# UniCom and Microsoft Lync Basic
## Windows User Guide

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![Diagram of Lync user interface elements]
What is UniCom?
UniCom is IU’s term for unified communications, a service at IU that brings voice, video, and data together in a unified desktop communication system, providing instant messaging (IM), telephone, email, desktop sharing, and audio/video conferencing.

What is Microsoft Lync?
Microsoft Lync is a virtual connection between you and the people you work with.

UniCom has integrated Microsoft Lync into IU’s communication systems to bring instant messaging (IM), PC to PC phone calls, video calls, email, and calendar features.

Who can use UniCom services?
At Indiana University Southeast, faculty and staff can use Microsoft Lync to communicate with those with UniCom accounts.

Setting up Microsoft Lync
Microsoft Lync is an application that allows users to communicate with other people with UniCom accounts.

Download Microsoft Lync
1. From http://iuware.iu.edu
2. Find Office Tools on the left menu
3. Click UniCom Lync Client
4. After you have read through the Installation Notes and signed the Emergency 911 Acknowledgment Statement, click the link that appears beneath Downloads. You may be required to log in.

Required equipment and how to test it
To use the voice communication capabilities of Microsoft Lync, you need a headset with a microphone or speakers and a microphone. If you want to use the video conferencing features, you will need a webcam.

You can test your audio and video equipment from the Lync Options button.

To set up audio and video:
1. Click the Lync Options button.
2. In the Options environment, choose either Audio Device or Video Device.
3. Choose the appropriate settings for your environment.

Note: When using UniCom Enterprise Voice, a shortcut appears at the base of the Lync window. The Select Primary Device shortcut button may be found in the lower left corner of the Lync window. Clicking on this button allows you to choose from all audio enabled audio devices, and allows you to switch between them rapidly.
Place Phone Calls Using Microsoft Lync

Lync can be used like a telephone to make calls between you and other Lync users from your computer if you have a headset with a microphone.

Initiating a call
To find someone, type their name, IU username, email address, or phone number into the Lync Search field and a list of names will appear as you type.

If you choose to search using a phone number, type all 10 digits including the area code. Dashes, parenthesis and the ‘1’ in front of the phone number are unnecessary. You also do not need to press ‘9’ to dial outside the IU Southeast network.

To call a contact, click the Call button to the right of the name. The default work number will automatically dial. If an alternate number is needed, click the drop-down menu next to the call button and select the appropriate phone number. If the contact is unavailable, a voicemail can be left.

The next step will be determined by the Presence State and whether or not the recipient of your call subscribes to UniCom:

a. If the recipient has no UniCom subscription, the Lync Call option and the New Number option appear:

If you select the Lync Call option, the call aborts. To make a call, click on the New Number option. Type the appropriate number into the dialogue box that opens:

b. If the recipient of your call has a UniCom account but an unknown Presence State, a ‘work number’ option appears in addition to those in section a.

Make a Lync PC-to-PC call to other UniCom users by clicking the Lync Phone icon.
Answering a call in Lync
When you have an incoming call, the computer will emit an electronic ‘ring.’ On the lower right corner of your computer screen, you will see a small pop-up window indicating that you have an incoming call.

To answer a call:
Click anywhere in the top half of the window to answer the call. If you click on the Decline button, the call will not connect. The Redirect button allows you to redirect the call to voicemail or to another contact.

Disconnecting a call
In all calling modes, the call is managed in the Conversation Window.

To hang up:
1. Click the End Call button in the upper-right corner of the Conversation Window

Placing and removing a call from Hold
Using Conversation Windows, you can have several calls open simultaneously. When you answer or initiate a second call while the original is in progress, the original call is muted and the newly generated call becomes active.

When you return to the original Conversation Window, you must click on the Resume Call button that appears in any conversation on hold.

Redirecting a Call:
Click Redirect in the pop-up, and choose Voice Mail or Another Contact.

Transfer a call
To transfer a call:
1. In the conversation window, click the Transfer icon.
2. Click Another number or contact.
3. Double-click the name in the Contacts list or enter a new number that you want to transfer the call to. The call disappears from your conversation window.
   An unsuccessful transfer results in an error message being displayed.

