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Get Started with Contact Management, Presence, and Instant Messaging

In this Quick Reference Card, you will find the tasks most commonly performed when managing contacts, managing your presence information, and contacting others. You will discover how to:

- Quickly determine if a person is available and willing to be contacted.
- Get additional details about a contact, such as the contact’s mobile phone number, schedule, and location.
- Manually change your presence state. For example, changing to Do Not Disturb when you want to limit interruptions.
- Control access to your presence information, such as your mobile and home phone numbers, by setting Access Levels.
- Determine the best way to contact others based on their presence state.
- Send and receive instant messages to a single contact, to multiple contacts, or to a group.

Where to find more information

For more detailed information, visit the following sections of Office Communicator 2007 online Help. (Click the Menu button, click Help, and then click Microsoft Office Communicator Help.)

- Managing Your Contacts and Contact List
- Presence
- Sending and Receiving Instant Messages
- How to Contact Others

Manage Your Contacts and Contact List

Your Contact List is a list of co-workers, family, and friends with whom you communicate most often. When you first install Communicator, you must build your Contact List.

Search for someone

Type a person’s name or e-mail address in the Search box.

Add a person or distribution group to your Contact List

Type the person or distribution group’s name in the Search box, and then drag the name from the Search Results box to the Contact List.

View a contact’s Contact Card

Click the contact’s Presence button.

Create a custom group

In the Contact List, right-click a group name, select Create New Group, type a name for the group, and then press ENTER. To add contacts to the group, drag them from an existing group or from the Search Results box.
Customize Your Presence Information

Office Communicator provides a full set of personal presence attributes that you can customize and make available to other contacts to help them communicate with you. As shown in this illustration, presence attributes include your presence status, your location, and a personal note.

Add and publish phone numbers

In the Office Communicator Title bar, click the menu button, click Tools, click Options, and then click the Phones tab. Click the button for the phone number you want to add. Enter the phone number and then click OK. Check the Publish this phone number box to make the number is visible to others. After you add the phone number, you should change access levels for those contacts for which you want the numbers to be visible. See “Control Access Levels to Your Presence Information” on this card for more information.

Manually change your presence status

Click your Presence button and then select a state.

Set your location

Click your Presence button, point to Current Location, and then select a location or create a new location.

Create a note

Click in the Type a note box, and then enter a personal note. Click outside the box when you are done.

Your Presence Information and Access Levels

Each Communicator contact, including you, has a full set of presence attributes that describe availability, activity, and willingness to be contacted. Presence attributes also include contact information such as phone numbers, personal notes, and location. The amount and type of presence information that you make available to others is controlled by Access Levels. For example, when you assign a contact to the Team Access Level, that contact has access to your mobile phone number, calendar “free or busy” information, and your location, as shown in this table.

*If these attributes are defined in Microsoft Active Directory, they are visible to all contacts in your company, regardless of Access Level. They are also visible to federated contacts, depending on the assigned Access Level. They are not visible to public instant messaging contacts.
Communicate with Your Contacts

Each contact in your Contact List has a Presence button and a status text string that reflects his or her availability and willingness to be contacted. You can use the status indicated by the Presence button to determine which mode of communication is best suited for connecting with the contact. Office Communicator provides a variety of communication options. For example, you can double-click the contact to start an IM session, click the Call button for one-click calling, or click the Presence button for additional contact details or communication options.

Determine if a contact is available
View the contact’s Presence button and status.

View a contact’s Contact Card
Click the contact’s Presence button.

View ways to communicate with a contact
Right-click the contact in the Contact List.

View phone calling options
Click the arrow to the right of the Call button associated with the contact.

Get notified when a contact’s availability changes
In the Contact List, right-click the contact, and then click Tag for Status Change Alerts. When the contact’s status changes, you receive an alert on your desktop.

Control Access to Your Presence Information

With Office Communicator, you use Access Levels to control the 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 phone number. To make your mobile number available to a contact, assign the contact to a Team or Personal Access Level.

Switch to Access Levels view
Click the Change view button and then click Access Levels.

