

Office Communicator Quick Start Guide

Step-by-Step Guide to Account Set-up & Administration

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1. Adding a new user to an existing organisation and assigning the Office Communicator service.

You can begin this section of the guide once your Office Communicator provisioning has been completed by Outsourcery and we have provided you with an initial admin login.

When you sign up for the Office Communicator Service, we will setup your organisation in our control panel. An admin account (usually admin@yourdomain); will be created for you, which is for configuring and administering your users. **The admin account is for administration and configuration only and cannot have services added to it.**

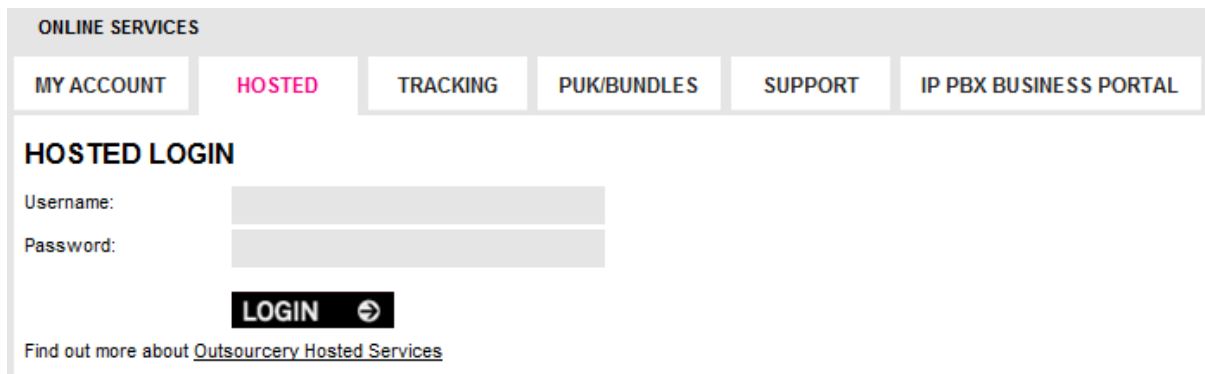
Note: Additional users can be given Administration access, but Outsourcery recommends you only use the admin login for admin tasks.

In this guide, we will log in as an administrator and add an additional user to an existing organisation.

- Start -

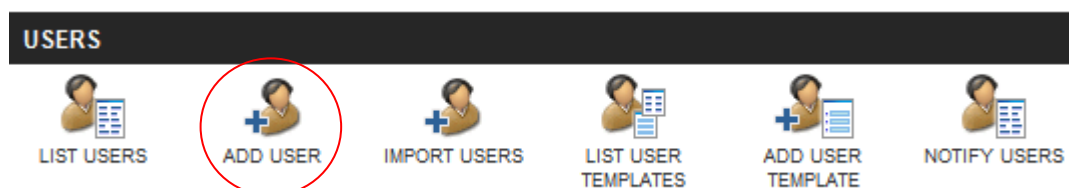
1.1 Go to: <https://www.outsourcery.co.uk/login/> and click on the **Hosted** tab.

1.2 Login to the control panel using your administrator username and password (in the format: admin@yourdomain).



Your password is what was agreed at the Pre Connect Courtesy Call and should be on the signed contract. If you have forgotten this, please e-mail in to hostingsupport@outsourcery.co.uk and the password will be resent to the account holders e-mail address.

1.3 Once you're on the control panel, click on the **Add User** icon.



1.4 You will now see the screen below. Proceed to enter all required details relating to the new user. You also have the option of giving the user administrator rights to the account by ticking the '**organisation administrator privileges**' box. Once completed, click **next**.

Note: Ensure you provide an alternative email address as a set-up confirmation e-mail will be sent to this address once provisioned.

The sections are explained as follows:

User Information:

- **Template:** This is not used, leave as [NO TEMPLATE]

General Information:

- **Username:** This is the username the user can use to log into the Control Panel – this also determines what the user's OCS sign-in address is going to be.
- **First Name:** Enter a first name (Required)
- **Middle Name:** Optional
- **Last Name:** Enter a Surname (Recommended)

Access Control:

- **Password:** Enter a password – The password must have at least one uppercase character and one number in it.
- **Confirm Password:** Confirm the password
- **Organization Administrator Privileges:** Confirm if the user needs admin rights to the Control Panel or not.
- **Account Expires:** You can set an expiry date for the account – if it's a temp user for example.

Contact Information:

- **External Email:** You can assign an external e-mail for the user if required
- **Phone:** Optional
- **Description:** Optional

Once you're finished editing the new user details, click **next**.

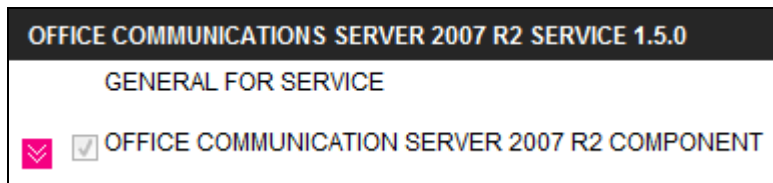
The screenshot shows a web form for creating a new user. It is divided into four main sections:


- USER INFORMATION:** Contains a dropdown menu for 'TEMPLATE' currently set to '[NO TEMPLATE]'. A red arrow points to this dropdown.
- GENERAL INFORMATION:** Includes input fields for 'USERNAME' (with '@gotest.co.uk' as a placeholder), 'FIRST NAME', 'MIDDLE NAME', and 'LAST NAME'.
- ACCESS CONTROL:** Contains checkboxes for 'AUTO GENERATE PASSWORD', 'ORGANIZATION ADMINISTRATOR PRIVILEGES', and 'CONTROL PANEL ACCESS ENABLED' (which is checked). It also has an 'ACCOUNT EXPIRES' section with dropdowns for 'Month' (7), 'Day' (8), and 'Year' (2009).
- CONTACT INFORMATION:** Includes input fields for 'EXTERNAL EMAIL', 'PHONE', and a 'DESCRIPTION' text area.

1.5 You now have the opportunity to select which services the account requires. E.g. Hosted Exchange or Hosted Blackberry Enterprise. As this account only has Office Communicator, place a tick next to '**Office Communications Server 2007 RC2**' and click **next**.

