

UniCom Basic

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User's Guide



**INDIANA UNIVERSITY**

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**UNIVERSITY INFORMATION TECHNOLOGY SERVICES**



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## Understanding UniCom and Lync

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### **What Is UniCom?**

UniCom (Unified Communications) is a project at Indiana to bring voice, video, and data together in a unified desktop communication system. UniCom is IU's implementation of a suite of Microsoft Office Communications Server applications that provide instant messaging (IM), telephony, email, desktop sharing, audio and video conferencing. There are two subscription options. This document describes UniCom Basic.

Anyone who has an IU username can take advantage of UniCom Basic mode for spontaneous communication that includes IM, desktop sharing, audio/videoconferencing, and file sharing—all in one application. You can access this powerful communication tool from remote locations as well as at your primary workspace.

The application that enables you to do all this is Microsoft Lync. Lync can be installed locally or may be accessed right from a web browser without any installation.

### **What Is Lync?**

Lync is a client that allows you to communicate easily with others in different locations from your computer's desktop using chat, voice, and video. At IU, the larger system that drives its functionality is called UniCom. UniCom collects information about IU affiliates and combines it all into the Lync interface. The other mode besides Basic, UniCom also integrates the phone system with Lync. Thus, with Lync you can talk with others in many ways: PC-to-PC phone calls; chat, audio, and video conferences; desktop sharing; and sharing of documents.

Those who subscribe to UniCom Enterprise Voice can also forward calls, appoint delegates to manage calls, initiate dial-in conferences, take advantage of a myriad of voice mail options, and more. See “What Options Are Available for UniCom Services?” below.

### **Who Can Use Lync with UniCom?**

At Indiana University, Lync is available to students, faculty, and staff to use in conjunction with UniCom services. Those who have UniCom accounts may use UniCom with certain federated colleges as well. (For more about federated colleges, see “What is the .edu Federation Registry?” below.)

At IU, Lync can be downloaded from IUware at <http://iuware.iu.edu>.

### **What Is the .edu Federation Registry?**

The OCS .edu Federation Registry is for educational institutions (including Indiana University) to collaborate with peer organizations that are also OCS federation partners. This means you may use UniCom's powerful communication tools to initiate spontaneous conferences with other people who use AOL, MSN, or belong to several colleges and universities within the federation.

(To be a federated partner, institutions must register and meet several infrastructure requirements. To see the list of federated universities and to learn more, see:

<https://accountmgmt.exchange.iu.edu/OCSEduRegistry/>.)

## What Options Are Available for UniCom Services?

There are two UniCom service options at Indiana University.

- 1) In **UniCom Basic**, when you make PC-to-PC calls with Lync, your IU phone line—if you have one—is not involved with UniCom at all. With this service, you can make PC-to-PC calls to only those who are on the UniCom user list.
- 2) In **UniCom Enterprise Voice**, all calls are routed exclusively to and from your computer or mobile devices—bypassing the IU phone switch altogether. This allows for maximum integration between phone and computer features. In this mode, you may enable call forwarding or even use Outlook Voicemail.

For UniCom Enterprise Voice, you must have an IU phone number. If you are interested in changing your service, contact your department's Telecommunications Coordinator (See: IU Knowledge Base, “At IU, how do faculty and staff request telephone service in an office?” <http://kb.iu.edu/data/allv.html>).

(For more information on what each service can do, see the IU Knowledge Base at <http://kb.iu.edu/data/awxm.html>.)

## Downloading the Software, Testing the Equipment

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### Getting the Software

Anyone with an IU username can download Lync from IUware. Note also that all UniCom users can use the web client without installing anything. (See the “Using the Communicator Web Access Interface” section, near the end of this document.) However, using the installed version of Lync provides more functionality than the web client alone offers.

To obtain the UniCom software:

1. Browse to <http://iuware.iu.edu>.
2. Click Communication.
3. Click UniCom Lync Clients.
4. Select either the 32-bit or 64-bit version of Lync; if you are not sure which to use, contact the UITS Help line at 855-6789 or your LSP.
5. Click the Login button.
6. Log in with your IU username and passphrase.

If you are new to UniCom, you will need to read and agree to the IU Emergency 911 Acknowledgment Statement before you are able to download the software. See “Setting Up an Account,” below.

7. Once you have read and agreed to the terms, click the Download button.

You can either save or install directly from the dialog box.

### Setting Up an Account

If you are new to UniCom, before you can use UniCom’s web interface or download Lync from IUware, you must read and agree to the IU Emergency 911 Acknowledgment Statement (<https://accountmgmt.exchange.iu.edu/E911>). The statement simply explains that computer-based phone applications have inherent limitations when sending automatic location information to utilities such as emergency 911 services, which may depend on landline information to respond.

If you have an account at IU and have already installed the software, setup and

sign-in on your computer is automatic. Sometimes, when the application is restarted, you will need to log in manually. As you launch Lync, you should be able to access most UniCom services.


