

# Using Lync 2011 for Macintosh



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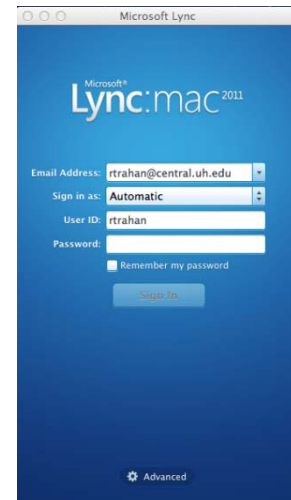
## Sign-in to Lync

To open Lync:

1. Click the **L** on your dock.

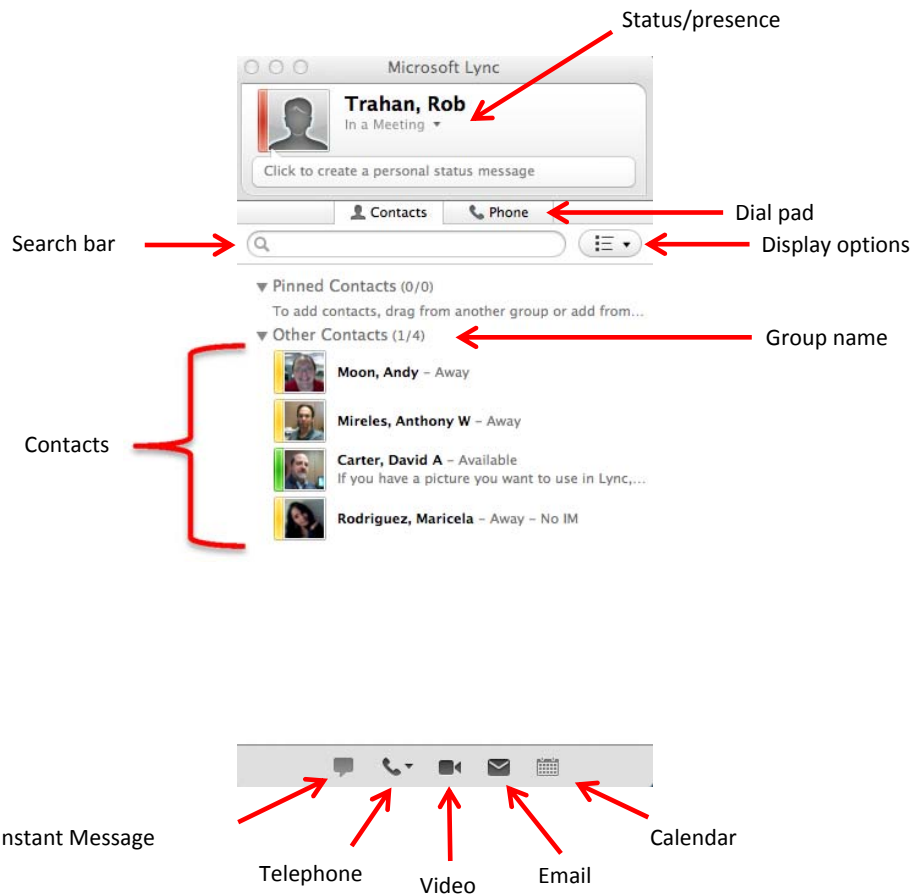
To Sign-in to Lync:

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 **CougarNet ID** in the **User ID** field.
3. Type your **CougarNet 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:

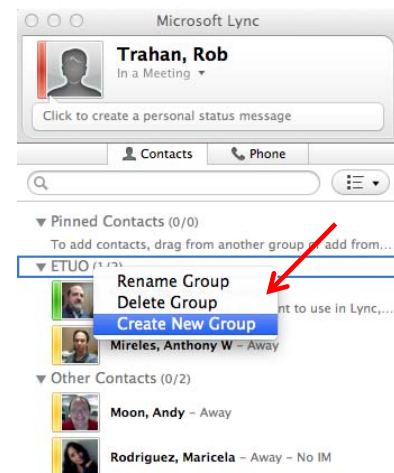
1. Type a name in the **Search** field.
2. The person's contact information appears in the area below the Search field.
3. Click the **+**.
4. Select a **Contact Group**.



