

# Microsoft Lync (UniCom Basic) Mac User Guide

What is UniCom? .....1  
 What is Microsoft Lync? .....1  
 Who can use UniCom services? .....1

Downloading Microsoft Lync .....1  
 Required equipment and how to test it .....1

Initiate a phone call .....2  
 Answer a call in Lync .....2  
 To invite other contacts to the call .....2  
 Call controls .....2  
 Set Up Call Forwarding .....3  
 Viewing missed calls .....3

Video controls .....3

Send an instant message .....4  
 Attach a file to an IM .....5  
 Conversation History .....5

Initiate a Conference .....5  
 Schedule an online Conference .....6  
 Video Conference .....6  
 Join a Conference .....6  
 Inviting additional participants to a current call .....7

What is Sharing? .....7  
 Sharing the Desktop .....7  
 Replace a Shared Desktop with your own Desktop .....8  
 Take control of a Shared Desktop .....8  
 Customize permissions on Sharing .....8

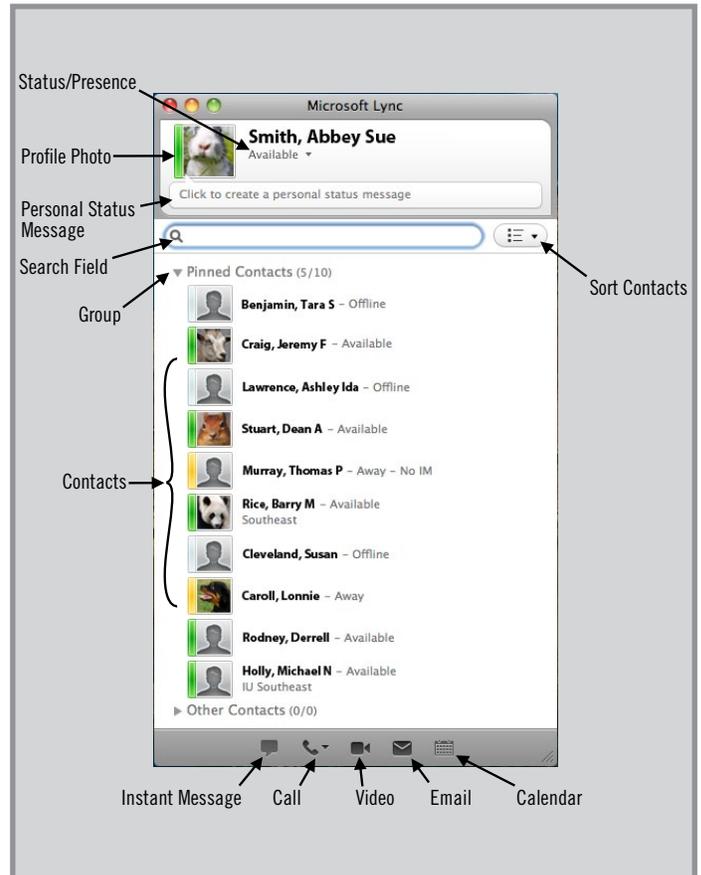
Signing into Lync from outside the IU network .....8  
 Using Lync 2010 Attendee .....8

What is the Lync Web App? .....9  
 Joining a meeting using the Lync Web App .....9  
 Audio Conversations with the Lync Web App .....9

What is an Ad Hoc Video Conference? .....10

Why Status/Presence settings are important .....10  
 How to set Status/Presence settings .....10

Adding Contacts .....11  
 Creating a new Contact Group .....11  
 Moving a contact to another Group .....11  
 Pinning a contact to the Frequent Contact Group .....11



## 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. UniCom Enterprise is comprised of Microsoft Lync, Outlook, and the CX600 Polycom phone, which work together to bring more flexibility in communication.

## 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.**

### Downloading 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.

### Required equipment and how to test it

To use the voice communication capabilities of Microsoft Lync, you need headphones or speakers and a microphone. If you want to use the video conferencing features, you will also need a webcam.

