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Part 1
Overview

In this Part:
Chapter 1: What’s New with Office Communicator 2007 R2
Chapter 2: Getting Started
Chapter 1: What’s New with Office Communicator 2007 R2

This chapter covers the following new features in Microsoft® Office Communicator 2007 R2:

- New calling features
- Meet now conferencing
- New Contact List features
- Dial-in audio conferencing
- Voice mail enhancements
- Desktop sharing
- Call delegation
- Team call
- Response groups
- Voice and video enhancements
- Desk phone integration
- Instant messaging enhancements
- Automatic updates

New Calling Features

Office Communicator 2007 R2 contains several new features that can be used when initiating a phone call or during a conversation.

- Inviting participants by using alternate phone numbers. When adding a participant to a conference, the conference leader can select any of a user's published phone numbers. When you click Invite from within the conference, a View more options for calling this contact button is available next to each contact in the Invite Someone list. You can click this button and select any of the phone numbers listed for the contact. This feature is especially useful if the conference leader knows that a contact is available by mobile phone only.

- Receiving an alert for incoming calls while you are in an IM session. When you are participating in an instant messaging (IM) session and you receive another call, an alert for the incoming call appears in the lower-right corner of your desktop. In the previous release, the IM conversation window would blink to indicate an incoming call.

- Using the keyboard during a call. If you are prompted to press a key during a Communicator call, you can use your keyboard instead of the Communicator dial pad. Communicator reflects your actions by automatically opening the dial pad and displaying the keys that you pressed.

- Copying and pasting numbers into the dial pad. If you need to type a long number into the Communicator dial pad, you can copy the code from another source and paste it into the dial pad. For example, if you are joining a Communicator conference, and you need to enter a long participant code, you can copy it from the e-mail invitation and paste it into the dial pad.

- Connecting Communicator with your desk phone. Communicator pairs with your Microsoft® Office Communicator 2007 R2 Phone Edition desk phone. When you use a USB cable to connect an Office Communicator 2007 R2 Phone Edition desk phone to your computer, your desk phone becomes your preferred audio device for calls, conferences, and Microsoft® Office Live Meeting 2007 sessions. See “Desk Phone Integration” later in this section.
Meet Now Conferencing

In Office Communicator 2007 R2, there is a new **Meet Now** option that lets you quickly start a new conference and invite people who are either inside or outside your organization. In earlier versions of Communicator, you could invite people to your Communicator conferences only if they were members of your organization or a federated organization. With the **Meet Now** option, you can start a new conference, and then use one of two options to invite people. You can use the **Invite a Contact** option to invite contacts from within your organization and federated organizations, or you can use the **Invite by Email** option to send out an e-mail invitation, which creates an Outlook e-mail message that contains links to the conference. The recipient can join the conference by using either Communicator or a Web browser. You can also use the **Invite by Phone** option to call someone and add them to the conference.

New Contact List Features

The Contact List in Office Communicator 2007 R2 contains the following new features for managing your phone contacts, call-forwarding groups, and current conversations.

- **Sort by Display Name in any view.** Whether you choose the **Contact List**, **Access Levels**, or **Tagged Contacts** view, you now have the option of sorting the contacts alphabetically by display name instead of presence state so that your Contact List can be used as an address book.

- **Phone number contacts.** You can add outside phone numbers to your Contact List so that you can conveniently call people, such as friends and family members, who do not have Communicator. You can type a phone number in the search box and then move it to your Contact List. Or, if you have recently dialed a phone number, the phone number appears in your Contact List under **Recent Contacts** and you can move it to your **Contact List**.

- **New Groups in the Contact List for Delegates and Team-Call Group.** In Communicator, you can display a **Team-Call Group** or a **Delegates** group in your Contact List. These two groups are determined by how you have configured your Call Forwarding settings. If you have set up a team-call group for the Team Call feature, you can display your Team-Call Group in the Contact List (See “Team call” later in this section). If you have configured delegates who will be using Microsoft Office Communications Server 2007 R2 Attendant to answer your calls and make calls on your behalf, you can display your Delegates group in the Contact List (See “Call Delegation” later in this section.). Be aware that you cannot add contacts to these groups in the Contact List by dragging and dropping contacts into them. Because these features must be configured in your call-forwarding settings, if you try to drag a contact into one of these groups, a message is displayed that asks whether you want to open the **Call-Forwarding Settings** dialog box.

- **New Current Conversations group.** When you have one or more active Communicator conversations, a new group called **Current Conversations** appears in Communicator at the top of your Contact List. You can use this group to scan your active conversations. You can also navigate quickly to one of the conversations in the list by double-clicking it.

- **“Last active” presence information is available to Company Access Level.** Contacts who are assigned an access level of **Company** can see how long you have been away when your status is **Offline**, **Away**, or **Out of Office**. Previously, only contacts who had access levels of **Personal** or **Team** could see this information.

Dial-in Audio Conferencing

Users without access to a computer who want to join an Office Communicator 2007 R2 audio conference can now call into the conference using a regular mobile, desk, or home phone. Previously, the only way for the organizer to include a user who only had access to a phone was to call the user from within Office Communicator.
Now, when you schedule an audio conference by using the Conferencing Add-in for Microsoft Office Outlook, you can add a conference call number to the conference. The Outlook invitation contains the dial-in information. Participants can use any phone to dial in to the conference and enter the conference ID and PIN when prompted. After the participant joins the audio conference, he or she appears in the conference roster.

The dial-in audio conferencing option is provided by the Conferencing Attendant application, which is a feature of the new Application Server in Office Communications Server 2007 R2.

**Voice Mail Enhancements**

Voice mail enhancements in Office Communicator 2007 R2 offer convenient ways to manage your voice mail and leave messages for others:

- In organizations that have Microsoft® Exchange Server 2007 with the Unified Messaging server role, Office Communicator users can now directly call a contact's voice mailbox to leave a message.
- A new option enables you to quickly access your voice mail greeting so that you can update it if necessary.
- When you click a voice mail indicator in Office Communicator, the voice mail indicator resets so that you can easily distinguish new voice mails from those that you have already handled.

**Desktop Sharing**

With desktop sharing in Office Communicator, a participant in a Communicator conversation can share his or her entire computer desktop with the other participants. If you have a document, slide deck, or application that you want to present to others in the conversation, you can start a desktop sharing session. After you start desktop sharing, you can also share control so that other participants can provide mouse and keyboard input into your desktop.

**Call Delegation**

New call forwarding options allow a manager or executive to select one or more assistants (delegates) to receive his or her phone calls. Delegates are contacts who can answer the manager’s calls, and make and transfer calls on the manager's behalf.

>Note

Delegates must use Office Communications Server 2007 R2 Attendant instead of Office Communicator 2007 R2 so that they can access all the call delegation features.

The manager specifies delegates in Office Communicator in the **Call-Forwarding Settings** dialog box. The manager can configure the call-forwarding settings to do the following:

- Simultaneously send all incoming phone calls to the manager and the delegates.
- Send all incoming phone calls directly to the delegates.

When using call delegation, it is important for all parties involved to be able to determine how a call is being handled. The following features help callers, assistants, and managers understand who will receive the call:

- When a caller uses Office Communicator to try to contact the manager, the status region shows that the call is also ringing the delegates. The caller then knows that there is a possibility that a delegate will answer the call.
- If a delegate answers the phone call, the manager's invitation shows the name of the delegate who has answered the call. Other delegates will see that the call has already been answered and by whom.

In the Conversation window, the Transfer menu now contains the list of the manager’s delegates so that he or she can easily transfer any phone call to a delegate for follow-up.

### Team Call

In the Office Communicator Call Forwarding Settings, you can set up a group of contacts, known as a team-call group, who can answer your incoming calls. This feature emulates the group pickup feature in traditional PBX systems, and is especially useful if you are part of a group of people who share responsibility for a particular area and any one of you can field incoming calls. You can set up this feature to ring you and your team-call group simultaneously, or you can set a delay so that your calls ring you first and then your team-call group after a specified number of seconds. This feature requires that Enterprise Voice capabilities are enabled for you and the members of your team-call group.

### Response Groups

The Response Group is a concept that is new in Office Communications Server 2007 R2. With a Response Group, incoming calls are queued and routed to designated agents based on predefined routing rules. This functionality is provided by the Response Group Service, which is a feature of the new Application Server in Office Communications Server 2007 R2. This feature is similar to the “hunt group” and “automatic call distribution” functionality in PBX systems.

As an Office Communicator 2007 R2 user, you can search for a response group and initiate a call to a response group just as you would any other distribution group. You can also add a response group to your Contact List. Communicator uses an automated service icon to differentiate response groups from other distribution groups.

Users who are designated as agents of a Response Group can receive calls by using a telephone or Office Communicator 2007 R2. Users are designated either as informal agents or formal agents, depending on whether they are required to formally sign in to the response group to begin receiving calls.

- Informal agents do not sign in to and out of the group. If you are an informal agent, you can receive calls routed to your group by using a standard telephone or Office Communicator 2007 R2.
- Formal agents are required to sign in to and out of the group. If you are a formal agent, you will see a tab at the bottom of your Communicator window, labeled Response Group. You use this tab to sign in to and out of your group.

### Voice and Video Enhancements

In Office Communicator 2007 R2, the following voice and video enhancements improve the experience during an Office Communicator voice or video conversation.

- **Video call controls.** The video call controls have been updated for easier use. During a video call, double-clicking the video automatically resizes the video to full screen.
• **High Definition and Video Graphics Array (VGA) video.** Previously, Communicator supported the Common Intermediate Format (CIF) video format, which has a resolution of 352 by 288. Now, both VGA display (resolution 640 x 480, ratio 4:3) and High Definition (resolution 1280 x 720, ratio 16:9) are available to Communicator users. VGA is the default format. Your administrator determines whether to enable High Definition through a policy setting. In Communicator, when you select the video size, the appropriate format is selected. In Large mode, the video format is VGA. In Full-screen mode, the video format is High Definition (if it is enabled by your administrator).

• **Video policy setting for conference rooms.** With the new policy setting EnableFullScreenVideoPreviewDisabled, administrators can enable Office Communicator to show video in full screen with the preview disabled for all Office Communicator video calls. This policy is typically used in conference room settings.

• **Reduced call setup time.** Updates to the implementation of the protocols that support early media negotiation help reduce call setup time and reduce delays when a call is established.

• **Improved connectivity.** Peer-to-peer voice conversations remain connected even when the SIP signaling channel is lost. Participants can continue the voice call while Office Communicator attempts to reestablish the signaling channel.

• **Voice and video quality indicators.** New indicators in the Conversation window indicate situations that may be affecting the quality of the voice or video call, including poor network conditions, low bandwidth network connections, or poor audio quality from a particular device.

**Desk Phone Integration**

If you connect an Office Communicator 2007 R2 Phone Edition desk phone to your computer with a USB cable, Communicator pairs with your desk phone, and the desk phone becomes your preferred audio device for calls, conferences, and Live Meeting sessions. The following activities occur:

• You can sign in to the desk phone from Communicator. When you connect your desk phone with your computer, Communicator detects the connection and provides a sign-in screen. You can enter your credentials in this screen to sign in to the desk phone.

• When you receive an incoming call, clicking the notification on your computer automatically connects your desk phone to the call.

• If you are using Outlook or Communicator and you click a contact to call them, the call is placed from your desk phone. During a call, any call control actions that you take (for example, putting the call on hold or transferring the call) are reflected both in Communicator and on your desk phone.

• If you are participating in an IM session and you add audio, your desk phone rings while it sends the audio invite to other participants.

• If your desk phone is the only audio device that you have connected to your computer and you are participating in a Live Meeting session, incoming calls will interrupt your Live Meeting audio and enable you to answer the desk phone.

When you plug the Communicator Desk Phone into your computer with a USB cable, a Communicator sign-in window appears on your computer. This enables you to sign in to the desk phone from your computer.

**Instant Messaging Enhancements**

Office Communicator 2007 R2 provides the following instant messaging enhancements:
- A new option, **Change the background color when the writer changes**, makes the instant messaging window easier to read. When you select this option, every time that the writer changes, the background color changes so that you can more easily differentiate messages from different writers.

- Previously, when IM conversations were saved in the Outlook Conversation History folder, emoticons were removed. In Communicator 2007 R2, the text equivalents for emoticons are retained in the conversation history, and if you restart the conversation, the emoticons are restored.

