Cisco UC Integration for Microsoft Lync 9.7(4) User Guide

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Introduction

This section provides an introduction to Cisco UC Integration for Microsoft Lync.

Cisco UC Integration for Microsoft Lync

Cisco UC Integration for Microsoft Lync is a Microsoft Windows desktop application that provides access to Cisco Unified Communications from Microsoft Lync. The solution extends the presence and instant messaging capabilities of Microsoft Lync by providing access to a broad set of Cisco Unified Communications capabilities; including software phone standards-based video, unified messaging, conferencing, desktop phone control and phone presence.

Key features of Cisco UC Integration for Microsoft Lync include:

- Make and receive video calls using the Cisco Precision Video engine.

- Make and receive phone calls through Cisco Unified Communications Manager.

- Drag and drop and right-click integration with the Microsoft Lync contact list.

- Instant Messaging and Presence integration with Microsoft Lync.

- Mute, hold, and transfer during calls.

- Software phone or desktop phone mode selection.

- Communications history of missed, placed, and received calls.

- Audio and visual notification of incoming calls.

- Ad hoc conferencing.

- Visual voicemail.

- Click to Call from the Microsoft Outlook and Excel Ribbon and Internet Explorer.

- Start a Cisco WebEx meeting from the contact list, a conversation, or a Microsoft Lync instant messaging session.

  - Right-click a Microsoft Lync contact and select **Instant WebEx meeting**.

◦ Select multiple contacts in the Microsoft Lync Contact List, right-click, and select **Instant Webex meeting**.

◦ Meetings can also be started from Call History, Voicemail, and search results. Right-click an entry and select **Instant WebEx meeting**.

- Expressway Mobile and Remote Access

- Service Discovery

C H A P T E R 2

User Interface Overview

This section provides an overview of the Cisco UC Integration for Microsoft Lync user interface.

Docked Window

Cisco UC Integration for Microsoft Lync now includes a user interface option that displays a small window at the top of the screen and allows users to quickly access common functions.

Select **View** > **Show docked window** to show or hide the docked window.

Select **View** > **Position docked window** to position the docked window and then select one of the following:

- **Top left**
- **Top center**
- **Top right**

The docked window provides access to the following functions:

- Contact search
- Direct dialing of phone numbers
- Call history
- Voicemail
- Hub display

☞

Restriction   Users must not position the Microsoft Windows taskbar on the top of the screen. The docked window displays only at the top of the screen. If users position the Windows taskbar at the top of the screen, the taskbar might overlay the docked window. If the taskbar overlays the docked window, the users cannot access the docked window.

Incoming Call Window

The Incoming Call window displays when you receive an incoming call. This window provides options for:

- Accepting a call

  Select **Accept** to connect the call and begin a conversation. The Call window is displayed after the call is connected. See Call Window, on page 4 for more information.

- Declining a call

  Select **Decline** to not answer the call. Declined calls are sent to voicemail if it is configured. See Voicemail, on page 14 for more information.
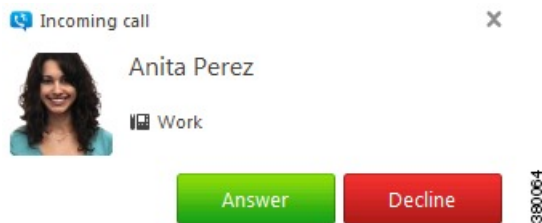
Call Window

The Call window is displayed during every connected call. This window provides options for control of the call and displays video during video calls. See Options Window, on page 7 for information on how to control how video is displayed when a call is connected.

The Call window provides the following call controls:

- **Start my video**

  Starts sending video in calls where video is not automatically sent.

- **Full screen**

  Expands video display to a full screen view.

- **Toggle self-view**

  Opens a small video display that shows the video you are sending.

- **Keypad**

  Opens a keypad to enter digits.

- **Mute**

- Mutes the audio.

- **Hold**

  Places the current call on hold.

- **Transfer**

  Provides options to transfer the call to a different number.

- **Merge**

  Provides options to merge the current call with another.

- **Conference Call**

  Provides options for creating a conference call.

- **Start Meeting**

  Starts a Cisco WebEx meeting with the call participant.

