Using Lync

for **Windows**

UNIVERSITY of **HOUSTON**

Information Technology

Contents

The Lync Client

This document 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.
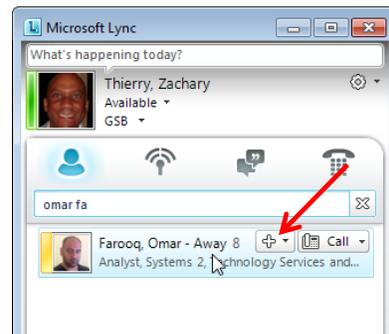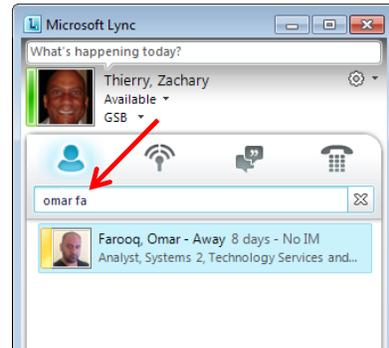
The Lync Window

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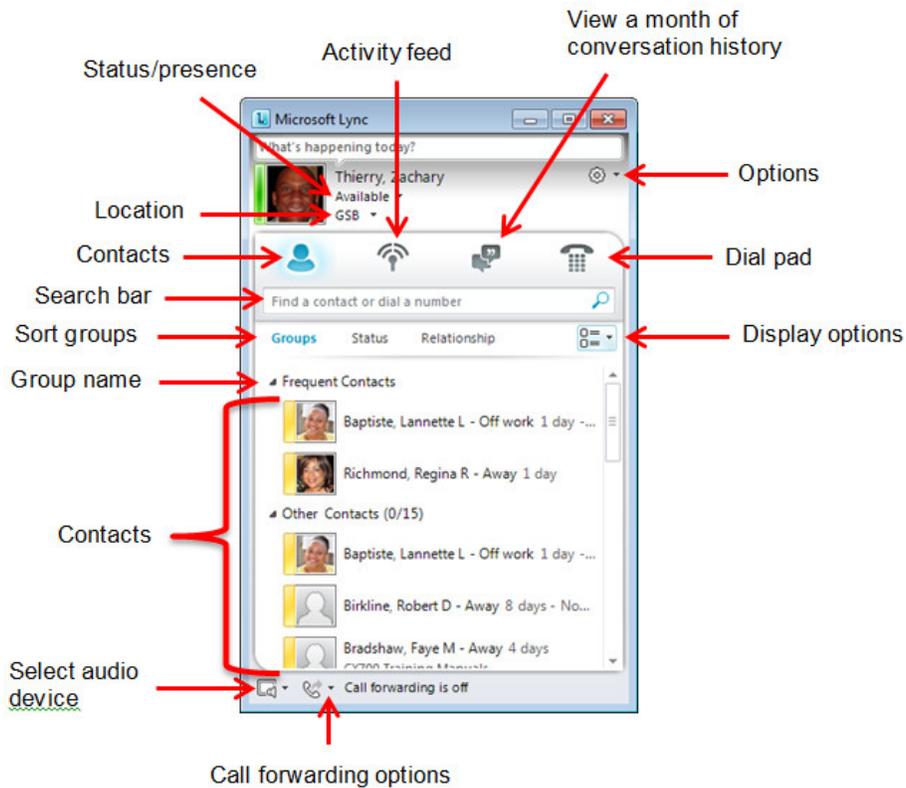
Add a Contact

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.

Create a Contact Group
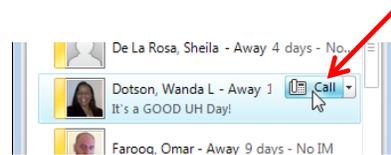
To create a Contact Group:

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>**.
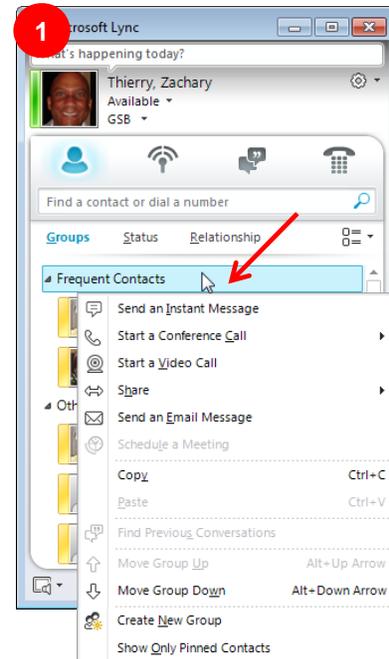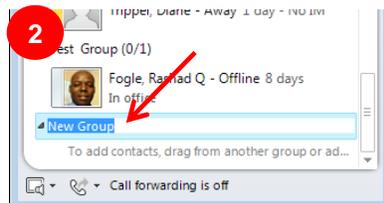
Make a Call with One-Click

