Cisco UC Integration for Microsoft Lync 10.6 User Guide

User Guide

Introduction

Welcome to Cisco UC Integration for Microsoft Lync. This application extends the presence and instant messaging capabilities of Microsoft Lync by providing access to a broad set of Cisco Unified Communications capabilities. Here are some of the things you'll be able to do:

- Make and receive voice and video calls through Cisco Unified Communications Manager.
- Drag and drop and right-click directly from Microsoft Lync to make a call.
- 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 Internet Explorer, Microsoft Outlook and other Microsoft Office applications.
- Start a Cisco WebEx meeting.
- Service Discovery.

Calls

Call From Docked Window

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 phone number to place a call.

Call From Call History

Procedure

Step 1	Select the dockable window.
Step 2	Select the **Recents** 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.

Drag and Drop Contacts

You can drag and drop your Microsoft Lync contacts to initiate a call.

Procedure

Step 1	Select your contact in Microsoft Lync.
Step 2	Drag and drop the contact to the dockable window. A call is placed to the contact.

Start Calls with Video

Procedure

Step 1	In the hub window, select **File** > **Options**
Step 2	Select the **Calls** tab.
Step 3	Select **Always start calls with video**.
Step 4	Select **Apply**.

Start Calls with Default Number

Use the contacts default number when you initiate a call from Microsoft Lync.

Procedure

Step 1	In the hub window, select **File** > **Options**
Step 2	Select the **Calls** tab.
Step 3	Select **Call the default number**.
Step 4	Select **Apply**

Select your Preferred Phone Device

Procedure

Step 1	In the hub window, open the Phone Controls drop-down menu.
Step 2	Select your preferred phone device.

Show the Call Information Windows

You can view 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.

Procedure

Step 1	In the hub window, select **File** > **Options**
Step 2	Select the **Calls** tab.
Step 3	Select **Display information when call is answered**.
Step 4	Select **Apply**.

Check Your Voice Messages

Procedure

Step 1	Select the voice messages tab on the hub window.
Step 2	You can listen to your voice messages by selecting a message to play. You can delete your message by right-clicking it and selecting **Delete**.

Click to Call

Call from Microsoft Outlook

Procedure

Step 1 Select an email in your inbox.

Step 2 You can create a call using one of the following options:

- In the ribbon menu, select **Call** *sender_name*
- In the ribbon menu select the **Recipients** drop-down list. Choose the recipient you wish to call.

Call from Microsoft Office Applications

Procedure

Step 1 Highlight a number in the current document.

Step 2 Start a call using one of the following options:

- On the ribbon menu select one of the following:
  - **Call**
  - **Call with edit**—You can edit the number before creating the call.
- In Microsoft Word or Microsoft Excel you can right-click and select one of the following menu options:
  - **Call**
  - **Call with edit**—You can edit the number before creating the call.

Call from Internet Explorer

Procedure

Step 1 Highlight a number on a web page in Internet Explorer.

Step 2 Right-click and select one of the following:

• **Call**

• **Call with Edit..**—You can edit the number before creating the call.

Start a Chat

You can start a Microsoft Lync chat session from Cisco UC Integration for Microsoft Lync.

Before You Begin

This feature is only available with Microsoft Lync 2010 or Microsoft Lync 2013.

This feature is not available if Microsoft Lync is not running or the user is not logged in.

Procedure

Step 1   Right-click a contact in Cisco UC Integration for Microsoft Lync in either search results, the call history tab, or voicemail tab.

Step 2   Select **Chat**.

Create a WebEx Meeting

Procedure

Step 1   Select a contact or multiple contacts from one of the following:

• Microsoft Lync contacts list

• Recents list

• Voicemail

• Search results

Step 2   Right-click and select **Instant WebEx Meeting**.

Customize

Select Audio Devices

Procedure

Step 1	In the hub window, select **File** > **Options** The options window opens.
Step 2	Select the **Audio** tab.
Step 3	Choose your Speaker, Microphone, and Ringer/Alerts options.
Step 4	Select **Apply**.