**Automatic Updates**

Communicator can be configured to receive automatic updates. You can configure updates to occur as soon as they become available, or you can schedule them for a specific hour of the day. The **Automatic Updates** option is available on the **Alerts** options page.
Chapter 2: Getting Started

In this chapter, we will cover:

- Office Communicator 2007 R2 Documentation
- Software and hardware requirements for Office Communicator 2007 R2.
- Office Communications Server 2007 R2 prerequisites.
- Audio and video requirements.
- Installing Office Communicator 2007 R2.
- Starting Office Communicator 2007 R2 and signing in.
- Audio and video setup.
- Automatic updates.

Office Communicator 2007 R2 Documentation

The following documentation is available for Office Communicator 2007 R2. You can obtain this document from the Office Communications Server 2007 R2 documentation installer file (UCDocumentation.msi).

- **Office Communicator 2007 R2 Quick Reference Cards**  Provides a visual reference to the tasks most commonly performed with Communicator 2007 R2. The following cards are provided:
  - *Office Communicator 2007R2 Contact Management, Presence, and Instant Messaging Quick Reference Card*
  - *Office Communicator 2007 R2 Conferencing with Communicator Quick Reference Card*
  - *Office Communicator 2007 R2 Phone and Video Quick Reference Card*
  - *Office Communicator 2007 R2 Keyboard Shortcuts Quick Reference Card*
- **Office Communicator 2007 R2 Testing and Troubleshooting Guide**  Intended for system administrators, this document explains how to install, configure, and test Office Communicator 2007 R2 in a laboratory environment.
- **Office Communicator 2007 R2 Deployment Guide**  Covers upgrade and interoperability issues, new features and required server roles, installation procedures for IT-managed and user-managed environments, integration with Office Outlook 2007, and implementing custom tabs. In addition, there is information about Group Policy settings.
- **Office Communicator 2007 R2 Group Policy Settings**  Covers Group Policy settings for Office Communicator 2007 R2.

Software Requirements

This release of Office Communicator 2007 R2 is compatible with the following environments, as shown in Table 2.1.
Table 2.1. Office Communicator 2007 R2 Compatibility List

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<th>Outlook Version</th>
<th>Exchange Server Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Vista®</td>
<td>Microsoft Office Outlook®</td>
<td>Microsoft Exchange Server 2007 SP1</td>
</tr>
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<td></td>
<td>2007 SP1</td>
<td></td>
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<tr>
<td></td>
<td>Outlook 2003 SP2</td>
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<tr>
<td>Microsoft Windows® XP SP2</td>
<td>Outlook 2007 SP1</td>
<td>Exchange Server 2007 SP1</td>
</tr>
<tr>
<td></td>
<td>Outlook 2003 SP2</td>
<td></td>
</tr>
<tr>
<td>Microsoft Windows Server® 2003 SP1, or later versions</td>
<td>Outlook 2007 SP1</td>
<td>Exchange Server 2007 SP1</td>
</tr>
<tr>
<td></td>
<td>Outlook 2003 SP2</td>
<td></td>
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</table>

Office Communications Server 2007 R2 Prerequisites


Audio/Video Requirements

Office Communicator 2007 R2 supports several hardware devices for audio/video communications, as described in the following sections.

Audio Requirements

To make and receive phone calls with Office Communicator, you must have one of the following:

- A headset or other universal serial bus (USB) audio device, or speakers and a microphone.
- A half-duplex or full-duplex sound card. Half-duplex audio enables only one person to speak at a time. Full-duplex audio enables two people to speak simultaneously.

Video Requirements

- To make video calls, you must have a webcam connected to your computer. Be aware that you can receive video calls without a webcam and view the caller’s video stream.
- To send and receive VGA quality video, your webcam must support VGA video.
- Computer and processor requirements for video formats are as follows:
  - Intel Pentium 4
  - Single Core 1.5 GHz or higher for CIF
  - Dual Core 1.9 GHz or higher for VGA
  - Quad Core 2.0 GHz or higher for High Definition

Installing Office Communicator 2007 R2

Before you install the latest version of Communicator 2007 R2, you may have to remove earlier versions of Office Communicator.
To remove earlier versions of Communicator
1. Exit the Microsoft® Internet Explorer® Internet browser and any Microsoft Office programs that are currently running.
2. Click Start, click Control Panel, and then click Add or Remove Programs.
3. Click Microsoft Office Communicator 2005, or Microsoft Office Communicator 2007 if present, and then click Remove.
4. Follow the instructions to remove all Communicator files.
5. Restart your computer.

To install Communicator
1. Exit any Microsoft Office programs that are currently running.
2. Click Start, and then click Run.
3. In the Run dialog box, click Browse, locate the Communicator.msi file, and then click Open.
4. In the Run dialog box, click OK.
5. In the Microsoft Office Communicator 2007 R2 Setup window, click Next.
6. Review the license agreement. If you agree with the terms, select the I accept the terms in the License Agreement check box, and then click Next.
7. On the Configure Microsoft Office Communicator page, either accept the default location or select an alternative location for the product files to be installed. We recommend that you accept the default location.
8. Click Next to begin the installation process.
9. When the installation is complete, click Finish.

Starting Communicator and Signing In
Typically, Communicator is configured for you by your system administrator. The administrator may have configured Communicator to start automatically when you log on to Windows, so we will cover this option in this section.

To start Communicator
1. Click Start, point to All Programs, and then click Microsoft Office Communicator 2007 R2.
2. In the Microsoft Office Communicator 2007 R2 Setup window, enter your password, and then click Sign In.
3. In the Office Communicator title bar, click the Menu button.
4. Click Tools, click Options, and select Automatically start Communicator when I log into Windows.
5. Click OK.
Office Communicator starts automatically the next time that you log on to Windows.

Audio and Video Setup
Office Communicator 2007 R2 provides a Set Up Audio and Video option that automatically detects and selects the preferred audio and video devices for you. Your audio and video devices, such as headsets, speaker and microphone, and webcam should work with Office Communicator without any special setup. However, you may want to run the Set Up Audio and Video to test or adjust devices before conducting any important communications with others.
To test or configure audio and video devices

1. In the Office Communicator title bar, click the Menu button.

2. Point to Tools, click Set up Audio and Video, and then follow the instructions in Set Up Audio and Video.

Automatic Updates

You can configure Communicator 2007 R2 to receive automatic updates. You can request that updates occur as soon as they become available, or you can schedule them for a specific hour of the day. The Automatic Updates option is available on the Alerts options page.

To configure automatic updates

1. In the Office Communicator title bar, click the Menu button, click Tools, and then click Options.

2. Click Alerts.

3. Under Automatic Updates, select the Automatically update Communicator when newer versions are available check box.

4. In the Install drop-down list, select When Available, or select a specific time to install updates.
Part 2
Contact Management, Presence and Instant Messaging

In this Part:
Chapter 3: Manage Your Contact List
Chapter 4: Customize Your Presence Information
Chapter 5: How to Contact Others
Chapter 6: Send and Receive Instant Messages
Chapter 3: Manage Your Contact List

Your Contact List is a list of co-workers, family, friends, and associates with whom you communicate most often. The Communicator Contact List shows the availability of your contacts and the ways in which your contacts can be reached, and lets you view additional contact details by clicking the contact’s Presence button. The Contact List is your starting point for communicating with your contacts. With a mouse-click or two, you can place a phone or video call, start an instant messaging session, or start an audio/video conference.

In this chapter, we will show how to do the following tasks:

- Add contacts and distribution groups from your corporate directory to your Contact List.
- Create contact groups.
- Use the Current Conversations group.
- View the groups for Delegates and Team-Call group.
- Add public instant messenger contacts to your Contact List.
- Add federated contacts to your Contact List.
- Add phone number contacts.
- View a person’s contact card.
- Change the way that you view contacts.

Add a Contact or Distribution Group to your Contact List

When you first start to use Communicator, you need to build your Contact List to suit your needs. You can add individual contacts and distribution groups to your Contact List, and you can create custom groups. If your company’s Office Communications Server supports Public Internet Connectivity, you can even add contacts from AOL Instant Messenger AIM®, Yahoo!® Messenger, MSN® network of Internet services, and Windows Live™ network of Internet services. If you are not sure if your company supports Public Internet Connectivity, contact your system administrator.
Figure 3.1 shows the **Office Communicator** window, and points out the portions of the user interface that you use most often when managing your contacts and Contact List.

![Office Communicator window and Contact List](image)

**Figure 3.1** The Office Communicator window and Contact List

**To add a contact or distribution group to your Contact List**

1. In the **Office Communicator** window, type the display name or e-mail address of a person or distribution group in the **Search** box. By default, Communicator lists all matching users and groups from the Active Directory® Domain Services and the Microsoft Outlook Contact folder.

2. Drag the name from the **Search Results** pane into the Contact List. You can drag individual names into an existing group in the Contact List. You can also drag a distribution group into the Contact List. However, you cannot drag a distribution group into an existing group.

**Note**

You can also add a response group to your Contact List. A response group is a predefined group of people who have been assigned to handle incoming calls for a particular team or department. Communicator displays a presence icon and an automated service icon next to response groups to differentiate them from distribution groups. If your organization has set up response groups, you can search for them in the Contact List and initiate a call to them.
Create a Contact Group

You can create contact groups to organize the people in your Contact List. After you create a group, you can right-click the group name in your Contact List, and then communicate with the group in many ways, including an IM conference or conference call.

To create a contact group

1. In the Office Communicator window, right-click an existing group name, and then click Create New Group.
2. In the New Group box, type a name for the group, and then press ENTER.
3. You can drag existing contacts from the Contact List into the group or use the Communicator Search feature to find users and add them to the group.

Use the Current Conversations Group

When you have one or more active Communicator conversations, a new group called Current Conversations appears in Communicator at the top of your Contact List. You can use this group to quickly scan your active conversations. You can also navigate quickly to one of the conversations in the list by double-clicking it.

![Image of Office Communicator window showing Current Conversations group]

**Figure 3.2** The Current Conversations Group in the Contact List

To navigate to a conversation

- In the Contact List, under the Current Conversations group, double-click a conversation in the list. The conversation window for the selected conversation appears in the foreground.
View the Groups for Delegates and Team-Call Group

In Communicator 2007 R2, you can display a Team-Call Group or a Delegates group in your Contact List. These two groups are determined by how you have configured your call-forwarding settings. If you have set up a team-call group for the Team call feature, you can display your Team-Call Group in the Contact List (See “Team Call” later in this document). If you have configured delegates who will be using Office Communications Server 2007 R2 Attendant to answer your calls and make calls on your behalf, you can display your Delegates group in the Contact List (See “Delegating your Calls to One or More Assistants” later in this document).

Be aware that you cannot add contacts to these groups in the Contact List by dragging and dropping contacts into them. Because these features must be configured in your call-forwarding settings, if you try to drag a contact into one of these groups, a message is displayed that asks if you want to open the Call-Forwarding Settings dialog box.

By default, the Team-Call Group and Delegates groups are not displayed. You can select to display them in the Contact List view.

To display your Team-Call Group and Delegates groups

1. Click the Change View button, and then click Contact List.
2. Click the Change View button, and then click the groups that you want to display:
   - Show Delegates. Click Show Delegates to hide or show a list of the delegates you have set up in your call-forwarding settings.
   - Show Team-Call Group. Click Show Team-Call Group to hide or show a list of the members of the team-call group that you have set up in your call-forwarding settings.

Figure 3.3 The Team-Call Group and Delegates groups in the Contact List
Add Public Instant Messaging Contacts

If your organization is configured to support public instant messaging (IM) connectivity, you can add instant messaging contacts from AOL, Yahoo, MSN, and the Windows Live network of Internet services to your Office Communicator Contact List. When you add a public instant messaging contact, you can communicate with the contact by using instant messaging. However, Communicator Calls, Video Calls, Audio/Video conferencing, and desktop sharing, are not supported with public instant messaging contacts.

The best practice for adding a public instant messaging contact is to add the contact by using the Outlook Contacts folder. When you add a public instant messaging contact by using the Outlook Contacts folder, you can add home, mobile, and other phone numbers for the contact so that you can use Communicator’s click-to-call feature to call the contact on his or her home, mobile, or work phone number.