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.
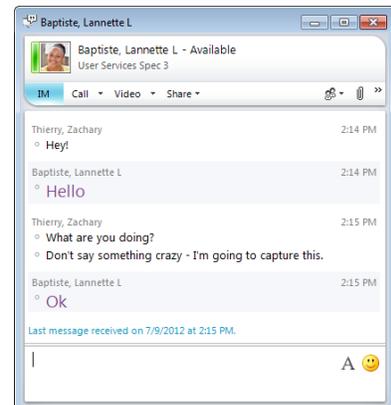
Set-up Voice Mail Using Your Soft Phone

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.
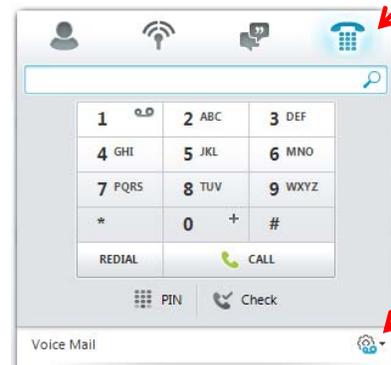
Listen to Voice Mail in Outlook

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.
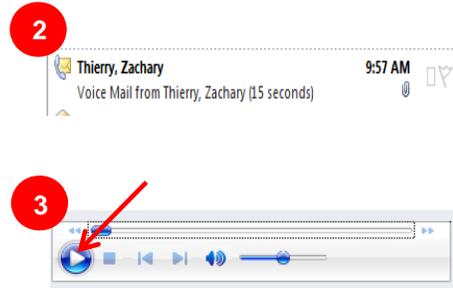
Listen to Voice Mail with Your Soft Phone

There are two ways to listen to your voice mail:

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.
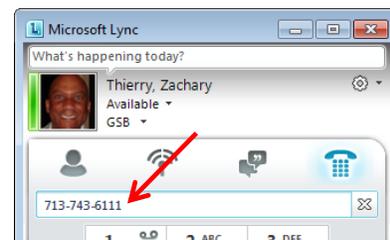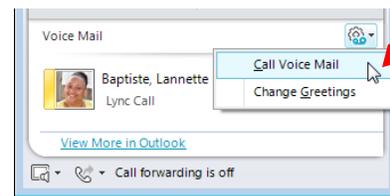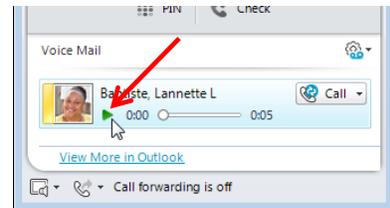
View Missed Calls in Outlook

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.
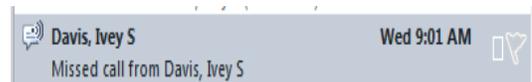
Schedule a Phone Conference or Online Meeting in Outlook

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.

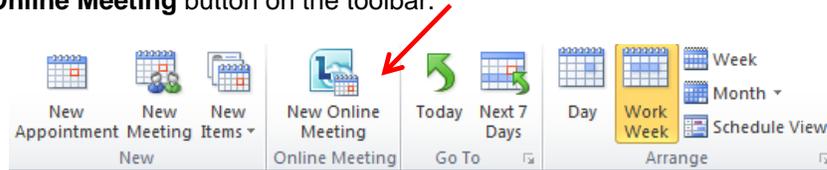3. Set the meeting date and time, and send the meeting invitation.

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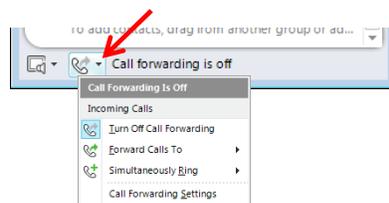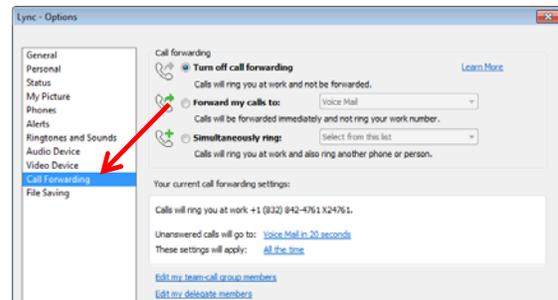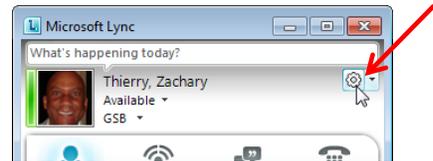
Note: All Call Forwarding options can be accessed by clicking the Call Forward button at the bottom of the Lync window. Select the desired option from the drop-down menu.