To transfer a call to a contact's voicemail in Windows:
1. While conducting the phone call, go to your computer screen and find the Lync pop-up window for the call.
2. Click the Transfer button (the curved arrow at the bottom right of the pop-up window).
3. Click Another number or contact.
4. Find the contact that you wish to transfer to.
5. Hover over the contact with your mouse and click the arrow next to the call button.
6. Click Voice Mail in the drop-down menu.
Call Forwarding
Lync 2010 Enterprise Voice offers a range of call forwarding options. To view some of these options, in the Lync Options window, select Call Forwarding:

You may set Lync call forwarding to three different options:
- Turn off call forwarding; Forward my calls to; and Simultaneous Ring.
- The ‘Turn off call forwarding’ option restricts all incoming calls to your Lync phone.
- Alternatively, if you have all your delegates, team-call group members, and alternate phone numbers configured, you can use the Call Forwarding shortcut button which appears in the lower left corner of the Lync window. An action menu opens from which you may choose any of the configured options with a click.

Forwarding calls:
Forwarding your calls allows you to send incoming calls to your voicemail, to someone else, or your cell phone.

Call Forwarding Options:
1. Click on the Lync Options button.
2. Click Call Forwarding on the left menu.
3. Choose one of the call forwarding options.
4. When you click on the Forward my calls to option, you can then select to forward your calls to Voice Mail, My Delegates (see 'To add Delegates' below), or New Number or Contact.
5. When you click on the Simultaneously ring option, choose a New Number, My Delegates (see 'To add Delegates' below), or My Team-Call Group. Calls will also reach your phone. You can also set a delay in which calls will ring to your phone for a set amount of time before reaching your delegate(s).

Note: If you choose a long-distance phone number for forwarding, or simultaneous calling, the IU phone system will prompt anyone calling from IU's system for a long-distance access code. When this occurs, the call bypasses your Lync work-phone completely and goes directly to the long-distance number.

To add Delegate(s):
1. Click on the Edit my delegate members. A list of your contacts opens.
2. In the Contact List, select one or more of your contacts as your delegate(s). You may only select persons inside your organization.
3. Ensure any of your Delegates that you wish to receive your forwarded calls have check marks in the boxes next to their names.
4. Click OK.

*For more on Delegates and Team-calling, see the CX600 Desktop Phone Training Handout (PDF).
Viewing missed calls
Even if a missed call does not have an associated voicemail message, you can view the information about the missed message. When you miss a phone call, but there is no Voicemail message, Lync alerts you to the missed call by changing the appearance of the Conversations Environment button in the Lync window.

To contact the caller directly from the missed conversation, double-click any missed conversation in the window; this method allows you to continue the missed call as an IM, Video chat, or Sharing event. Alternatively, to return a call with a telephone call, just click the Call button to the right of the listing.

Call Volume Settings
You can adjust the volume settings so that all sounds are reduced when you receive a phone call.

To reduce all volume settings when there is an incoming phone call:
1. Click the Lync Options button.
2. Choose Ringtones and Sounds on the left menu.
3. Click Sound Settings.
4. Click the Communications tab.
5. Choose your desired volume setting.
6. Click Apply.
7. Click OK.

Using Video
You can add video to calls made through Lync.

Adding Video to a conversation
Just as you generate an IM or Lync call, if you have a video camera (or webcam) hooked up to your computer, you can place video calls. Participants who have video cameras will be seen in the Conversation Window, while an icon will appear for those who do not have a webcam.

To initiate a video call:
1. Double-click the contact you want to call. A Conversation Window opens.
2. Click the Video button in the active conversation window.

The Conversation Window now shows a large pane and an IM pane in the lower section. Participants with configured video cameras will be seen in the video pane. Observers of participants without video configurations see a generic image.

Images are seen in picture-in-picture layout; the image of the person who is speaking will be automatically featured as the largest in the window. To initiate a video conference call, see the ‘Initiate a Conference Call’ section under ‘Conferences’.
Record, View, and Share a Meeting

**Record a Meeting:**

1. Click the Options button in your meeting, and then click Start Recording.
2. The Pause and Stop commands become available at the bottom of the meeting window.
3. Click the Stop button and customize the options on the Stop Recording window if needed.
4. By default, Lync saves your recordings in Lync recording format in the location: C:\Users\username\LyncRecordings. Click Browse to save your recording to a different location.
5. By default, the option to save the recording in (.wmv) format is also enabled. If not, select the Also create a version that you can publish to others (.wmv) check box. This option saves your recording in a single .wmv video format, which you can send to others.