To add a public instant messaging contact to your Contact List

1. If you do not know the IM address of the contact that you want to add, contact them by phone or e-mail to obtain the address.
2. Open the Contacts folder in Office Outlook, and then click the New button.
3. Enter a name for the contact in the Full Name box. The Company, Job title, and File as boxes are optional.
4. Fill in at least one of the following boxes:
   - **Phone numbers.** In the Business, Home, Business Fax, or Mobile box, type the contact’s phone number.
   - **E-mail.** In this box, type the contact’s e-mail address.
   - **IM address.** In this box, type the IM address of the contact.
5. Enter phone numbers for the contact. Use the E.164 format to make sure that the number will work. The E.164 format includes the country code, area code, the local number, and optionally the + symbol. You do not have to format the number. A number in the U.S. for example, might look like this: 14255555555 or +14255555555, where 1 is the country code, 425 is the area code, and 5555555 is the local number. An international number dialed from the U.S. might look like: +441223479818 or 011441223479818
6. Save the contact.
7. Open Office Communicator and type the name that you entered in the Display as box in Office Outlook into the Search box. The contact name appears in the Search Results pane.
8. Drag the contact from the Search Results pane into a group in the Contact List. You can now have IM conversations with the contact. You can also click the phone button to the right of the contact’s name. Communicator calls are not supported for public IM contacts. However, you can make calls to the contact’s home, business, and or mobile phone numbers.

For more information about how to add public IM contacts to your Contact List, see the Communicator online Help.

Add Federated Contacts

Office Communicator 2007 R2 and Office Communications Server 2007 R2 support the ability to federate (connect) with other organizations, enabling you to add contacts from those organizations. When you add a federated contact to your Contact List, you can communicate with the contact by using any of the communication modes that are supported by both organizations. For example, if both organizations support Communicator calls, video calls, and audio/video conferencing, you can make
Communicator calls and video calls, and conduct audio/video conferences with contacts from that organization.

To add a federated contact to your Contact List

1. Open Office Communicator, and then type the name that you entered in the Display as field in Office Outlook into the Search box. The contact name appears in the Search Results box.
2. Drag the contact from the Search Results pane into a group in the Contact List. You can now have IM conversations with the contact. You can also click the phone button to the right of the contact’s name.

For more information about how to add federated contacts outside your company to your Contact List, see the Communicator online Help.

Add Phone Number Contacts

In Office Communicator 2007 R2, you can add a phone number to your Contact List, even if the phone number is not associated with someone at your organization, a federated organization, or a public IM provider. If you primarily make phone calls using Communicator, for convenience, you may want to add outside phone numbers (for example, numbers for friends and family members) to your Contact List.

In earlier versions, Communicator would allow you to add only people who had an Office Communications Server account or sign-in address. The workaround was to create a new contact in Outlook, assign a phone number and IM address (or a fictitious placeholder), and then search for the new Outlook contact from Communicator.

In Office Communicator 2007 R2, if you have recently dialed a phone number, the phone number appears in your Contact List under Recent Contacts. To save the phone number for future calling, you can drag-and-drop the phone number into one of the groups in your Contact List. Or, you can right-click the phone number, click Add to Contact List, and then click a group.

You can also add an Outlook contact to your Contact List even if the contact has only a phone number and no IM address. In Communicator, search for the Outlook contact, and then add the contact to your Contact List.

After a phone number is added to your Contact List, you can take the same actions that are available for regular contacts. For example, you can move the phone-only contact to a different group. You can also view the contact’s properties by right-clicking and selecting Properties. An Outlook contact card will open, where you can view or update the contact’s information. Phone number contacts are designated by a phone icon . Double-clicking the Call button to the right of the phone number starts a phone conversation with the contact.

To add a phone number as a contact

- Do one of the following:
  - Type the phone number in the search box, and then click the phone number and drag it into one of the groups in your Contact List.
  - If you have recently used Communicator to call the phone number, under Recent Contacts, click the phone number and drag it into one of the groups in your Contact List.
  - Right-click the phone number, click Add to Contact List, and then click a group.

View a Person’s Contact Card

A person’s contact card provides details about the contact’s availability and activity. Depending on the access level that a contact granted you, you can see a contact’s schedule, in addition to any personal notes that the contact has written. The contact card also provides a starting point for connecting with a
contact, including the ability to start an instant messaging session, call the contact, schedule a meeting, or e-mail the contact, as shown in Figure 3.4.

![Contact Card](image)

**Figure 3.4.** The Contact Card is opened by clicking a contact’s Presence button

- **To view a person’s contact card**
  - In the Office Communicator window, click the Presence button in the Contact List to the left of the contact name.

You can open a user’s contact card in multiple places in the Office Communicator 2007 R2 user interface. For example, to view a person’s contact card, you can click the user’s Presence button in the Contact List, the Search Results pane, or in the Communicator Conversation window.

### Change the Way that You View Contacts

Office Communicator 2007 R2 provides several views that you apply to the Contact List to see contacts organized differently from the default view. You can use the Communicator Change View button to view contacts grouped by Access Levels or by Tagged Contacts.

- **To change the way that you view contacts**
  - Click the Change View button as shown in Figure 3.5, and then select a view from the menu.
    - **Contact List.** This view is the default view that you see when you start Office Communicator.
    - **Access Levels.** This view shows contacts grouped by access levels. Access levels are permission levels that you assign to contacts to determine their access to your presence information.
- **Sort Contacts by Availability.** In the Office Communicator window, click the **Change the way that you view your contacts** button, make sure that the Contact List view is selected, and then click **Sort Contacts by Availability**.

- **Sort Contacts by Display Name.** In the Office Communicator window, click the **Change the way you view your contacts** button. Any view can be selected. Click **Sort Contacts by Display Name**.

- **Show Recent Contacts.** In the Office Communicator window, click the **Change the way you view your contacts** button, make sure that the **Contact List** view is selected, and then click **Sort Contacts by Availability**.

- **Show Recent Contacts.** In the Office Communicator window, click the **Change the way you view your contacts** button, make sure that the **Contact List** view is selected, and then click **Sort Contacts by Display Name**.

- **Show Recent Contacts.** In the Office Communicator window, click the **Change the way you view your contacts** button, make sure that the **Contact List** view is selected, and then click **Show Recent Contacts** to hide or show a list of your most recent contacts.

- **Show Delegates.** In the Office Communicator window, click the **Change the way you view your contacts** button, make sure that the **Contact List** view is selected, and then click **Show Delegates** to hide or show a list of the delegates you have set up in your call forwarding settings.

- **Show Team-Call Group.** In the Office Communicator window, click the **Change the way you view your contacts** button, make sure that the **Contact List** view is selected, and then click **Show Team-Call Group** to hide or show a list of the members of the team-call group that you have set up in your call-forwarding settings.

![Office Communicator window and Contact List](image)

**Figure 3.5. The Office Communicator window and Contact List**

For more information about access levels, see Chapter 3, “Manage Your Contact List.” For more information about tagging contacts, see Chapter 5, “How to Contact Others.”
How contacts are sorted in the Contact List

By default, Communicator sorts contacts in each group in the Contact List first by availability, and then alphabetically. Available contacts (those that can be contacted) have either the Available or Busy presence status. The Recent Contacts group is an exception, and sorts contacts top-to-bottom according to those contacts with whom you’ve most recently communicated. To change the way contacts are sorted in the Contact List, click the Change View button in the Office Communicator window, and then select Sort Contacts by Availability. This option moves contacts with Away, Unavailable, and Unknown status into groups, leaves contacts with Busy or Available status in their groups, and then sorts the contacts alphabetically.

In any view, you can sort contacts alphabetically by display name. Click the Change View button in the Office Communicator window, and then select Sort Contacts by Display Name. This option sorts contacts alphabetically within the displayed groups.
Chapter 4: Customize Your Presence Information

Office Communicator 2007 R2 provides a full set of personal presence attributes that you can make available to other contacts to help them get in touch with you. Presence attributes include information about you, such as your work phone, mobile phone, and home phone, together with additional information, such as your work schedule and personal notes. When you first start to use Communicator, it is generally best to customize and publish your presence information, and then set access levels for your contacts to control the type and amount of presence information that they see. In this way, you can make presence information, such as your home or mobile phone numbers, available to your closest contacts, but not available to everyone in your company.

In this chapter, we will show how to do the following tasks:

- Customize and publish your presence information.
- Set access levels for contacts to control the presence information available to them.
- Manually change your presence information.

Customize and Publish your Presence Information

Your presence information includes a diverse set of attributes that describe your availability, activity, contact information, schedule, location, and notes, both Personal and Out of Office. Table 4.1 provides a full list of Communicator presence attributes that others can potentially see. The left column of the table shows the presence information attributes, whereas the remaining columns of the table show whether the attribute is available for a given access level, which we will cover later in this chapter.

<table>
<thead>
<tr>
<th>Presence Information</th>
<th>Block</th>
<th>Public</th>
<th>Company</th>
<th>Team</th>
<th>Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offline Presence</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Capabilities</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Display Name</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>E-Mail Address</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Title *</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Work Phone *</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Mobile Phone *</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Home Phone *</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Other Phone *</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Company *</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Office *</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>SharePoint Site *</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Meeting Location</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Meeting Subject</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Free Busy</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Working Hours</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Add and publish alternate phone numbers

As a best practice, you should add alternate phone numbers, such as your Mobile number, to your presence information.

To add and publish alternate phone numbers

1. In the Office Communicator window, click the Menu button and then click Tools.
2. Click Options, and then click the Phones tab.
3. Click the button for the phone number that you want to add.
4. In the Phone number text box, enter the number that you want to add and then click OK. Use the International Phone Number format. Enter the country code, followed by the local phone number. For example, for a United States number: 15555555555. Phone numbers should contain only the digits 0123456789. Communicator removes parentheses and additional characters. Do not include the international dialing prefix. For example, (011) in the United States and (00) in Europe. See the Communicator online Help for examples.
5. To make the number available as part of your presence information, select the Publish this phone number check box next to the phone number.
6. To accept your changes, click OK in the Options dialog box.

Remember that as soon as you publish your phone numbers, it is important to set access levels for your contacts to control who has access to those numbers. For example, if you publish your mobile phone number but do not grant a Personal or Team access level to a contact that you want to have access to your number, that contact will be unable to see your mobile phone number. Setting access levels is covered in the following section.

Control Access to Your Presence Information with Access Levels

With Communicator, you use Access Levels to control the level of your presence information that others see. For example, you probably have a short list of co-workers who you want to have access to your mobile and home phone numbers. To expose these alternate phone numbers to a contact, you need to assign that contact to the Personal or Team access level. Setting access levels is generally done in one of three ways:

- You set an access level for a contact when you add them to your Contact List. By default, when you add a contact inside your company to your Contact List, they are given the Company access level. Contacts outside your company, such as contacts from AOL, MSN, Windows Live, and Yahoo Messenger IM services, are assigned the Public access level by default.
After you add a contact to your Contact List, you can easily change his or her access level to increase or reduce how much information you want them to see.

When a contact adds you to his or her list, you receive an alert that enables you to accept or reject the request. From this alert, you can set the access level for the contact and add them to your Contact List.

**Note**

If you designate a contact as your delegate, that contact is automatically granted the Team access level. You cannot change a delegate’s access level. For more information, see “Chapter 18: Delegating your Calls to One or More Assistants.”

---

### To view contacts by Access Levels

- In the Communicator window, click the Change View button, and then click Access Levels. (To understand what presence information is exposed for each access level, see Table 4.1 above.)

### To change an Access Level for a contact in your Contact List

- Right-click a contact, point to Change Level of Access, and then select an access level for the contact. If you have the Access Levels view applied in the Contact List, you can also assign a contact to an access level by dragging the contact into an Access Level Group. To understand how access levels control what other see, see “Access Levels and Phone Numbers Example” later in this chapter.
Assign Access Levels when someone adds you to their Contact List

When a person adds you to his or her Contact List, you receive an alert, as shown in Figure 4.1. The alert enables you to add the contact to your Contact List and allows you to set the person’s level of access to your presence information.

![Figure 4.1. Contact request alert](image)

To assign an access level when someone adds you to their Contact List

- In the Office Communicator window, select an access level in the This person’s level of access list, and then click OK. To understand how Access Levels control what others see, see the following “Access Levels and Phone Numbers Example” section.

Access Levels and Phone Numbers Example

One of the most important aspects of access levels is to control the exposure of your mobile and home phone numbers to others. After all, you will want your closest co-workers to have your mobile number, but not the entire company. In addition, you will want to make you home phone number available only to a selected list of people.