On a Mac you will need to modify your headphones/speakers and microphone settings in System Preferences.

## Place Phone Calls Using Microsoft Lync

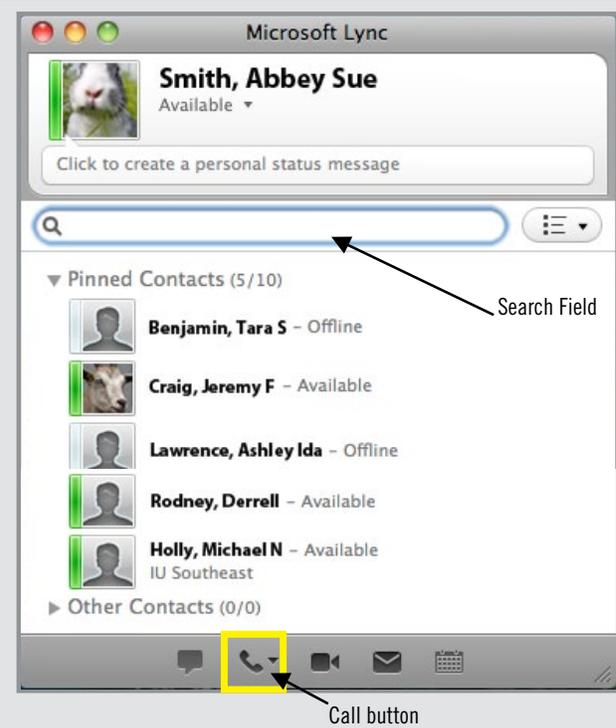
You can use Lync for Mac to talk to contacts in your network. You can also conduct conference calls by inviting multiple contacts to join the conversation. During an audio call, you can also use Lync to send files and instant messages.

Note: All users participating in a Microsoft Lync phone conversation must have headphones or speakers and a microphone installed on the desktop computer. To learn about how to set up these devices, see Mac Help.

### Initiate a phone call

#### Call a contact that is not in your contact list:

1. In the **Search Field**, type the contact's name, username, or work phone number. One or more contacts will appear if the desired contact is in the network.
2. Either click on the appropriate contact and click on the **Call** button in the bottom of the Lync window, *Or* double-click on the contact to begin an IM session, then click the **Call** button toward the top of the conversation window to begin a phone conversation.



### Answer a call in Lync

When you receive a PC to PC phone call in Microsoft Lync, a small window will appear at the bottom right of your screen with the callers photo and name.

#### To answer a call in Lync:

1. Make sure you have headphones or speakers, and a microphone set up on your desktop.
2. Click anywhere on the small window that appears on the bottom right of your screen except for the **Decline** button.



#### Call a contact in your Contact List:

- In the Lync window, select a contact, and then click the **Call** button at the bottom of the Lync window. After your contact accepts the call, talk into the microphone.

#### To invite other contacts to the call

- In a conversation window, click on the **Options** pop-up menu, click **Invite by Name or Phone Number**, and then either select the contact you want, or in the Search Field, enter a name, username, or phone number to search for a new contact.



### Call controls

#### Add video to the call:

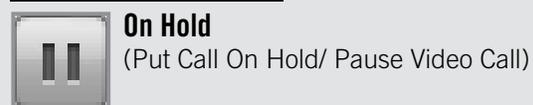
- Click the **Video** button in the conversation window.

#### Adjust the volume:

- Drag the **Volume Slider** in the conversation window.

#### Put the call on hold so that no sound is sent or received:

- Click the **On Hold** button.
- Click **Resume** to continue the call.



### Transfer the call:

- Click **Transfer Call**, click **Other Person or Number**, and then either select the contact you want, or in the **Search Field**, enter a phone number or email address.

### Redirect the Call:

- Click the **Redirect** when the call pop-up window appears at the lower right of your screen, then choose voicemail or another contact.

### End the audio part of the call but leave the message window open:

- Click the **End Call** button.

### Use the touch-tone feature while in a call:

- Click the **Dial Pad** button.