Change a person’s Access Level
Right-click a contact’s name, click Change Level of Access, and then select a level. You can also drag a contact into an Access Level group if you are viewing the Contact List by Access Levels.

Block a person from contacting you
In the Contact List, right-click a contact’s name, click Change Level of Access, and then select Blocked.

Create a list of contacts who can interrupt you
Switch to the Access Levels view, and then drag the contacts who you want to be able to interrupt you while your presence

Send and Receive Instant Messages

With Office Communicator, you can start an instant messaging session with a single contact, with multiple contacts, or with a group.
Send an Instant Message

You typically start an instant messaging session by double-clicking a contact name in the Contact List.

Send an instant message

In the Contact List, double-click a contact, type a message, and then press ENTER.

Add an emoticon

Place the mouse pointer where you want to add the emoticon, click the emoticon button, and then select the emoticon.

Send an instant message to a group

Hold the CTRL key and select multiple contacts. Right-click the last contact, and then select Send an Instant Message or press ENTER. You can also right-click a group, then click Send an Instant Message.

Receive an Instant Message

When a contact sends you an instant message invitation, you see an instant message invitation alert in the bottom right corner of your computer screen.

To accept an instant message invitation, click the left pane.

Set your status to Do Not Disturb when you receive an invitation

Click the Do Not Disturb button, and then click Set Status to Do Not Disturb. You typically use this feature when your status shows you as available, but you are in an unscheduled meeting or an important conversation. The new presence status lasts until the beginning of the next hour.

Get Started with Office Communicator 2007 Conferencing

This Quick Reference Card covers the tasks most commonly used to start, conduct, and join conferences with Microsoft Office Communicator 2007. Before you start using Office Communicator 2007 Conferencing capabilities, make sure you have the required hardware and software installed, as discussed below.

What you need to get started

For audio (phone) conferencing you must have a headset, or a speaker and microphone, or a USB audio device connected to your computer. For audio/video conferencing, you must have a webcam connected to your computer.

Set up your audio and video

Before getting started with conferencing, you may want to adjust your audio and video devices: click the Menu button on the Communicator Title bar, click Tools, and then click Set Up Audio and Video.

Installing the Live Meeting console

With Office Communicator 2007, you can escalate instant messaging (IM), audio, or audio and video (A/V) conferences into a Live Meeting. To conduct Microsoft Office Live Meeting conferences, you must install the Live Meeting console.

Installing the Conferencing Add-In for Outlook

With the Conferencing Add-In for Microsoft Office Outlook, you can schedule phone conference calls with Office Communicator or Web conferences with Live Meeting.
Where to find more information
For more detailed information, visit the following sections of Office Communicator 2007 online Help. (Click the Menu button, click Help, and then click Microsoft Office Communicator Help.)

- Conferencing and Collaboration
- How to Contact Others

Start an IM Conference
You can select multiple contacts or a group in your Contact List to start an IM conference. You can also escalate a one-to-one IM session to a group conference by simply inviting other contacts to an IM session.

Start an IM conference with multiple contacts
In the Contact List, hold the CTRL key, and then select the contacts you want to invite. Right-click the last contact, and then click Send an Instant Message. Type your message in the Message Entry box, and then press ENTER.

Start an IM conference with a group
In the Contact List, right-click a group name, and then click Send an Instant Message. Type your message in the Message Entry box, and then press ENTER.

 Invite someone to an IM session or conference
In the Conversation window, click Invite, and then select the contacts you want to invite.

Join an IM Conference
In the conference invitation alert, click the left pane. The alert appears in the bottom right of your computer screen.

Start an Audio/Video Conference
You can start an audio/video (AV) conference with multiple users or a group that you select in the Contact List.

Start an audio/video conference with multiple contacts
In the Contact List, hold the CTRL key, and then select the contacts you want to invite. Right-click the last contact, and then click Start a Video Call.

Start an audio/video conference with a group
In the Contact List, right-click a group name, and then click Start a Video Call.

Join an Audio/Video Conference
In the conference invitation alert, click the left pane.