If you want to make your mobile phone number available to a contact, you assign that contact to the Team access level. If you want to make all your phone numbers available to a contact, you assign that contact to the Personal access level. Table 4.2 provides an example of how access levels assigned to a contact affect the phone numbers that they see.

<table>
<thead>
<tr>
<th>Table 4.2. Access Levels and Phone Numbers Example</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>If Kelly Rollin assigns Lola Jacobsen this access level:</td>
<td>Lola Jacobsen can see these phone numbers for Kelly Rollin in her Communicator user interface:</td>
</tr>
</tbody>
</table>
| Personal | Work Phone number  
Mobile Phone number  
Home Phone number  
Other Phone number |
| Team | Work Phone number |
Manually Change Your Presence Information

Your presence information is constantly being updated by Communicator and Office Communications Server, based on several factors, including your Outlook Calendar, whether you are in a call, an instant messaging session, or conference. However, there may be times when you want to manually change your presence status. For example, if you are working on something that is time critical, you may want to change your status to **Do Not Disturb** to avoid being interrupted.

**To set your status to Do Not Disturb**

- In the **Office Communicator** window, click your **Presence** button and change your presence status to **Do Not Disturb** in the Status area. When you change your presence status to **Do Not Disturb**, as shown in Figure 4.2, by default, only those people who you have assigned the **Team** access level can contact you.

![Office Communicator window with Presence status set to Do Not Disturb](image)

**Figure 4.2. Presence status set to Do not disturb**
For example, a person with a **Team** access level to your presence information can interrupt you and sees this status in their Contact List:

| Peter Krebs | Urgent interruptions only |

A person with a **Company** or lower access level to your presence information cannot interrupt you with an instant message or phone call and sees this status in their Contact List:

| Peter Krebs | Do not disturb |

For more information about how to set **Access Levels** to control interruptions, see the Office Communicator online Help.
Chapter 5: How to Contact Others

Each contact in your Contact List has a Presence button that reflects his or her current state of availability. You can use a contact’s presence status to decide which mode of communication is best suited for successful communication with that contact. For example, if a contact’s status is Available, you can send her an instant message or place a call to her. If a contact’s status is Busy, you might want to send an e-mail message or check the contact card to determine when the person will be free for a conversation.

In this chapter, we will show how to do the following tasks:

- Determine whether a contact is available for a conversation.
- Find additional contact details, such as a schedule, to determine when a contact will be available.
- Find alternate contact phone numbers, such as mobile phone or other phone numbers.
- Tag a contact so you are notified when the contact becomes available.

Know If and When a Contact is Available

The presence information that is displayed for each contact in your Contact List reflects the availability of the contact, as shown in Figure 5.1. Presence status is indicated graphically by a Presence button to the left of the contact’s name, and by a text string to the right of the contact’s name. Some presence states, such as Available, can be set either by the user or by Office Communicator; other presence states, such as Inactive, can be set only by Office Communicator.

![Figure 5.1. The Contact List for Don Hall](image-url)
Table 5.1 describes each Presence button and the accompanying status text.

**Table 5.1. Presence states set by the user or by Communicator**

<table>
<thead>
<tr>
<th>Presence button</th>
<th>Contact status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>The contact is online and can participate in conversations. This status can be set manually by the user.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The contact’s presence may include the ways in which he or she can be reached, for example:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Available – Voice Only The contact can be reached on his or her Communicator Phone R2 device.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Available – Mobile The contact can be reached on his or her Communicator Mobile device.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Available – IM only The contact may be reached by IM but not voice.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Available – No IM The contact does not have access to IM.</td>
<td></td>
</tr>
<tr>
<td>Busy</td>
<td>The contact is available but engaged in another activity. Activities include:</td>
<td></td>
</tr>
<tr>
<td>In a Call</td>
<td>The contact is in a phone, voice, or video conversation.</td>
<td></td>
</tr>
<tr>
<td>In a Conference</td>
<td>The contact is in a multiparty conversation using phone, voice, video, or application sharing.</td>
<td></td>
</tr>
<tr>
<td>In a Meeting</td>
<td>The Office Outlook calendar shows that the contact has a scheduled meeting.</td>
<td></td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>You see this status for a contact if the contact has assigned you to an access level other than the <strong>Team</strong> access level and one of the following conditions is true:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The contact has manually set his or her presence status to <strong>Do Not Disturb</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The contact is displaying a Microsoft ®Office PowerPoint® presentation or is running another program in full-screen mode.</td>
<td></td>
</tr>
<tr>
<td>Urgent interruptions only</td>
<td>You see this status for a contact if the contact has assigned you to the <strong>Team</strong> access level and the following condition exists:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The contact has manually set his or her presence status to <strong>Do Not Disturb</strong>.</td>
<td></td>
</tr>
<tr>
<td>Away</td>
<td>The contact is probably not available. This status is displayed for the following reasons:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The contact’s computer has been idle for more than the idle time period setting—15 minutes by default.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The contact has manually set his or her presence status to <strong>Away</strong>.</td>
<td></td>
</tr>
<tr>
<td>Inactive</td>
<td>This contact may be available, but their computer has been idle for more than the idle time period setting—five minutes by default. In this state, the contact is online, idle, and transitioning from an Available state. This status is set by Communicator.</td>
<td></td>
</tr>
<tr>
<td>Busy (Inactive)</td>
<td>This contact is engaged in a meeting, but their computer has been inactive for the idle time period setting—5 minutes by default. In this state, the contact is online, idle, and transitioning from a Busy state. This status is set by Communicator.</td>
<td></td>
</tr>
<tr>
<td>Offline</td>
<td>The contact is not available. This status is displayed for the following reasons:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Communicator 2007 R2 is not running on the contact’s computer, or the contact has not signed in.</td>
<td></td>
</tr>
</tbody>
</table>
### Presence button

<table>
<thead>
<tr>
<th>Contact status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presence unknown</td>
<td>Communicator 2007 R2 cannot determine the status of the contact. This status is usually displayed because the contact’s presence status is stored in another computer system, such as that of an organization that is not a federated partner.</td>
</tr>
<tr>
<td>Blocked</td>
<td>This indicator is displayed in your Contact List next to the name that you have blocked. To the person that you have blocked, you appear to be offline.</td>
</tr>
</tbody>
</table>

### Get Additional Contact Details

If a contact’s status is not available, you can open his or her Contact Card to get additional details to determine when the contact will be available, assuming that you have been granted Company access level or higher.

**To view a contact’s schedule information**

- In the Office Communicator window, click the contact’s Presence button in the Contact List. If a contact has granted you the default Company access level or higher, you can click the contact’s Presence button to view his or her schedule and determine when the contact will be available.

### View Calling Options

Sometimes you have to contact a person on their cell phone or at an alternate number. In Office Communicator, you can view a contact’s alternate phone numbers by clicking the arrow to the right of the Call button. In the previous chapter, we looked at how you publish your alternate phone numbers. But how do you find alternate phone numbers for your contacts?

**To view calling options for a contact**

1. In the Contact List, click the arrow to the right of the Call button that is associated with the contact, as shown in the following illustration.

2. The phone numbers that you see for a contact are determined by the access level the contact has granted you. For example, if the contact has granted you a Team or Personal access level, you will see his or her mobile phone number. If a contact’s mobile number is not available to you, you can contact that person and ask them to raise your access level to Team or Personal.

### What Is a Communicator call?

One of the menu items in the Call option menu is **Communicator call**. A Communicator call is a Voice over IP (VoIP) call that is routed to all a contact’s devices that are running Office Communicator 2007 R2. A contact can receive a Communicator call on his or her computer, or on a telephony device that is configured for Office Communicator 2007 R2.

**Note**

You can only make Communicator calls to Office Communicator contacts within your company and to federated contacts outside your company. Communicator calls to public IM contacts or non-federated contacts outside your company are not supported.
Receive Notification When a Contact’s Status Changes

Communicator can notify you of changes in a contact’s status by displaying an alert when the contact’s status changes to Available or Offline. The alert shows the contact’s name, title, instant messaging address, and new presence status. You can click the alert to start an instant messaging session with that person. Configuring Communicator to display this alert for a given contact is called tagging.

To tag a contact for status change alerts
- In the Contact List, right-click a contact, and then click Tag for Status Change Alerts.

To view tagged contacts in the Contact List
- In the Office Communicator window, click the Change View button,

and then click Tagged Contacts. This view shows all your currently tagged contacts.
Chapter 6: Send and Receive Instant Messages

With Office Communicator 2007 R2, you can start an instant messaging session with a single contact or multiple contacts. After you start an instant messaging session, you can invite other contacts to the session and seamlessly add audio and video to the session without opening a new Conversation window.

In this chapter we will show how to do the following tasks:

- Start an instant messaging session.
- Add emoticons to instant messages.
- Format instant messages.
- Invite another person to an instant messaging session.
- Accept or decline an instant message invitation.

Start an Instant Messaging Session

You typically start an instant messaging session by double-clicking a contact name in the Contact List. Double-clicking a contact name opens the Conversation window where you enter your instant message and view responses from others, as shown in Figure 6.1.

![Office Communicator window and Conversation window](image)

Figure 6.1. The Office Communicator window and the Conversation window

To start an instant messaging session with a single contact

**Note**

Instant messaging is supported only with your organization’s Communicator contacts, public IM contacts, and federated contacts.
In the Contact List, double-click a contact name, type a message, and then press ENTER. If the contact is not in the Contact List, type the person’s name in the Search box, and then double-click the name in the Search Results box.

To start an instant messaging session with a group
Do one of the following:
- To send an instant message to a distribution group or contact group, right-click a group name, click Send an Instant Message or press ENTER, type a message and then press ENTER.
- To send an instant message to multiple contacts, hold the CTRL key to select the contacts, right-click the last contact, and then click Send an Instant Message or press ENTER, type a message and then press ENTER.

Add Emoticons to Instant Messages
Emoticons are graphic images that you can use in your instant messages to convey feelings and emotions, as shown in Figure 6.2.

Figure 6.2. An emoticon is inserted into an instant message
To add an emoticon to an instant message
1. In the Conversation window, in the message area, place the cursor where you want to insert the emoticon.
2. Click the Emoticon button, and then select an emoticon.

Format Instant Messages
With Communicator, you can change the font, font size, and color, or format text with additional attributes such as bold, italic, or underlining.

To format instant message text for a single message
1. In the Office Communicator window, double-click a contact name in the Contact List to start an instant message.
2. In the Conversation window, select the Change text color, font, and other formatting button, and then select the formatting options from the formatting popup window.

In addition to formatting the current instant message, you can permanently set formatting changes to apply for all your instant messages.

To format instant message text for all instant messages
1. In the Office Communicator title bar, click the Menu button.
2. On the Tools menu, click Options.
3. In the Options dialog box, click the General tab, and then click Change Font.
4. In the Change Font dialog box, make the changes that you want, and then click OK.
5. Click OK again to accept the changes, and then close the Options dialog box. Your font changes now apply to all your instant messages.

Invite Someone to an Instant Messaging Session
You can start an instant messaging session with one person, and then discover that you need to invite additional people to the conversation. You can add contacts by selecting them from the contact list. You can also invite someone outside your organization by sending them an e-mail invitation.

To invite someone to join a conversation in progress
1. In the Office Communicator window, double-click a contact.
2. In the Conversation window, type a message, and then press ENTER.
3. When the conversation begins with the contact, click the Invite button in the Conversation window to add others as needed.
4. In the Search box, type a name, or select a contact from the Contact List, and then click OK.

To invite someone outside your organization by e-mail
1. In the Conversation window, click Invite, and then click Invite by E-mail. An e-mail message opens in Microsoft Outlook. (If you do not have Outlook, you can copy the invitation text to the e-mail program of your choice.)
2. In the e-mail message, type the person’s e-mail address, and then click Send.
3. The e-mail message contains two links for joining the conference: one for Communicator, and one for a Web browser. If the recipient does not have Communicator installed, the recipient can join by using a Web browser.
Receive an Instant Message Invitation

When someone sends you an instant message invitation, you receive an alert that appears in the lower right of your computer screen, as shown in Figure 6.3.

![The instant message invitation alert](image)

Figure 6.3. The instant message invitation alert

- **To accept an instant message invitation**
  1. In the instant message invitation alert, click anywhere in the left pane of the invitation.
  2. In the Conversation window, type your response in the message area, and then press ENTER.