### Mute the call:

- Click the **Audio Mute** button

### Leave the conversation completely:

- Close the conversation window.

Note: If you are in an IM conversation with a contact, you can add audio and video to the conversation. In the conversation window, click the **Call** button or the **Video** button.



### Set Up Call Forwarding

1. Click the **Lync** menu option on the top menu bar, and select **Preferences**.
2. Select the **Phone Calls** tab.
3. Click the **'Forward my calls to:'** radio button.
4. Choose your forwarding preference.



### Viewing missed calls

If you have Outlook installed, you will receive email alerts stating that you have missed a phone call. They include the callers name, work title, phone number, and email address.

### To reply to the caller with a phone call using Microsoft Lync:

- Click the callers phone number in the email, Lync will automatically dial the number.

Note: You will need headphones or speakers and a microphone to communicate via Microsoft Lync phone.

## Using Video

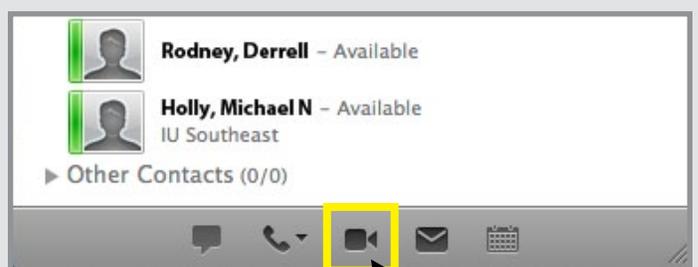
### You can add video to calls made through Lync.

You can use Lync to make video calls to multiple contacts in your network. During a video call, you can use Lync to send files and instant messages. To use video calling, both you and your contact must have a webcam, a microphone, and either speakers or headphones.

### Video controls

#### To initiate a video call:

1. On the **Contacts** tab, select a contact.
2. Click the **Video** button at the bottom of the Lync window.
3. After your contact accepts the call, talk into the microphone.



Video Button

### Begin a video call during an IM session:

- Click on the **Video** button toward the top of the conversation window to begin a video call.

### Invite other contacts to join the video call:

1. On the **Options** pop-up menu, click **Invite by Name or Phone Number**.
2. Either select the contact you want, or in the search box, enter a name, username, or phone number.

### End the video and audio parts of the call, but leave the message window open:

- Click **End** call.

### Put audio and video on hold or resume a call:

- Click **On Hold** button.

### Change the video to full-screen mode or back to regular size:

- Click **Full Screen** button.

### Mute or unmute your microphone:

- Click **Audio Mute** button.

### Adjust the volume:

- Drag the **Volume slider**.

### Show or hide all participants or yourself during a conversation:

- Click **Show** or **Hide Participant List**.

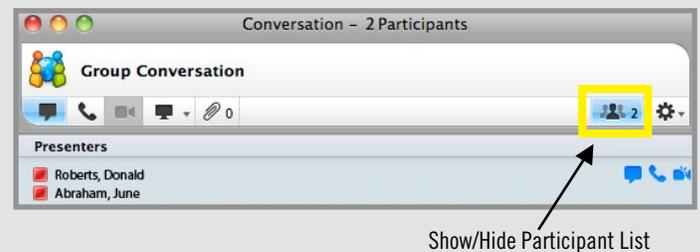
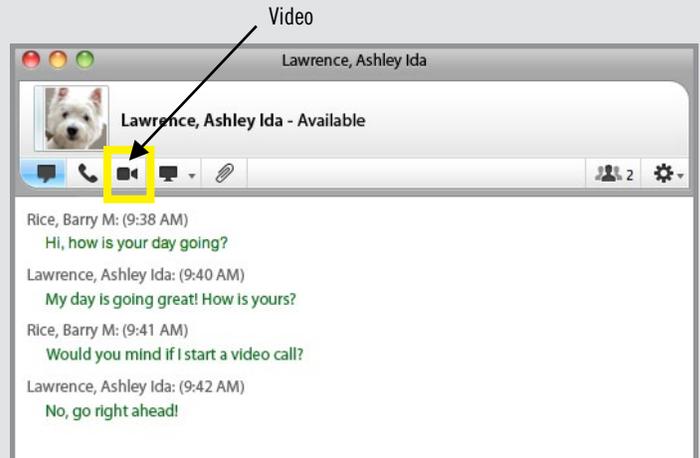
### Change to an audio-only call:

- Click the **Call** button.

