you have a message waiting for you.

To check your voice mail:

1. On the Home screen, select **Voice Mail**.
2. Press **Call Voice Mail**.
3. Say **Voice Mail** into your handset.
4. Follow the instructions for checking your voice mail.

Note: To use the touchtone menu rather than the voice menu, press **0** after calling your voice mail.



To check your voice mail from another phone without signing into the phone:

1. Dial **713-743-6111**.
2. Follow the prompts.

To check your voice mail from off-campus:

1. Dial **713-743-6111**.
2. Follow the prompts.

View Call Log

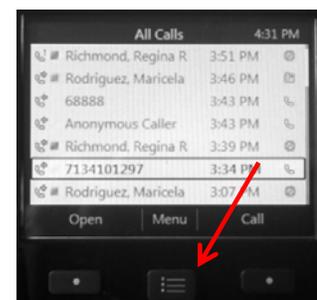
You can view a history of incoming, outgoing, and missed calls.

To view your call log:

1. On the Home screen, select **Call Logs**. A list of all calls (incoming, outgoing, and missed) appears.



2. On the **All Calls** screen, press **Menu** to sort the calls.



Search by Name

You can search for a person on your Lync phone by using the phone keypad. Use the letters on the keypad to spell out the person's name. Select the desired person from the list and your phone will dial their number. Separate the first and last name with the asterisk symbol *.

To search by name:

1. Select **Search** on the Home screen or **Enter a person's name or phone number** directly on the Home screen using the letters or numbers on the phone keypad. Lync will search your person Outlook address book and UH's global address book on Exchange.
2. Select the desired **person** from the list and your phone will dial their number.



Add a Contact

To add a Contact:

1. Search for a person in your Personal Address Book in Outlook, or in the university's Global Address Book.
2. Highlight the name of the person you want to add as a Contact.
3. Press **Menu**.
4. Select **Add to Contacts**.

The Lync Client

This section covers the Lync soft phone, also referred to as the Lync client. In this section you will learn how to:

- Sign-in to Lync
- Define Areas of the Lync Window
- Use Contacts
- Make and Receive a Call
- Use Voice Mail
- Use the Call Log
- Forward Calls
- Access Saved Conversations
- Set a Picture
- Set Your Presence

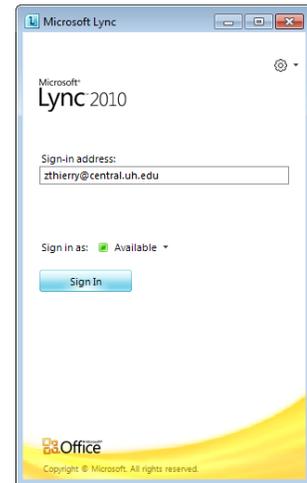
Sign-in to Lync

To open Lync:

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

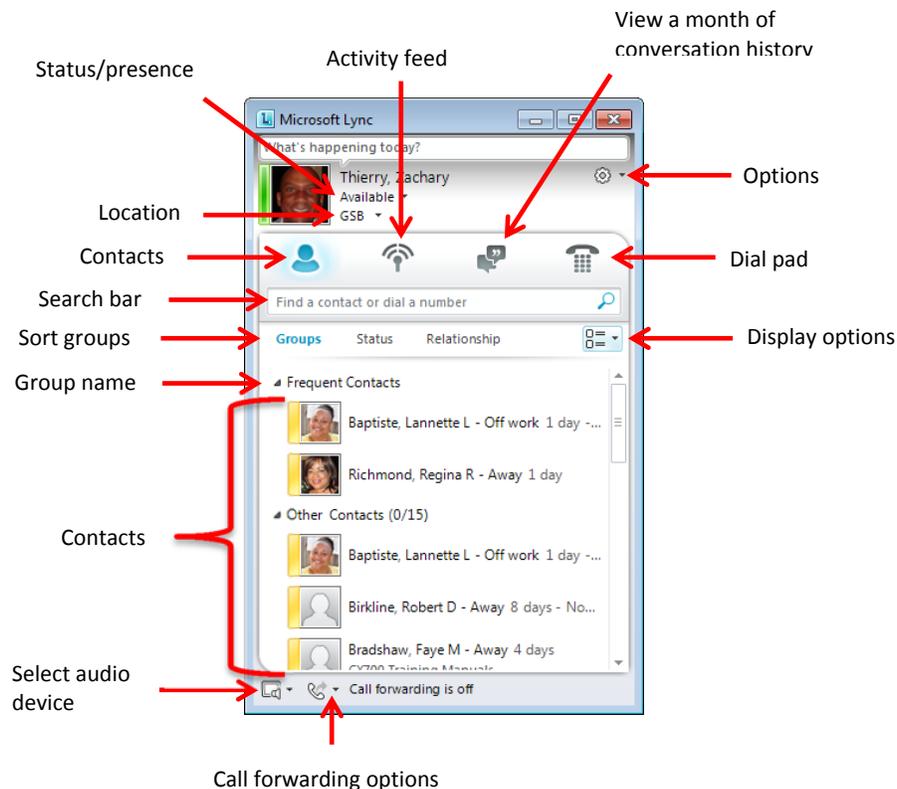
To Sign-in to Lync:

