Delegate Access In Lync 2010



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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 **Id_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.

ync - Options			-
General	Call forwarding		
Personal	🖓 🕐 Turn off call forwarding	Learn More	
Status	Calls will ring you at work and not be forwarded.		
My Picture	C Forward my calls to: Voice Mail		
Alerts	will be forwarded immediately and not ring your work number.	V	
Ringtones and Sound	Ct @ Simultaneously ring: My Delegates	*	
Audio Device	Calls will ring you at work and also Work 832-842-4761		
Call Forwarding	Your current call forwardon settings: My Team-Call Group	La la	
Eile Cauloo			

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

Receive Calls	Delegate		

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 **Id_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.
 - Open in New Window

 Open File Location

 Remove Thierry, Zachary'

 New Folder...

 Show in Eavorites

 Account Properties...

 Folder Permissions

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

Outlook Today - [Thierry, Zachar	ry] Properties	×
General Home Page Permission	ns 🦰	
Name	Permission Level	
Default	None	
Anonymous	None	
Add	Remove Properties	
remissions		
Permission Level: None	-	

- 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**.

Outlook Today - [Thierry, Zacha	ary] Properties	×
General Home Page Permissio	ons	
Name	Permission Level	
Default	None	
Anonymous	None	
Farooq, Omar	Owner	
Add	Remove Properties	
Permissions		
Permission Level: Owner	•	
Read	Write	
Mana	Crosto itomo	

- 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**.

ccount Setting	s							×
E-mail Acco You can a	unts dd or remo	ve an acc	ount. You	can s	elect an account and	change its settings.		
E-mail Data F	-mail Data Files RSS Feeds SharePoint sts Internet Calendars Published Calendars Address Books							
🧟 New 💈	Repair	. 🔗 Ch	ange	🔊 s	et as Default 🗙 R	emove 👚 🖶		
Name					Туре			
Szthierry					Microsoft Exc	hange (send from this	account by default)	

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

10. Click Add.



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

Add Mailbox		×
Add mailbox:		
	ОК	Cancel

12. If more than one potential match is found, select the desired name in the Check Name dialog box.

Check Name		×
More than one potential match has been found for: Change to	farooq	
Farooq, Omar	•	Properties
Farooqi, Maha D		
Farooqi, Sehrish R	E	
Farooqi, Sidra D		
Farooqui, Salma A		
Farooqui, Salman	-	
	ОК	Cancel

- 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.

🖑 Group Conversation (1 Participant)					
Call for 🧧 Dooling, Brian J Away					
Group Conversation Join Information and Meeting Options					
IM Call - Video - Share -	g ^g • U ≫				
R 🕪 🏭 📾 -	0:08 📶 🖑 🏕 -				
Thierry, Zachary for Dooling, Brian J	F 🗞 💿 ⇔				

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**.

Bradshaw, F	aye I	I - Offline 16 hours	Ē	
Farooq, Om		Send an Instant Message]
People I Manage Calls	Ś	Start a Conference <u>C</u> all	•	For Myself
Dooling, Bri	Ĵ Ĵ	Start a <u>V</u> ideo Call S <u>h</u> are	> >	For Dooling, Brian J
▲ Other Contacts (10/2)		Send an <u>E</u> mail Message		
Baptiste, Lar	Ð	Schedule a Meeting	Chill C	
Bhakta, Anit	P	Find Previous Conversation	s	
	4	Pin to Frequent Contacts Copy Contact To	•	
		Tag for Status Change Aler Change Privacy Relationshi	ts p →	

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