**View Your Recording:**

1. Click Start, All Programs, Microsoft Lync, and then click Microsoft Lync Recording Manager.
2. Tip: You can also access the Recording Manager from Lync. Click Tools on the menu bar, and then click Recording Manager.
3. In the Recording Manager window, select if you want to view the recording in Lync Recording format or Windows Media Recordings format. Click the appropriate tab at the top of the Recording Manager window.
4. Select a recording, and then click Play.
5. If you have selected the Windows Media Recordings format, the recording will play in Windows Media Player. If you have selected the Lync format, the recording will play in Lync Recording Playback.

**Share a Recording:**

1. Open the Recording Manager, and click the Windows Media Recordings tab.
2. Select your recording, and then click Browse to the location where your recording was saved.
3. Copy the file and post it where others can access it.

*If you have saved your recording only in the Lync Recording format and want to have a WMV version as well, follow these steps:*

1. Click the Lync Recording tab.
2. Select your recording, and then click Publish.
3. In the Save and Publish window, change the name and path of the recording if you want, and then click OK.
4. In the Save and Publish window, change the name and path of the recording if you want, and then click OK.

**TIP:** You can also publish the recording directly to a location accessible to others, such as a team SharePoint.
Instant Messaging (IM)

Microsoft Lync allows you to send and receive instant messages to others with UniCom accounts.

When you initiate a chat session in Lync, you generate a new Conversation Window. A Conversation Window is a small window that allows you to chat, screen-share, transfer files, manage PC-to-PC calling, and more. Commonly, people begin conversations with an instant message display and then shift to PC-to-PC calling and desktop sharing. In a single Conversation Window, you can smoothly shift from one mode of communication to another. All these modalities may be used together or separately.

Generating an IM
In Lync, there are several ways to initiate an IM session.

To generate an IM session by finding a name in the Search Field:

1. To find someone, simply type the name or IU username into the Lync Search field.

   You can use common name or username arrangements, for example: John Doe; Doe, John; johdoe; or johdoe@ius.edu. A list of names appears as you type: A bar parallel to the edge of the user icon will be displayed to the left of the name. If the person has a UniCom account, the bar will be colored. The color of the bar indicates that person’s status. If the person does not have a UniCom account, the bar appears empty.

   Note: The image to the right shows ‘Picture View.’ You may view your contact list in ‘Name View.’ In Name View, the Contact List does not contain pictures or silhouettes. The Status of your contacts is shown with a small colored square.

   Important: Using UniCom Basic, you may IM or call only those who have colored icons. (Note, that all IU people are eligible to get UniCom accounts; those with the empty bars have yet to sign up).

2. Double-click the name.

   A new Conversation Window opens in IM mode by default; the IM pane appears at the bottom.

3. Type your text into the bottom pane and press Enter.

To initiate an IM conversation in an existing Conversation Window:

1. Click the Show Instant Message Area icon. An IM pane opens in the Conversation Window.

2. Type your text and press Enter.
Attaching a file in an IM
You can send a file securely with an instant message. When you transfer a file through IM, the email quota of both the recipient and the sender remains unaffected.

To send a file:
1. Click the Send a File icon:
2. Browse to the file you want to send. If accepted, the file copies into the recipient’s ‘My Received Files’ folder under My Documents.

Note: A file cannot be sent to more than one person at a time.

Conversation Logs
If you have an IU Exchange account, all your IM conversations and phone logs can be stored in Outlook, inside a folder named Conversation History. By default, Lync will automatically store 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 on the Options button.
2. Under the Personal tab, determine the desired settings from the following:

Conferences
You can have a meeting without leaving your computer by using Lync phone (PC to PC), video, or IM conferences using Microsoft Lync.

Initiate a Conference
From the main Lync window, you can initiate a conference with others by email invitation or by selecting a contact.

To initiate a Meet Now conference:
1. Click the Lync Menu button (the arrow next to the Options button) and click Meet Now. A Conversation Window opens.
2. Click the People Options drop-down menu. A set of choices are displayed:
   a. To bring someone who utilizes Lync directly into the conference, click Invite by Name or Phone Number.
   b. To switch between means of communication, click on the IM, Call, or Video options toward the top of the conversation window.
   c. To invite someone who is not available via Lync, or is a non-IU person, choose Invite by E-Mail. This allows both IU and non-IU participants to join.

   You can also provide a hyperlink (URL) for those who do not have Microsoft Lync, but have alternate communication clients such as Windows Live Messenger, AOL, or Yahoo. To provide a hyperlink, click on Join Information and Meeting Options.
Video Conference
Follow the steps under ‘Initiate a Conference,’ under the ‘Conferences’ section. Then, follow the steps under the section called ‘Using Video.’