## Create a Contact Group

To create a Contact Group:

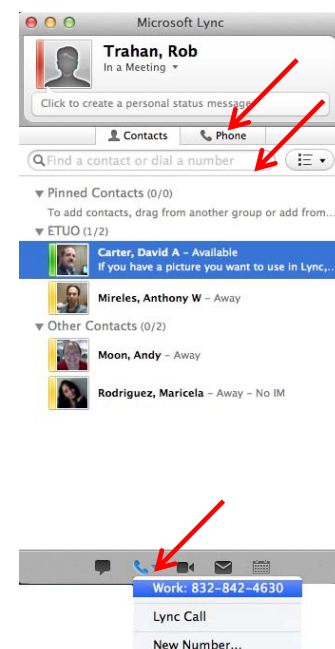
1. Right-click on **Other Contacts**.
2. From the menu that appears, select **Create New Group**.
3. Type a **name** for the group.



## Make a Call

Choose one of three options to make a call:

1. Enter the **phone number** in the Search field and press **<return>**.
2. Select a **Contact**, click the **Telephone** icon at the bottom of the window and select **Lync Call**.
3. Click the **Phone** tab and use the dial pad to make a call.



## Answer a Call

To answer a call:

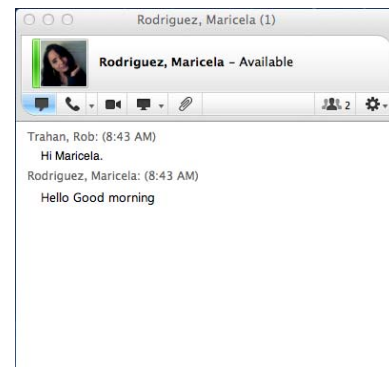
1. When you receive a phone call, a **Call Invitation** alert appears in the lower-right corner of your screen.
2. Click the green **Handset** icon.



## Send an Instant Message (IM)

To send an Instant Message (IM):

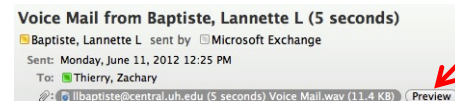
1. Double-click a **Contact**.
2. In the Conversation window that appears, type the **message** you want to send.
3. Press **<return>**.
4. When the IM conversation is complete, click the **red dot** in the top left-corner of the window to close the Conversation window.



## 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 **Preview** to listen to the message.

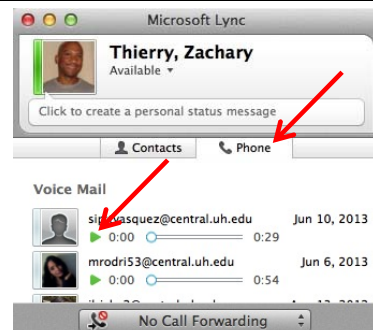


If you are using Entourage for email, the voice mail message will play using the program assigned to play wav files. In most cases, the program assigned is iTunes.

## Listen to Voice Mail in Lync

To listen to your voice mail in Lync, choose one of two options:

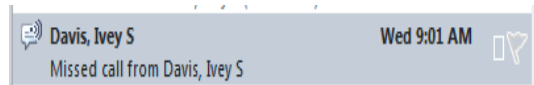
1. In the Lync window, click the **Phone** icon. Your voice mail appears at the bottom of the window. Click the **Play** button.
2. Type **713-743-6111** in the Search field, press **<return>**. Lync dials the Voice Mail system.



## View Missed Calls in Outlook

To view missed calls in Outlook:

1. Go to your Outlook Inbox.
2. Double-click any message with **Missed Call** as the subject.



You missed a call from Davis, Ivey S at [isdavis@central.uh.edu](mailto:isdavis@central.uh.edu)

Caller-Id:	<a href="mailto:isdavis@central.uh.edu">isdavis@central.uh.edu</a>
Job Title:	Lead, User Services Spec
Company:	University of Houston
Work:	<a href="tel:713-743-1411">713-743-1411</a>
E-mail:	<a href="mailto:ISDavis@Central.UH.edu">ISDavis@Central.UH.edu</a>
IM Address:	<a href="mailto:ISDavis@Central.UH.edu">ISDavis@Central.UH.edu</a>

## 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](http://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:

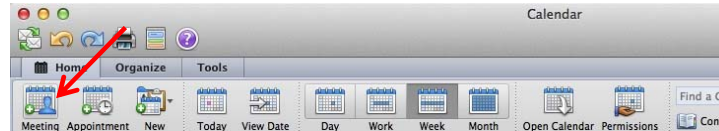
- Everyone waits in the lobby except the Organizer
- No one waits in the lobby
- Only the Organizer is a Presenter

## Schedule a 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 those not using Lync – including students.

To schedule a phone conference or online meeting in Outlook:

1. Open your **Outlook Calendar**.
2. Click **Meeting** on the toolbar.



3. In the Meeting Invitation that appears, click **Online Meeting**.
4. Select **Create Online Meeting** from the menu that appears.