- **To decline an invitation**
  - In the instant message invitation alert, click the Close conversation button.

- **To respond to an instant message with a call**
  - In the instant message invitation alert, click Redirect, and then click a name or number to place the call.

- **To set your status to Do Not Disturb until the top of the hour**
  - In the instant message invitation alert, click Redirect, click Set to Do Not Disturb and your status will be changed to Do Not Disturb until the next hour increment.

For example: If you set your presence status to Do Not Disturb at 11:15 A.M., your status will change to Do Not Disturb and will change back to Available at 12:00 noon.
Part 3
Conferencing and Collaboration

In this Part:
Chapter 7: Getting Started with Unified Communications Conferencing
Chapter 8: Conferencing with Communicator
Chapter 9: Use Desktop Sharing
Chapter 10: Moving Seamlessly Between Communication Modes
Chapter 11: Schedule a Communicator Conference Call or Live Meeting Conference
Chapter 12: Add a Dial-In Number to a Conference Call
Chapter 7: Getting Started with Unified Communications Conferencing

With Office Communicator 2007 R2, you can easily start a conference from a one-to-one IM session. You can also seamlessly add communication modes to conference sessions, including phone, video, and even full Web conferencing and data sharing with Live Meeting.

The conferencing capabilities described in Part 3, Conferencing and Collaboration, require you to have conferencing capabilities enabled in your organization. If you are not sure whether conferencing capabilities are enabled, contact your system administrator. Also, before you start using Communicator’s conferencing capabilities, make sure that you have the required hardware and software installed, as covered in the “Automatic Set Up of Audio and Video” section, later in this chapter.

When to Use Communicator and When to Use Live Meeting

Microsoft Unified Communications offers several possibilities for conducting conferences. For example, for everyday informal communications, you can conduct conferences with your co-workers by using Office Communicator 2007 R2. Features in Communicator 2007 R2 such as desktop sharing and dial-in conferencing make for an even more complete conferencing experience. In Communicator 2007 R2, you can share your desktop with other participants, for example to display slides or share other documents and applications. For more formal presentations that require full Web conferencing capabilities such as application sharing, recording, and question and answer management, you can schedule a more formal Live Meeting conference. Table 7.1 helps you decide which conferencing method to use.

<table>
<thead>
<tr>
<th>If you need to:</th>
<th>Use this method of conferencing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct unscheduled multiparty conferences – for example, you need to make a quick decision among co-workers</td>
<td>Use the conferencing capabilities of Office Communicator. See Chapter 8, “Conferencing with Communicator.”</td>
</tr>
<tr>
<td>Make an unscheduled conference call</td>
<td>Use Office Communicator. See Chapter 8, “Conferencing with Communicator.”</td>
</tr>
<tr>
<td>Share a view of your desktop to present an open document or application</td>
<td>Use Office Communicator desktop sharing. See Chapter 9, “Using Desktop Sharing.”</td>
</tr>
<tr>
<td>Present slides, share Web pages, or perform desktop or application sharing during an unscheduled conference call</td>
<td>Use Office Communicator to start the conference and escalate to a Live Meeting Conference, if required. See Chapter 10, “Moving Seamlessly Between Communication Modes.”</td>
</tr>
<tr>
<td>Schedule a conference call to get on</td>
<td>Use the Conferencing Add-in for Microsoft Office Outlook to schedule a</td>
</tr>
</tbody>
</table>
If you need to: | Use this method of conferencing
--- | ---
Everyone’s calendar, and use voice, video, and desktop sharing | Communicator conference. See Chapter 11, “Scheduling a Conference Call or Live Meeting.”
Schedule a Web conference where you use Web conferencing features beyond desktop sharing, such as application sharing, meeting lobby, question and answer, white board, and shared notes. | Use the Conferencing Add-in for Microsoft Office Outlook to schedule a Live Meeting conference. See Chapter 11, “Scheduling a Conference Call or Live Meeting.”

**Automatic Set Up of Audio and Video**

For audio (phone) conferencing you will need a headset; or a speaker and microphone; or a USB audio device connected to your computer. For audio/video conferencing, you will need a webcam connected to your computer to initiate an audio/video call. However, you can participate in an audio/video conference and view other’s participant’s video stream without actually having a webcam.

By default, Office Communicator detects your audio and video devices so that you do not need to perform any special setup procedures. However, before you schedule a conference call, you may want to run the **Set Up Audio and Video** wizard to ensure your devices are correctly adjusted.

**To set up audio and video**

- In the title bar of the **Office Communicator** window, click the **Menu** button, point to **Tools**, and then click **Set Up Audio and Video**. Follow the instructions in the **Set Up Audio and Video** wizard. Be aware that the **Set Up Audio and Video** wizard sets up audio and video settings for both Office Communicator and Live Meeting.

**Installing the Live Meeting Console**

If you plan to initiate Live Meeting sessions, you will need to have the Live Meeting client installed. As shown previously in Table 7.1, there are several possibilities for conferencing with Microsoft Office Unified Communications. For example, you can open the Live Meeting client from Office Communicator during a conference call if you decide that you need data-sharing capabilities. You can also schedule Live Meetings from Outlook when a more formal, scheduled Web conference is required. For instructions about how to install the Live Meeting client, contact your system administrator.

**Installing the Conferencing Add-in for Microsoft Office Outlook**

With the Conferencing Add-In for Microsoft Office Outlook, as shown in Figure 7.1, you can schedule phone conference calls for Communicator and Web conferences with Live Meeting, Contact your system administrator for instructions about how to install the Conferencing Add-in for Microsoft Office Outlook.

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![Figure 7.1. The Conferencing Add-in for Microsoft Office Outlook](image-url)
When you schedule an audio conference by using the Conferencing Add-in for Microsoft Office Outlook, you can add a conference call number to the conference in the Audio options. Participants can use any phone to dial into the conference and enter the conference ID and PIN when prompted. After the participant joins the audio conference, he or she appears in the conference roster. The conference dial-in number, conference ID, and passcode display in the conference window.

**Where to Find More Conferencing information**

For more detailed conferencing information, visit the Conferencing section of the Office Communicator online Help. To access online Help from Office Communicator 2007 R2, click the Menu button, and then click **Microsoft Office Communicator Help**.
Chapter 8: Conferencing with Communicator

Office Communicator 2007 R2 supports the natural, typically unstructured way that you communicate with others. For example, with Office Communicator, you might start an IM conversation with somebody and then decide you need to invite another person to the conversation to make a decision. When you invite a third person to the IM conversation, you create an ad hoc conference. Once you have started the conference, you can invite others, or seamlessly add audio and video communication modes without ever leaving the Communicator Conversation window. With Communicator, starting a conference requires only a few mouse clicks. For example, a great way to take advantage of Communicator’s conferencing capabilities is to start an IM conference or phone conference by selecting a group in the Contact List, and then clicking **Send an Instant Message** or **Make a Conference Call**.

In this chapter, we will show how to do the following tasks:

- Start an IM conference by inviting others to an IM session.
- Start an audio conference call by selecting multiple contacts in the Contact List or by selecting a contact or distribution group.
- Start an ad hoc audio/video conference from an instant messaging session.
- Join a conference.

Conferences with three or more participants, including audio/video conferences, require an Office Communications Server 2007 R2 A/V Conferencing Server. If you are not sure if an A/V Conferencing Server is set up for your organization, contact your system administrator.

Start an IM Conference from the Contact List

Starting an unscheduled (ad hoc) IM conference is often a fast way to make decisions. Perhaps equally important, starting an IM conference is as easy as selecting multiple contacts in the Contact List or selecting a group, and then clicking **Send an Instant Message**. You can start an IM conference from the Contact List by selecting multiple contacts, a distribution group, or contact group. You can also start a conference from a phone or video conversation between two people by simply inviting another person to the conversation.

**To start an unscheduled IM conference**

- In the Contact List, do one of the following:
  - Select multiple contacts by holding down CTRL as you click the contacts that you want to invite to the conference, right-click the last contact, and then click **Send an Instant Message**. Type a message in the **Message Entry** area and then press ENTER.
  - Right-click a contact or group, as shown in Figure 8.1, and then click **Send an Instant Message**. Type a message in the **Message Entry** area and then press ENTER.

![](image.png)

**Figure 8.1.** A contact group is selected to start an IM conference
In the **Conversation** window that appears, you see the **Inviting** status for each contact, as the contact is sent the IM invitation. When the contact accepts the call and joins the conference, you see the phone indicator to the right of the contact name, as shown above in Figure 8.1.

When you send an instant message to more than one person, the recipients of the IM see an IM conferencing invitation, as shown in Figure 8.2.

![Figure 8.2. IM Conference Invitation](image)

**To join an IM conference**

- Click the left pane of the Conference invitation alert.

At any time during the conference, you can invite additional people to the conference by clicking the **Invite** button and then selecting those contacts that you want to invite.

---

**Start a Conference with Contacts Inside or Outside your Organization**

In Communicator 2007 R2, you can start a new conference by using the **Meet Now** option, which is available by clicking the **Menu** button. By using this option, you are not limited to inviting contacts who are within your organization. You can also invite contacts outside your organization to a conversation by sending them an e-mail invitation. These outside contacts can click a link in the e-mail invitation to join the conference by using a Web browser.

**To start a conference by using the Meet Now option**

- Click the **Menu** button, and then click **Meet Now**.

**To invite someone within your organization or a federated organization**

1. In the new **Conversation** window, click **Invite**, and then click **Invite a Contact**.
2. In the **Search** box, type a name, or select a contact from the Contact List, and then click **OK**.

**To invite someone outside your organization by e-mail**

1. In the new **Conversation** window, click the arrow next to **Invite**, and then click **Invite by E-mail**.
2. In the Conference Call e-mail message, type the person’s e-mail address, and then click **Send**.
3. The e-mail message contains two links for joining the conference: one for Communicator, and one for a Web browser. If the recipient does not have Communicator installed, the recipient can join by using a Web browser. Although video is not available to the Web browser user, IM, audio, and desktop sharing are available.

**To invite someone by phone**

1. In the **Conversation** window, click the arrow next to **Invite**, and then click **Invite by Phone**.
2. In the **Invite someone by phone** dialog box, type the person’s phone number, and then click **Call**.
Place a Conference Call

You can start a phone conference call from the Contact List by selecting multiple contacts, or a group. You can also start a conference from a one-to-one phone or video conversation between two people by inviting another person to the conversation.

To start a conference call

1. In the Contact List, do one of the following:
   - Select multiple contacts by holding down CTRL as you click the contacts that you want to invite to the conference, right-click the last contact, and then point to Start a Conference Call.
   - Right-click a contact group, and then point to Start a Conference Call.

2. Click one of the following options:
   - Start Conference Now Using. Click Communicator to start the conference from your default USB phone device or computer (if you have a headset or speakers and microphone).
   - Start a Conference Call by Calling Me At. Click a phone number to have Communicator call the phone number and join you into the conference when you answer the phone. Be aware that you can also enter a new phone number from which to join the conference.

![Figure 8.3. The Conversation window during a conference call](image)

During a conference call, you can do the following:

- Click Start video conference call to add your video feed to the conference (provided that you have a Web camera connected to your computer).
- Click Show instant message area to send an instant message to the conference participants.
- Click Invite to add people to the conference.
Join a Conference Call

When you place a conference call, the recipients of the call see a conference call invitation, as shown in Figure 8.4.

Figure 8.4. Conference call invitation alert

To join a conference call
- Click the left pane of the Conference invitation alert.

To join a conference call from another phone
- To join a conference call from a phone other than your default phone, click Join From in the Conference Call invitation alert, and then select the phone from which you want to join the conference. Communicator calls the phone number and when you answer the call, Communicator joins you to the conference on that number.
Chapter 9: Use Desktop Sharing

With desktop sharing in Office Communicator 2007 R2, a participant in a Communicator conversation can share his or her entire computer desktop with the other participants. If you have a document, slide deck, or application that you want to present to others in the conversation, you can start a desktop sharing session.

You can also allow other participants to take control of the document or application that is displayed on your desktop. When you first start desktop sharing, you are in control of your mouse pointer and keyboard, so you control the action on any open programs or documents. After you start desktop sharing, you can also enable other participants to provide mouse and keyboard input into your desktop so that you can collaborate with your colleagues. For example, if you are sharing a slide deck and another participant wants to present the slides while advancing them at his or her own pace, you can give control to the participant.