Join a Conference
There are a few ways to connect to a Lync Online Meeting.
- Join a scheduled online meeting through Outlook.
  1. In the Microsoft Outlook Calendar, open the meeting you want to join.
  2. In the meeting request, click Join online meeting.
- Join a meeting via a hyperlink (URL). This should be provided to you in the email invitation.
  1. Visit the hyperlink on your internet browser.
  2. Lync will automatically start up.
  3. You may have to log in with security credentials. They should be provided to you by the conference initiator.

Starting a Conference Call from Outlook
If you have an IU Exchange Outlook client, you may use the Schedule a Conference Call feature in Outlook. Invitees may join using Lync or using a web browser. The invitation that Outlook creates will contain a phone number that people can use to join the conference call. In this case, web-joiners may connect to the conference using both the Lync web application and their own call-in device, or choose either mode alone.

To Schedule a Conference Call in Outlook:
1. Click the Schedule a Conference Call button in the Outlook Button bar (if available);
or
2. From the Outlook Menu bar, click Conferencing and then click Schedule a Conference Call.

For more information about inviting by contacts or email invitation, see step 2 of ‘Inviting additional participants to a current call,’ below.

Inviting additional participants to a current call
In UniCom Basic mode, you can invite any UniCom user to join in your current conversation at any time during the call.

To add an additional person to a call, in the Conversation Window:
1. Click the People Options drop-down menu. A pop-up window appears, with six options.
2. Choose one of the options:
   a. Invite by Name or Phone Number – brings up a list of your Lync contacts:
      i. Type a name into the top field or click a on a name already present.
      ii. Then Click OK.

Continued on next page
Note: You may select multiple contacts by clicking on contacts while holding the Ctrl key.

b. Invite by E-Mail - generates an email message with an invitation. In order to invite new attendees by email, the conversation must be active.

Note: Any time you directly invite people by email from this drop-down list, your invitees will be prompted for their UniCom account info with the option to ‘Log in using Corporate Credentials.’ If any invitees do not have a UniCom account, they may select the ‘Log in as Guest’ option.

i. Click on Invite by E-Mail in the pop-up People Options box. If you are using Microsoft Outlook, a new ‘Compose E-mail’ box opens in Outlook. The invitees may opt to join from the Lync Web App or Lync Attendee.

ii. Supply the email address(es) for the attendees you wish to invite.

iii. Click Send.

Note: If you are not using Outlook, when you click on the Invite by E-Mail option the Join Information and Meeting Options pop-up window opens.

To send the email invitation using an email client other than Outlook, open your email client; then click on the Copy All Information button in the Join Information and Meetings Options pop-up window. Paste the information into the body of an email to your invitees.

You can invite many people to a conference at once by Ctrl-clicking multiple contacts or clicking a Contact List Group header. For more information, see the ‘Starting a Conference Call to everyone in a Contacts Group’ below.

Starting a Conference Call to everyone in a Contacts Group
You may initiate a conference with an entire group of people at once, using your contact list Groups.

To Conference-Call a group:
1. Right-click a group header in the Contact List.
2. Choose one of the conference options.
   A new Conversation Window opens with all of the contacts in the group being contacted by UniCom. The participants are immediately called. You may choose to open a conference by IM, by video call, or share a program or desktop with the group also.
Scheduling a Conference Call

If you want to conduct a conference call, even with people who are unaffiliated with IU, you can schedule a meeting from The IU Exchange Outlook client. When you schedule a conference call, you generate an email invitation that contains information about how to join. When you and your invitees receive the invitation, you will all click a link in the message in order to enter the call. Depending on your participants’ setup, they can participate in various ways:

- If the scheduled meeting participants (both IU and non-IU) have Lync, they can join in and take full advantage of chat, audio, video, and desktop sharing.
- If the participants want to join by phone, they can call a dial-in number (that is local to IUS) and then talk using their computer headset.
- If the participants join via web browser (the Lync Web App), they are automatically able to chat and share desktops. If these web invitees want to participate by phone, they must supply a phone number in their conference window. Those who join by web can direct the conferencing service to call them from the web interface if they have a phone number that is local to IUS. For more information on audio options when joining the Lync Web App, please see the section ‘Audio Conversations with the Lync Web App’ under the ‘Lync Web App’ section.

Scheduling a Conference Call using Outlook

You may schedule a conference call in Microsoft Outlook using the New Online Meeting tool. You must have an updated version of Microsoft Outlook 2010.