The screenshot shows a section titled 'AVAILABLE SERVICES'. It contains a single checkbox next to the text 'OFFICE COMMUNICATIONS SERVER 2007 R2 SERVICE 1.5.0'. At the bottom right of the section are two buttons: 'PREVIOUS' and 'NEXT'.

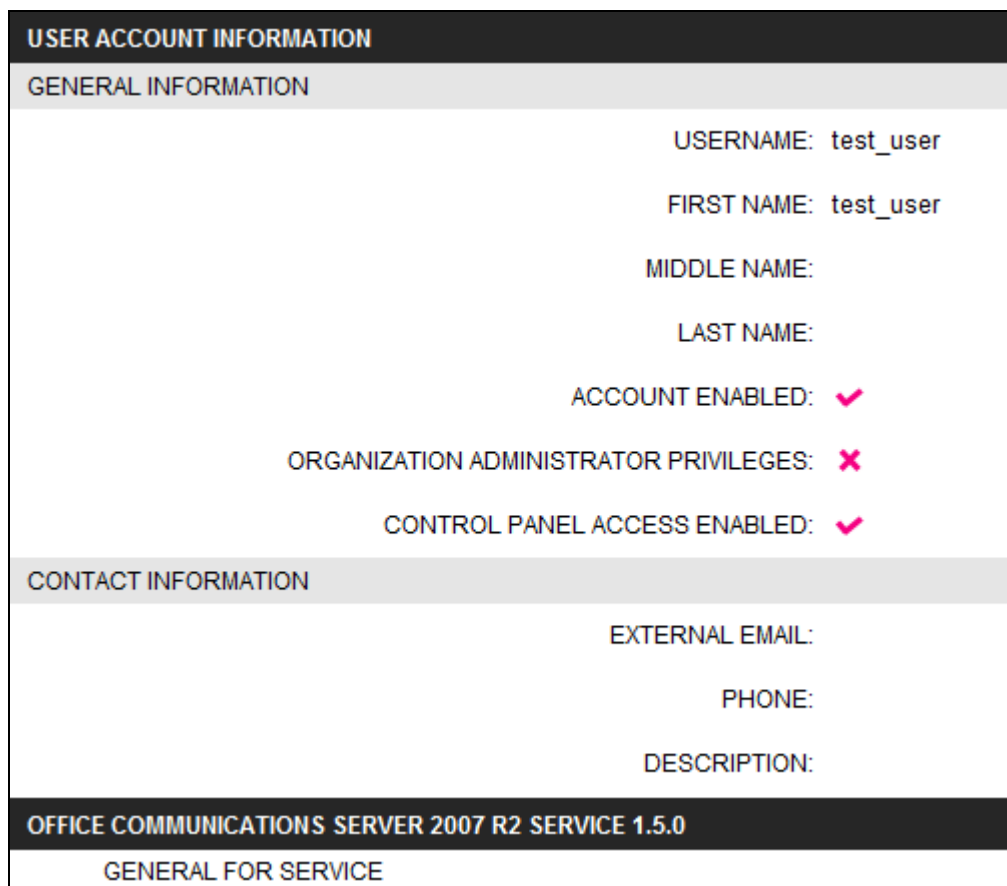
1.6 You will be shown all the previously selected services in a list.



Click the **magenta arrow** icon  to show additional options. Most options can be left as default but make sure to tick the option REMOTE USER ACCESS.

When you're done, click **Next**.

1.7 You will now see a summary of the information provided. If you are satisfied that all details are correct, click **Finish**.



1.8 The services status screen will now appear confirming that the new hosted mailbox has been set up successfully. Click **OK**

Status: Completed
Your task completed successfully. The details are shown below.

ACTION LOG DETAILS

LOG IDENTIFICATION

ID: 6259671

USER: :

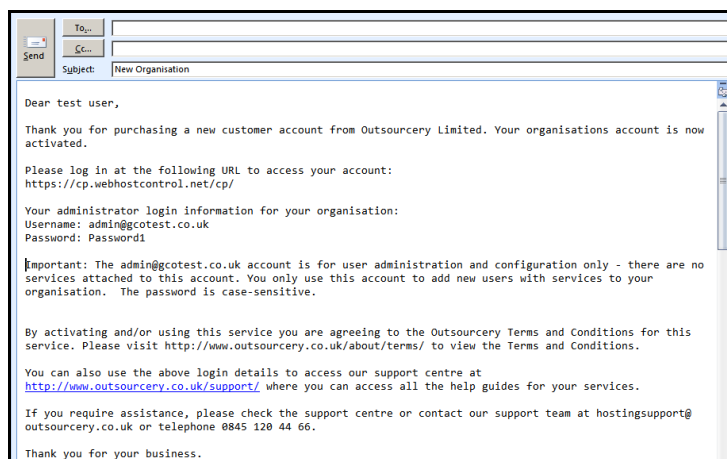
DURATION: 11/20/2009 10:29:36 AM - 11/20/2009 10:29:38 AM

LOG DETAILS

- Information: Creating User [ocstestuser] (10:29 AM)
 - Information: Adding user to Active Directory (10:29 AM)
 - Information: Adding the user to the Resource Manager. (10:29 AM)
 - Information: Provisioning user (10:29 AM)
 - Information: Provision a service ocs2007r2service (10:29 AM)
 - Information: Sending welcome email to @outsourcery.co.uk. (10:29 AM)

OK

1.9 The Office Communicator user has now been provisioned and the user will receive a confirmation e-mail to the external e-mail address provided containing their username and password. An example one is shown below:



- Finish -

2. Required: Download and Install the Microsoft Office Communicator Client (Free download)

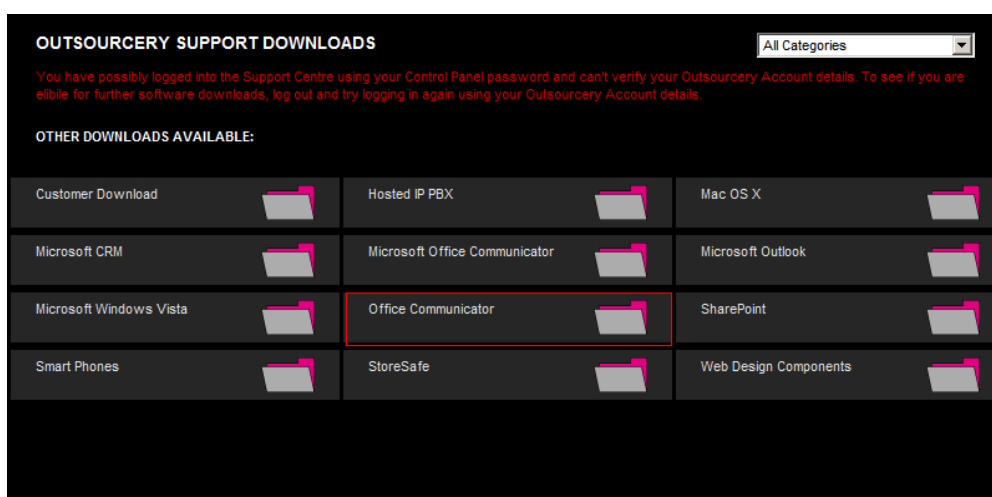
You will need to download the Office Communicator client, so that you can sign-in with your Hosted Office Communicator Server username. To download the Microsoft Office Communicator client, please follow the instructions below:

2.1 Go to: <https://www.outsourcery.co.uk/login/?redirect=/members/downloads.cfm#tab-6> and click on the **Support** tab.

2.2 Log in to the Download Centre using your username and password.

Note: If you are having issues logging in please contact the Technical Support Team on 0843 366 3366 and select option 3 for assistance.

2.3 Click on the **Office Communicator** icon:



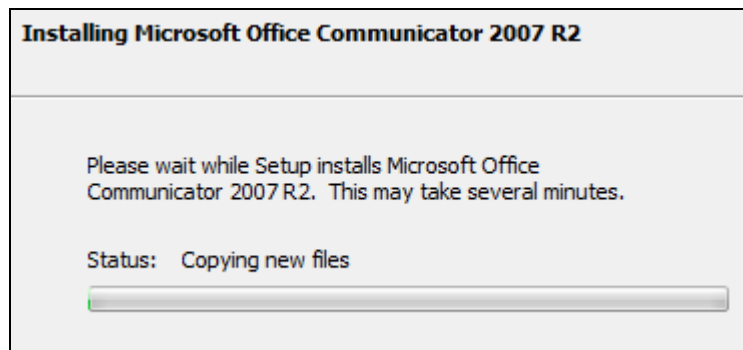
2.4 Now click on the **Communicator 2007** download icon and save it to your desktop.

2.5 Double click the setup file and you will see the below welcome screen. Click **Next**



2.6 On the next screen tick the option “**I accept to the licence terms**”. Click **Next** again.

2.7 Leave the install location on default and click **Install**, the setup program will install the Office Communicator client 2007 R2:



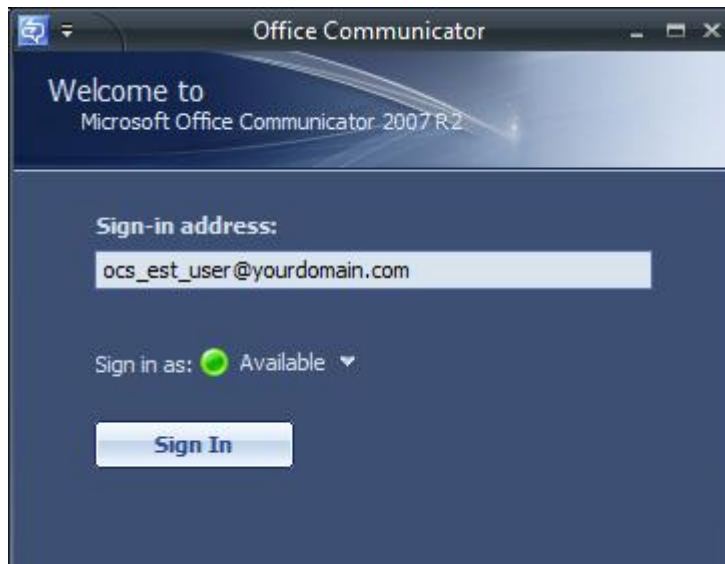
2.8 Once Microsoft Office Communicator 2007 R2 client is installed, click **Finish** to exit setup.

3. Configuring a Hosted Office Communicator Server account in Office Communicator 2007 client

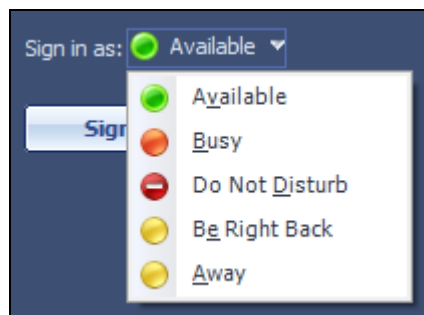
The Office Communicator client is very simply to configure. It can configure itself automatically, but there may be cases where you have to provide some additional server information. The following section explains how to configure the Office Communicator 2007 client

- Start -

3.1 Select **Start > All Programs > Microsoft Office Communicator 2007 R2** icon:  The Office Communicator client window will load:



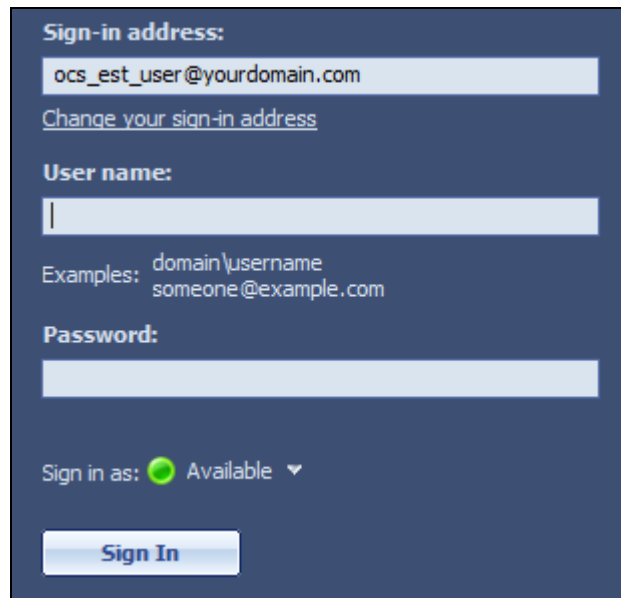
3.2 Now enter in **your sign-in address**. This is the username that was configured in section 1 of this guide. You can also select what presence / status you'd like to sign into OCS using, the default is Available. Other options are:



Note: You can read more details about the different presence / statuses in section 4 of this guide.