### Equipment Needed

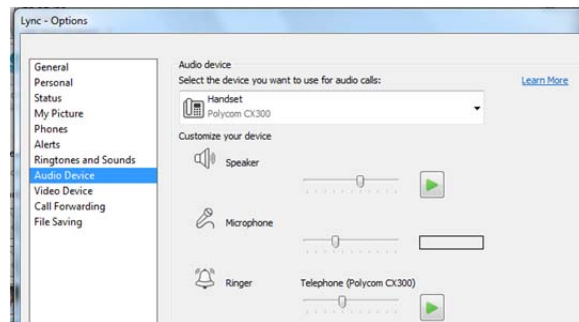
To use the voice communication capabilities of Lync, you'll need an USB device and PC speakers or a headset. If you want to do video conferencing, you'll also need a webcam. If you utilize UniCom Enterprise Voice, you can get a phone specially made for Lync. For information about telephones, headsets, and webcams that UITS recommends, see the IU Knowledge Base article at <https://kb.iu.edu/data/awgk.html>.

### Testing the Equipment

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

To set up audio and video:

1. Click the Lync Options button  .  
The Lync Options environment opens.
2. Choose either Audio Device or Video Device...



3. Choose the appropriate settings for your environment.

## Using Instant Messaging

### About Instant Messaging and Conversations

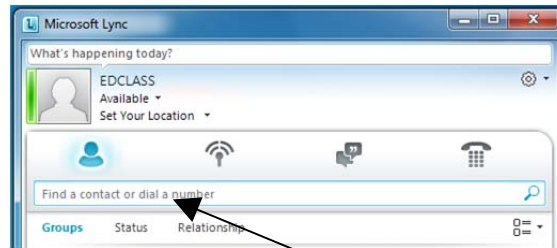
When you initiate a chat session in Lync, you generate a new **Conversation Window**. A Conversation Window is a small window that allows you to chat, screen-share, transfer files, manage PC-to-PC calling, and more. Commonly, people begin conversations with an instant message display and then shift to 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 Instant Message

There are a number of ways to initiate an IM session, in both Lync and in The IU Exchange Outlook client.

To generate an IM session by finding a name in the Communicator window:

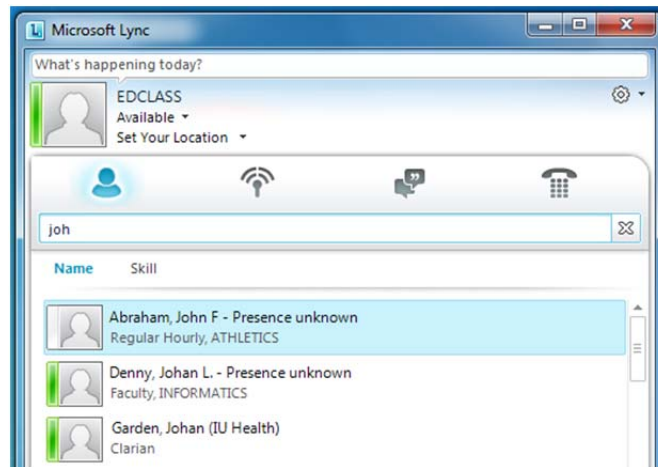
1. To find someone, simply type the name or IU username into the Lync Search field:



**Search Field**

You can use common name or username arrangements, for example: *John Doe*; *Doe, John*; *johdoe*; or *johdoe@indiana.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, known as their Presence State. If the person does not have a UniCom account, the bar appears empty.

Note: The image above 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, called a "jellybean."

**Important: Using UniCom Basic, you may IM or call only those who have colored icons.** (Note, however, 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.

Note: You do not need to search for people with whom you have already communicated; you will be able to find them in the Contact List. Just double-click the name in the Contact List and enter your message into the Conversation Window.

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.

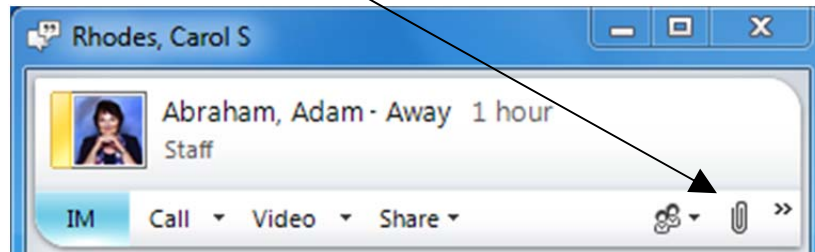
2. Type your text and press Enter.

### **Sending 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 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.

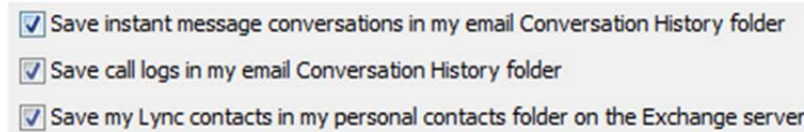
Note: a file cannot be sent to more than one person at a time.

### **Viewing 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:



## **Setting Your Presence**

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### **What are Presence States?**

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

**How Do  
Presence  
States  
Affect  
Workflow?**

Presence 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.