For a highly interactive meeting experience, you can add desktop sharing to a video call, or you can start the video during desktop sharing, as shown in Figure 9.1. Participants can view the video, desktop sharing, and IM conversation window all at the same time.

![Figure 9.1. Using desktop sharing and video together](image)

Sharing Your Desktop

You can start a desktop sharing session at any time during a conversation. As the person sharing your desktop, you can give control to the other participants, return to the conversation window (for example to continue an IM conversation or start video), and stop the desktop sharing session.

To share your desktop during a Communicator conversation

1. In the Conversation window, click the Sharing button, and then click Share Desktop. A highlighted frame appears around your entire desktop to indicate that your desktop is currently visible to other participants, as shown in Figure 9.2.
2. In the participants’ conversation windows, the message **Click to accept invitation to sharing session** appears together with an alert. The other participants click the message to accept the invitation.

3. When you are sharing your desktop, you can open and display programs, page through documents, or walk through a slide deck as you would typically do.

### To give control to another participant

1. To share control of the desktop sharing session, in the **Conversation** window, click the arrow next to the **In Control** sharing bar, and then do one of the following:
   - Under **Grant Control To**, click the name of the participant to whom you want to give control. The participant will see the message **You have been granted control**.
   - Click **Share Control with All Participants** if you want to allow any participant to take control. The other participants will see a **Request Control** button, which they can click to control the mouse and keyboard on your desktop.

2. To take back control of the desktop sharing session, in the **Conversation** window, click the arrow next to the **Sharing** button, and then click **Take Back Control**.

### To add video to the desktop sharing session

1. In the sharing menu bar, click the **Show conversation** button, as shown in Figure 9.3, to return to the **Conversation** window.

---

**Figure 9.2. Desktop sharing from the sharer’s viewpoint**

**Note**
If you have multiple monitors, you can select the monitor that you want to share.
Figure 9.3. Show conversation button in the desktop sharing menu bar

2. In the Conversation window, click the Start video call button.

Note

If a participant has joined the conference by using a Web browser, video will not be available to the participant.

To stop desktop sharing

- Click the arrow next to the Sharing button, and then click the Stop button in the sharing menu bar at the top of your screen, as shown in Figure 9.4.

Figure 9.4. Stop button in the desktop sharing menu bar

Viewing a Shared Desktop

When someone else initiates desktop sharing, you can accept the invitation to view desktop sharing, change your view of the shared desktop, and request control of the shared desktop.

To accept an invitation to a desktop sharing session

1. When a participant initiates desktop sharing during a conversation, the message Click to accept invitation to sharing session appears in your conversation window, as shown in Figure 9.5. If you are currently not in a conversation, an alert appears on your desktop, as shown in Figure 9.6.

Figure 9.5. Invitation to a desktop sharing session from the participant’s viewpoint
Figure 9.6. Invitation to a desktop sharing session from the participant’s viewpoint

2. Click the message or alert to begin viewing the sharer’s desktop.

To change your view of the shared desktop

- You can use window controls to maximize or resize your view of the shared desktop:
  - To toggle the size of the shared desktop between actual size and fit to window, click the Actual size button.
  - To fill your entire screen with the shared desktop, click the Fit to screen button.
  - To request control of the shared desktop, click the Take control button.
  - To stop desktop sharing, click the Stop desktop sharing button located above the desktop sharing window.

Chapter 10: Move Seamlessly Between Communication Modes

One of the great new features in Office Communicator 2007 R2 is the ability to move seamlessly between communication modes during a session. For example, you can start a simple IM “you there?” session with a co-worker. After a few IM exchanges, you might decide that you need a third person, so you can invite another person to the session. Next, you might decide that you need more sophisticated communication than IM, so you can add audio and video to the conference. Then perhaps, you need to show a Web page or share an application, so you can launch Live Meeting and share out your desktop. Office Communicator makes this scenario not only possible, but fairly seamless.

In this chapter, we will show how to do the following tasks:

- Start an IM conference by inviting others to an IM session.
- Start an audio conference call by selecting multiple contacts in the Contact List, or by selecting a contact or distribution group.
- Start an unscheduled audio/video conference from an instant messaging session.
- Escalate a conference call to a Live Meeting data sharing conference.

Conferences with three or more participants, including conferencing-mode video sessions, require an Office Communications Server 2007 A/V Conferencing Server. If you are not sure if an A/V Conferencing Server is set up for your organization, contact your system administrator.

Add Audio and Video to an IM Conference

One benefit of Communicator 2007 R2 is that you can easily move between communication modes without having to open a new window. For example, you can start an instant messaging conference with several users and then add audio and video to the conference.

To start an audio conference from an instant messaging session
1. First start an instant messaging conference. Select multiple contacts in the Contact List by holding down CTRL as you click the contacts that you want to invite to the conference. Right-click the last contact, click **Send an Instant Message**, type a message, and then press ENTER.

2. After the participants have accepted the instant messaging invitation, you can add audio to the conference by clicking the **Call** button in the **Conversation** window. Communicator adds you to the conference as the conference leader and calls the other conference participants. When the participants have accepted the conference call invitation, you see the phone indicator next to their name.

3. After the conference participants have accepted the audio call, you can add video to the conference by clicking **Start a video conference call**. This sends a Join Video Conference invitation to the participants and displays the video pane for the conference participants, as shown in Figure 10.1.

![Figure 10.1. The Conversation window during a conference call with instant messaging, audio, and video](image)

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**Escalate a Conference Call to a Live Meeting Web Conference**

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Live Meeting menu options are enabled only for conference participants who have Live Meeting installed and configured on their computers.</td>
</tr>
</tbody>
</table>

With Office Communicator 2007 R2, you can escalate a Communicator conference, whether it is instant messaging or audio video conference, into a Live Meeting Web conference, without having to re-invite participants.

**Escalate a conference call to a Live Meeting conference**

1. First start a conference call. Select multiple contacts in the Contact List by holding down CTRL as you click the contacts that you want to invite to the conference. Right-click the last contact, and then click **Start a Conference Call**.

2. After the conference participants have joined the conference, you can escalate to a Live Meeting Web conference in one of the following ways:
• Click the **Live Meeting** button in the **Conversation** window to start a Live Meeting session and to send a Live Meeting invitation to all conference participants, as shown in Figure 10.2.

• Click the options arrow to the right of the **Live Meeting** button, and then click one of the following:

  - **Share Information Using Live Meeting** to send an application-sharing invitation to conference participants, who will receive the invitation request in the message area of their **Conversation** window. When the invitation is accepted, application-sharing will be conducted by using a Live Meeting session that is connected to the same Office Communications Server that is hosting the conference call. This menu item appears only if you have Live Meeting configured to connect to Office Communications Server.

  - **Meet Now Using Live Meeting Service** to send an invitation to conference participants to join a Live Meeting by using the Live Meeting service. When the invitation is accepted, application sharing can be conducted by using a Live Meeting session that is connected to the Live Meeting service. This menu item appears only if you have Live Meeting configured to connect to a Live Meeting service.

![Figure 10.2. Starting Live Meeting from the Conference window](image-url)
After you sign in to Live Meeting, you can begin sharing slides, applications, or collaborate on a Text Page, as shown in Figure 10.3.

**Figure 10.3.** A text page is shared between participants of a Live Meeting session

When you send a Live Meeting invitation, the recipients of the invitation see a Live Meeting invitation in the Communicator Conversation window, shown in Figure 10.4.

**Figure 10.4.** The Live Meeting invitation in the Office Communicator Conversation window

- To join a Live Meeting Conference
  - Click the Start link in the invitation.
Chapter 11: Schedule a Communicator Conference Call or a Live Meeting Conference

Note
If you have not installed the Conferencing Add-in for Microsoft Office Outlook, contact your system administrator.

Microsoft Unified Communications offers you a Conferencing Add-In for Microsoft Office Outlook that you can use to schedule Communicator phone conferences and Live Meeting Web conferences.

Schedule an Office Communicator Conference Call
You can use the Conferencing Add-in for Microsoft Office Outlook to schedule an Office Communicator phone conference. Invitees to the conference, including you, can join the conference from their traditional (PSTN) phone lines, from cell phones, or from their computers if they have a speaker/microphone or USB audio device attached.

When scheduling an Office Communicator conference call or a Live Meeting Web conference, you can add a dial-in number so that invitees can use any telephone to participate in the audio part of the conference. The meeting invitation contains the telephone number, conference ID, and passcode that the participant can use to join the audio part of the conference. For information about including a dial-in number, see “Dial-in Conferencing Setup” in Chapter 2.

To schedule a Communicator conference call
• Open Microsoft Office Outlook, click Conferencing, and then click Schedule a Conference Call.

To schedule a Live Meeting Web conference
• Open Microsoft Office Outlook, click Conferencing, and then click Schedule a Live Meeting. Select the meeting options as you typically would when scheduling a meeting with Outlook.
Chapter 12: Add a Dial-In Number to a Conference Call

When you schedule an Office Communicator conference call by using the Conferencing Add-In for Outlook, you can add a dial-in number so that invitees can use any telephone to participate in the audio part of the conference. The meeting invitation contains the telephone number, conference ID, and passcode that the participant can use to join the audio part of the conference.

The dial-in conferencing options vary, depending on how your administrator has set up this feature. For example, some organizations may allow you to choose between using your own dial-in information for all your conferences, or allowing Communicator to create new dial-in information for each conference.

The options also vary, depending on the type of access you have assigned to the conference. Therefore, you should select the access level before you configure the dial-in number.

In some organizations, the administrator may have assigned a personal identification number (PIN) to each employee specifically for joining Communicator conferences. This allows participants to join conferences by entering their PIN instead of a passcode. If you are scheduling a Communicator conference and want to require a PIN to join, you can select this in the Audio Options dialog box.

Creating Conferences with the Dial-In Audio Feature

The option to include the dial-in feature is available in the Conferencing Add-In for Outlook. When using Outlook to schedule a conference call, the organizer can use the Conference Call Audio Options page to select the dial-in option, which is default selection, or another audio option.

In the conference call audio options, the organizer can select between the following two types of dial-in audio connections, as shown in Figure 12.1:

- **Use my assigned conference ID for each conference.** Office Communications Server reserves a conference space for each user. Users have their own conference ID that they can use for any conference they organize. This option is useful if you want to remember just one conference ID for all your conferences.
- **Use a new conference ID for each conference.** Office Communications Server assigns a unique conference ID.

Depending on the organization’s policies, the organizer can also decide whether to require participants to use a passcode to join the audio conference.

Note

Users who have not yet set a PIN can do so by clicking the Have you set your PIN? link in the e-mail invitation. This displays a Web page that allows the user to set a PIN.
Using the Dial-in Feature to Join a Conference

The invitation e-mail contains the telephone audio numbers that participants can use to access a conference. The invitation also contains the conference ID and participant passcode, if required.

The participant uses any phone to dial into the conference and enter the conference ID and passcode, if required. After the participant joins the audio conference, the participant appears in the conference roster. Office Communicator participants can view the conference dial-in number, conference ID, and passcode in the conference window by clicking the arrow next to Invite, and then clicking Invite by Phone.

If you are the Leader or you need to join a conference with restricted access, you need to configure your Dial-in Conferencing Settings and create a PIN.

To configure your Dial-in Conferencing Settings for Microsoft Office Communications Server 2007 R2

1. In the Office Communicator title bar, click the Menu button, click Tools, and then click Dial-in Conferencing Settings.
2. On the Dial-in Conferencing Settings page, under Personal Identification Number (PIN), click Sign In, as shown in Figure 12.2.
3. Click Language, click your preferred language from the list, and then click Sign In.
4. In the Connect to dialog box, type your domain account username and password, and then click OK.
5. On the Create New PIN page, click PIN, type a number that meets the PIN requirements, click Confirm PIN, and then retype your new PIN.
6. When you are finished, click Save.
To schedule a Communicator conference call

1. On the **Conferencing** menu, select **Schedule a Conference Call**. Or, on the Outlook toolbar, select **Schedule a Conference Call**.

2. In the conferencing request, on the **Appointment** tab, in the **Subject** line, type a description for your conference call.