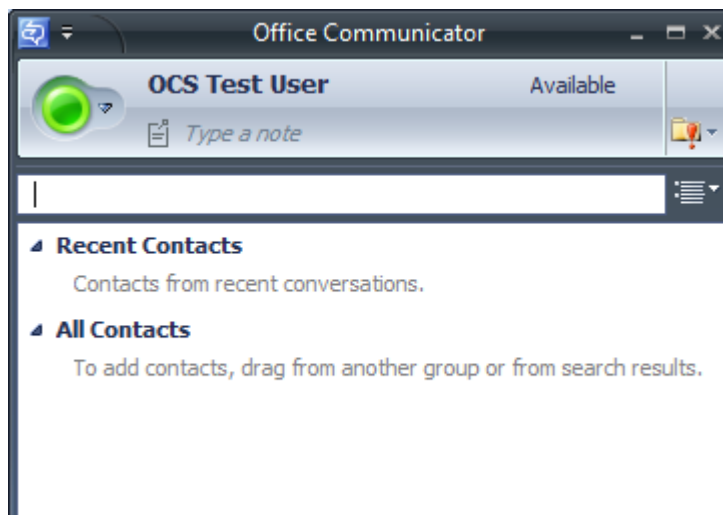
3.3 When you have selected your status, click the **Sign In** button.

3.4 The Office Communicator client will attempt to automatically sign you in. If it's working correctly, the client will ask you to enter your user name and password which were configured in section 1 of this guide. Enter these in and click **Sign In** again.

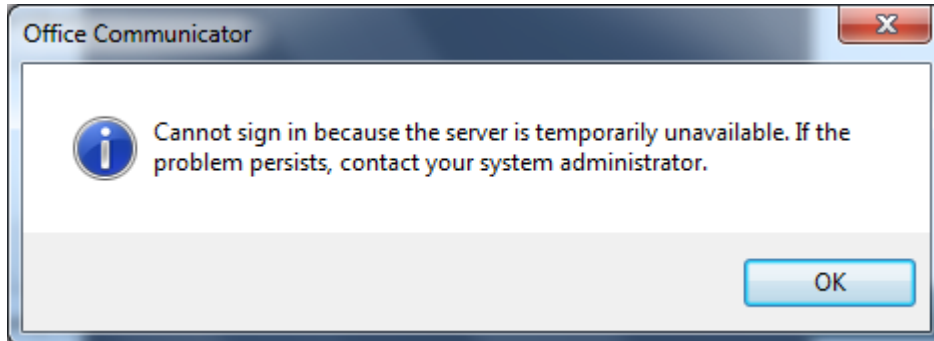


The screenshot shows a dark blue sign-in dialog box. At the top, it says "Sign-in address:" followed by a text box containing "ocs_est_user@yourdomain.com" and a link "Change your sign-in address". Below that is "User name:" with an empty text box and examples: "domain\username" and "someone@example.com". Then "Password:" with an empty text box. At the bottom, it says "Sign in as: ● Available" with a dropdown arrow, and a "Sign In" button.

3.5 You will be signed in and presented with your Office Communicator contact list. At this moment in time it will be blank. **Section 4** goes into detail of how you can add contacts to your contact list and send instant messages to them:

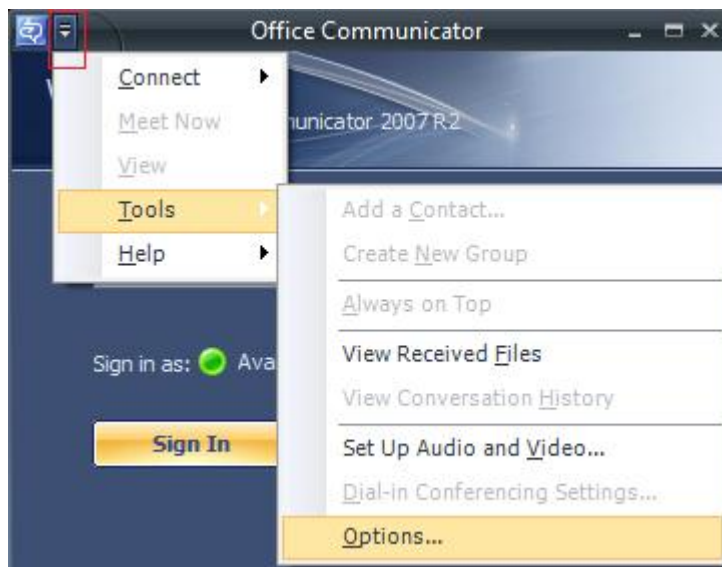


3.6 If the automatic login does work however you will see the following error message:

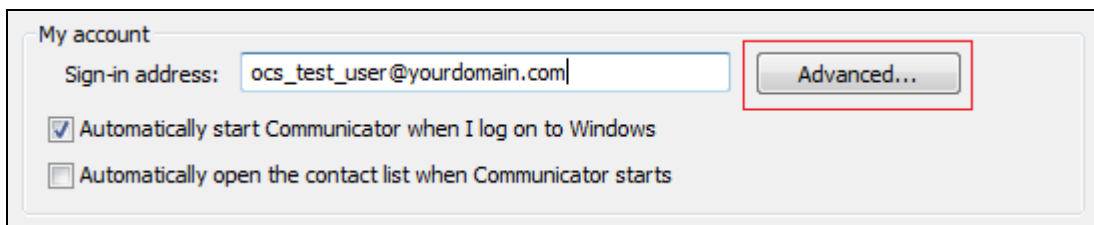


Check that your sign-in address is correct and try again. If you get the error again, click **OK** and continue to the next step to resolve this problem

