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## I. Provision Lync and Lync Federation

Apptix customers may provision (order and setup) Microsoft Lync services completely within the Hosting Control Panel and storefronts. The Lync services include Secure IM and Web Conferencing, and Federated Secure IM and Web Conferencing. Lync is built to fully integrate with Microsoft Office.

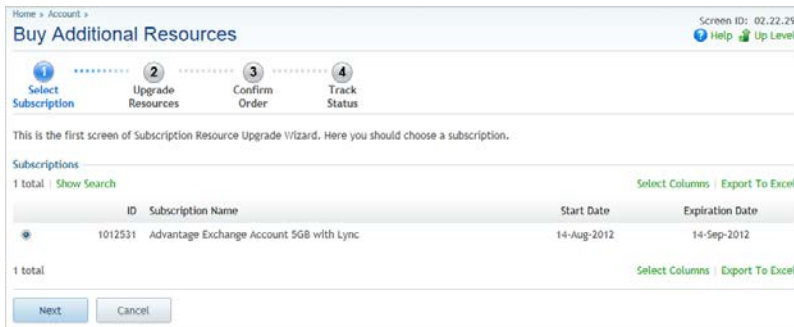
Customers who are familiar with the Hosting Control Panel may order the Lync service for their mailboxes without the assistance of the Apptix Implementation Team. If a customer is having difficulty adding the Lync service to their account, have them follow the procedure below.

### Order Lync for Existing Customers

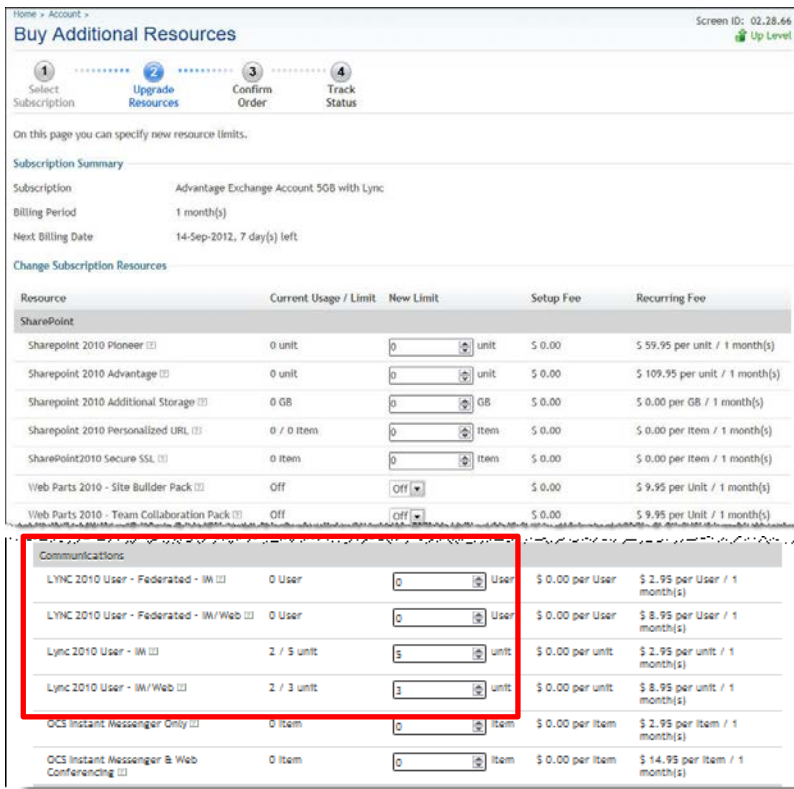
1. Log into the Control Panel.  
The Control Panel's main dashboard (home) displays.
2. Select **Buy Additional Resources** from the **Store** section of the main dashboard:

The screenshot shows the Apptix Hosting Control Panel main dashboard. The top navigation bar includes 'Home', 'Users', 'Microsoft Lync 2010', 'More Services', 'Account', and 'Help & Support'. The user is logged in as 'Mike Lamb (Account ID: 1003869)'. The dashboard displays several sections: 'Service Information' (Subscription: Advantage Exchange Account 5GB with Lync, Diskspace: 0 KB used of 24.4 GB, Mailboxes: 2 unit used of 5 unit), 'Exchange' (Add New Mailbox, Mailboxes), 'Microsoft Lync 2010' (Microsoft Lync 2010, Users, Configuration), 'More Services' (Boundary Defense for Email), 'Account' (Need Attention: 1 service(s), Financial Documents, Admins, Subscriptions, Payment Methods, Change Password), 'Users' (Create and manage users, Assign services to created users, Users, Create User), 'Store' (Here you can buy additional services, domains and more. Buy More Services, Buy Additional Resources, Register New Domain, Change Service Plan), and 'Domains' (Manage your domains and domain names, Registered Domains, Hosted Domains). The 'Buy Additional Resources' link in the 'Store' section is highlighted with a red box.

The first screen of the **Buy Additional Resources** wizard displays:



- From the first screen of the wizard, select the Exchange subscription from the list of available subscriptions by clicking the appropriate radio button (if it is the only subscription, it will be automatically selected) and click **[Next]**.  
The list of available resources displays on the second screen of the wizard (the graphic has been altered because the list is long):



From the **Communications** category, select the appropriate number of units of the desired Lync service(s) from the **New Limit** column by clicking the up and down arrows:

- Lync 2010 User – IM
- Lync 2010 User – IM/Web
- Lync 2010 User – Federated – IM
- Lync 2010 User – Federated – IM/Web

**NOTE:** You may lower the number of units (downgrade) using this screen, as well as raise the number of units (upgrade) to the number you have purchased.

**NOTE:** In order to communicate with external Lync customers (Federation), you must purchase the Federation resources.

4. Click **[Next]**.

The next screen of the wizard – the **Confirm Order** screen – displays.

Home > Account > Buy Additional Resources Screen ID: 02.29.61 [Up Level](#)

1 Select Subscription    2 Upgrade Resources    3 **Confirm Order**    4 Track Status

Here you can review upgrade order and select payment method.

**Order Information**

Total Before Taxes	\$ 0.00
Tax Total	\$ 0.00
Total	\$ 0.00

Comments Upgrade/Downgrade of Resources for Subscription #1012531.

**Order Details**

2 total [Select Columns](#) | [Export To Excel](#)

ID	Description	Type	Quantity	Unit of Measure	Duration	Period	Unit Price	Discount Amount	Extended Price
1	Refund for Additional Resource Lync 2010 User - 0.23 month(s) downgrade (for 0.23 month(s)).	Resource Downgrade	-1.00	unit	0.23	month(s)	\$ 0.00	\$ 0.00	\$ 0.00
2	Refund Adjustment.	Refund Adjustment	1.00	unit			\$ 0.00	\$ 0.00	\$ 0.00

2 total [Select Columns](#) | [Export To Excel](#)

\*Required fields

5. Review your order and click the **[Place Order]** button.

The final wizard screen displays:

Home > Account > Buy Additional Resources Screen ID: 03.30.13 [Up Level](#)

1 Select Subscription    2 Upgrade Resources    3 Confirm Order    4 **Track Status**

✔ Upgrade Order #UG003143 has been placed.

This is a final screen of resource upgrade wizard. Here you can review order and payment statuses.

**Order Information**

Order Status	● Completed
Order Number	UG003143 <a href="#">(Details)</a>
Total Before Taxes	\$ 0.00
Tax Total	\$ 0.00
Total	\$ 0.00

Comments Upgrade/Downgrade of Resources for Subscription #1012531.

6. Review and click **[Exit Upgrade Wizard]**.

Your order has been completed.