Hub Window

The Hub window displays call history, voicemails, and meetings. Phone configuration is also performed on this window. The Hub window is displayed when the user first logs into the application but can be hidden by closing it. Use the Docked window when the Hub window is closed to access the Hub window functions. See Docked Window, on page 3 for more information.
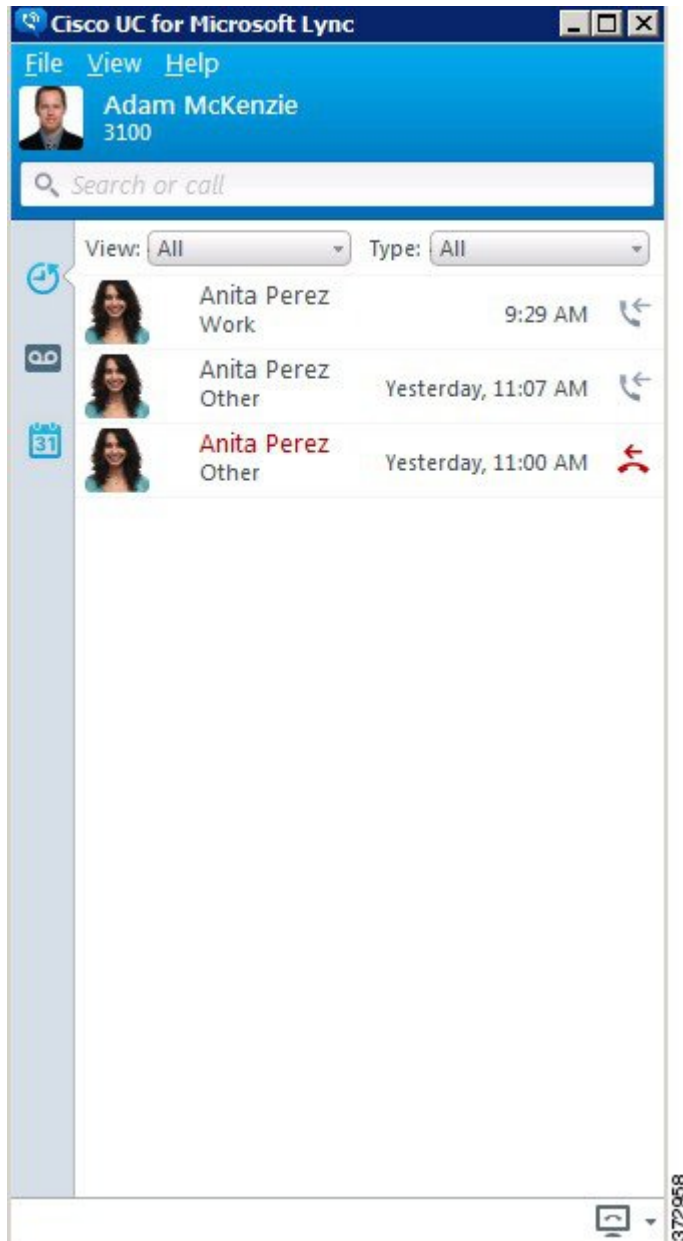
Options Window