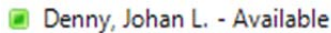
**Manually  
Setting  
Your  
Presence  
State**

Presence 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 “jellybean” in Name View).

In Picture View:



In Name View:



In Lync, you may set your Presence to:

- Available
- Busy
- Do Not Disturb
- Be Right Back
- Off Work
- Appear Away
- Appear Offline

If you have an IU Exchange account, the 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. Press the Presence button. A drop-down menu appears.
2. Choose the presence state.

For more help on Presence States, see:

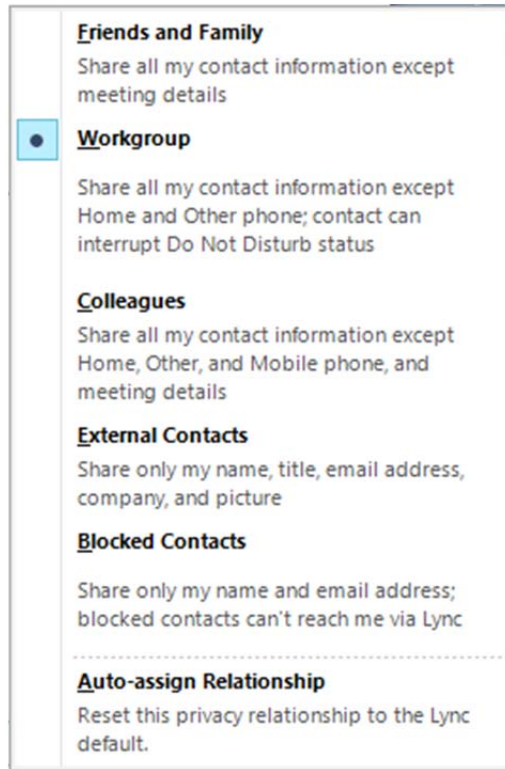
["Quick Start: Use instant messaging and presence" at  
http://office.microsoft.com/client/helppreview.aspx?AssetId=HA101832519&lcid=1033&NS=COMM14&Version=14&respos=0&CTT=1&queryid=5a5ebe2e6a0c41cfac3fa7934cbfbcc6](http://office.microsoft.com/client/helppreview.aspx?AssetId=HA101832519&lcid=1033&NS=COMM14&Version=14&respos=0&CTT=1&queryid=5a5ebe2e6a0c41cfac3fa7934cbfbcc6)

## Understanding Privacy Relationships

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### What Are Privacy Relationships?

Lync assigns a Privacy Relationship to every contact. There are five Privacy Relationships:



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 (click on the Options button ) and search using the term, “Control access to your presence information.”

### Setting Privacy Relationships for Contacts

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.

## Entering and Publishing Alternate Phone Numbers

You may list alternate phone numbers to some of your contacts in Lync. You can choose to publish some of the numbers for your colleagues. Depending on their Privacy Relationship with you, they can see and call your mobile device or other phone. For example: Your home phone number is only visible to your contacts with a Friends & Family designation, whereas your mobile phone number is visible to contacts in the Friends & Family and the Workgroup Privacy Relationships.

To enter additional phone numbers:

1. Click the Options  button. The Options environment opens.
2. Click on the Phones sidebar tab.
3. Add phone numbers as you see fit.
4. Ensure the 'Include in my contact card' checkbox is marked next to each phone number.

Remember, those who do not have access will not be able to see personal numbers.

Note: It could take up to 24 hours for other users to see phone number changes.

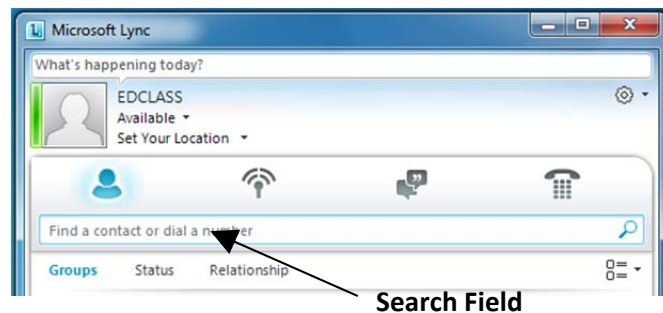
## Working with PC-to-PC Audio Calls

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### Making a Call by Name or Username

With UniCom Basic and a webcam or headset, you can find people who are also UniCom users and call one or several of them at a time on your PC. When you use the Lync Search field, the UniCom system searches the IU Global Address List (GAL) and your personal Outlook Contact List (if Outlook is running).