### Leave the conversation completely:

- Close the conversation window.

If you are in an IM conversation with a contact, you can add audio and video to the conversation. In the conversation window, click the **Call** button or the **Video** button.



## Instant Messaging (IM)

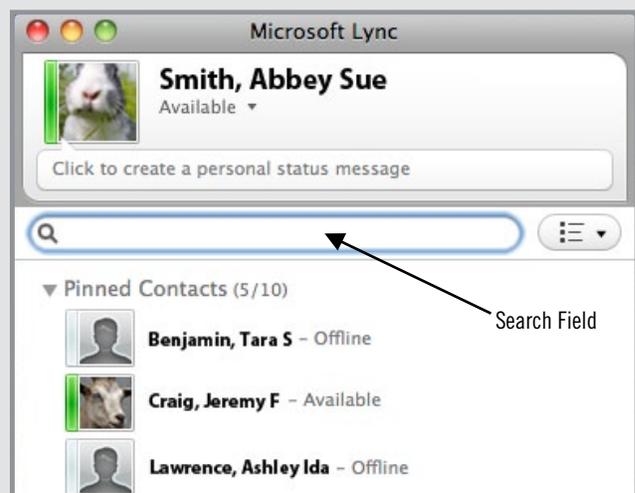
Microsoft Lync allows you to send and receive instant messages to others with UniCom accounts.

### Send an instant message

#### On the **Contacts** tab, do one of the following:

- To send a message to an existing contact who is online, double-click the contact.
- A person who is not in your contact list:
  1. In the Lync window, in the **Search field**, type the person's name or username, and then double-click the contact.
  2. To add this person as a contact, click the person's photo in the conversation window, and then click **Add contact to instant messenger contact list**.
  3. In the lower part of the conversation window, type your message, and then press **RETURN**.

You can add contacts to a conversation. However, you must start the conversation with a single contact.



## Attach a file to an IM

1. In a conversation window, click the **File** button.
2. Browse and double-click the appropriate file.



## File button

## Conversation History

Your instant message conversations can be saved for future reference.

### To save conversations automatically:

1. Click **Lync** in the top menu bar.
2. Click **Preferences**.
3. Click on the **History** tab.
4. Check **'Save Messages'**, and choose either **'Ask to save when I close a conversation window'**, or **'Always save conversations without asking'**.

### Find previous conversations:

1. Click **Window** in the top menu bar.
2. Click **Conversation History**. All your conversations are archived by date and contact.

## Conferences

You can have a meeting without leaving your computer by using the Lync phone (PC to PC with the use of headphones or speakers and a microphone), video, or IM conferences using Microsoft Lync.

### Initiate a Conference

From the main Lync window, you can initiate a 'Meet Now' conference or schedule them in advance by clicking the **Calendar** button at the bottom of the Lync window.

### To initiate a 'Meet Now' conference:

1. Double-click on a contact. A Conversation Window opens.
2. Click the **Options** drop-down menu. A set of choices are displayed: **Invite by Name or Phone Number** and **Invite by E-mail**.
3. To bring someone who utilizes Lync directly into the conference, click **Invite by Name or Phone Number**.
  - a. If you choose 'Invite by Name or Phone Number,' A list of your contacts will pop up. Hold down **Ctrl** while clicking on the desired contacts.
  - b. Click **Okay**.

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.

Participants who receive the email invitation will have the option to join by phone, or by hyperlink. See 'Join a Conference' under 'Conferences with Microsoft Lync 2011' for more information on these options.