The Options window is used to configure Cisco UC Integration for Microsoft Lync according to user preferences and deployment. Access the window by selecting **File** > **Options** on the Hub window. Select **Apply** or **OK** after making changes on this window to save those changes. Select **Cancel** to cancel any changes.
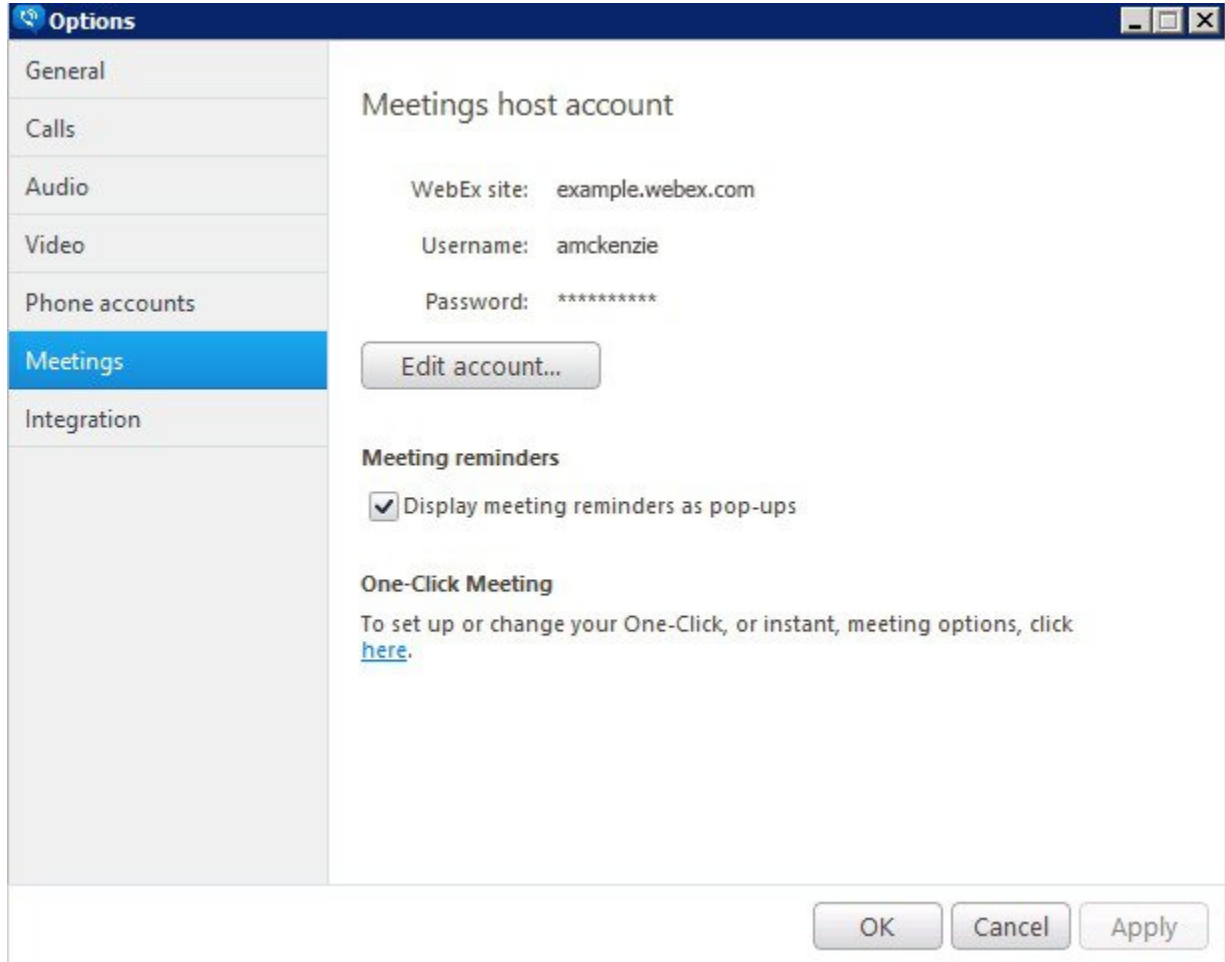
The following table lists the settings that can be configured on this window.

Category	Setting	Description
General	**Start Cisco UC for Lync when my computer starts.**	Starts the application automatically when the computer is started if selected.

Category	Setting	Description
Calls	**Always start calls with video.**	Automatically sends video when a calls starts if selected. This is the default selection.
	Never start calls with video.	Never sends video when a call starts if selected. Video can be started manually during the call.
	Call the default number	Call the contact's default number when initiating a call from Microsoft Lync.
	Allow me to select the number to call	Allow the user to select a number to call when initiating a call from Microsoft Lync.
	Display information when call is answered	Display the Call Information Window when a call is answered. See Call Information Windows, on page 15 for more information.
Audio	**Speaker**	Select the speaker the application will use from the drop down list. Use the slider under the drop down list to adjust the volume.
	Microphone	Select the microphone the application will use from the drop down list. Use the slider under the drop down list to adjust the volume. The strength indicator under the drop down list indicates the current loudness of the microphone.
	Ringer/Alerts	Select the device the application will use to play ringer and alert sounds from the drop down list. Use the slider under the drop down list to adjust the volume.
	Advanced >>	Select **Advanced >>** to arrange the order of preference for each audio device.