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

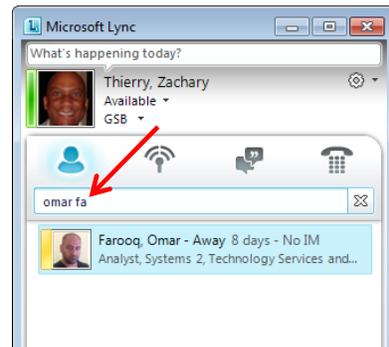
The Lync window that appears after you sign-in is your access to all of the communication tools that are available to you.



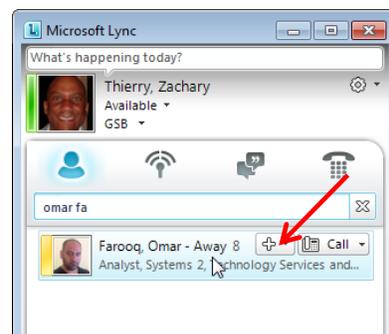
Add a Contact

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.



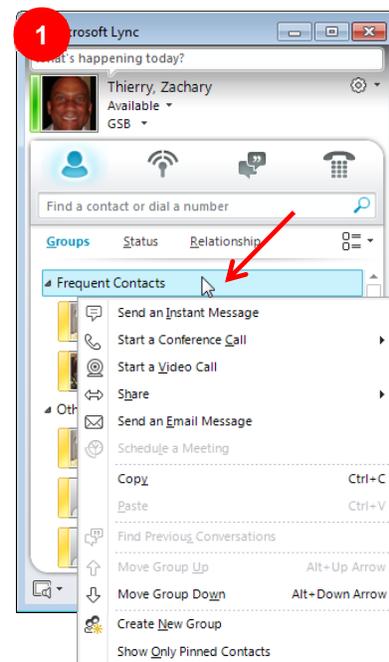
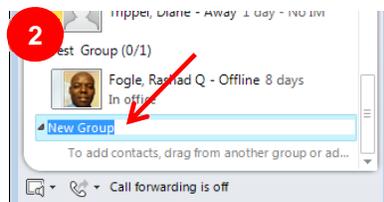
3. Hover over the name of the person you want to add as a Contact.
4. Click the + that appears.
5. Select the desired Contact group.



Create a Contact Group

To create a Contact Group:

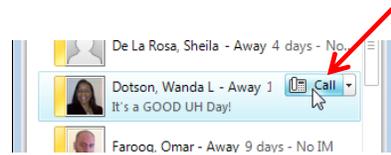
1. In the **Lync** window, right-click an existing group name, and click **Create New Group**.
2. Type a **name** for your new Group in the **Group Name** field.
3. Press **<return>**.



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 with Your Soft Phone

To answer a call:

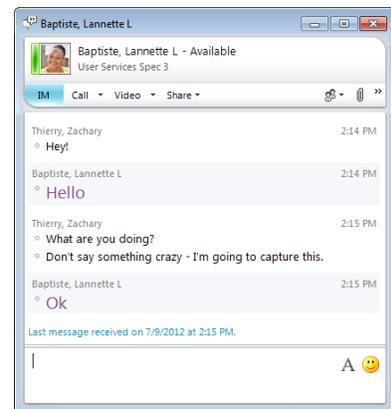
1. When you receive a phone call, a Call Invitation alert appears in the lower right corner of your screen.
2. Click the green **Handset** icon.