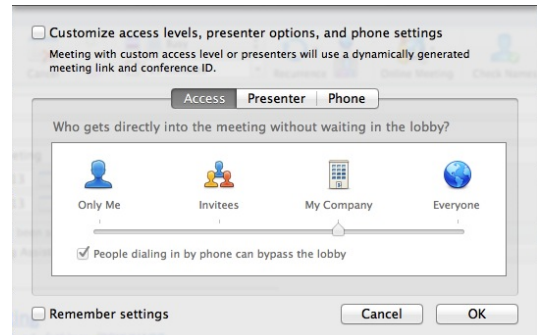


5. Add the **recipients** in the To: field.
6. Enter a **subject** in the Subject: field.
7. Click **Send**.

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.

## Call Forwarding

There are three call forwarding options. To access all three options, click the **Call Forward** button at the bottom of the window. Select one of these options from the menu:

1. No Call Forwarding – turn Call Forwarding off.
2. Forward Calls To Voice Mail – sends calls directly to Voice Mail.
3. Simultaneously ring – calls will ring in Lync and your desk phone, while also ringing at another location that you set.



**Note:** All Call Forwarding options can be accessed by selecting **Phone Call Preferences** from the **Forward** 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.



## Save Conversations

You can save IM conversations to your hard drive.

To manage your IM conversations:

1. Select **Preferences** from the **Lync** menu.
2. In the **History** dialog box that appears, select the desired setting.



## Change Personal Options

To change your personal options:

1. Select **Preferences** from the **Lync** menu.



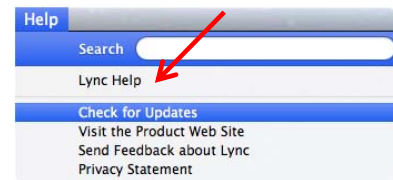
2. In the Preferences dialog box, select the personal options that you want to change. Click on one of the **topics** shown at the top of the dialog box.



## Self Help

To access Lync Help:

1. Select **Lync Help** from the **Help** menu.

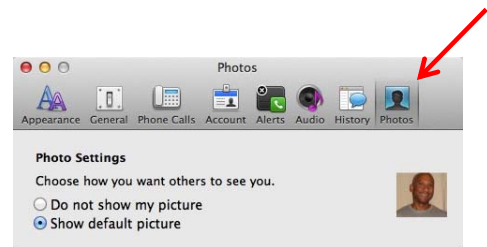


## Set a Picture

It is not possible to set a picture of yourself that appears on your Lync contact card using the Mac version of Lync. To set a picture, you must sign-in to the Windows version of Lync. For instructions on how to set a picture using the Windows version of Lync, see UIT document **Using Lync 2010 for Windows**. If you have a picture in Lync, you can use the Mac version to choose not to show your picture.

To change your photo settings:

1. Select **Preferences** from the **Lync** menu.
2. In the Preferences dialog box, select **Photo**.
3. Choose your photo preference.



# Advanced Lync Features

This section covers advanced Lync features. In this section you will learn how to:

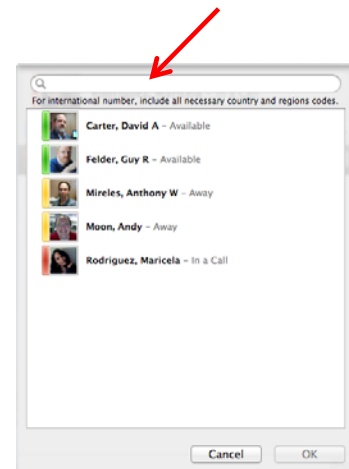
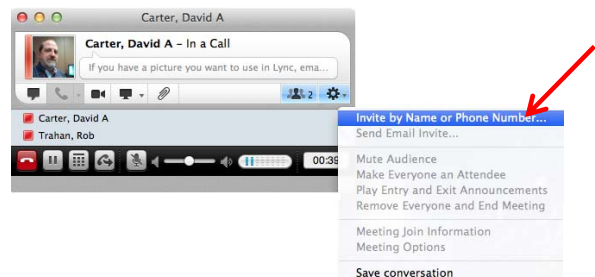
- Start a Conference Call
- Start a Video Call
- Dial a Long Distance Number
- Share Your Desktop
- Transfer a File
- Use a Federated Contact List
- Dial 911

## 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** or enter a **number** in the **Search** field.
4. Click **Ok**.