If you choose to send an email invitation, you can add Corporate Credentials for added security. If any invitees do not have a UniCom account, they may select the **'Log in as Guest'** option.



## Options

### Email Invitation

[Join online meeting](https://meet.contoso.com/meet/kenc)  
<https://meet.contoso.com/meet/kenc> ← Conference Hyperlink

**Join by Phone**  
425-555-0130 ← Conference Phone Number  
425-555-0131  
1-800-555-0132  
[Find a local number](#)

Conference ID: 18285  
← Conference ID Number

### To add Corporate Credentials to an email invitation:

1. In the Compose E-Mail window, click the **Options** tab.
2. Click the arrow next to the **Permissions** button.
3. Click **Manage Credentials** in the pop-up menu.
4. Type in your IU username and passphrase.
5. Enter your Corporate Credentials.

To switch between means of communication while conducting a conference, click on the **IM**, **Call**, or **Video** options toward the top of the conversation window.

### Schedule an online Conference

Currently, you cannot send the online meeting call-in number, hyperlink, or conference ID number until the meeting is about to begin. You can, however, send an email through Outlook with general information about the meeting time, date, and topic.

### To schedule an online conference in advance:

1. Click the **Calendar** button at the bottom of the Lync window. Outlook will open a Compose E-mail window.
2. Enter the contacts with whom you want to conduct a conference.
3. Fill out the location, time, and message you wish to send.

Note: You may want to include instructions on how to join the online meeting for when the meeting occurs. For information on how to initiate a 'Meet Now' conference, see 'Initiate a Conference' in the previous section.



**Calendar button**

### Video Conference

Follow the steps under 'Initiate a Conference', under the 'Conferences' section. Then, follow the steps under the section called 'Using Video' once you have a conversation window open.

### Join a Conference

The meeting invitation contains many ways to connect to a Lync Online Meeting. If you are not using Lync to connect to the conference, the presenter can send you an email invitation, which contains the conference phone number, the conference hyperlink, and the Conference ID number.

Join Online Meeting connects you to the meeting through Lync, which lets you hear a conference call and see visual content such as web camera and desktop sharing. Meeting hyperlink provides an internet browser method of connecting if the Join link fails or you don't have Lync installed.

Join by Phone connects you to the conference call if you are using a home or cell phone. It connects you through Lync if you are using Lync Phone Edition or the Lync Dial pad. Conference ID is required when you are prompted. You are not prompted when using Join online meeting or the meeting hyperlink.

### Email Invitation

A screenshot of an email invitation for a Lync online meeting. The email content includes a 'Join online meeting' link, 'Join by Phone' options with three phone numbers, a 'Find a local number' link, and a 'Conference ID: 18285'. Three arrows point from labels to specific parts of the invitation: 'Conference Hyperlink' points to the meeting URL, 'Conference Phone Number' points to the first phone number, and 'Conference ID Number' points to the ID number.

**Join online meeting**  
<https://meet.contoso.com/meet/kenc> ← Conference Hyperlink

**Join by Phone**  
425-555-0130 ← Conference Phone Number  
425-555-0131  
1-800-555-0132  
[Find a local number](#)

Conference ID: 18285 ← Conference ID Number

### 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 **Options** drop-down menu. A pop-up window appears, with two options: **Invite by Name or Phone Number**, and **Send E-Mail Invite...**
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. Click **Okay**.



**Options**

For more information on the 'Invite by Name or Phone Number' or 'Send E-Mail Invite..' options, see the 'Initiate a Conference' section under 'Conferences with Microsoft Lync 2011'.

Note: You may select multiple contacts by clicking on contacts while holding the **Ctrl** key. Only the first contact selected may be highlighted.

## Sharing

**Conveniently share your desktop 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, a single file or participate in PowerPoint presentation with other participants; a user may even allow others to take control. You may share your desktop in a conference call or IM session.

### Sharing the Desktop

#### To initiate desktop sharing:

1. In the Conversation window, click the **Share** drop-down button.
2. Click on **Desktop**.
3. If you have multiple monitors, choose the monitor you want to share.

