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 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 4 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 6 for more information.