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

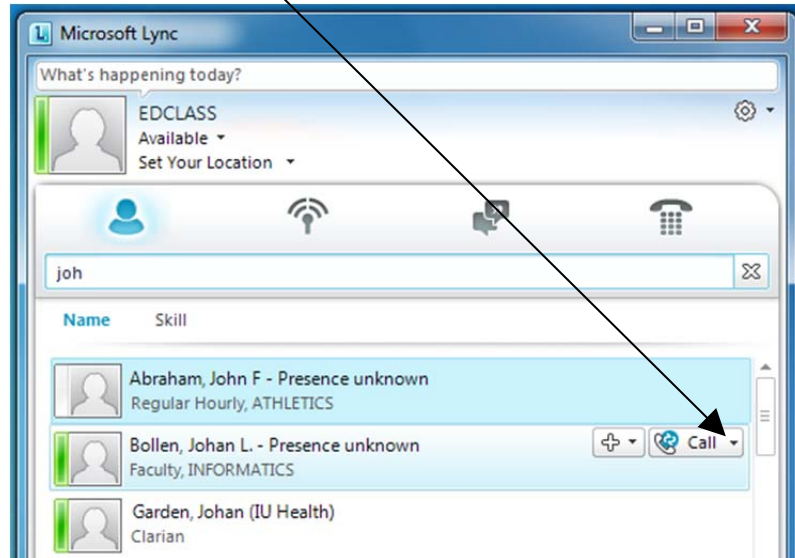


You can use common name or username arrangements, for example: *John Doe*; *Doe, John*; *johndoe*; or [johndoe@indiana.edu](mailto:johndoe@indiana.edu).

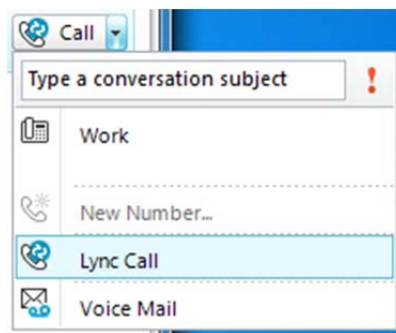
A bar parallel to the edge of the user icon will be displayed to the left of the name. If the person has a UniCom account, the bar will be colored. The color of the bar indicates that person's status. If the person does not have a UniCom account, the bar appears empty.

**Important:** Using UniCom Basic, you may IM or call only those who have colored icons. (Note, however, that all IU people are eligible to get UniCom accounts; those with the empty bars haven't signed up yet.)

- To call the person, click the drop-down arrow next to the phone icon to the right of the name:



In UniCom Basic, the Lync Call options will appear:

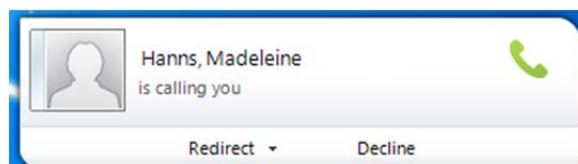


- Make a Lync PC-to-PC call to the other UniCom users by clicking the Lync Call option or icon.

### Answering a Call in Lync

When you have an incoming PC-to-PC call, the computer headset or your USB device or PC speakers will emit an electronic “ring.”

On the lower right corner of your computer screen, just above the System Tray, you will see a small pop-up window (or “toast”) indicating that you have an incoming call:



(Note: If the number is in your Contact List, the contact's name will be displayed along with the number.)

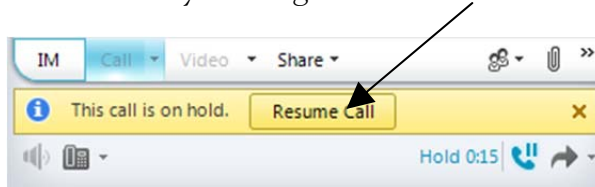
To answer a call:

1. Click anywhere in the pop-up. The call is connected.

### Placing a Call on 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 placed on hold and the newly generated call becomes active.

When you return to the original Conversation Window, you must take the original call off-hold by clicking on the Resume Call button:



## Working with Conference Calls

### What is a Conference Call?

A conference call involves more than two users. In a conference call, participants may talk via phone, chat in the Chat window, share their desktops, and invite others.

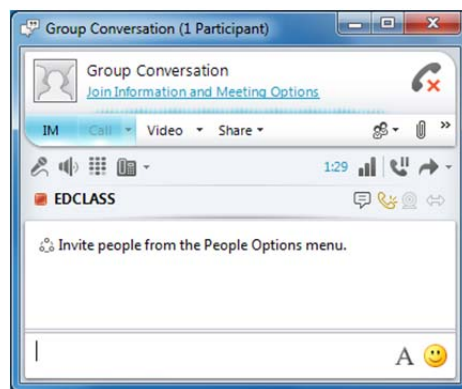
### Starting a Conference Call from the Lync Window

From the main Lync window, you can initiate a conference with others by email invitation or by selecting a contact. The email option in Meet Now allows non-IU participants or those away from their desks to join via web browser.

To initiate a Meet Now conference:

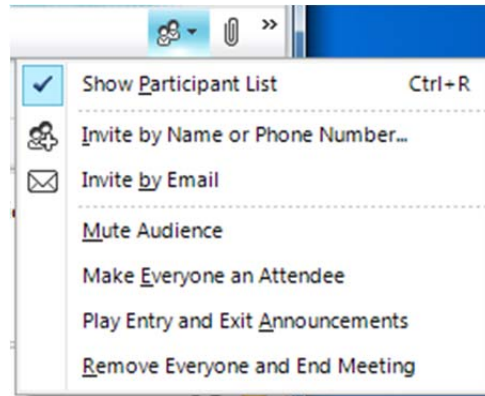
1. Click the Lync Options button  and click Meet Now.