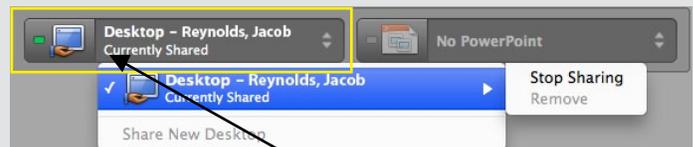


**Share**

The desktop sharing window opens, and a highlighted frame appears around your entire desktop to indicate that the desktop is currently visible to other participants.

#### To end desktop sharing:

1. In the desktop sharing window, click the **Desktop Sharing** pop-up menu.
2. Choose the desktop that you want to stop sharing, and then click **Stop Sharing**.



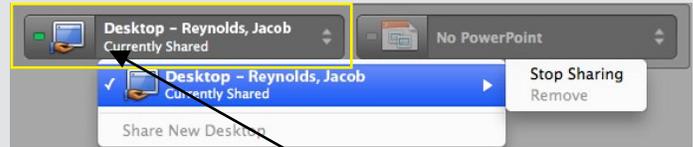
Desktop Sharing Pop-up Menu

### Replace a Shared Desktop with your own Desktop

Only one desktop can be shared at a time. You can replace a shared desktop with your desktop so that session participants can then view your desktop.

1. In the desktop sharing window, click the **Desktop Sharing** pop-up menu.
2. Click **Share New Desktop**.

Note: If you have already started sharing your desktop during this session, you can click the **Desktop Sharing** pop-up menu, point to your desktop, and then click **Share Now**.



Desktop Sharing pop-up menu

### Take control of a Shared Desktop

Important: This feature is available on Lync for Mac only if the desktop sharing session is initiated from a Windows-based computer.

You can request control of a shared desktop at any time if the sharer allows participants to request control.

#### In the desktop sharing window:

1. Click the **Desktop Sharing** pop-up menu.
2. Click **Request Control**.

### Customize permissions on Sharing

1. In a conversation window, click the **Options** button and choose **Meeting Options**.
2. Under the **Presenter** tab, choose your desired settings for sharing.



Options

## 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.
2. Enter your email address; enter ads\[user name], and passphrase.
3. Click **Sign In**.

For more information on downloading Lync, please see the section titled 'Downloading Microsoft Lync' under the 'Setting up Microsoft Lync' section.

### 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.

## Lync Web App

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 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, you must be a presenter in the meeting. All meeting attendees may ask permission to take control of a presenter's desktop.

### Joining a meeting using the Lync Web App

#### To join a meeting using the Lync Web App:

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 an audio conversation using 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.

### Email Invitation

[Join online meeting](#)

<https://meet.contoso.com/meet/kenc>

← Conference Hyperlink

Join by Phone

425-555-0130

425-555-0131

1-800-555-0132

← Conference Phone Number

[Find a local number](#)

Conference ID: 18285

← Conference ID Number

Language: English

Microsoft  
Lync Web App

Join as a guest  
Use this option if someone outside your company invited you.

Join using your corporate credentials  
Use this option if you have an account with ads.iu.edu

Use one of the options to join the call.

#### Option 1: The conference calls you.

Enter your phone number below and click Call Me.

Country code ▾

Enter area code and number

Call Me

#### Option 2: Dial in to the conference.

Dial-in number: +14255550189

Conference ID: 97127

Passcode: Passcode is not required.

[Find a Local Number](#)

## Joining the 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. 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>.

## 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 Microsoft Lync or the Outlook Web App. This feature is currently unavailable for the Mac version of Outlook.

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.

### 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.

In Picture View:



In Name View:



### To set your status manually in Lync:

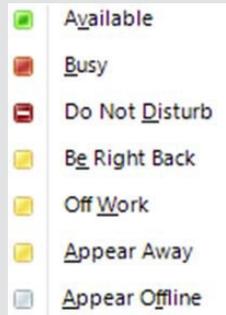
1. Click the **Status** bar next to your profile photo. A drop-down menu appears.
2. Choose the status state.