3. To add people to the invitation, do one of the following:
   - On the **Appointment** tab, in the **To** box, type the full e-mail addresses of the people you want to invite, separating each address by a semi-colon.
   - On the **Appointment** tab, click **To**, and then select the invitees from your address book.

4. To designate which invitees are to be leaders, in the meeting request, on the toolbar click **Leaders**. In the Participants list, click the appropriate names and e-mail addresses. Click **Add** to move the selected names to the Leaders list, and then click **OK**.

5. To check the availability of meeting participants (that is, if you have not done so already), on the **Scheduling Assistant** tab, find a time when all participants are available, and then click that time. Drag the bars that indicate the start and end time for the meeting until they are as you want them.

6. To choose the type of audio, on the toolbar click **Audio**. Figure 12.3 shows the **Conference Call Audio Options** page.
   - To enable participants to connect using a computer with a headset or microphone and speakers, click **Use computer audio**.
   - To enable participants to connect to the meeting audio either by using a computer with headset or microphone and speaker, or by dialing in using the conference calling number, click **Use computer audio or dial in from any phone**. Choose the type of conference bridge you want to use:
     - If you want all of your conferences to use the same dial-in information, click **Use my assigned conference ID for each conference**. You can change your conference ID and passcode at any time. To change your conference ID or passcode, from the Outlook **Conferencing** menu click **Dial-in Conferencing Settings**
     - If you want all of your conferences to use unique dial-in information, click **Use a new conference ID for each conference**.
     - Optionally, select the **Require a passcode to join the meeting** check box, and then click **OK**. With this option, meeting participants are required to use a passcode to join the meeting. If this option is unavailable, it means that your administrator requires a passcode for all Communicator dial-in conferences
     - From the drop down select the region for the local phone numbers.
7. If you want to send a message to all recipients, on the **Appointment** tab, type your message above the dotted line in the box provided.

8. When the meeting invitation is as you want it, as shown in Figure 12.4, on the Standard toolbar, click **Send**.

---

**Figure 12.3. Conference Call Audio Options**

By default, anyone with the conference calling number and your conference ID can join your conference. If you want to restrict who can join your dial-in conference, configure the following advanced access options when you schedule the conference:

- **Invite Within Network**. Allow participants within or affiliated with your corporate network to join the meeting. The meeting participants can also forward the meeting invitation to others within or affiliated with your corporate network.

- **Invite Within Network (Restricted)**. Allow participants that are invited by only you who are within your organization or affiliated with your organization to join the meeting. The meeting invitation cannot be forwarded by others.

- **Invite Anyone**. Allow anyone to join the meeting.

---

**Figure 12.4. Conference Call invitation**

**Schedule a conference call with advanced access options**

By default, anyone with the conference calling number and your conference ID can join your conference. If you want to restrict who can join your dial-in conference, configure the following advanced access options when you schedule the conference:

1. In the conferencing request, on the toolbar, click **Permissions**.

2. Select **Invite Within Network**, **Invite Within Network (Restricted)**, or **Invite Anyone**.
Part 4
Phone and Video

In this Part:
Chapter 13: Getting Started with Office Communicator Phone and Video Capabilities
Chapter 14: Make and Receive Phone Calls
Chapter 15: Make and Receive Video Calls
Chapter 16: Call Forwarding and Voice Mail
Chapter 17: Team Call
Chapter 18: Delegating your Calls to One or More Assistants
Chapter 19: Signing In to Your Response Group Service Agent Groups
Chapter 13: Getting Started with Office Communicator Phone and Video Capabilities

Office Communicator 2007 R2 offers phone and video capabilities to improve your everyday communication. With Office Communicator 2007 R2, you can do the following tasks:

- Make one-click phone calls by clicking a contact in your contact list.
- Make group conference calls by right-clicking a group name, pointing to Start a Conference Call, and then selecting a conference calling option. *
- Configure Call-Forwarding Settings to forward calls to another number, to simultaneously ring an additional number when your number rings, or redirect unanswered calls to another phone number, contact, or Voice Mail.
- Add a subject conversation and an importance flag to a call.
- Keep a record of all IM and voice conversations in Outlook.
- Take notes during a call with Microsoft® Office OneNote®.
- Move seamlessly from an instant messaging conversation, to a phone call, to a full audio/video conference call, all within the same Conversation window.
- Connect Communicator with your Office Communicator 2007 R2 Phone Edition desk phone.

* Capabilities available only with Office Communicator Enterprise Voice.

About Phone and Video Capabilities

The Phone and Video capabilities described in this part of the Getting Started Guide require phone and video capabilities to be enabled in your environment. If you are not sure if these capabilities are available, contact your system administrator.

Phone capabilities with Communicator can be configured for Enterprise Voice or for remote call control (RCC), as described in the following:

- **Enterprise Voice.** With Enterprise Voice, your phone system offers full unified communication capabilities, including the ability to make single-party and multiparty VoIP calls, configure robust call-forwarding features and receive voice mail in your Exchange mailbox. To determine whether Communicator is set up for Enterprise Voice, click the arrow to the right of the Call button. If you see a Preferred Calling Device option, you are configured for remote call control, not Enterprise Voice.

- **Remote Call Control.** With remote call control, your phone system is integrated with a PBX system and offers call-forwarding features, but does not offer features such as ringing an additional number or redirecting unanswered calls. To determine whether Communicator is set up for remote call control, click the arrow to the right of the Call button. If you see a Preferred Calling Device option, you are configured for remote call control.

What You Should Do First

Before you get started, make sure that you have a USB audio device, headset, or speakers and microphone connected to your computer.
Make a Few Phone Calls

With the phone capabilities of Communicator, you can make outbound calls to traditional PSTN/PBX phones or mobile phones and receive inbound calls from these phones. In short, you can do everything that you can do today with your traditional desktop phone—and then some. To get started, try making a few calls with Communicator.

Call a contact in your Contact List

- In the Communicator Contact List, click a contact’s Call button to the right of the contact name. By default, the Call button, when clicked, will call the contact’s Work phone number. After you call a contact, Office Communicator remembers the most recently used calling option and uses that option when you click the Call button again.

![Figure 13.1. Call button for a contact](image)

Call an outside number

1. In the Communicator window, enter a number (could be your home number) in the Search box (Type a name or phone number). You do not have to format the number.

2. Double-click the Call button for the number in the Search Results pane to dial the number.

Adjust Audio and Video

Office Communicator automatically detects your audio and video devices. However, it might be a good idea to run the Set Up Audio and Video option to adjust volume levels.

To run the Set Up Audio and Video option

- In the Communicator window, click the Menu button in the title bar, point to Tools, and then click Set Up Audio and Video.

About Phone Number Formats

Communicator provides several locations for entering phone numbers. If you are entering a phone number to call in the Search box, Communicator enables you to enter digits or alphabetical characters. For example, you can enter a number such as 1-555-555-0101 or a 1-800 number such as 1-800-EXAMPLE.

If you are entering a phone number for call forwarding or to publish one of your phone numbers, you need to use the E.164 Number Format. Enter the country code, followed by an area code, and then the local number. As a best practice, the phone numbers that you enter should contain only the digits 0123456789. Communicator will automatically add the formatting to the phone number for you. Do not include the international dialing prefix—for example 011 (in the United States) and 00 (in Europe and South America).

About Setting up Voice Mail

If your system is configured for Enterprise Voice (you can easily determine this by clicking the arrow to the right Call button[], and if you do not see a Preferred Calling Device option, you are configured for Enterprise Voice), you will continue to receive your missed calls and voice mail notifications in Outlook. However, with Enterprise Voice capabilities, you can play voice mail items inline on your speakerphone, without opening Windows Media® Player.

Instructions for retrieving your temporary PIN number and for creating a new one are typically sent to you in an e-mail message by your system administrator. If you need to use the dial pad to enter a PIN number, the dial pad is located on the Call Controls area of the Conversation window. Refer to the e-mail message for the PIN.
Where Is the Dial Pad?

With voice mail systems or conference calls, you are often asked to enter a PIN or make a selection by entering a number. To enter PINs or to respond to automated voice systems, you have to either enter numbers from your phone dial pad or the Communicator dial pad. While a call is being connected, the dial pad is available in the Call Control area of the Conversation window, as shown in Figure 13.2.

![Figure 13.2. Communicator dial pad when a call is connecting](image)

After the call is connected, the dial pad is available in the Call Control area, as shown in Figure 13.3.

![Figure 13.3. Communicator dial pad during a connected call](image)
Connect Communicator with Your Desk Phone

If you connect an Office Communicator 2007 R2 Phone Edition desk phone to your computer with a USB cable, Communicator pairs with your desk phone, and the desk phone becomes your preferred audio device for calls, conferences, and Live Meeting sessions. The following activities occur:

- When you receive an incoming call, clicking the notification on your computer automatically connects your desk phone to the call.
- If you are using Outlook or Communicator and you click a contact to call them, the call is placed from your desk phone. During a call, any call control actions that you take (for example, putting the call on hold or transferring the call) are reflected both in Communicator and on your desk phone.
- If you are participating in an IM session and you add audio, your desk phone rings while it sends the audio invite to other participants.
- If your desk phone is the only audio device that you have connected to your computer and you are participating in a Live Meeting session, incoming calls will interrupt your Live Meeting audio and enable you to answer the desk phone.

Chapter 14: Make and Receive Phone Calls

Communicator enables you to contact others by using several communication methods. You might start a conversation with another person by instant messaging, for example, and then add audio (using a phone call) to the conversation as needed.

Communicator offers a rich phone communication experience that extends beyond traditional phone capabilities. For example, using Communicator’s Contact List, you can quickly see whether a contact is available and then call her with one-click calling. If the contact is not available, you can click the View more options for calling this contact arrow in the Contact List, and then place a call to the person’s mobile phone (assuming you have a Team or Personal access level). You can also click the contact’s Presence button to view additional details about the contact, including their schedule information to see when they might be available next.

In this chapter, we show how to use Communicator to perform tasks traditionally associated with your desktop phone. These tasks are as follows:

- Place calls with one-click calling from your Contact List.
- Find optional phone numbers, including mobile phone, for contacts.
- Make calls by typing a new call number in the Search box.
- Add phone capabilities to an instant messaging session.
- Answer an incoming phone call.
- Use Call Controls to place calls on hold or transfer calls.
- Add video to a phone call.

Make a One-Click Phone Call

Each contact in your Contact List has a number that you can call by clicking the Call button associated with the contact. The number is the contact’s work number by default, but it can change based on the number most recently used to call the contact. The Call button is shown in Figure 14.1.
To make a one-click audio call
- In the Contact List, click the Call button to the right of the contact that you want to call.

Call Additional Numbers

Communicator users can publish additional phone numbers, such as their mobile or home phone numbers and give you Team or Personal access level so you can view the numbers and use them for “click-to-call.” To call an additional phone number, you click the arrow next to the Call button, as shown in Figure 14.2.
To view call options for a contact
1. In the Contact List, click the arrow to the right of the Call button associated with the contact.
2. In the Call options menu, click the name or number that you want to call or click New Number, and then enter the number that you want to call.

What is a Communicator Call?
Office Communicator 2007 R2 provides a Communicator Call option, as shown in the previous Figure 14.2, as a way of placing a call to a contact. When you place a Communicator Call, the call is a VoIP call that is directed to all the contact’s devices that are configured for Office Communicator 2007 R2. Depending on the devices on which the contact has Office Communicator configured, the call can ring either the contact’s computer or her telephony devices that are configured for Office Communicator, or both.

Type a New Number to Call
In addition to one-click calling and using Call options, you can type the number that you want to call in the Search box in the Office Communicator window, as shown in Figure 14.3.

![Figure 14.3. Phone number entered in the Search box](image)

To type a new number and call it
1. In the Office Communicator window, enter the number that you want to call in the Search box. Use the International Phone number format. Enter the country code, followed by the local phone number. For example, for a United States number: 15555555555. For example, (011) in the United States and (00) in Europe. You can also use alphabetical characters for 1-800 numbers. For example, you can type: 1-800-EXAMPLE.
2. In the Search Results pane, click the Call button to the right of the phone number that you entered. You can also press the ENTER key to place the call.

Answer a Phone Call
When you receive a phone call from another Communicator contact, a Call alert appears in the lower-right corner of your computer screen. From the alert, you can accept the call, ignore the call, or redirect the call to another number, as shown in Figure 14.4.