Category	Setting	Description
Video	**Camera**	Select the camera the application will use from the drop down list. A video preview will be displayed if the camera is selected successfully.
	Advanced >>	Select **Advanced >>** to arrange the order of preference for each camera device.
Phone accounts	**Voicemail**	Enter the user name and password associated with your Cisco Unity Connection voicemail account. Consult your system administrator if you do not have this information. Select **Advanced >>** if you need to input Cisco Unity Connection server information. This information will be supplied by your system administrator if necessary.
Meetings	**Edit Account**	Select **Edit Account** to enter the address of your Cisco WebEx server.
	Meeting Reminders	Select this checkbox to receive pop-up meeting reminders.
	One-Click Meeting	Use the link provided to edit your One-Click Meeting settings.
Integration	**Calendar integration**	Select the calendar to integrate with the application.

Options Window

CHAPTER 3

Features and Functionality

This section contains information and procedures on the features and functionality of Cisco UC Integration for Microsoft Lync.

Contact Search

Perform the following procedure to place a call using the contact search.

Procedure

Step 1   Select the dockable window.

Step 2   Begin typing the name of the contact in the search box.

Step 3   Select the desired contact from the search results.

Step 4   Use the call icon beside the contact name to place a call.

Call History

Perform the following procedure to place a call using the call history.

Procedure

Step 1   Select the dockable window.

Step 2   Select the **Calls** icon.
The Hub window opens.

Step 3   Select the desired phone number from the list.

Step 4   Use the call icon beside the phone number to place a call.

Step 5   Close the Hub window.

Direct Dial

Perform the following procedure to place a call using direct dialing.

Procedure

Step 1   Select the dockable window.

Step 2   Enter the phone number in the search box.

Step 3   Press **Enter**.

Drag and Drop Contacts

Perform the following procedure to place a call by dragging and dropping Microsoft Lync contacts.

Procedure

Step 1	Select Microsoft Lync.
Step 2	Select and drag the desired contact to the dockable window.
Step 3	Drop the contact on the dockable window. A call will be placed to the contact.

Call a Contact from Microsoft Lync

Perform the following procedure to call a contact from within Microsoft Lync.

Procedure

Step 1	Select Microsoft Lync.
Step 2	Perform one of the following actions to place a call:

a) Right-click a contact and select **Place Call**.

b) Select **Show Participant List** from a Microsoft Lync instant messaging window. Right-click a participant and select **Place Call**.

c) Select several participants in a Microsoft Lync group chat and right click to make a conference call. This feature is only available with Microsoft Lync 2010.

d) Right-click a contact and display their Microsoft Lync Contact Card. Select **View more options for interacting with this person**. Use the presented option for making a call. This feature is only available with Microsoft Lync 2010.

Receive a Call

The Incoming Call window displays when you receive an incoming call. This window provides options for:

- Accepting a call

  Select **Accept** to connect the call and begin a conversation. The Call window is displayed after the call is connected. See Call Window, on page 4 for more information.

- Declining a call

  Select **Decline** to not answer the call. Declined calls are sent to voicemail if it is configured. See Voicemail, on page 14 for more information.

Voicemail

The Voicemail tab on the Hub window provides access to your voicemail. This tab displays a list of all current voicemail messages.

Cisco UC Integration with Microsoft Lync provides access to your corporate voicemail. Select the Voicemail tab on the main window. This tab displays a list of all current voicemail messages. You can interact with the messages on this tab by:

- Selecting a message to play it.

- Selecting anywhere in the playback bar to reverse or advance playback.

- Pausing playback by selecting the **Pause** button.

Voicemail messages are deleted by selecting a message, right-clicking it, and selecting **Delete**.

The text of unplayed messages are bolded to distinguish them from played messages.

Click to Call Functionality

Cisco UC Integration for Microsoft Lync integrates with Microsoft Outlook, Microsoft Excel, and Microsoft Internet Explorer to provide Click to Call functionality in those applications. Click to Call provides the ability to call phone numbers or contacts without leaving the application. The following features are provided:

- **Microsoft Outlook**

    ◦ Call the sender of the currently highlighted message in the main Outlook window using the button provided on the Ribbon (Microsoft Outlook 2010 only).

