Using Lync for Windows
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.

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**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.

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**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.

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**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.
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.

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 submenu.
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**.
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**.
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.
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.

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.