A Conversation Window opens:



2. Click the People Options  drop-down menu.

A set of choices is displayed:



3. To bring someone who utilizes either Lync or Communicator directly into the conference, click Invite by Name or Phone Number.

To invite someone who is neither available via Lync nor Communicator, or is a non-IU person, choose Invite by E-mail. This allows both IU and non-IU participants to join.

Note: If you use UniCom Basic, when you invite people by email using Lync, those who join the conference via web are limited to IM only. The web-based conferees may see the option to join your conference call by phone; even so, the call will be unsuccessful. However, you may allow people to join your conferences via web and/or with phone-based audio. See “Starting a Conference Call from Outlook.”

### **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.

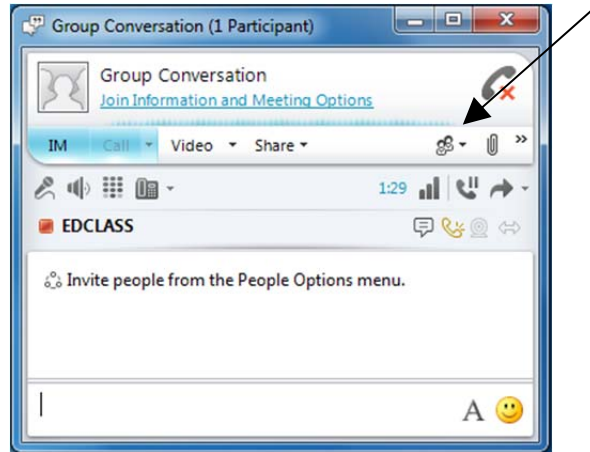
For more information about inviting by contacts or email invitation, see step 2 of “Inviting Additional Participants to a Current Call,” below.

### **Inviting Additional Participants to a Current Call**

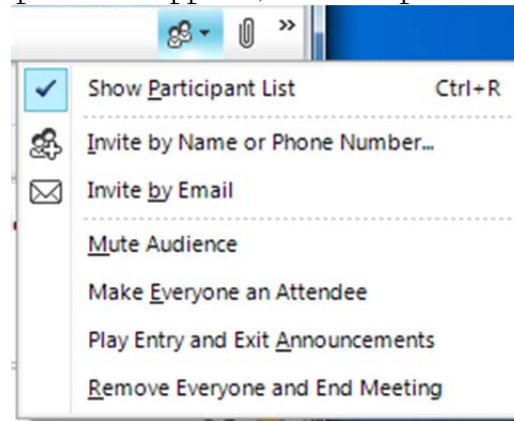
In Basic mode, you can invite any UniCom user to join in your current conversation at any time during the call.

To add an additional person to a call, in the Conversation Window:

1. Click the People Options  drop-down menu:



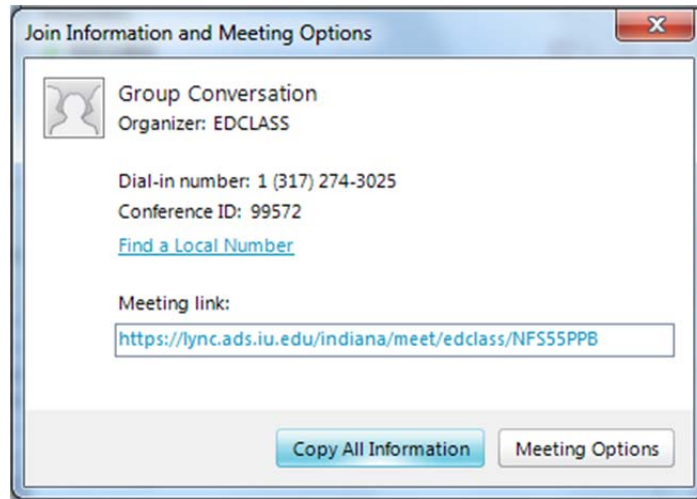
A pop-up window appears, with six options:



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.  
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 e-mail 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 e-mail invitation using an e-mail client other than outlook, open your e-mail client; then click on the Copy All Information button in the pop-up window. Paste the information into the body of an email to your invitees.

The additional party answers, if available.

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 or IM to Everyone in a Contacts Group” section, under “Calling or Instant-Messaging Contacts,” below.

## Creating Contacts, Creating Groups, and Changing the View

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### Creating Contacts

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.

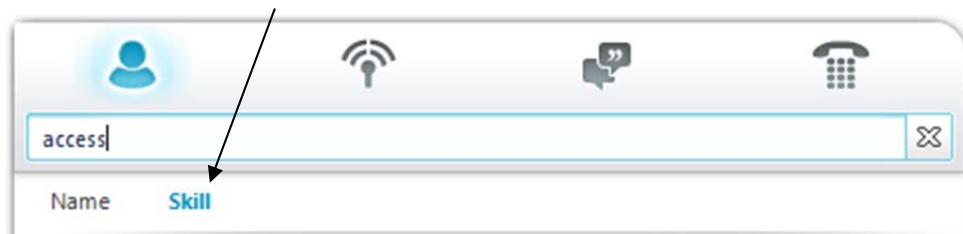
There are several ways you may create contacts, described in the following sub-sections.