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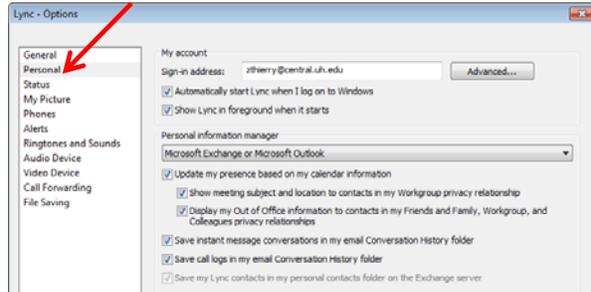
To manage how your IM conversations and phone logs are stored in Conversation History in Outlook:

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 or Flickr), 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
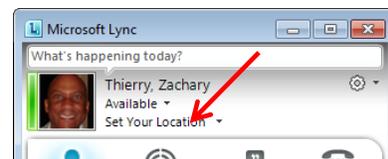
To access Video Device options:

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**.
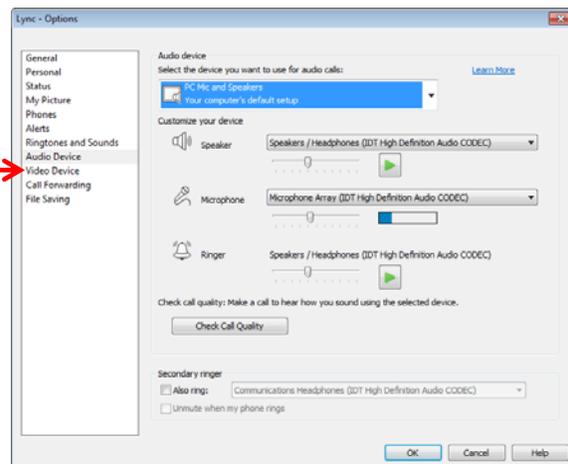
Set Your Presence

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**.
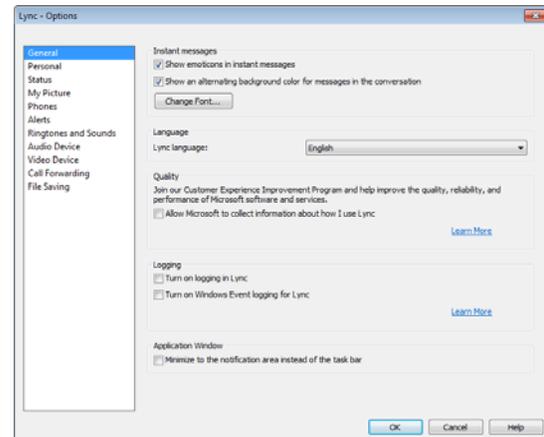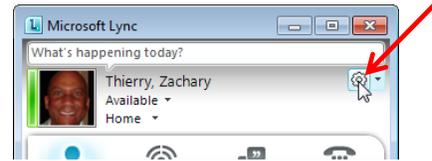
Self Help

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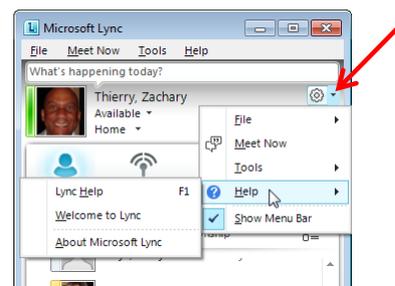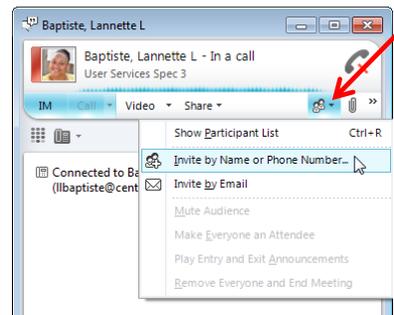- Start a Video Call
- Share Your Desktop or a Program
- Send an Attachment
- Record Video
- Use a Federated Contact List
- Assign a Delegate
- Response Group
- Dialing 911