You can join an audio/video conference even if you do not have a webcam. While you will not transmit a video stream, you can view the video stream of others.

Conduct Conference Calls
During a conference, you can use the Conference call controls to invite others, make a participant a leader, eject a participant, mute a participant, or invite a participant to a new conversation.

Invite others to a conference call
In the Conversation window, click the Invite button, and then select the contacts that you want to invite.
Make a participant a conference leader
In the conference roster, right-click a participant, and then click Make Leader. This action is only available if you initiated the conference and are the conference leader.

Eject a participant
In the conference roster, right-click the person you want to eject, and then click Remove from Conversation.

Mute a participant
In the conference roster, right-click the person you want to mute, and then click Mute. This action is only available if you initiated the conference and are the conference leader.

Invite a participant to a new conversation
In the conference roster, right-click the participant, click Invite to New Conversation, type a message in the message entry area, and then press ENTER.

Escalate Conferencing Communication Modes
With Office Communicator 2007, you can seamlessly add communication modes to your conferencing session. For example, you can start an IM conversation with a single contact, add additional contacts for an IM conference, and then add audio and video to the conference. If you need to share data, applications, or slides, you can escalate to a Live Meeting session—without having to re-invite participants.

Turn an IM conversation into a conference
During an IM session, click Invite, and then select the contacts you want to invite to the conference.

Turn an IM conference into an AV conference
During an IM conference, click Add Audio to add audio to the conference, or click Add Video to add video to the conference.

Turn an AV conference into a Live Meeting
During a conference call, click the arrow to the right of the Additional Actions button, and then click Share Information Using Live Meeting or Meet Now Using Live Meeting Service. (These options are only available if Live Meeting is installed.)

You typically use Share Information Using Live Meeting if all of your conference participants are internal, such as peer employees and federated partners. Common scenarios include conferences with team members and strategy meetings with partners. Use Meet Now Using Live Meeting Service if your conference includes external users, such as clients and personal contacts, as in sales calls and customer training sessions.

Schedule a Conference Call or Live Meeting
You can use the Conferencing Add-In for Microsoft Office Outlook to schedule Office Communicator conference calls or Office Live Meeting Web conferences.
Schedule Live Meeting Web conferences when you need to show slides, share an application or your desktop, or collaborate on a whiteboard.

Schedule a Conference Call
Open Microsoft Outlook, click Conferencing, and then click Schedule a Conference Call. This schedules a call exclusively in Communicator; you do not need Live Meeting installed.

Schedule a Live Meeting
Open Microsoft Outlook, click Conferencing, and then click Schedule a Live Meeting.

Add the Microsoft Office Live Meeting toolbar
Open Microsoft Outlook, click View, point to Toolbars, and then select Microsoft Office Live Meeting.
Microsoft Office Live Meeting

Start an Unscheduled Meeting Now
To start an unscheduled Meet Now meeting
1. Click Start.
2. Click All Programs, point to Microsoft Office Live Meeting 2007, and then click Microsoft Office Live Meeting 2007.
3. On the Welcome to Microsoft Office Live Meeting page, click Meet Now to start your unscheduled meeting.

To invite participants to your Meet Now meeting from the Microsoft Office Live Meeting client
1. To open the Attendee pane, click the Attendees menu.
2. In the Attendees pane, point to Invite, and then click By E-mail.
3. In the To box of the e-mail invitation, type the e-mail addresses for your participants, separating each address by a semi-colon.
4. To send the invitation, click Send.

Join a Meeting, Connect to Computer Audio and Video
1. From your calendar, open the meeting invitation, and then to join the meeting, click the Join the Meeting link.
2. When you are connected to the meeting, computer audio is on by default. If it is not on, in the Voice & Video pane, click Join Audio.
3. To mute the speakers or microphone, in the Voice & Video pane, click the Mute Microphone or Mute Speakers icon.
4. To modify the speaker or microphone volume, in the Voice & Video pane, click the Microphone or Speaker drop-down and move the volume slider up or down.
5. To show your video, in the upper right of the meeting client, click the webcam icon.