### Adding a Contact from the Search Field

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. This is the most straightforward method.

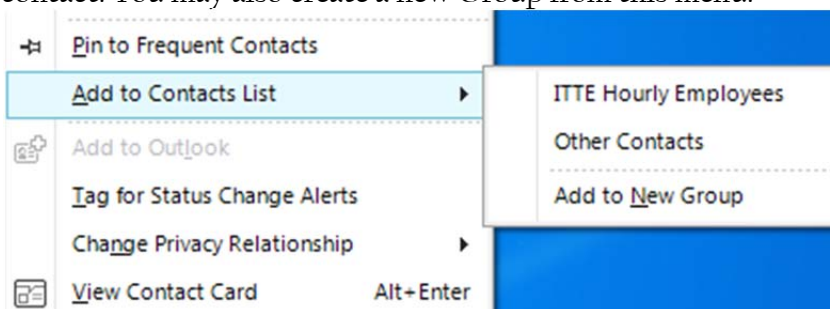
1. Click in the search field. There are two types of searches: by Skill and by Name.
  - a. If you are searching for contacts possessing a particular skill, type in that particular skill.

- b. Then click on the Skill tab below the Search text field.



Alternatively:


- a. For a person with IU username, you may type either their email username or their name. Either syntax for a full name—[Firstname Lastname] or else [Lastname, Firstname]—will work.
  - 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 this menu.



### Adding a Contact from a Recent Conversation

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

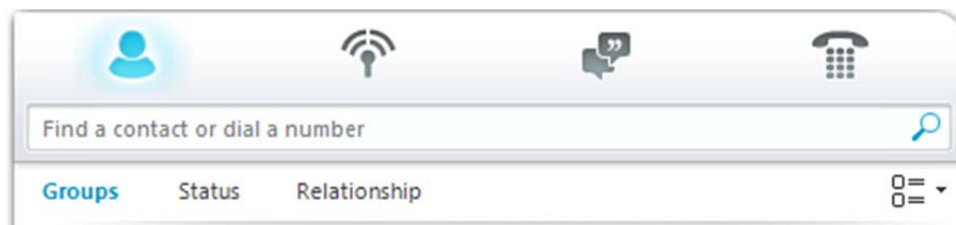
If you want to send instant messages to or use Lync with people who are in a federated organization (including AOL, MSN, or several federated colleges; see “What Is the .edu Federation Registry” section, above), you must first add them to your Outlook Contact List. To add a federated identity, you will 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.








## Default Contact Group Settings

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. To switch from the Groups view, you may first need to click on the small down-arrow  directly beneath the Search field. You will see the three types of Contact List arrangements:



In the Status view, your Contact List is sorted by Status, with each color indicating a different Presence State:

-  Available
-  Busy
-  Do Not Disturb
-  Be Right Back
-  Off Work
-  Appear Away
-  Offline

In the Relationship view, your Contact List sorts by Privacy Relationship levels. To learn more about Privacy Relationships and their settings, read “What Are Privacy Relationships?” in the ‘Introduction to Privacy Relationships’ section.

## Creating a New Contact Group

You may want to create your own groups, such as “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:

1. By pressing and dragging:
  - a. Simply press 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 Contacts 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.

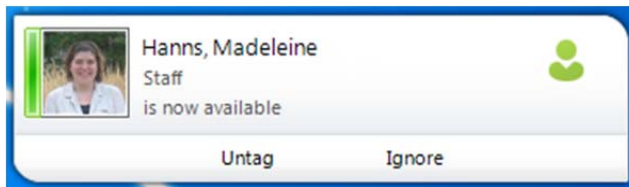
To pin a contact to your Frequent Contacts Group:

1. Right-click any contact.
2. From the pop-out menu, choose Pin to Frequent Contacts.

Pinned contacts will appear at the top of your Frequent Contacts Group.

**Tagging for 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 'de-tag' a contact:

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

## Calling or Sending Instant Messages to Contacts

**Initiating an Instant Message or Audio call to a Contact**

The Contact List allows you to store and organize many numbers and lots of information. Once you have entered people in your Contact List, you can then initiate an instant message or call them from the Contact List.