## Provision Lync for New Customers

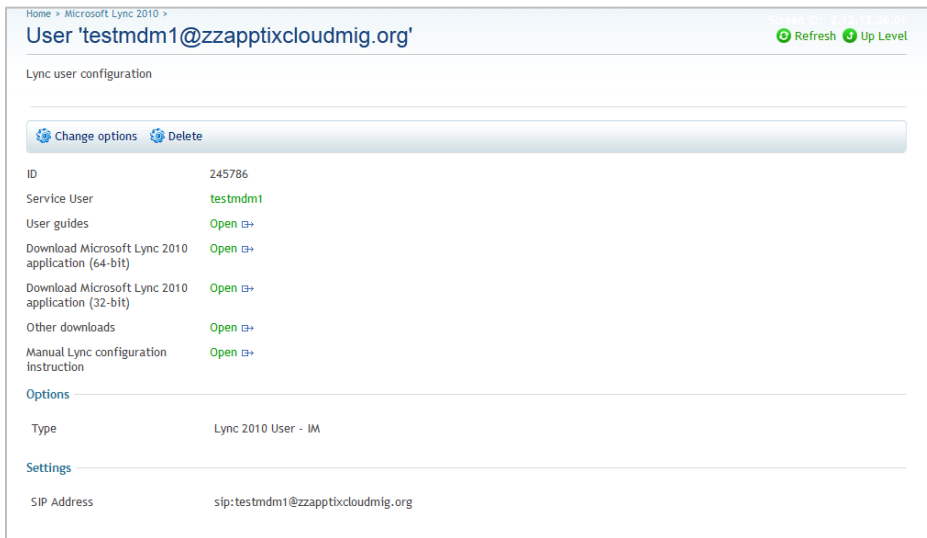
Provisioning new Hosting Control Panel Exchange customers with the Lync services is similar to the provisioning steps setup for current customers, except that new customers will order from the Aptix website shopping cart rather than through the Admin Console (though once becoming a new customer, they may add the Lync resources via the Admin Console as well). The process is similar to setting up current customers:

- Customer orders Lync as an optional service within any Exchange service plan  
- OR -
- Customer orders Lync as a stand-alone service plan without Exchange or other services
- Customer adds users to the Lync service via the **Microsoft Lync 2010** tab within the Control Panel
- Customer installs Lync client software onto desktop computers

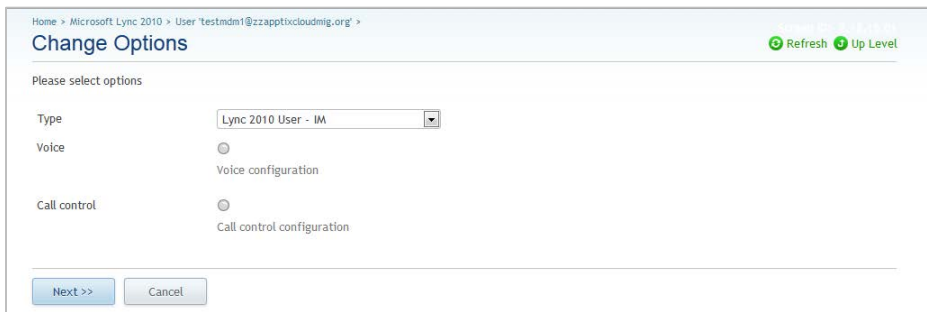
**NOTE:** The customer may have more or fewer Lync quantities/purchases than they have Exchange users. Lync purchased as an optional feature of Exchange allows customer to subscribe fewer users to Lync than Exchange mailboxes owned—in other words, not every Exchange mailbox is enabled for Lync. Customer can also have more Lync users created than there are mailboxes—these would be considered Lync-only users.

## Switch a User between Non-Federated and Federated

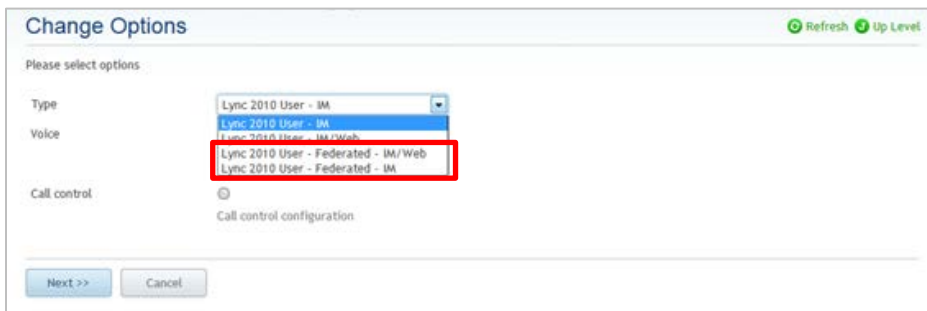
1. If you are switching from non-federated Lync to federated Lync, you must first purchase the proper number of federated Lync licenses, using the previous steps.
2. Begin by selecting **Microsoft Lync 2010** from menu bar of the home page.  
The list of Lync users displays.
3. Select the user you would like to configure with Lync Federation.  
The user's details page displays:



4. Click **[Change options]**.  
The **Change Options** screen displays:



5. Select a **Federated** option from the **Type** drop-down list:



6. Click **[Next]**.
7. Click **[Finish]**.
8. After all of the appropriate users have been modified, downgrade the non-federated resources

(see *Ordering Lync for Customer Accounts* on page 1 for downgrade instructions).

**NOTE:** To switch from the federated version of Lync to the non-federated version, follow the previous steps.



## II. Configure Lync Users within the Hosting Control Panel

The creation of Lync users is performed entirely within the Hosting Control Panel. From within the console or via the web shopping cart, Lync IM or Lync IM + Web Conferencing users must be purchased. Once purchased, the administrator can then go to the **Microsoft Lync 2010** tab within the Hosting Control Panel to create new Lync users or enable existing users for Lync.

**NOTE:** A customer may purchase both services, giving the IM + Web Conferencing to a subset of users and the IM service to the remaining users within the organization. (When switching from Federated to Non-Federated Lync, this is not necessary.)

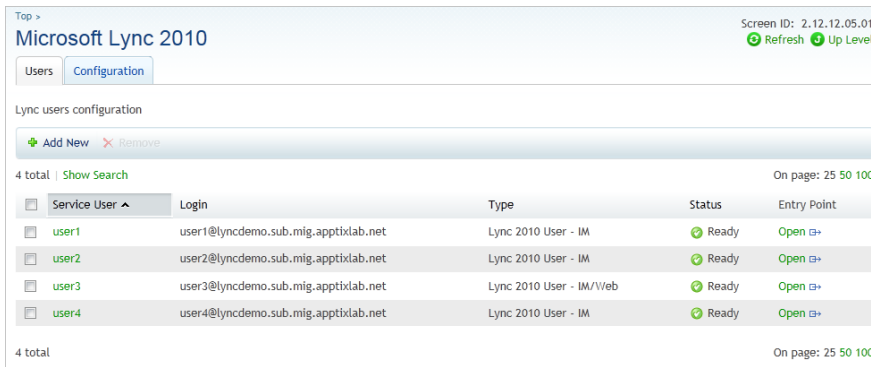
### Configure New Lync Users

1. Log into the Hosting Control Panel.

The screenshot shows the APPTIX Hosting Control Panel dashboard. The main menu bar includes 'Home', 'Users', 'Microsoft Lync 2010' (highlighted with a red box), 'More Services', 'Account', and 'Help & Support'. The dashboard content is organized into several sections:

- Service Information:** Shows subscription details for 'Advantage Exchange Account 5GB with Lync (ID:1012531)', disk space usage (0 KB used of 24.4 GB), and mailbox usage (2 unit used of 5 unit).
- Account:** Lists 'Need Attention' items such as Financial Documents, Admins, Subscriptions, Payment Methods, and Change Password.
- Exchange:** Provides facilities for managing mailboxes, public folders, distribution lists, and contacts.
- Microsoft Lync 2010:** Describes the Lync platform and offers links for 'Microsoft Lync 2010' and 'Users'.
- More Services:** Offers options like 'Boundary Defense for Email'.
- Users:** Allows creating and managing users, with a 'Create User' button.
- Store:** Provides options to buy additional services, domains, and resources.
- Domains:** Offers options to register new domains and change service plans.