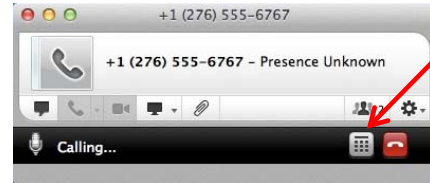


## Dial a Long Distance Number

Your long distance authorization code must be entered using the Lync keypad.

To dial a long distance number:

1. Dial a **long distance number** or select a long distance **Contact**.
2. In the Conversation window of the long distance call, click the **Keypad** icon.
3. Wait for the beep, and then enter your **long distance code** using the keypad. If you enter your long distance code too soon, the call will fail.



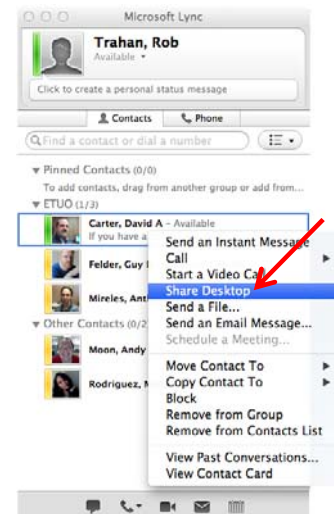
## Add a Long Distance Number

Unfortunately, it is not possible to add a long distance number to a phone conference or online meeting. If a person with a long distance number needs to join a phone conference or online meeting already in progress, send the person a meeting invitation or email the dial-in number and conference ID. You cannot add them, but they can dial-in.

## Start a Video Call

To make a video call:

1. In the Lync window, right-click a **Contact**.
2. Select **Start a Video Call** from the menu.
3. To end a video call, close the Conversation window.

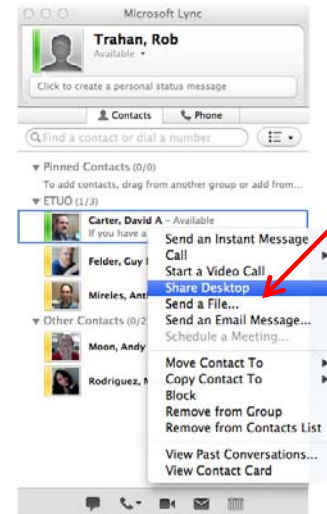


## Share Your Desktop

To share your desktop:

1. In the Lync window, right-click a **Contact**.
2. Select **Share Desktop** from the menu.
3. To stop sharing, close the Conversation window.

**Note:** Giving control of your desktop and application sharing are not possible with the Mac version of Lync.



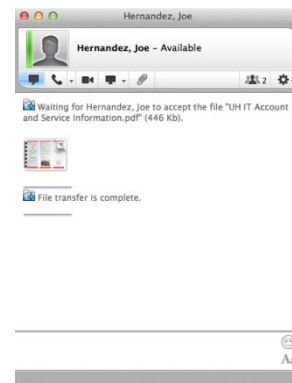
## Transfer a File

To transfer a file to a contact, choose one of two options:

1. With your mouse, drag and drop a file that you want to send onto the Conversation window.

or

2. In the Conversation window, click the paperclip and select the desired file. Click **Ok**.



## Assign a Delegate

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. For more information on delegation including how to delegate an Outlook mailbox, see UIT document **Delegate Access in Lync 2011**.

To set-up delegate access in Lync:

1. Open **Lync**.

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

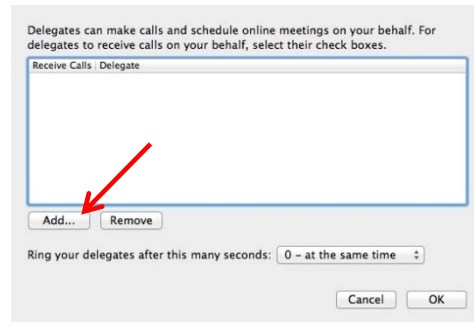
When creating a delegate for a department phone, the sign-in address is **ld\_xxxxx@central.uh.edu** where xxxxx is the **5-digit department phone number**. The password for a department account is available from your local IT support.

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

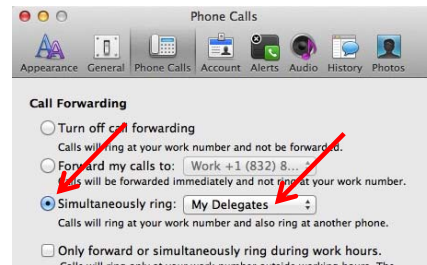


6. In the Delegates dialog box, click **Add**.
7. In the list of Contacts that appears, select the **desired name**.

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.

## 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](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.