To initiate an audio call:

1. Click the phone icon to the right of the contact.



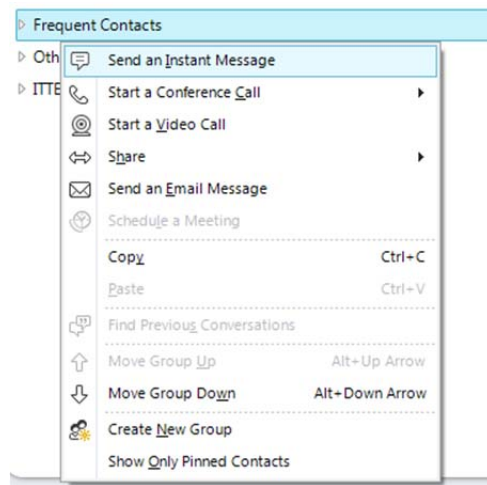
Alternatively, to initiate an IM session:

1. Double-click the name in the Contact List.
2. Then enter your message into the IM conversation window.

**Starting a Conference Call or IM to Everyone in a Contact List Group**

You may initiate a conference with an entire Group using your Contact List groups. To IM or conference-call a Group:

1. Right-click a Group header in the Contact List.
2. Choose one of the conference options:



If you elect to conference with your contacts by IM, Conference Call, or Video call, a new Conversation Window opens. In this window, Lync attempts to make a connection with all the contacts in the Group. Lync then calls the participants by phone, contacted by instant message, or invited to a video call.

You may also send an email to the entire Group by clicking on Send an Email Message. A new email will open in Outlook with the addresses of your group in the Send field.

**Initiating a Call or IM to Non-contiguous Contacts**

You can choose non-contiguous contacts from your Contact List and then contact them.

To initiate an IM or a conference call to non-contiguous contacts,

1. Individually Ctrl-click just the contacts you want to contact.
2. Choose one of the conference options.

**Initiating an IM or Audio Call to a Federated User**

In order to contact a user who is in a federated college or is an AOL or MSN instant message user, you must first create them as a contact in your Outlook Contact List. See “Adding a Federated Contact,” above.

If you want to use PC-to-PC audio calling, your contact must be in a federated college and have Lync or Office Communicator. On the other hand, instant messaging works in native AOL or MSN windows.

To call or IM a federated user,

1. In the Lync Search field, type the email address of the federated contact. The name appears underneath the search field.
2. Follow directions for sending an instant message or initiating a PC-to-PC call, in previous sections.

## Using Video

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### Making a Video Call

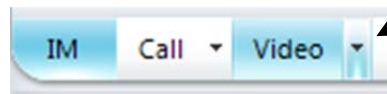
Just as you generate an IM or Lync call, if you have a video camera (or webcam) hooked up to your computer, you can place video calls. Participants who have video cameras will be seen in the Conversation window, while an icon will appear for those who don't have a webcam.

To initiate a video call:

1. Double-click the contact you want to call.

A conversation Window opens.

2. Click the Video drop-down menu:



3. Click on Start a Video Call.

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

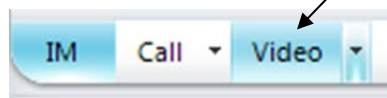


Images are seen in picture-in-picture layout; the image of the person who is speaking will be automatically featured as the largest in the window.

To initiate a video conference call, follow the same steps combined with those discussed in the 'Working with Conference Calls' section of this document.

### Opening Video in an Active Conversation

When you are engaged in an active conversation, you may initiate a video link at any time. To begin add a video aspect to your conversation, click on the Video button in the active conversation window.



## Using Sharing

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### 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.

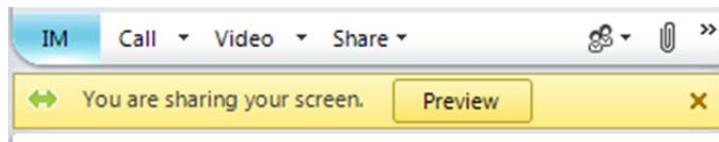
Now, your participants will view everything you do on your desktop.

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. An image of what your conversation partner(s) may view presents in the Stage.

To give control to another participant or a 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:

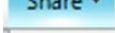
1. In the Conversation window, click the Control drop-down arrow.
2. Click Take Back Control. Alternatively, you may use the keyboard shortcut Ctrl-Alt-Space to regain control.

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.”

## Using OneNote

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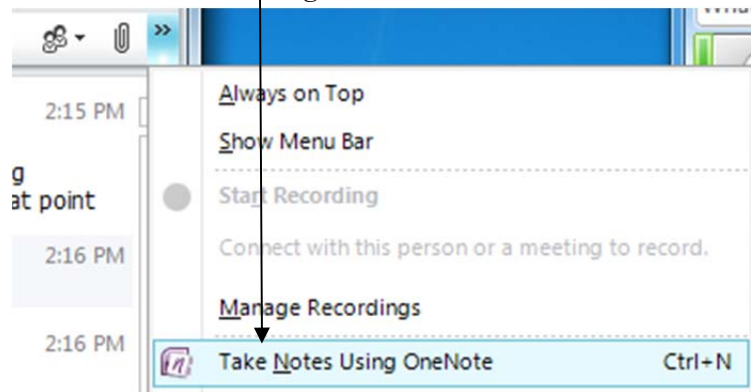
### What is OneNote?

OneNote is an organizational 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, under Microsoft Office. OneNote is available only with Office 2007 and 2010.