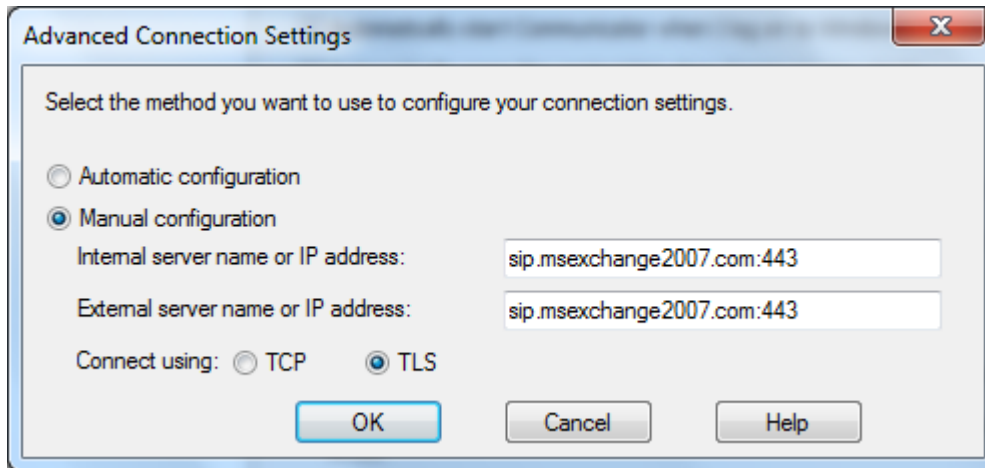
3.7 From the top of the Office Communicator window click the **blue down arrow icon** and select **Tools > Options...**



3.8 You will see your sign-in address under the My account section, click the **Advanced...** button



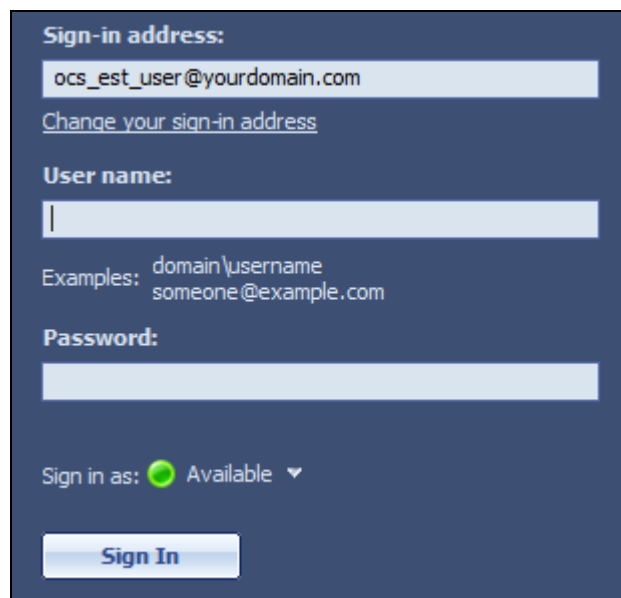
3.9 Click the option **'Manual configuration'** and enter into both the Internal and External server name and IP address boxes: **sip.msexchange2007.com:443**. Also select Connect using **TLS** option.



Click **OK**, and then click **OK** again to return to the sign-in screen.

3.10 Click the **Sign In** button again

3.11 If it's working correctly, the client will be asked to enter your user name and password which were configured in section 1 of this guide. Enter these in and click **Sign In** again.



3.12 You will be signed in and presented with your Office Communicator contact list.

- Finish -

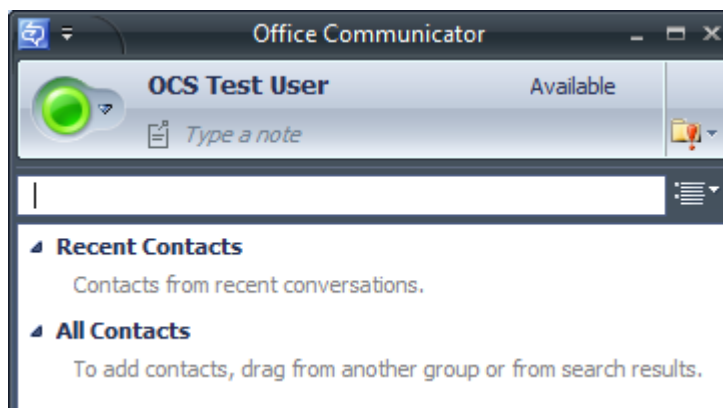
4. Adding contacts to Office Communicator client and how to Instant Message contacts

Before you can begin using Office Communicator, you need to add contacts, so you will be able to communicate with them and view their presence / status in your client window.

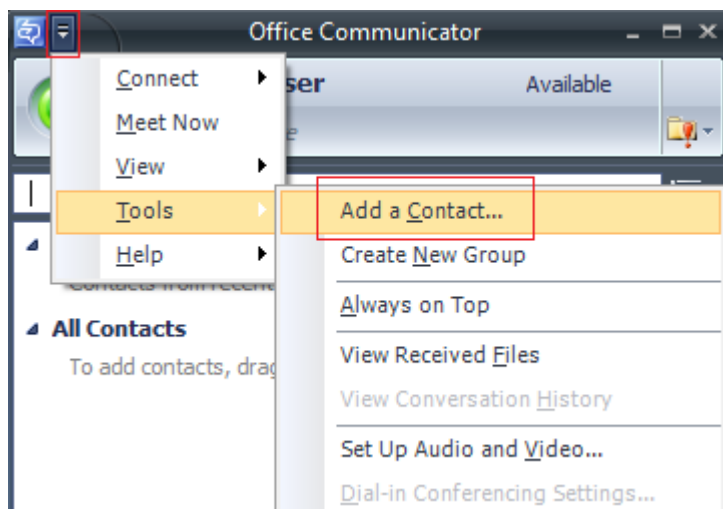
This section first explains how to add contacts to Office Communicator and then how you can message contacts.