To schedule a conference call in Outlook:

1. Open your Calendar in Outlook.
2. On the Home tab and in the New group, click on the New Online Meeting button. A meeting request opens.
3. Type the email addresses of the people you want to invite to the meeting in the meeting request, in the ‘To’ field.
4. Add a subject in the subject line or the invitation and any additional details in the body of the message.

Note: Do not alter any of the information created for the meeting invitation in the body of the message.

5. At this point, you can utilize the Scheduling Assistant to ascertain the availability of your invitees or await their response.

Create a conference call in response to an email:

1. Navigate to the email. It could be an email you received or one that you sent; it can be addressed to many people or to just one.
2. In the Respond group under the Home tab, click on the Meeting button.
A meeting event is generated with clickable links to join the conference; it is directed to all persons addressed in the email.

3. To create an online conference, click Join Online Meeting.
4. Enter addresses of attendees and type a subject, just as you would with any appointment invitation.
5. Send the message.

Sharing

Conveniently share your desktop or a single program with your contacts and allow them to make changes.

What is Sharing?
Sharing is a feature in Lync. Directly in any Conversation Window, participants can share their entire computer desktop or a single program with other participants; a user may even allow others to take control. You may Share a program or a desktop in a conference call or IM session.

Sharing the Desktop

You can initiate desktop sharing in any Conversation Window.

To initiate desktop sharing:
1. In the Conversation Window, click the Share drop-down button.
2. Click on Desktop.
3. Click Share Desktop. If you have multiple monitors, choose the monitor you want to share.

Now, your participants will view everything you do on your desktop. A highlighted frame appears around your entire desktop to indicate that your desktop is currently visible to other participants. A Sharing menu appears at the top of the screen indicating that you are in control of the sharing session.

This Sharing menu will disappear into the background a few seconds after sharing begins. It will reappear if your mouse cursor approaches the top of your desktop.

Alternatively, you may ‘pin’ the menu so that it will not disappear by clicking on the thumbtack icon in the Sharing menu bar.

A notice will open in the Conversation Window: If you click on the Preview button, a ‘Stage’ opens to the right of the Conversation Window.

To give control to another participant or to an entire meeting:
1. In the Sharing menu bar at the top of your desktop, click the Give Control drop-down arrow.
2. Then click the name of the participant, or Share Control with All Participants.

Note: If you share control with all participants, the first one to make a change will have control. Thereafter, participants must Request Control from the Sharing menu at the top or their desktops.
To take back control of the desktop sharing session:
1. In the Conversation window, click the Control drop-down arrow.
2. Click Take Back Control. Alternatively, you may use the keyboard shortcut Ctrl-Alt-Space to regain control.

To end desktop Sharing:
1. In the Sharing menu bar, click the Stop Sharing button.

Sharing a Program
In a similar manner to sharing a desktop, you may share a single program with any other user in a Conversation Window.

To share a program:
1. In the Conversation window, click the Share drop-down button.
2. Click on Program… in the drop-down menu. The Share Programs dialogue box opens.
3. Click on the program you wish to share.

All the other steps in ‘Sharing a Program’ are the same as those in section ‘Sharing the Desktop.’

Taking Notes Using OneNote
Type notes while using Microsoft Lync by using OneNote.

What is OneNote?
OneNote is a tool that allows you to take notes and keep things organized. Essentially, OneNote is a virtual notebook that allows you to create tabs and sub-tabs to keep meeting notes or any other information. OneNote can be initiated from any Conversation Window or from the Windows Start Menu. OneNote is available only with Office 2007 and 2010.

Opening OneNote from a Conversation Window
To open OneNote in a Conversation Window:
1. Click the drop-down arrow next to the Add attachment icon.
2. Click Take Notes Using OneNote.
Using Lync Outside the IU Network

If you are unable to work on campus, you can use Microsoft Lync Attendee.

Signing into Lync from outside the IU Network
You can take advantage of all the features of Lync from a computer that is not on the ADS domain.

To Sign into Lync from outside the IU network:
1. Open Lync 2010 from the Start menu.
2. Enter your email address; enter ads\[user name], and password
3. Click Sign In.

For more information on downloading Lync, please see the section titled ‘Setting up Microsoft Lync.’

Using Lync 2010 Attendee
Lync Attendee is client software of Lync Server. People using computers off the IU network can install the Lync Attendee client without the need for a license. All of the in-meeting features of Lync are available in Lync Attendee.