Arrange Audio Devices

If you have more than one audio device, you can arrange them in order of preference.

Procedure

Step 1	In the hub window, select **File** > **Options**
Step 2	Select **Advanced**.
Step 3	Select your audio device and use the up and down arrow to set the order.

Select Video Devices

Procedure

Step 1	In the hub window, select **File** > **Options** The options window opens.
Step 2	Select the **Video** tab.
Step 3	Choose your camera.
Step 4	Select **Apply**.

Arrange Video Devices

If you have more than one video device, you can arrange them in order of preference.

Procedure

Step 1	Select **File** > **Options**
Step 2	Select the **Video** tab and then **Advanced**.
Step 3	Select your camera and use the up and down arrows to set the order.

Add Phone Account

Procedure

Step 1	Select **File** > **Options**
Step 2	Select **Phone accounts**.
Step 3	(Optional) Select **Advanced** to input the Cisco Unity Connection server information.
Step 4	Enter the username and password for your Cisco Unity Connection account.

Add Meetings Accounts

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 associate username and password in the fields provided.
Step 6	Select **Ok**.

Integrate Your Calendar

Procedure

Step 1	Select **File** > **Options**.
Step 2	Select the **Integration** tab.
Step 3	Select the calendar to integrate with the application.

Accessibility

Keyboard Shortcuts

Global Shortcuts

Operation	Keyboard Shortcut

Access the docked window
 	
Tip   To show the docked window:
 	
    1 Open the Hub window.
 	
    2 Select **View** > **Show docked window**.
	CTRL + Shift + ?

Open the context menu	Menu key Shift + F10

Incoming Calls

Operation	Keyboard Shortcut
Answer calls	CTRL + L
Decline calls	CTRL + D
Reply to calls with chat	CTRL + R

Active Calls

Operation	Keyboard Shortcut
End calls	CTRL + K
Enter or exit full screen mode	CTRL + SHIFT + F
Show or hide self-view video	CTRL + SHIFT + B
Mute or unmute your audio	CTRL + Down Arrow
Start or stop video	CTRL + SHIFT + V

Operation	Keyboard Shortcut
Dock or undock the call window	CTRL + ALT + P
Hold or resume calls	CTRL + SHIFT + H
Open or close the keypad	CTRL + SHIFT + K **Tip** Enter numbers on the keypad with your keyboard.
Increase Volume	CTRL + SHIFT + Up Arrow
Decrease Volume	CTRL + SHIFT + Down Arrow
Open or close the More menu	CTRL + SHIFT + Plus
Open the Merge menu when calls are on hold	CTRL + M
Transfer a call	CTRL + SHIFT + T
Start a conference call	CTRL + SHIFT + C
Show call statistics	CTRL + SHIFT + S

Font Smoothing

Administrators who install and configure Cisco UC Integration for Microsoft Lync can control how font smoothing occurs.

The ForceFontSmoothing parameter specifies whether the client or the operating system applies anti-aliasing to text. By default, the client applies anti-aliasing to smooth text.

If you want the operating system to apply anti-aliasing to text, set the ForceFontSmoothing parameter in the client configuration as follows:

```
<Policies>
  <ForceFontSmoothing>false</ForceFontSmoothing>
</Policies>
```

Troubleshooting

Presence Behavior

Expected presence behavior in Microsoft Lync when Cisco UC Integration for Microsoft Lync is used for calls

Initial Presence state in Microsoft Lync	On a call using the soft phone, status changes to:	On a call using the desk phone, status changes to:	End a call using soft phone, status changes to:	End a call using desk phone, status changes to:	Mouse move desk phone or return from idle

