Microsoft® Lync™ 2010 Delegate Training
Objectives

In this course you learn how to:

• Set up Delegate Access by using Outlook

• Set up Delegate Access in Lync

• Schedule an Online Meeting on Behalf of Your Manager

• Initiate a Meet Now on Behalf of Your Manager

• Start a Conference Call on Behalf of Your Manager
Set up Delegate Access by Using Outlook 2007

1. Click **Tools**, and then click **Options**.
2. Click **Options**.
3. In the **Options** window, click the **Delegates** tab.
4. Click **Add**, and then type the name of the person whom you want to designate as your delegate.
5. Click **Add**, and then click **OK**.
6. In the **Delegate Permissions** dialog box, under the calendar option, select **Editor** rights.
7. To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.
8. Click **OK**.

Note: These steps must be performed by the manager.
Set up Delegate Access by Using Outlook 2010

1. Click the **File** tab.
2. Click **Account Settings**, and then click **Delegate Access**.
3. Click **Add**.
4. Type the name of the person whom you want to designate as your delegate.
5. Click **Add**, and then click **OK**.
6. In the **Delegate Permissions** dialog box, under the calendar option, select **Editor** rights.
7. To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.
8. Click **OK**.

Note: These steps must be performed by the manager.
Set up Delegate Access in Lync

1. Open Microsoft Lync.

2. Click the down arrow next to the Options button, click Tools, and then click Call-Forwarding Settings.

3. Click **Edit my delegate members**, and then click **Add** to select the delegates.

**Note:** These steps must be performed by the manager.
1. Open Outlook and locate your manager’s calendar.

2. Select a time, and then click **New Online Meeting** (in Outlook 2010) or **Online Meeting** (in Outlook 2007) on the Outlook toolbar.

3. When the invitation opens, notice that the meeting URL contains your manager’s alias.

4. Also notice your manager’s name **In Shared Folder** at the bottom of the invitation.

5. Type a subject and add the invitees.
Customize Your Meeting Options

Change the default meeting options.

1. Click **Meeting Options** on the Outlook ribbon to customize **Access Level**, **Presenters**, and **Audio** options.

2. When the **Meeting Options** window opens, select the check box next to **Customize access and presenters for this meeting**.

3. Under the **Access and Presenter** section, select the options as appropriate.

   **TIP:** You can click **Remember Settings** to save the options as default for your manager.

4. When you have finished scheduling the meeting, send the invitation to the participants.

   **Note:** The invitation includes your name, your manager’s name, and the meeting information, including the meeting link and audio information.
Meet Now on Behalf of Your Manager

To start an unscheduled meeting by using the **Meet Now** command, do the following:

1. Open Microsoft Lync, click the **Options** button, and then click **Meet Now**. You can also click **Meet Now** on the menu bar.

2. Select **For <your manager>**.

3. An online meeting opens for your manager.

4. Click the **People** menu and invite your manager and any other contacts.
Join the Meet Now Meeting

People that you invite to the meeting receive a notification and can join by clicking the notification.

1. Pop-up invitation

2. Connecting to the meeting

3. Participants connected

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Start a Conference Call on Behalf of Your Manager

1. Open Microsoft Lync and select the contacts to join the conference call.

Note: Hold Down The CTRL Key when you select multiple contacts.

2. Right-click the selection and point to Start a conference call.

3. Select For <your manager>.

4. Select Lync or the number to be used to start the conference call from.
Review

This course covered the following:

• Set up Delegate Access by using Outlook
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