### Opening OneNote from a Conversation Window

In any Conversation Window:

1. Click the drop-down arrow next to the Add attachment icon
2. Click Take Notes Using OneNote:



## Using Lync from Outside the IU Network

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### Signing in to Lync from Outside the IU Network

You can take advantage of all the features of Lync from a computer not on the ADS domain. To do so:

1. Open Lync 2010 from the Start menu.
2. Enter your email address; enter ads\[user name], and password; then click **Sign In**.

For more information on downloading Lync, please see the section titled “Getting the Software.”

## 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, including:

- Computer audio
- Video
- Dial-in and dial-out (“Call me”) audio conferencing
- Detailed meeting roster
- Multi-party instant messaging (IM)
- Desktop and program sharing, including giving control to participants
- Collaboration features, including with Microsoft PowerPoint presentations, whiteboards, polls, and file sharing

## Using the Lync Web App

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### What is 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.

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

#### Join by Phone

425-555-0130

425-555-0131

1-800-555-0132

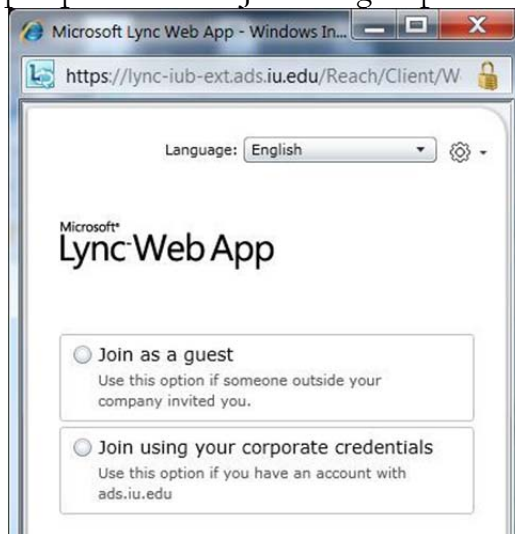
[Find a local number](#)

Conference ID: 18285

2. In the Lync 2010 screen that opens, click the Join online meeting hyperlink. A window opens.



3. Click on the 'Join the meeting using your web browser' button.
4. Users with and Exchange account should log on using their username and passphrase in the 'Join using corporate credentials.'

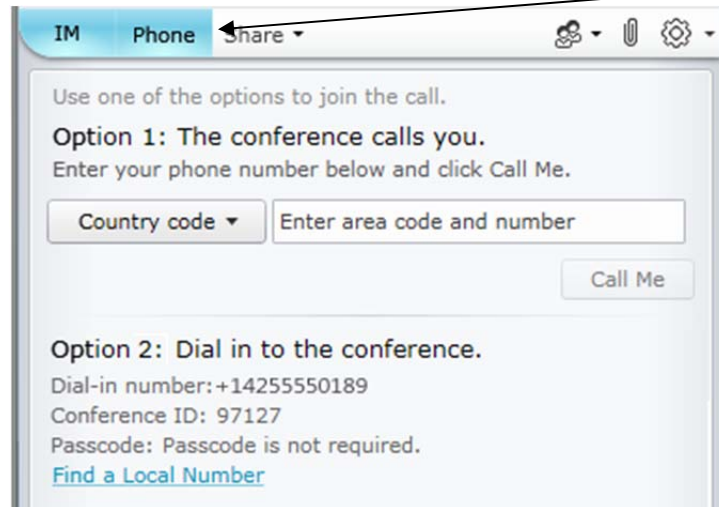


Depending upon the supplied credentials, you may be admitted to the meeting immediately. Otherwise, you may have to wait to be admitted by the leader of the meeting.

### **Audio Conversations with the Lync Web App**

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

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.

## Getting Help

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### Learning the Basics

Microsoft provides Quick Start, Work Smart, and How-to videos for Lync to will help you learn the basics of presence management (determining the information that others see about your availability status), contacting others, and responding when others contact you. You can access the Getting Started with Lync from the Help menu within Lync or at <http://office.microsoft.com/client/helphome.aspx?lcid=1033&NS=COMM14&Version=14>

There are many tutorials and demos available to help you get started with Lync. For more help resources, see the following section on Getting More Help.

### Getting More Help

#### Demos

##### Lync: Getting Started

<http://office.microsoft.com/en-us/support/office-video-FX102493438.aspx?CTT=1>

#### Help

##### All Help:

<http://office.microsoft.com/en-us/communicator-help/?CTT=1>

##### Quick Reference cards for Contact Management, Presence, IM, Phone and Video Conferencing, Keyboard Shortcuts and Dial-in Conferencing:

<http://office.microsoft.com/client/helppreview.aspx?AssetId=HA102280204&lcid=1033&NS=COMM14&Version=14&respos=0&CTT=1&queryid=9f8f9aeb66fd402dbd29c4e2843f5866>

#### Downloadable How-to Reference Materials:

##### Lync Quick-Start Guide

<http://www.microsoft.com/download/en/details.aspx?id=7091>

##### Lync Training

<http://www.microsoft.com/download/en/details.aspx?id=16547>

#### IU-specific Help and Resources

Unicom: <http://unicom.iu.edu/>

For forwarding and more, see <http://umsweb.iu.edu>