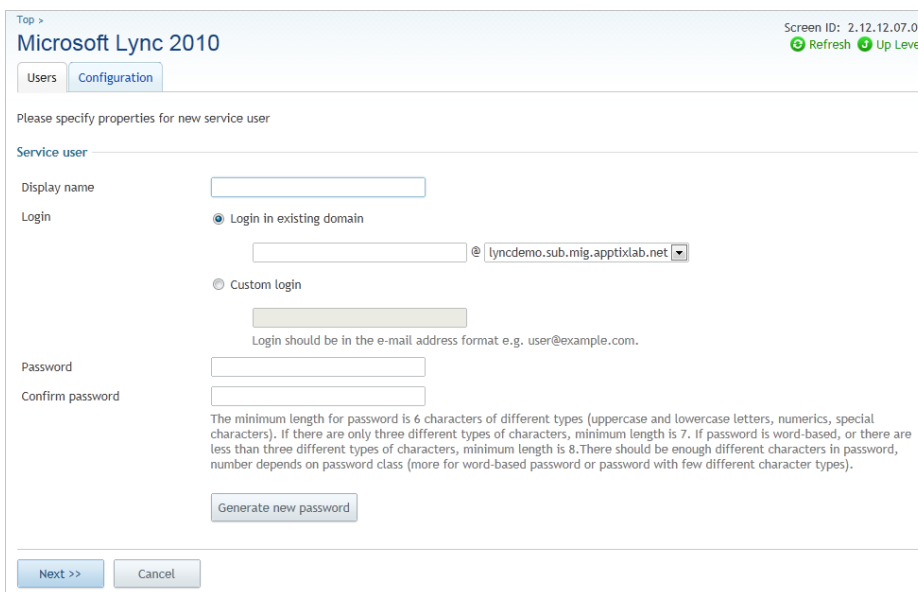
2. Select the **Microsoft Lync 2010** tab from the main dashboard menu bar (highlighted above). The **Configuration** screen displays the list of enabled Lync users:



**NOTE:** This list will be blank until some users are added by the company administrator.

3. Click the **[Add New]** button.

The first screen of the **Add New User** wizard displays:



4. Enter the information associated with this new service user as needed and click the **[Next]** button.

- **Display Name:** How the service user name will be displayed to others
- **Login:** Must be a unique login associated with one of your account domains which may be selected from the drop-down menu. Apptix suggests using the first.lastname nomenclature.
- **Password and Confirm Password:** Enter a login password for this service user and confirm the password in the confirmation field.
  - The Admin Control may display warning messages related to the security of passwords entered.
  - **Optional:** You may click the **[Generate new password]** button to have the new

password generated automatically.

- **Services section:** Click the checkbox(es) for those services to be added to this service user. You may select multiple services in this section (if available).

The second wizard screen displays:

5. Select the appropriate Lync service(s) from the drop-down list:

- Lync 2010 User – IM
- Lync 2010 User – IM/Web
- Federated Lync 2010 User – IM
- Federated Lync 2010 User – IM/Web

6. Click **[Next]**.

The final screen of the wizard displays:

7. Review the summary information and then click the **[Finish]** button to accept all of the parameters entered to create this new Lync user.

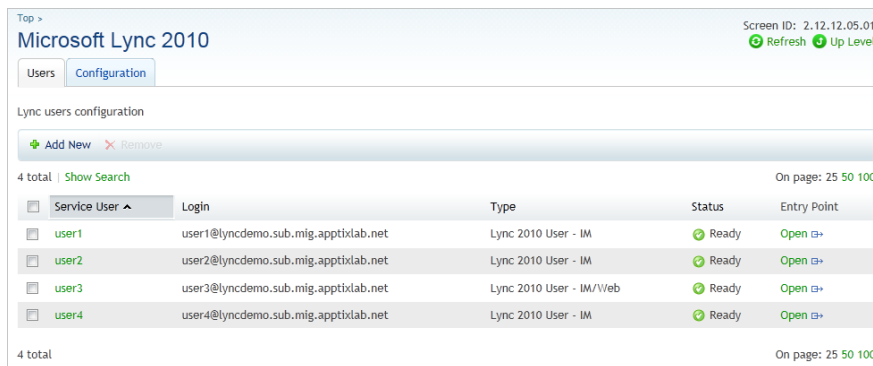
The updated **Users** list displays.

From this screen, you can continue to add new Lync users or delete or manage the Lync users currently listed.