![Figure 14.4. Audio call invitation alert](image)

To answer a phone call
- Click the left pane of the Call invitation alert.

To ignore a call
- Click the Ignore Call button in the Call invitation alert.
**To redirect a call**

- Click the **Redirect call to another phone or instant message** button, and then select an option from the menu. You can redirect a call to any of the phone numbers that you have published, including your mobile, home, or other phone number. If you choose to redirect a call to an instant message, the call is ignored and the **Conversation** window opens so that you can send the contact an instant message.

---

**Using Call Controls**

When you answer a phone call from a Communicator contact, the **Conversation** window opens. The **Conversation** window offers several call controls that you can use to transfer a call, put a call on hold, or adjust your speaker or microphone volume.

Table 14.1 shows the call controls and gives a brief description of what each one does.

**Table 14.1. Call controls**

<table>
<thead>
<tr>
<th>Control</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="End call." /></td>
<td>End call.</td>
</tr>
<tr>
<td><img src="image" alt="Put call on hold." /></td>
<td>Put call on hold.</td>
</tr>
<tr>
<td><img src="image" alt="Mute your line during a conference call" /></td>
<td>Mute your line during a conference call</td>
</tr>
<tr>
<td><img src="image" alt="Transfer call to: another person another one of your devices (such as your cell phone)." /></td>
<td>Transfer call to: another person another one of your devices (such as your cell phone).</td>
</tr>
<tr>
<td><img src="image" alt="Display the dial pad. The dial pad is used to enter input to access voice mail and to enter a passcode for conferences." /></td>
<td>Display the dial pad. The dial pad is used to enter input to access voice mail and to enter a passcode for conferences.</td>
</tr>
<tr>
<td><img src="image" alt="Toggle audio from a call between the USB telephony device and other speakers. This control appears only if you have a USB telephony device attached to your computer and you have configured your audio device to play call audio on a separate device from your USB telephony device." /></td>
<td>Toggle audio from a call between the USB telephony device and other speakers. This control appears only if you have a USB telephony device attached to your computer and you have configured your audio device to play call audio on a separate device from your USB telephony device.</td>
</tr>
<tr>
<td><img src="image" alt="Mute speakers. Click the Menu button to adjust the audio volume." /></td>
<td>Mute speakers. Click the Menu button to adjust the audio volume.</td>
</tr>
<tr>
<td><img src="image" alt="Mute microphone" /></td>
<td>Mute microphone</td>
</tr>
<tr>
<td><img src="image" alt="Audio level indicator." /></td>
<td>Audio level indicator.</td>
</tr>
<tr>
<td><img src="image" alt="Time elapsed." /></td>
<td>Time elapsed.</td>
</tr>
</tbody>
</table>
Chapter 15: Place and Receive Video Calls

You can use Office Communicator 2007 R2 to communicate with your contacts using audio and video. For example, if you have a webcam connected to your computer, you can place a video call to a contact. When the contact answers the call, she can see your video feed, even if she does not have a webcam. If the contact has a webcam connected to his or her computer, you can see the video feed for that person in your Conversation window.

Note
You can only make video calls to Communicator contacts within your company and to federated contacts outside your company. Communicator calls to public IM contacts or non-federated contacts outside your company are not supported.

In this chapter, we show how to place and receive a video call.

Place a Video Call

You can add video to an existing instant messaging session or phone call, or you can start a video call from the Office Communicator window.

To start a video call from the Contact List

- In the Contact List, right-click a contact, and then click Start a Video Call, as shown in Figure 15.1. After the video call is accepted, the Conversation window expands to display the video.

Receive a Video Call

To receive an audio/video call, you need speakers and a microphone, or a headset, or a USB audio device. However, you are not required to have a webcam to accept a video call. If you do not have a webcam, you will see the caller’s video feed, but the caller will see a video icon placeholder for your video feed.
To receive an audio/video call

- Click the left pane of the Video Call invitation alert, as shown in Figure 15.2.

![Figure 15.2. The Video Call invitation alert](image)

When you accept a Video Call invitation, the Communicator Conversation window opens and shows the caller’s video stream, as shown in Figure 15.3.

![Figure 15.3. The Conversation window with the video stream](image)
Chapter 16: Call Forwarding and Voice Mail

Office Communicator 2007 R2 provides call handling options that enable you to forward calls to another phone number or contact, to ring an additional number at the same time your default device rings, and to redirect unanswered calls to another number, contact, or voice mail.

In this chapter we will show how to do the following tasks:

- Forward incoming calls to another number, contact, or voice mail.
- Set forwarding settings to simultaneously ring an additional number at the same time your default phone device rings. *
- Cancel call-forwarding settings.
- Call a contact’s voice mailbox.
- Change your voice mail greeting.

* These features require that Enterprise Voice capabilities are enabled for Communicator.

Forwarding Calls

Office Communicator 2007 R2 provides call handling options that you can set to forward your incoming calls to your voice mail, to an alternate phone number, such as your mobile phone or home phone number, or to another contact, as shown in Figure 16.1.

To forward a call to your voice mail, another person, or phone number

- In the Office Communicator window, click the Call Forwarding button. Click Forward Calls To, and then select one of the following:
  - **Voice mail** to automatically forward all incoming calls to your voice mail.
- A phone number to automatically forward calls to that number.
- **New Number** to enter a new number to which to forward the call. You can refer to the Communicator online Help for examples of how to enter phone numbers.
- **Contact**, and then select a contact to forward calls to that contact.

**To ring another number at the same time your device rings**

- In the **Office Communicator** window, click the **Call Forwarding** button, point to **Simultaneously Ring**, and then do one of the following:
  - Click a phone number to simultaneously ring your primary phone and the additional number.
  - Click **New Number** to enter a new number to which to ring at the same time as your primary number. You can refer to the Communicator online Help for examples of how to enter phone numbers.

---

### Cancel Call Forwarding

You can set or cancel call-forwarding rules at any time.

**To cancel call-forwarding rules**

- In the **Office Communicator** window, click the **Call Control** button, and then click **Do Not Forward Calls**.

---

### Check Voice Mail

You can use Office Communicator 2007 R2 to retrieve your voice mail and to change your voice mail greeting. However, be aware that with Communicator Enterprise Voice, missed calls and voice mail will continue to arrive in your Outlook Inbox.

**To check voice mail**

1. In the **Office Communicator** window, click the **Call Control** button, and then click **Call Voice Mail**.

2. When prompted, use the dial pad in the **Conversation** window to enter your PIN number. Your PIN number is provided by your system administrator and is typically sent to you in an e-mail message.

---

### Call a Contact’s Voice Mailbox

In Office Communicator 2007 R2, you can leave a message directly in a contact's voice mailbox, instead of ringing the contact first.
To access a contact’s voice mailbox

1. In the Contact List, click the View more options for calling this contact arrow next to the contact’s name.
2. Click Voice Mail. Communicator will call the contact’s voice mail, allowing you to leave a message.

Change your Voice Mail Greeting

In Communicator 2007 R2, a new option allows quick access to your voice mail greeting, so that you can update it.

To change your voice mail greeting

1. In the Office Communicator window, click the Call Forwarding button, and then click Change Greetings.
2. Follow the prompts to change your personal greeting.
3. To change your Out of Office greeting, follow the prompts to accept the personal greeting and go to the main menu. From there you can change your Out of Office greeting.

Chapter 17: Team Call

In the Office Communicator Call-Forwarding Settings dialog box, you can set up a group of up to 25 contacts, known as your team-call group, who can answer your incoming calls if you are unavailable. This feature requires that Enterprise Voice capabilities are enabled for Communicator.

The option for setting up the Team Call feature is available in the Call-Forwarding Settings dialog box. You can add contacts to your call-forwarding list and designate when your phone calls will ring through to these contacts. Incoming calls can ring you and your team-call group at the same time. Or, you can set a delay so that incoming calls ring you first, and then ring your team-call group after a specified number of seconds. When your status is set to Offline, your calls are automatically redirected to your team-call group. When your status is set to Do Not Disturb, your calls are automatically redirected to your voice mail.

When a call is directed to you, the contacts in your team-call group each receive the incoming call alert. This alert indicates that you are the intended recipient of the call. When you or one of the contacts answers the call, the other contacts will see that the call has already been answered.

If the person calling you is another Communicator 2007 R2 user, his or her call window will indicate that the call may be answered by either you or one of your contacts. When the call is answered, the call window displays the name of the person who has answered the call.

To set up team call

1. In the Office Communicator window, click the Call Forwarding button.
2. Click Call-Forwarding Settings.
3. In the Do the following when I get calls drop-down list, select Ring me and my team-call group.
4. Click Add, and then click Contact.
5. Select a contact from the list, or search for a contact, and then click OK.
6. By default, the delay for each team contact is 0 seconds. To set a delay for your contacts, click the Ring Delay button. In the Ring Delay window, select the Turn on ring delay check box, and then type the number of seconds that should elapse before the contacts are rung.

Note
The ring delay setting that you set applies to all the contacts in your team-call group.

Chapter 18: Delegating your Calls to One or More Assistants

In Communicator 2007 R2, the call forwarding options allow a manager or executive to select one or more assistants (delegates) to receive his or her phone calls. Delegates are contacts who can answer the manager's calls, and make and transfer calls on the manager's behalf.

Important
Delegates must use Communicator Attendant instead of Office Communicator, so that they can access all the call delegation features. The manager specifies delegates in Office Communicator in the Call-Forwarding Settings dialog box.

The manager can configure the call-forwarding settings to do the following:
- Simultaneously send all incoming phone calls to the manager and the delegate.
- Send all incoming phone calls directly to delegates.

Delegates are automatically assigned the Team access level. You cannot change the access level for a delegate.
To set up your delegates

1. In the Office Communicator window, click the Call Forwarding button.
2. Click Call-Forwarding Settings.
3. In the Do the following when I get calls drop-down list, select one of the following:
   - Ring me and my delegates
   - Ring my delegates only
4. Click Add, and then click Contact.
5. Select a contact from the list, or search for a contact, and then click OK.
Chapter 19: Signing In to Your Response Group Service Agent Groups

The Response Group Service is a Unified Communications application that is used to create and configure workflows. Workflows route and queue incoming calls to groups of designated agents.

An agent group is a collection of agents who handle incoming calls from the Response Group Service. When an administrator creates an agent group, he or she can select the agents that are assigned to the group, and specify whether the group requires agents to sign in and out. You will be considered either an informal agent or a formal agent, depending on whether you are required to formally sign in to your agent group to begin receiving calls:

- Informal agents are agents that have been assigned to an agent group that does not require them to sign in and out. Informal agents are automatically signed in to the group when they sign in to Office Communications Server 2007 R2. If you are an informal agent, you can receive calls routed to your group by using Office Communicator 2007 R2 Attendant or Office Communicator 2007 R2.

- Formal agents are agents that have been assigned to an agent group that requires them to sign in and out. Formal agents must be signed in to the group before they can receive calls routed to the group.

Know When You Need to Sign In

The Response Group Tab is a custom tab on the Microsoft Office Communicator 2007 R2 client that formal agents use to sign in and out of their assigned agent groups. The Response Group Tab displays your agent group membership information. A Response Group Tab lists your group membership information for a particular pool. If you are assigned to multiple groups, and the groups are handled by more than one pool, each running the Response Group Service, you will have a Response Group Tab for each pool.

The Response Group Tab is a custom tab that appears at the bottom of your Communicator window, as shown in Figure 19.1.

![Response Group Tab](image)

**Figure 19.1.  Response Group Tab**

The **Signed in** column displays the sign-in status for each of your assigned groups.
A dimmed check box indicates that you cannot sign in and out of the group. You are an informal agent in this group.

A check box that is not selected indicates that you are currently not signed in to the group.

A check box that has a check mark indicates that you are currently signed in to the group.

Your sign-in status, combined with your presence state, signals whether you are available to take calls. Calls will be routed to you when you are signed in, and your presence state is Available.

### Sign In and Out of Agent Groups

You can selectively sign in or out of your groups or you can sign in or out of all your groups at the same time.

**To sign in to your agent groups**

- To sign in to an agent group, select the check box next to the agent group that you want to sign in to.

  - or -

- To sign in to all your agent groups, select the All groups check box.

**To sign out of your agent groups**

- To sign out of an agent group, click to clear the check box next to the agent group that you want to sign out of.

  - or -

- To sign out of all your agent groups, click to clear the All groups check box.