    ◦ Select a recipient of the currently highlighted message to call in the main Outlook window using the button provided on the Ribbon (Microsoft Outlook 2010 only).

    ◦ Call the sender of the currently read email from the Ribbon in the message window.

    ◦ Select a recipient of the currently read email to call from the Ribbon in the message window.

    ◦ Call the selected contact or recipients list directly or using the **Call With Edit** option with the Ribbon button.

    ◦ Right-click the sender or any recipient to call them using the **Additional Actions** right-click menu item. Senders or recipients can be called directly or using the **Call With Edit** option. This is a Smart Tag option only available in Microsoft Outlook 2003 or 2007.

    ◦ Right-click any user and call them. Use the **Contacts** > **Additional Actions** menu in Microsoft Office 2007. Contacts are accessed directly in Microsoft Office 2010. Contacts can be called directly or using the **Call With Edit** option.

    ◦ Call a contact from the **Contact** window using the buttons provided on the Ribbon.

    ◦ Call a contact from any **Calendar** item using the buttons provided on the Ribbon.

- **Microsoft Excel**

    ◦ Call a phone number highlighted in a spreadsheet using the button provided on the Ribbon.

◦ Right-click and call a phone number highlighted in a spreadsheet.

◦ Use the **Call with Edit** button in the Ribbon to modify a selected value or enter a different number.

◦ Use the **Call with Edit** item in the right-click menu to modify a selected value or enter a different number.

- **Microsoft Internet Explorer**

  ◦ Right-click and call a phone number highlighted on a web page.

  ◦ Use the **Call with Edit** item in the right-click menu to modify a selected value or enter a different number.

See *Software Requirements* in the *Cisco UC Integration for Microsoft Lync Release Notes* for information on the supported versions of each application.

Set the Preferred Phone Device

Perform the following procedure to set the preferred phone device.

Procedure

Step 1 Select the dockable window.

Step 2 Select the Hub window icon.

Step 3 Select the phone device selection drop down list in the bottom right hand corner of the Hub window.
Note This list is populated with all of your configured phone devices. If a device is not available and should be, contact your system administrator.

Step 4 Select your preferred phone device.

Call Information Windows

Cisco UC Integration for Microsoft Lync has the ability to display contact and other information about connected incoming calls. These information windows are displayed after the call is connected in either a new Microsoft Internet Explorer tab or window. A new information window is displayed when the following occurs:

- An incoming call is connected.

- A call is transferred to you from another user.

- Participants are added to a conference call. An information window is displayed for each unique participant in a conference call.

These information windows are configured by your administrator. They will inform you if this functionality is available to you.

You can control the appearance of call information windows. Select **File** > **Options** from the menu and select the **Calls** tab. Select or deselect **Display information when call is answered** according to your preference.

Initiate a Chat Session

Perform the following procedure to initiate a Microsoft Lync chat session from Cisco UC Integration for Microsoft Lync.

Procedure

Step 1   Right-click a contact in Cisco UC Integration for Microsoft Lync in either search results, the Call History tab, or the Voicemail tab.

Step 2   Select **Chat**.

    Note   This feature is only available with Microsoft Lync 2010.

    Note   This feature will not work if Microsoft Lync is not running or the user is not signed in.

Add Meeting Accounts

Add a Cisco WebEx account to quickly start, join, and manage online conferences.

Procedure

Step 1   Select **File** > **Options**.

Step 2   Select the **Meetings** tab.

Step 3   Select **Edit account**.

Step 4   Select **New Site** from the **WebEx Site** drop-down list.

Step 5   Enter the site and associated user name and password in the fields provided.

Step 6   Select **OK**.

Start a Cisco WebEx Meeting

Start a Cisco WebEx meeting with one of the following actions:

- Right-click a Microsoft Lync contact and select **Instant WebEx meeting**.

- Select multiple contacts in the Microsoft Lync Contact List, right-click, and select **Instant Webex meeting**.

- Meetings can also be started from Call History, Voicemail, and search results. Right-click an entry and select **Instant WebEx meeting**.

This feature is only available if a user has set up a Cisco WebEx Meeting account. See Add Meeting Accounts, on page 16 for more information.