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**.
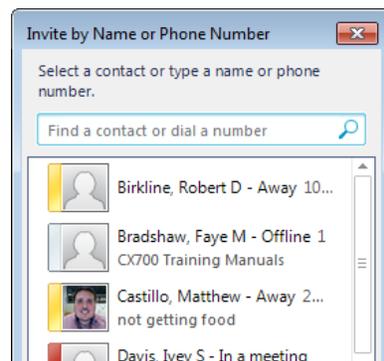
Start a Video Call

To make a video call:

1. In the Conversation window, click **Video**.
2. To end a Video Call, close the Conversation window.
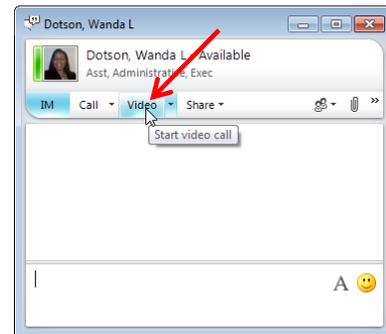
Share Your Desktop or a Program

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**.
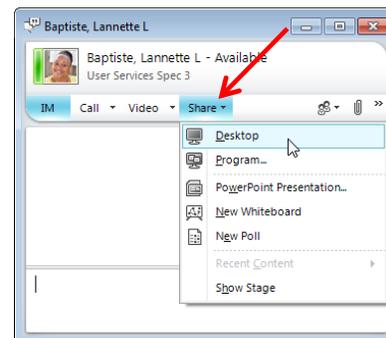
Send an Attachment

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**.
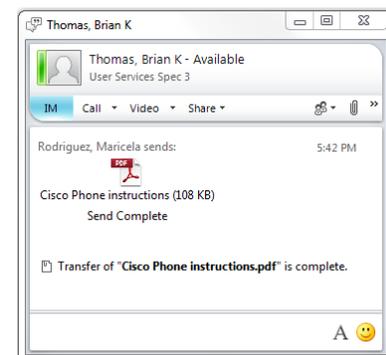
Make a Video Recording of a Meeting

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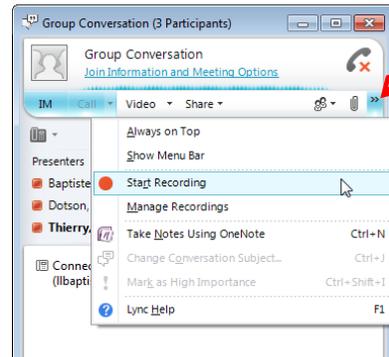
2. While recording, you can use the controls at the bottom of the window to pause, resume, or stop recording.

3. To save the Video recordings click the **Stop** button at the bottom of the window.
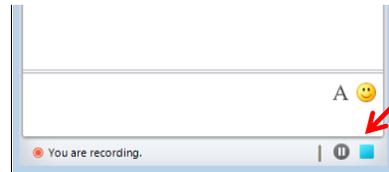
4. Select the directory where you want to save the recording and click **OK**.
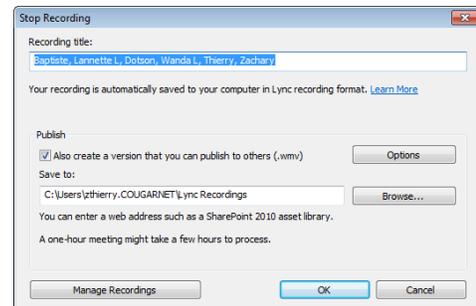
5. To view the saved recording, either go to the directory you saved it in or click on **Start** > **All Programs** > **Microsoft Lync** > **Microsoft Lync Recording Manager**.
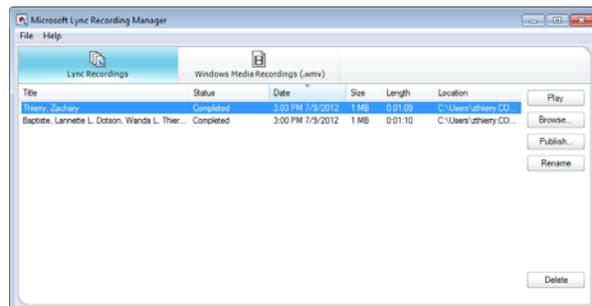
Federated Contact Lists

The Lync federation lets you communicate faster and more effectively with others outside 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

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.