### To set your status manually in the Outlook Web App:

1. Click on your name in the upper right corner of the window.
2. Choose a presence status from the pop-up menu.

For more help on status/presence states, see 'Quick Start: Use instant messaging and presence' at: <http://office.microsoft.com/client/helppreview.aspx?AssetId=H A101832519&Icid=1033&NS=COMM14&Version=14&respos=0&CTT=1&queryid=5a5ebe2e6a0c41cfac3fa7934cbfbcc6>

### Status/Presence States



## 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 IU or your Outlook Personal Contact List by searching by name or email address.

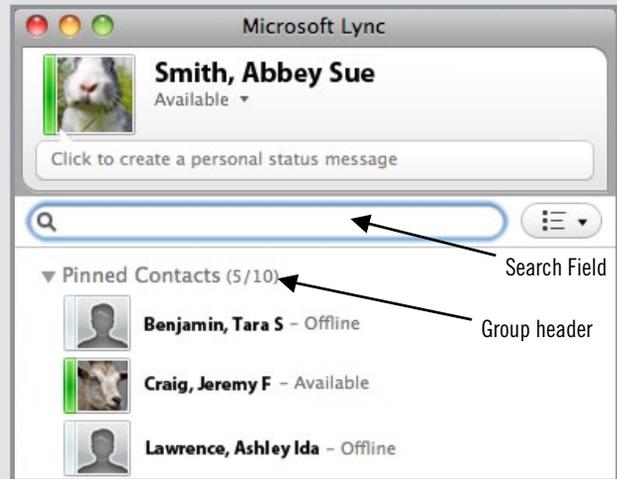
### Adding Contacts

#### To add a contact to a contact list:

1. Click in the **Search Field**.
2. You may type either their email username or their name.

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.

3. You can right-click the name and choose **Add to Contact Lists**.
4. From your list of contact groups, select one group appropriate for the new contact.



### 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 can be moved into another group in two ways:

1. By clicking and dragging;
  - a. Simply click and drag the contact into another group.
2. 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.

### Pinning a contact to the Frequent Contact Group

Default group settings for your contact list include frequent contacts. You may pin any contact you choose permanently to the frequent contacts group (labeled ‘Pinned Contacts’) 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 **Move Contact To...**, then **Pinned Contacts**.
3. Pinned contacts will appear at the top of your Frequent Contacts Group.

## 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.
2. Visit [www.sharepoint.iu.edu/sitepages/home.aspx](http://www.sharepoint.iu.edu/sitepages/home.aspx).
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. You now have a Sharepoint site.
6. Click on your name in the upper right-hand corner.
7. Click **My Profile** in the drop-down menu.
8. Click **Edit My Profile** underneath the photo box area.
9. Find the section that is labeled "Picture" and click **Choose Picture**.
10. A new window will pop up. Click **Browse** and search the files on your computer to find your photo.
11. Click **Okay**.
12. Click **Save and Close** at the top left.
13. You're finished! It will take approximately 24 hours for your photo to appear on your Microsoft Lync profile.

For more information on Sharepoint, visit the IU Knowledge Base at [kb.iu.edu](http://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:**

Microsoft Quick Guides:

<http://office.microsoft.com/client/helpcategory.aspx?CategoryID=CL101952792&Icid=1033&NS=COMM14&Version=14>

Microsoft Lync 2011 Quick Tour:

<http://mac2.microsoft.com/help/office/14/en-us/lync/item/2202d122-0b3a-4a28-be98-fc7175cd993e>

Microsoft Lync 2011 Help:

<http://mac2.microsoft.com/help/office/14/en-us/lync/>

Microsoft How-to Videos:

<http://office.microsoft.com/client/helpcategory.aspx?CategoryID=CL101833114&Icid=1033&NS=COMM14&Version=14>

CX600 Phone Tutorial Video:

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