Microsoft Lync (UniCom Basic)
Mac User Guide

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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.

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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.
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.

Conversation History
You’re 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.

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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.

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
- Conference Hyperlink
- Conference Phone Number
- 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 win-
dow 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.

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 con-
tacts while holding the Ctrl key. Only the first contact select-
ed 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 desk-
top, 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.

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.
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 own 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.

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.

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.
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=HA101832519&licid=1033&NS=COMM14&Version=14&resp=os=0&CTT=1&queryid=5a5ebe2e6a0c41cfac3fa7934cbfbc6
**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.
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, 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:

Microsoft Lync 2011 Quick Tour:

Microsoft Lync 2011 Help:
http://mac2.microsoft.com/help/office/14/en-us/lync/

Microsoft How-to Videos:

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