Adding Lync to a Smartphone or Tablet
Lync is a free app on most smartphone or tablet devices.

Lync App for smartphones or tablet devices:
- iOS device users (Apple) can find the free Lync app in the App Store.
- Android users can find the free Lync app in the Google Play Store.
- Windows 8 users can find the Lync app in the Metro App Store.

Once the free Lync app is installed on your smartphone or tablet, follow these instructions to sign in with your IU Southeast credentials:
1. Under Sign-in address, add your entire email address, i.e. jsmith@ius.edu.
2. Under Username, type ads\username. Add your username after the ads\.
3. Under Password, type in your IU Southeast passphrase.
4. Press Sign in.

Some fields may be labeled differently depending on the operating system. If you have trouble signing in, call Help Desk at (812) 941-2447.
Another way you can work with Lync off campus is by using the Lync Web App.

**What is the Lync Web App?**

If you are using a computer anywhere that has Internet access, you may use the Lync Web App. Lync Web App provides most of all Lync's utility including viewing and presenting PowerPoint slides; meeting-wide IM; telephone-based audio; file distribution and application; and desktop and program sharing. To use the Lync Web App, you must be invited to a meeting or possess a meeting's unique URL.

Note: To engage in desktop or program sharing, you must be a presenter in the meeting. All meeting attendees may ask permission to take control of a presenter’s desktop or program.

**Joining a meeting using the Lync Web App**

**To join the meeting, do the following:**

1. At meeting time, open your Online Meeting email invitation, and then click Join Online Meeting in the email message.
2. In the screen that opens, click the Join Online Meeting hyperlink. A Microsoft Lync 2010 window opens.
3. Click on the Join the meeting using your web browser button.
4. Users with an Exchange account should log on using their username and passphrase in the Join using corporate credentials.

Depending upon the supplied credentials, you may be admitted to the meeting immediately. Otherwise, you may have to wait to be admitted by the leader of the meeting.

**Audio Conversations with the Lync Web App**

Just as in a normal Lync Conversation, you can initiate audio communication using your phone.

**To initiate audio communication with your phone:**

1. In the Conversation window for your meeting, click on the Phone tab.
2. Do one of the following:
   a. To have the conference call you, choose the country code, type your phone number, and then click the Call Me button.
   b. To call in using your phone, use the dial-in number found in the Join Online Meeting invitation.
Joining an IU Ad Hoc Video Bridge Conference

What is an Ad Hoc Video Conference?
An Ad Hoc Video Conference at IU is a video conference connection you establish on-the-fly with a central multimedia server. You identify your conference code using four numbers of your own choice, and distribute that information to people whom you want to join. Users from anywhere can use your four-digit code to join the conference. At this time, the Ad Hoc Video Conference works on the Windows platform only. For more information, see the IU Knowledge Base article ‘At IU, how do I create or join a video conference?’ at http://kb.iu.edu/data/ause.html.

Initiating an Ad Hoc Video Bridge Conference
To initiate your own video conference:
1. Create a four number sequence. This will be the identifying code for the ad hoc conference.
2. In the search field in the Lync window, type: 22 [+four digit code created in step 1] @vc.iu.edu.
3. The address appears in a blue highlighted area below the search field.
4. Right-click the address and choose Start a Video Call from the menu.

The video conference commences. You do not need video equipment to initiate a video conference; you will be able to see all who join with video equipment but your colleagues will only see a black screen for you.

Joining an Ad Hoc Video Bridge Conference
How participants are joining will determine the protocol they use. Users can join your conference in three ways: using point-to-point video conference equipment (such as that found in conference rooms); using UniCom with an optional web cam; and by calling in via telephone. All methods may be used simultaneously in a conference.

To join the Ad Hoc video conference with Tandberg equipment:
1. On the remote unit, press the Call button.
2. Dial 22 [+code] or find the listed conference room in the directory. The video conference then connects.

To join the Ad Hoc video conference via UniCom:
1. In the Search Field at the top of the Lync main window, type: 22 [+code]@vc.iu.edu.

   The address appears in a blue highlighted area below the Search Field.
2. Right-click the address and choose Start a Video Call.

   You connect with video to the conference. You can see all attendees in your Conversation Window.

   Proceed to use the audio and video just as you would in any UniCom call.

Continued on next page
To join the Ad Hoc video conference by phone:

1. From any phone, dial **812-856-7070**.

2. Press ‘**22[^code]#**’ (the pound symbol is required) when the conference service prompts you to enter the code.

You will then connect by phone to the conference.