Adding a contact to Office Communicator

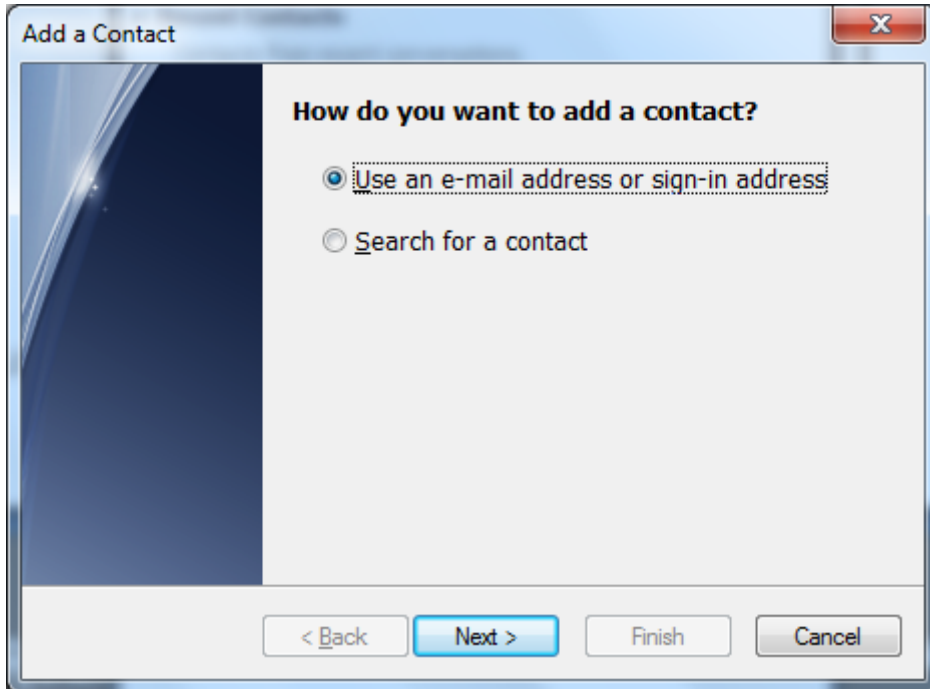
4.1 If you are not already signed into Office Communicator, please sign into the client. You will see the contact list, which has no contacts initially:



4.2 To add a new contact click the **blue down arrow icon** and select **Tools > Add a Contact...**

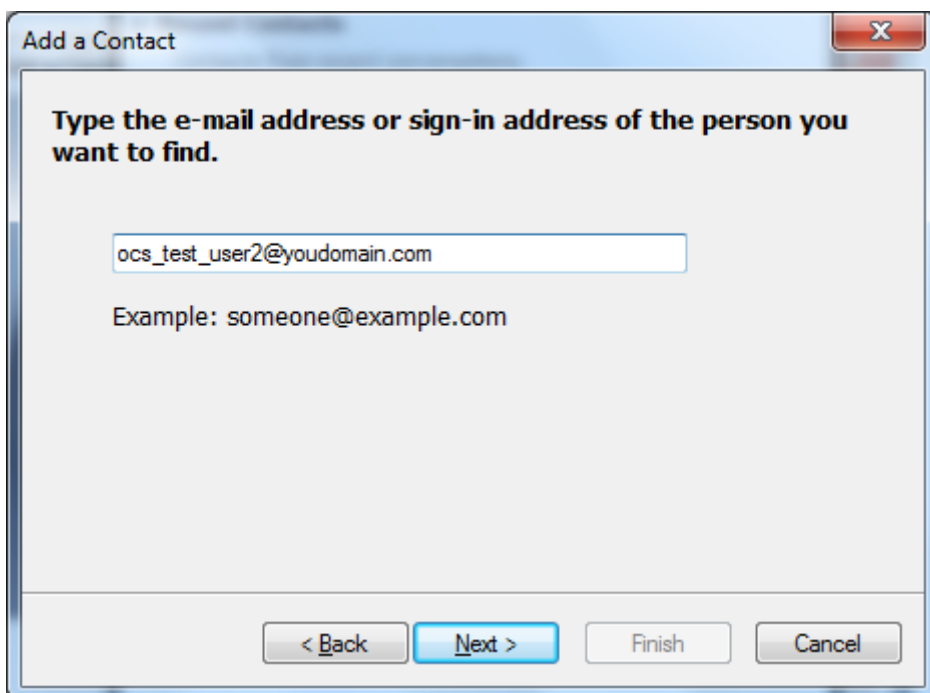


4.3 You will be shown the “add a new contact” wizard. You have two options available:

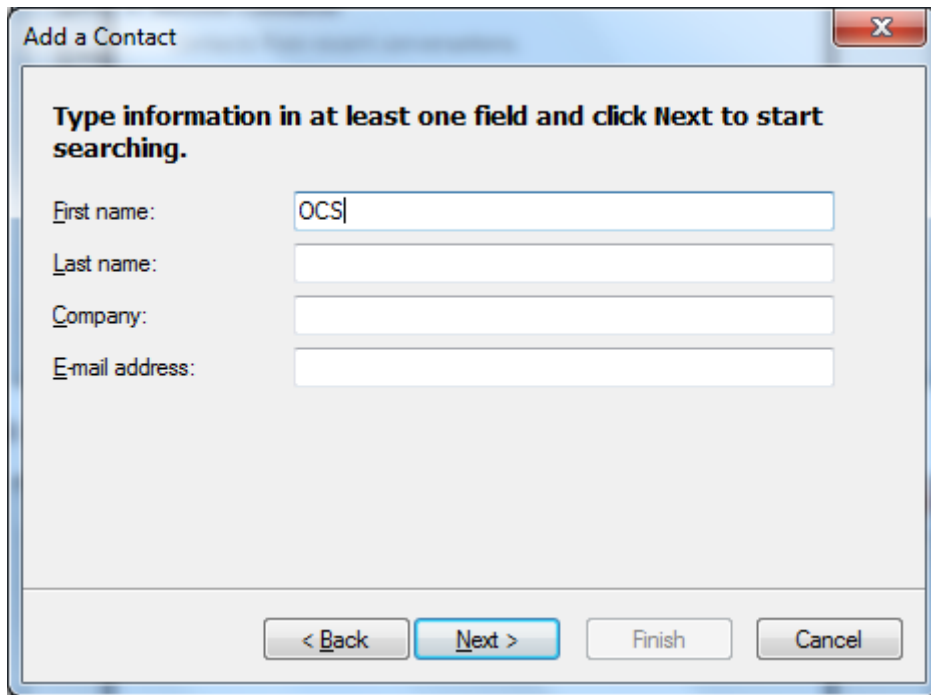


4.4 If you know the e-mail address (Control Panel username) or sign-in address select the first option and click **Next**