Tip: Run the Set Up Audio and Video feature to help set up your audio and video devices. To run the feature, you must first disconnect from all voice and video conversations. To launch Set Up Audio and Video, in the Voice & Video pane, click Options, and then click Set Up Audio and Video.

Import Content
Meeting presenters can import multiple file types into Live Meeting (for example, Microsoft PowerPoint®, Word, Excel, Visio™, Project, and video presentations).

To import content into the meeting as a presenter
1. In the meeting client, click the Content pane, click Share, and then click Upload File (View Only).
2. In the Choose a document to share dialog box, select a file to import, then click Open to import the file.
3. To present the file, from the Content pane, select the file you want to present.
4. To go through the slides, click the Previous or Next icon located in the lower left of the meeting client.
Show and Share Applications

Live Meeting provides several ways to share applications. When sharing the Desktop or Selected Area, the applications to be shared must be open.

To share and exchange control of an application with a meeting participant

1. To share an application in the meeting client, click the Content pane, click Share, click Share a Program, and then select a program to share.
2. To give control of the application to a participant, click the Share Control icon.
3. In the Give Control dialog box, select a participant’s name, click OK, and then, in the Give Control dialog box, click Yes.
4. To take control, the attendee clicks OK in the Microsoft Office Live Meeting dialog box.
5. Click the Share Control icon to continue sharing and take control back from the participant, or choose another participant with whom to share control.
6. Click the End sharing and return to Live Meeting icon to finish sharing and return to the presenter meeting client.

Tip: To share your entire desktop or a selected area on your computer, in the Content pane, click Share, click Share Your Desktop, and then select All to share your entire desktop, or select Selected Area to share a selected area on your computer.

Ask and Answer Questions

To ask a question

1. In the meeting client, click the Q&A menu.
2. Type your question in the Q&A text box.
3. Click Ask.

Tips: The presenter can enable questions and answers by clicking the More icon in the Attendees pane, clicking Permissions, and then in the Attendee Permission dialog box, selecting Ask questions. Attendees can ask only one question at a time. When the presenter has answered your question, you can then type another question. You can also edit the question you asked by clicking Edit. Or, you can delete your question by clicking the Retract Your Question icon.

To answer questions

1. Click the Q&A menu, and then click the Manage tab.
2. On the Manage tab, a list of all questions received from attendees is displayed. Click the question that you want to answer.
3. In the answer text box, type your response, and then click Reply to All or Reply Privately. Or you can Chat or Give the Floor to the person who asked the question.

Record Your Meeting

Before recording your meeting, in the click Options to access Personal Recording Options dialog box, choose where you want to save your recording and what you want to record.

1. To record your meeting, in the Recording pane, click Record.
2. To save your recording, click the Stop icon, and choose Save Recording.
3. To check the status of your recording, click Start, click All Programs, click Microsoft Office Live Meeting, and then click Microsoft Office Live Meeting Recording Manager.

**Configure the Conferencing Add-in for Outlook**

1. In your calendar, click Conferencing, and then click User Accounts.
2. In the User Accounts dialog box, under Office Communications Server, in the Sign-in name text box, type your sign-in name.

Note: Steps 3 and 4 are optional.

3. To set Advanced Connection Settings, click Advanced.
4. In the Advanced Connection Settings dialog box, select Use these servers. In the Internal Server name or IP address or the External Server name or IP address text box, type the server name or the IP address of the Office Communications 2007 Server to which you will connect.
5. To verify your login information, click Test Connection. In the confirmation dialog box, click OK.

**Schedule a Meeting**

To schedule a meeting using the Conferencing Add-in for Outlook

1. In your calendar, click Schedule a Live Meeting.
2. On the Appointment tab, in the Subject text box, type a description of your meeting. In the To text box, enter the e-mail addresses for your invitees, separating each address with a semi-colon.
3. To designate presenters on the Live Meeting Request form, click Attendees/Presenters. In the Attendees list, click a name, and then click Add. Click OK.
4. To choose the type of audio for your meeting, click Audio.
5. To enable participants to connect using a computer with a headset or microphone and speakers, click Connect to the meeting using computer audio.