Send an Instant Message (IM)

To send an Instant Message (IM):

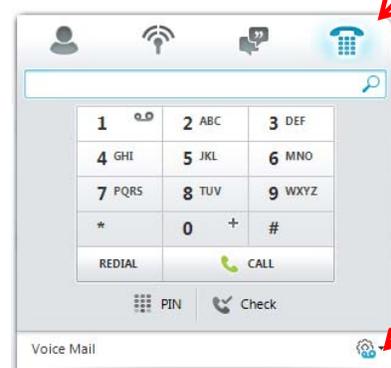
1. Double-click a **Contact**, a Conversation window appears.
2. Type the message that you want to send.
3. Press **<return>**.
4. When the IM conversation is complete, click the **X** in the top right corner of the window to close the Conversation window.



Set-up Voice Mail Using Your Soft Phone

To set-up voice mail:

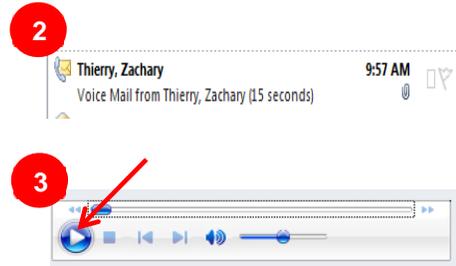
1. Click the **Keypad** icon.
2. Click the **Voice Mail** drop-down menu located under the keypad.
3. Select **Set-Up Voice Mail** from the menu.



Listen to Voice Mail in Outlook

To listen to your voice mail in Outlook:

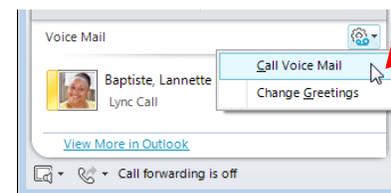
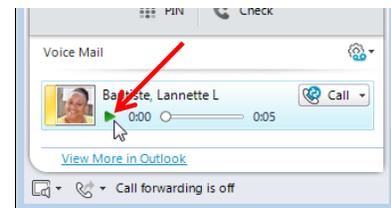
1. Go to your Outlook Inbox.
2. Open any **email** from Lync with Voice Mail in the subject line.
3. Click the **Blue** play button to listen to Voice Mail.



Listen to Voice Mail with Your Soft Phone

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

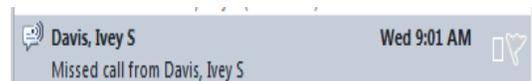
1. In the Lync window, click . Your voice mail appears at the bottom of the window. Hover over the desired message. Click the play button.
2. Click . Click the **Voice Mail** drop-down menu. Select **Call Voice Mail** from the menu.
3. Type **713-743-6111** in the Search field, press **<return>**. Lync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



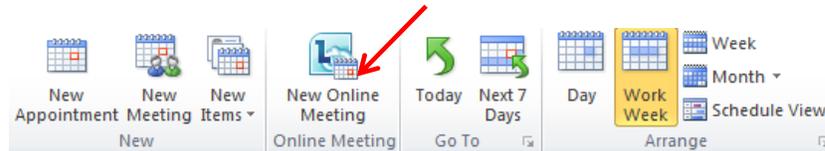
You missed a call from Davis, Ivey S at isdavis@central.uh.edu
Caller-Id: isdavis@central.uh.edu
Job Title: Lead, User Services Spec
Company: University of Houston
Work: [713-743-1411](tel:713-743-1411)
E-mail: ISDavis@Central.UH.edu
IM Address: ISDavis@Central.UH.edu

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.



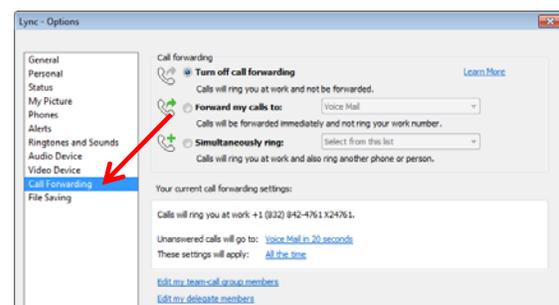
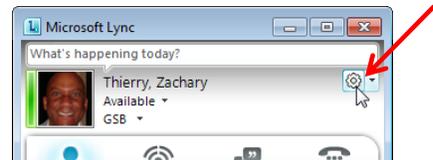
3. Set the meeting date and time, and send the meeting invitation.