4.5 Enter in the e-mail address (Control Panel username) or sign-in address and click Next. It will add the contact to your Contact List

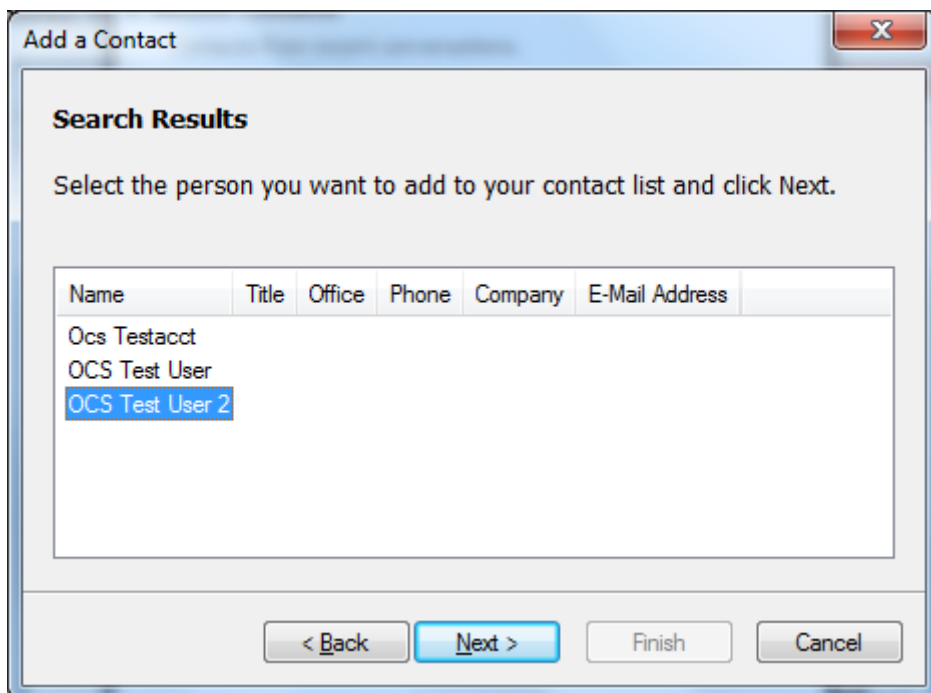


4.6 Alternatively you can search for a contact using a number of different details. You can search by as many details as you like, but entering the contacts first name is normally enough. When you have entered the details you want to search by, click **Next**



The screenshot shows a dialog box titled "Add a Contact" with a close button (X) in the top right corner. Below the title bar, there is a bold instruction: "Type information in at least one field and click Next to start searching." Below this instruction are four text input fields with labels: "First name:" (containing "OCS"), "Last name:", "Company:", and "E-mail address:". At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

4.7 You will be shown a list of search results based on the information you provided, in this example 3 contacts are shown. List the contact you want to add and click **Next**

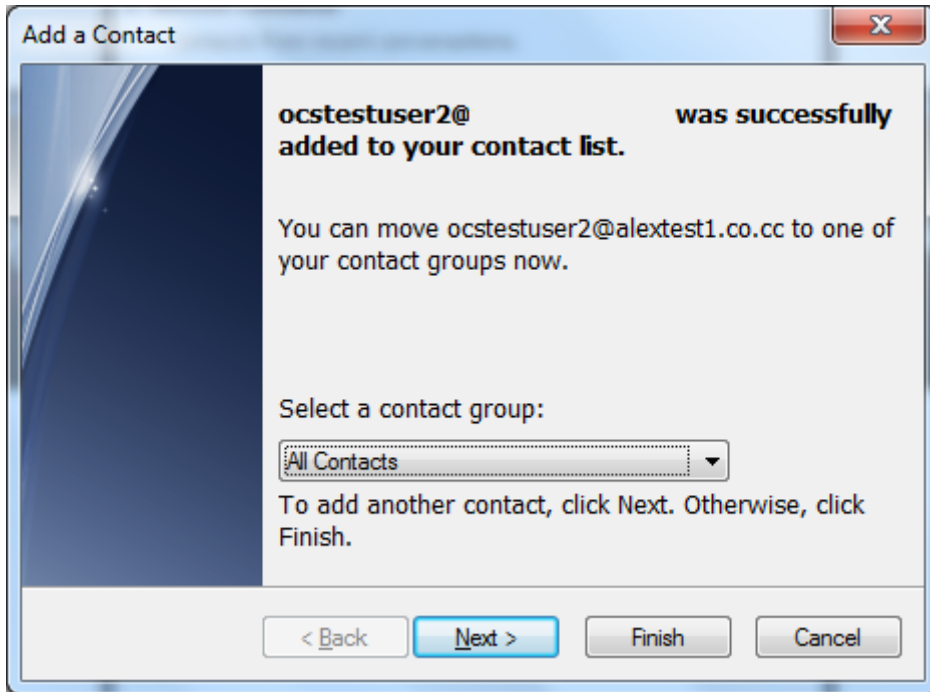


The screenshot shows the same "Add a Contact" dialog box, but now it displays search results. The title bar remains "Add a Contact" with the close button (X). Below the title bar, the text "Search Results" is displayed in bold. Below that, the instruction "Select the person you want to add to your contact list and click Next." is shown. A table with the following columns is displayed: Name, Title, Office, Phone, Company, and E-Mail Address. The table contains three rows of data:

| Name | Title | Office | Phone | Company | E-Mail Address |
|-----------------|-------|--------|-------|---------|----------------|
| Ocs Testactc | | | | | |
| OCS Test User | | | | | |
| OCS Test User 2 | | | | | |

The "OCS Test User 2" row is highlighted with a blue background. At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