Available 🟩	On the Phone/Custom 🟥	On the Phone 🟥	Available 🟩	Available 🟩	X
Inactive / Idle 🟨	On the Phone/Custom 🟥	On the Phone/Custom 🟥	Available 🟩	Inactive / Idle 🟨	Available 🟩
Away / Idle 🟨	On the Phone/Custom 🟥	Away/Idle 🟨	Available 🟩	Away / Idle 🟨	Available 🟩
Be right back /Manual 🟨	Be right back/Manual 🟨	Be right back/Manual 🟨	Be right back/Manual 🟨	Be right back/Manual 🟨	X
Off work /Manual 🟨	Off work/Manual 🟨	Off work / Manual 🟨	Off work / Manual 🟨	Off work / Manual 🟨	X
Appear Away / Manual 🟨	Appear Away / Manual 🟨	Appear Away / Manual 🟨	Appear Away / Manual 🟨	Appear Away / Manual 🟨	X
Busy / Manual 🟥	On the Phone / Custom 🟥	On the Phone / Custom 🟥	Available 🟩	Available 🟩	X
Busy Idle (5 min) - Busy 🟥	On the Phone / Custom 🟥	Busy Idle (5 min) - Busy 🟥	Available 🟩	Busy Idle(5 min) - Busy 🟥	Available 🟩
Busy Idle (10 min) - Away 🟨	On the Phone / Custom 🟩	Busy Idle (10 min) - Away 🟨	Available 🟩	Busy Idle (10 min) - Away 🟨	Available 🟩
On the Phone / Manual 🟥	On the Phone / Manual 🟥	On the Phone / Manual 🟥	Available 🟩	Available 🟩	X

Do not Disturb / Manual	Do not Disturb / Manual	Do not Disturb / Manual	Do not Disturb / Manual	Do not Disturb / Manual	X
🟥	🟥	🟥	🟥	🟥	

This table describes the expected behavior in Microsoft Lync when Cisco UC Integration for Microsoft Lync is used for calls.

Note The different behavior when using a soft phone and desk phone for the inactive state is because when the user responds on a soft phone when their machine is inactive, it will immediately become active.

Presence Issues

Presence showing Busy not On the Phone

Problem Description: When on an active call, *Busy* presence is showing instead of *On the Phone*.

Resolution: Cisco UC Integration for Microsoft Lync provides an *On the Phone* custom presence xml file, for information on configuring the registry keys see the *Custom Presence Status* in the *Cisco UC Integration for Microsoft Lync 10.6 Administration Guide*.

Presence Not Changing as Expected

Problem Description: When on an active call, Cisco UC Integration for Microsoft Lync doesn't change status.

Resolution: Cisco UC Integration for Microsoft Lync changes status in certain scenarios, see the *Presence Behavior* section for further information.

Presence Not Showing In a Meeting

Problem Description: When a meeting is started and the meeting is shown in the meetings tab, the presence doesn't change.

Resolution: Microsoft Lync controls the presence changing to In a meeting. Verify the following:

- Verify that Microsoft Lync is connected with the Microsoft Lync server.
- Verify that the Exchange Web Service (EWS) is deployed to Lync.
- Check the values for the Microsoft Lync server parameters:
  - CalendarStatePublicationInterval
  - WebServicePollInterval

For further information check your Microsoft Lync documentation.

Presence not Changing

Problem Description: Using a desk phone to make a call and presence doesn't change

Resolution: When you are using a desk phone your computer can be in Idle state. See the Presence Behavior section for more information on states and presences.

Expected Presence When On a Call and In a Meeting

Problem Description: When on a call and in a meeting what is the expected presence.

Resolution: In Cisco UC Integration for Microsoft Lync the presence statuses *In a Meeting*, *On the Phone* and *Busy* have the same priority, this is treated the same in Microsoft Lync. The last presence set is the last presence shown.

Overrides Manual Presence

Problem Description: Manually changing presence to *Away* doesn't change to *On the Phone* when on a call, but manually changing presence to *Busy* and on a call will change the status to *On the Phone*.

Resolution: In Cisco UC Integration for Microsoft Lync the presence status *Away* has priority over the presence statuses *In a Meeting*, *On the Phone*, and *Busy*.