**Status (Presence) Settings**

Let people know when you're available using the Status/Presence settings.

**Why Status/Presence settings are important**

When using UniCom, you always have a presence setting called Status. Status describes your activity, location, willingness or ability to communicate, and contact information. You can manually set your Status in Lync.

Status information helps you, your contacts, and IU colleagues to decide the best way to communicate with each other at the current time. When you initiate any communication with someone using Lync at IU (via voice, IM, or video desktop sharing), you can see whether he or she is available to talk. In addition, you can set access levels that allow only certain people to interrupt you when you are in 'Do not disturb' mode. For example, when your status is set to Do Not Disturb, no one can call or IM you.

**How to set Status/Presence settings**

Status state is indicated by a colored bar next to your name and picture as seen in other people's contact lists (or by the color of the square in Name View).

In Picture View:

![Denny, Johan L. - Available](image)

In Name View:

![Denny, Johan L. - Available](image)

If you have an IU Exchange account, the Status or Presence state will ordinarily be the same as your Outlook Calendar Free/Busy status. You can manually override your status until it next changes in your Outlook Calendar.

**To set your status manually in Lync:**

1. Click the status bar next to your profile photo. A drop-down menu appears.
2. Choose the status state.

For more help on status/presence states, see 'Quick Start: Use instant messaging and presence' at:
Contacts

Adding and organizing your contacts is easy.

Your Lync window can store a large set of contacts to enable you to contact them conveniently. You can add anyone from the IU Global Address List (GAL) or your Outlook Personal Contact List by searching by name or email address. In addition, every time you are involved in a peer-to-peer call or IM session, the contact is stored in the conversations environment. There are several ways you may create contacts, described below.

Adding contacts

If you are adding an IU entity or a contact in your personal Outlook Contact List, you can type the name directly in the main Lync window’s Search field.

To add a contact to a Contact List:

1. Click in the Search field. There are two types of searches: by Skill and by Name.
   a. If you are searching for contacts possessing a particular skill, type in that particular skill.
   b. Then click on the Skill tab below the Search text field.

Or:

a. For a person with IU username, you may type either their email username or their name.
b. Click on the Name tab below the Search text field.

2. The name (or a set of names) appears in the space below the search box. If the person is a UniCom participant, his or her presence state will be indicated with a colored bar. If the person is not a participant or is outside IU, the color bar appears grey, indicating the person is offline.
   a. You can right-click the name and choose Add to Contact Lists.
   b. From your list of contact Groups, select one group appropriate for the new contact. You may also create a new Group from the menu to the right.

You can also add a contact from your recent conversations. When you and another person have a phone call or an IM session, the other party in the discussion is not added to a contact list. The Lync Conversation tool records your contacts, and you may add those contacts to your Contact List.

To add a contact from a recent conversation:

1. Click the Lync Conversation button.
2. From this list of conversations, right-click on the contact you wish to add to your Contact List.
3. Click on Add to Contact Lists.
4. Select the appropriate Group unto which you will add this contact.
**Adding a Federated Contact**

If you want to send instant messages to or use Lync with people who are in a federated organization (including AOL, MSN, or several federated colleges; see ‘What Is the .edu Federation Registry’ section, above), you must first add them to your Outlook Contact List. To add a federated identity, you will add the contact from the Lync Menu button as described above. That contact should have at least a name and an email address. Once you correctly create a contact in Outlook, it will show up in the list of search results in the Lync window. You can then initiate an instant message to the contact.

**Adding an Out-of-network Contact**

1. First, make sure you have Lync opened and you are signed in. Add out-of-network contacts to Lync using phone numbers.
2. Open Outlook.
3. Find the “View” tab at the top.
4. Find the button that says “To-Do Bar,” and click it.
5. Make sure “Quick Contacts” is checked.
6. At the bottom right, you should see the same contacts that you have in Lync.
7. Find a phone number that you want to add a name to and right-click it.
8. Click “Add to Outlook Contacts.” A window will pop up.
9. Enter the name for the contact, and any other information you want to add.
10. Click “Save and Close.”
11. Wait for the contact to update in Lync. It should take a few minutes.

**Group settings for contacts**

The default view of your Contact List is the Groups view. Groups include Frequent Contacts and any other Groups you have created. You may also view your contacts by Status and by Relationship. Beneath the Search field, you will see four types of Contact List arrangements: Name and Skill. In the Status view, your Contact List is sorted by Status, with each color indicating a different Status/Presence State.