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.

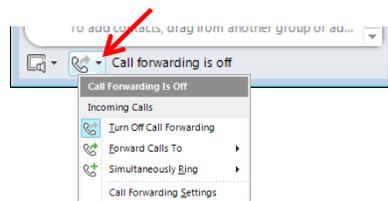
Call Forwarding

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 Contract, or a Delegate.
3. Simultaneously ring – calls will ring in Lync and your work phone, while also ringing at another location that you set.



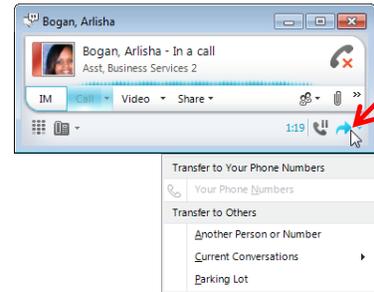
Note: All Call Forwarding options can be accessed by clicking the Call Forward button at the bottom of the Lync window. Select the desired option from the drop-down menu.



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.

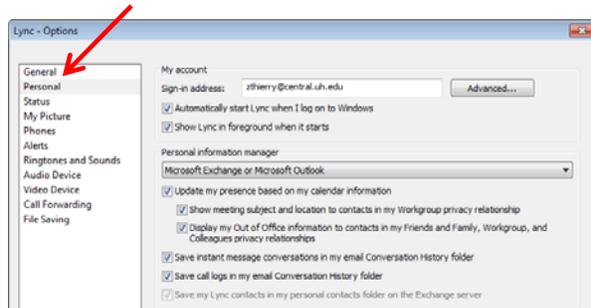


Saved Conversations

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**.

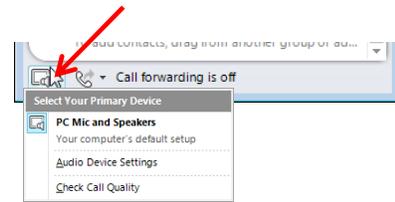
Note: In Internet Explorer, right-click your picture and select **Properties**. Copy the image location shown in the Properties dialog box.

Setting Audio/Video Devices

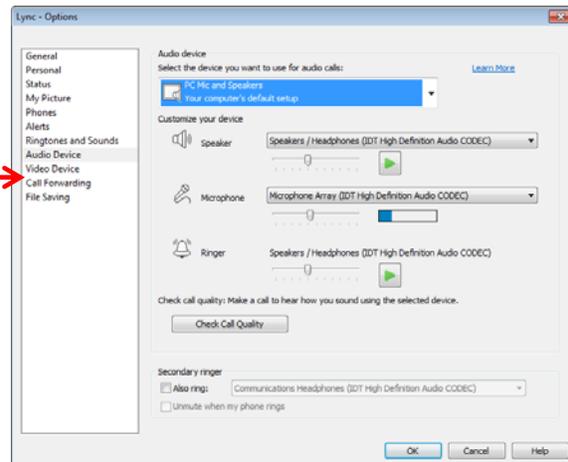
The Options dialog box is used to adjust audio settings and check audio quality.

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



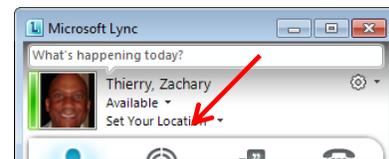
To access Video Device options:

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:

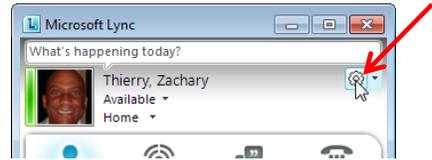
1. Click the **Location** field.
2. Type your **location**.
3. Press **Enter**.