## Edit Existing Lync Users

You can edit a limited number of Lync user parameters. To edit general “service user” attributes for a selected user, access the **Users** dashboard and select the user from the list; the user details you then see enable you to perform a number of basic editing functions, such as view and edit the user’s display name and login, contact information, mailbox information, and password expiration parameters.

1. Log into the Hosting Control Panel.
2. Select the **Microsoft Lync 2010** tab from the main dashboard menu bar (highlighted above). The **Configuration** screen displays the list of enabled Lync users.



Service User	Login	Type	Status	Entry Point
user1	user1@lyncdemo.sub.mig.apptixlab.net	Lync 2010 User - IM	Ready	Open
user2	user2@lyncdemo.sub.mig.apptixlab.net	Lync 2010 User - IM	Ready	Open
user3	user3@lyncdemo.sub.mig.apptixlab.net	Lync 2010 User - IM/Web	Ready	Open
user4	user4@lyncdemo.sub.mig.apptixlab.net	Lync 2010 User - IM	Ready	Open

3. Select a user to edit by clicking the user’s **Service User** name. The **User Details** screen displays.



ID	13597
Service User	user1
User guides	Open
Download Microsoft Lync 2010 application (64-bit)	Open
Download Microsoft Lync 2010 application (32-bit)	Open
Other downloads	Open
<b>Options</b>	
Type	Lync 2010 User - IM
<b>Settings</b>	
SIP Address	sip:user1@lyncdemo.sub.mig.apptixlab.net

From the **User Details** screen, you can **Delete** this user, or **Change options** for the user.

**NOTE:** In addition to editing this user’s Lync options, you can also access Microsoft Lync application downloads, as well as a user guide, and directly access the selected user’s “service user” attributes. By accessing the user’s “service user” attributes, you can edit more than just

the Lync options for this user.

4. Click **[Change options]** to edit the selected user.  
The **Change Options** screen displays:

5. From the **Type** drop-down menu, select the appropriate Lync service.
6. Click **[Next]**.

A confirmation screen displays:

7. Click **[Finish]** to finalize the change for this user.

### III. About Lync Federation

Lync external connectivity (Federation) enables a Lync user to connect with users in other organizations that use Lync. Federated contacts can see presence, communicate by using IM, and make Lync-to-Lync phone calls.

All Federated communications are encrypted between the IM systems using access proxy servers. Lync external connectivity requires the consent and correct configuration of both parties of the Federation relationship. After the Federation is set up by the administrators of both sides, users in each company can see presence and communicate with users in the other company.

#### New DNS SRV Entry

The customer admin must edit their DNS. A DNS SRV record should be created with the following parameters:

- `_sipfederationtls._tcp.customerdomain.name`
- Port 5061
- Host offering service would be: `lyncaccess01.hostaccount.com`

**NOTE:** If the above DNS changes are not made by the customer, Federation will not work properly.

#### Configure Lync Federation for Recipient Organizations

Apptix has set up Lync Federation on our servers. In order for the Federation to work, an external organization must enable one of the following options:

- Allow Federation with all Apptix customers by adding Apptix as a hosting provider
- Federate with only one of Apptix's customers by adding the customer to their Federated domains list

The recipient/external organization will need the following server settings in order to configure their Lync servers for successful Federation. Should they need assistance configuring Lync Federation, they can refer to the appropriate Microsoft TechNet articles (see the links below).

- The **Access Edge** (FQDN) name should be: `LYNCACCESS01.HOSTACCOUNT.COM`.
- The **Provider Name** can be any name the recipient organization wants, but is often and preferably the sending company's name.

**For more information about configuring:**

**Lync 2010 Server –**

[http://technet.microsoft.com/en-us/library/gg398349\(v=ocs.14\).aspx](http://technet.microsoft.com/en-us/library/gg398349(v=ocs.14).aspx)

[http://technet.microsoft.com/en-us/library/gg521001\(v=ocs.14\).aspx](http://technet.microsoft.com/en-us/library/gg521001(v=ocs.14).aspx)

**Lync 2013 Server –**

<http://technet.microsoft.com/en-us/library/jj552445.aspx>