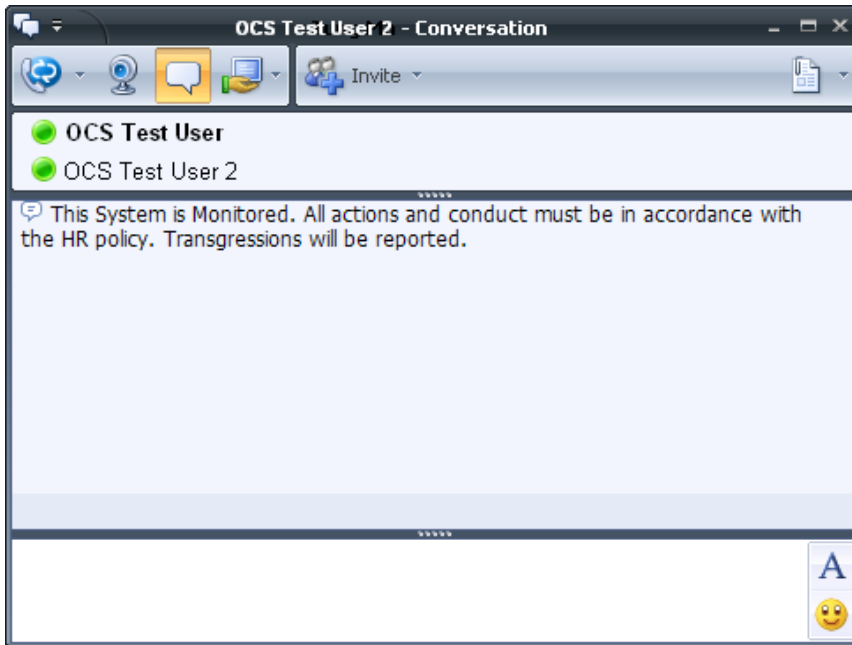
4.8 Finally you will be asked to select the contact group you want to add it to. Unless you have created additional groups only the default one is available, which is All Contacts. Click **Finish** to return to the contact window.



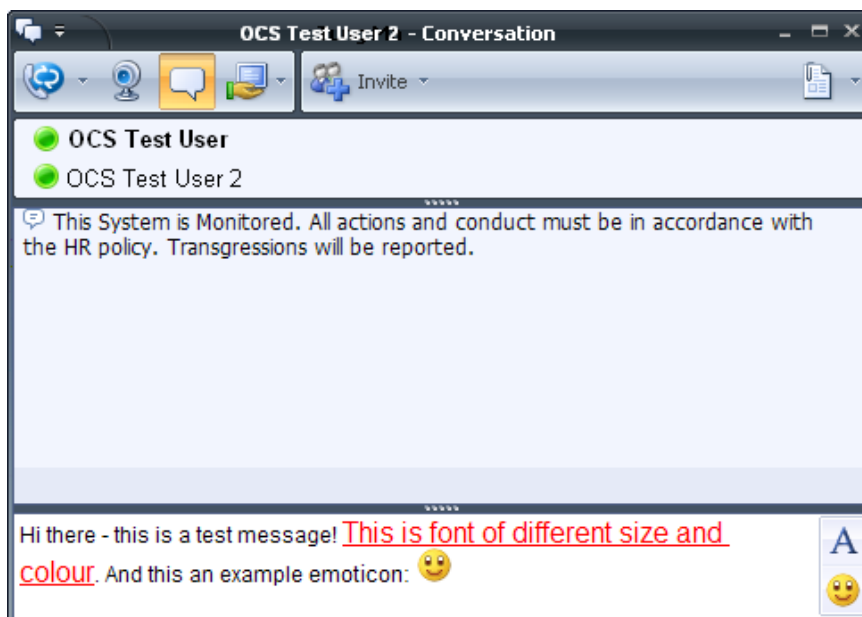
4.9 You will now see the new contact in your contact list.

Starting a Instant Message conversation with another contact

4.10 Starting a instant message conversation is simply, double left click the name of the contact you want to message, and the client will open a chat window:






4.11 Type in the lower section of the window the text you want to send to the client. You can also click the **A** icon to change your font, font size and colours. You can also click the 😊 icon to use a variety of emoticons:



When you are done typing your message, press the enter key to send the message

Available presence / statuses presence statuses in Office Communicator

The below is a list of the presence statuses available in Office Communicator and their descriptions:

| | Status Text | Description |
|---|--|---|
|  | Available | The contact is online and is willing and able to participate in conversations |
|  | Busy In a Call In a Conference In a Meeting | The contact is available but is engaged in another activity. Activities include: In a Call: The contact is in a phone, voice, or video conversation (using click 2 call) <ul style="list-style-type: none"> • In a Conference: The contact is in a multiparty conversation using phone, voice, video, or application sharing. • In a Meeting: The Office Outlook 2007 calendar shows that the contact has a scheduled meeting (it monitors the calendar) |
|  | Do Not Disturb | The contact is available but does not want to be interrupted. This status is displayed for the following reasons: <ul style="list-style-type: none"> • The contact has manually set his or her presence status to Do Not Disturb. • The contact is displaying a Microsoft[®] Office PowerPoint[®] presentation or is running another program in full-screen mode. Do Not Disturb state stops all notifications and incoming communications, except for those from contacts that the user has designated as part of his or her team. |



Away

If the contact is probably not available. This status is displayed for the following reasons:

- The contact's computer has been idle for longer than a time period that is specified by the user (by default, 15 minutes).
- The contact's Office Outlook 2007 calendar or Out of Office Assistant indicates that he or she is out of the office.
- The contact is temporarily unavailable.
- The contact has manually set his or her presence status to Away.



Inactive

The contact may be available, but the computer has been idle for longer than a time period that is specified by the user (by default, 5 minutes).

This contact is engaged in another activity, but the computer has been inactive for longer than a time period that is specified by the user (by default, 15 minutes). Customisable on a per user basis



Inactive

The contact is not available. This status is displayed for the following reasons:

- Office Communicator 2007 R2 is not running on the contact's computer.
- The contact has not signed in.
- The contact has blocked the user from seeing his or her presence status.



Offline

Office Communicator 2007 R2 cannot determine the status of the contact.



Presence unknown



Offline

The user has blocked the corresponding contact. To the blocked contact, the user appears to be offline.

- Finish -