In the Relationship view, your Contact List sorts by Privacy Relationship levels. To learn more about Privacy Relationships and their settings, read the section ‘What are privacy relationships and why are they important?’

**Creating a New Contact Group**

You may want to create your own groups, such as ‘Extended Family’ or ‘Work Team.’

**To create a new custom group, in the Group view in your Contact List:**

1. Right-click any Group header.
2. Choose Create New Group.
3. Type the name for the new Group and press Enter.

**Moving a Contact to another Group**

A contact that is recognized by Lync as a UniCom participant, a GAL entry, or a member of your Outlook Contact List can be moved into another group in two ways:
To move a contact to another group:

- By clicking and dragging:
  a. Click and drag the contact into another group.
- By right-clicking:
  a. Right-click the contact.
  b. Choose Add to Contact List, and choose the group to which you want to add the contact.

**Status Change Alerts**

If you would like to be notified of a contact’s changes in availability and status, you may tag that contact for status change alerts. When the contact changes Presence States, an alert window will open in the lower right corner of your monitor and show the contact’s name and current state:

**To tag a contact for status change alert:**

1. Right-click any contact.
2. From the pop-out menu, click on Tag for Status Change Alerts.

**To “Untag” a contact:**

1. Right-click on any contact currently tagged for status change notification.
2. Uncheck the Tag for Status Change Alerts option.

**Pinning a Contact to the Frequent Contact Group**

Default Group settings for your Contact List include Frequent Contacts. Frequent Contacts automatically populates with contacts with which you have had multiple peer-to-peer conversations. You may pin any contact you choose permanently to the Frequent Contacts Group irrespective of how often you converse with that contact.

**To pin a contact to your Frequent Contacts Group:**

1. Right-click any contact.
2. From the pop-out menu, choose Pin to Frequent Contacts.
3. Pinned contacts will appear at the top of your Frequent Contacts Group.

**Privacy**

Privacy relationships are categorizations for your contacts that allow you to control what information is seen by the individuals, and when and how they are able to contact you.

**What are Privacy Relationships and why are they important?**

Lync assigns a Privacy Relationship to every contact. There are five Privacy Relationships shown in the screenshot below.

By default, new IU contacts are all at the Colleagues-level Privacy Relationship. Contacts obtained from your Outlook Contact List not associated with IU are assigned to the External Contacts group. However, you can change the Access Level for each contact. This means you can control how much of your information people can see, and how they are able to contact you, depending on your Presence Status.

For example, you can share a mobile phone number with your closest coworkers but not make the number available to the entire IU UniCom community. You can also control interruptions. For example, by setting your presence status...
to Do Not Disturb, you can block all incoming calls and instant messages, except for those from people that you have granted the Workgroup or the Friends and Family access levels. For more information about Privacy Relationships and their interactions with Presence States, refer to the Help menu within the Lync Options environment and search using the term, ‘Control access to your presence information.’

How to set privacy relationships for each contact
You can set a Privacy Relationship for any contact.

To set a Privacy Relationship for an individual contact:
1. Right-click the contact.
2. Choose Change Privacy Relationship.
3. Select one of the five Privacy Relationships.

Uploading a profile photo
People can’t always remember your name. Help them out by using a profile photo.

To upload a photo, you will need a SharePoint account. If you do not have one, follow these steps:
1. First, make sure you have a photo of you saved on your computer.
3. Click on Request a site (where the horn icon is)
4. Click on My Sites
5. Click I Agree if you agree with the statement above.
6. You now have a SharePoint site.
7. Click on your name in the upper right-hand corner.
8. Click My Profile in the drop-down menu.
9. Click Edit My Profile underneath the photo box area.
10. Find the section that is labeled “Picture” and click Choose Picture
11. A new window will pop up. Click Browse and search the files on your computer to find your photo.
12. Click Okay.
13. Click Save and Close at the top left.

For more information on SharePoint, visit the IU Knowledge Base at kb.iu.edu, and search for ‘SharePoint.’

Getting Help
If you can’t find the help you need from this guide, call Help Desk at (812) 941-2447 and select Option 5, or visit these websites for additional help:

For Microsoft Quick Guides visit:

For Microsoft How-to Videos:

CX600 Phone Tutorial Video:
https://www.sharepoint.iu.edu/sites/iuk/it/training/Shared%20Documents/unicom/CX600-interactive-tutorial.wmv