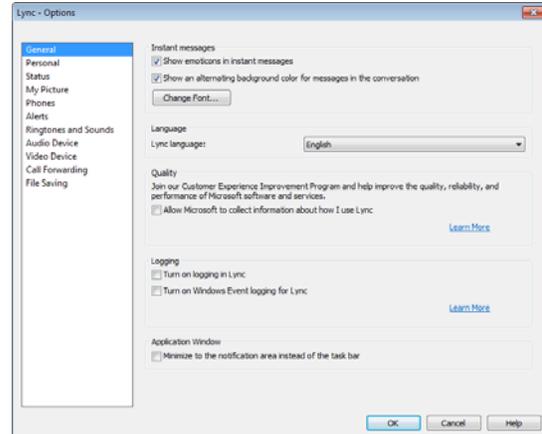
Change Your Personal Options

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 features. In this section you will learn how to:

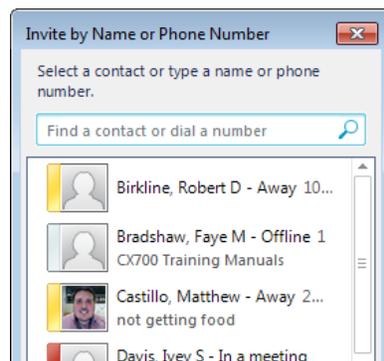
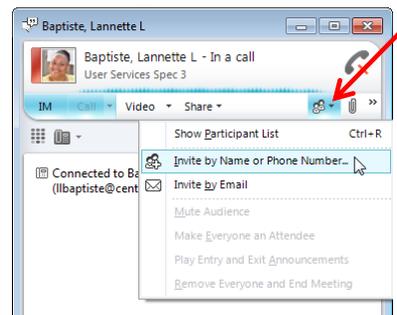
- Start a Conference Call
- Start a Video Call
- Share Your Desktop or a Program
- Send an Attachment
- Record Video
- Use a Federated Contact List
- Assign a Delegate
- Response Group
- Dialing 911

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**.



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.

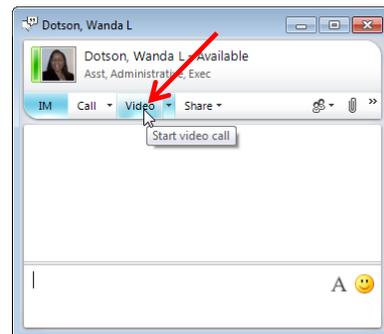
To add a long distance number to a conference call:

1. Dial a **long distance number** or select a **Contact**. Your current call is put on Hold.
2. Wait for the beep, and then enter your **long distance code**.
3. In the Conversation Window of the new call, click **People Options** .
4. 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:

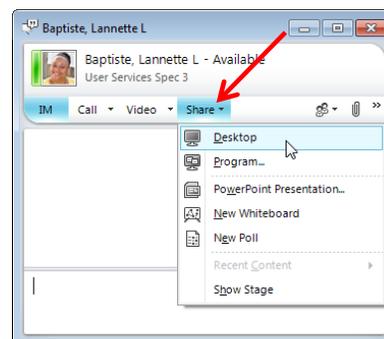
1. In the Conversation window, click **Video**.
2. To end a Video Call, close the Conversation window.



Share Your Desktop or a Program

To share your desktop or an application:

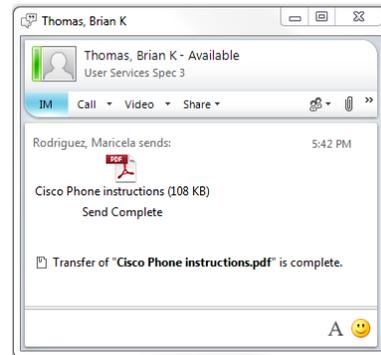
1. During a call, in the Conversation window, click **Share**.
2. Select **Desktop** or **Program** from the drop-down menu.
3. When you are done sharing your desktop, click **Stop Sharing**.



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**.

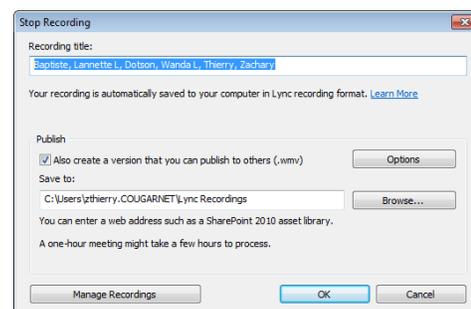
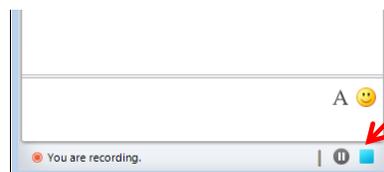
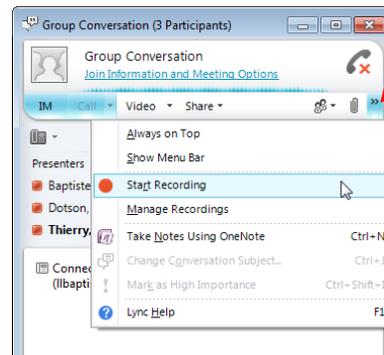


Make a Video Recording of a Meeting

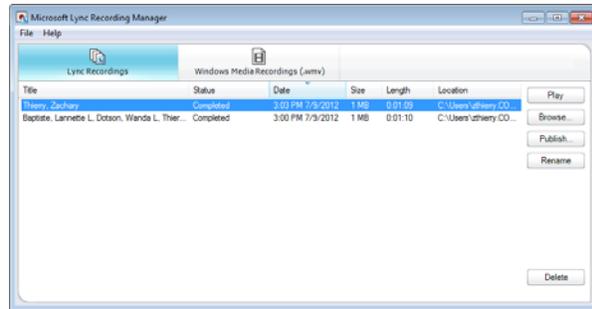
Note: You must be a Presenter to record meetings.

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://windowspbx.blogspot.com/2011/09/usa-microsoft-lync-federation-directory_02.html

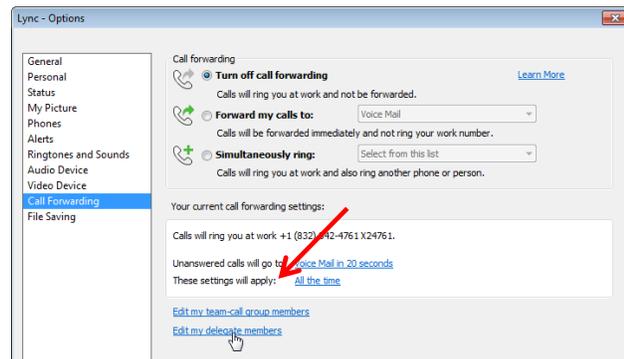
Administrative Work Group

Assign a Delegate

If you need someone to answer your calls and email messages, assigning a Delegate is recommended. A delegate is someone who is granted permission to open your email, send email, set your calendar, and respond to requests. The person granting delegate permission determines the folders they can access and the changes they can make. You can assign one or more delegates to make or receive calls on your behalf.

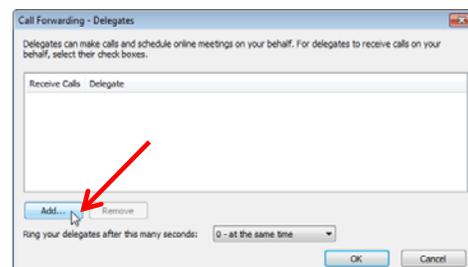
To set-up a Delegate:

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

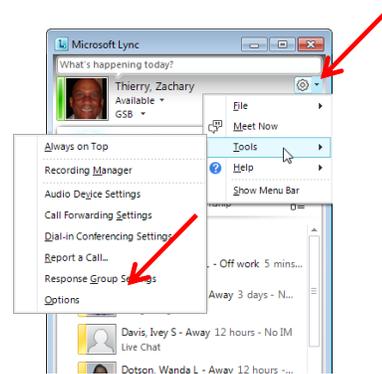
Response Group is a unified communications application that is used to create and configure workflows. Workflows can route and queue incoming calls to designated groups. An agent group is a collection of agents who handle incoming calls from the Response Group. When an administrator creates an agent 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.

Configuring Your Mobile App

Use the following information to configure the Lync app on your smart phone.

SIP or Sign-in Address: **[name]@central.uh.edu** (your full email address)
Password: **[your_cougarnet_password]**

Depending on your phone type, select: **Options** or **More Details**

Username: **cougarnet \ [your_cougarnet_ID]**

Note: It can take a long time (up to five minutes) for the mobile app to sign-in.

Note: Turn WiFi off to sign-in. Turn it back on after you are connected.

Turn on **Simultaneous Ring** in your soft phone to route calls to your cell phone.